TÜRKİYE CENTURY

THE 100TH ANNIVERSARY OF THE REPUBLIC OF TÜRKİYE

ISTANBUL & MARMARA, AEGEAN, MEDITERRANEAN, BLACK SEA REGIONS

CHAMBER OF SHIPPING

MARITIME SECTOR REPORT

İstanbul 2024

TURKISH CHAMBER OF SHIPPING

ISTANBUL & MARMARA, AEGEAN, MEDITERRANEAN, BLACKSEA REGIONS

MARITIME SECTOR REPORT

İSTANBUL - 2024

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FOREWORD

The world is going through a difficult period. Following the instability that began with the Covid-19 pandemic we have entered a period of conflicts that deepened with the Russia-Ukraine War and whose fronts expanded with Israeli attacks. In the north, we witness that the war between Russia and Ukraine, in its third year, continues to intensify from time to time, far from ending. While the conflicts between Israel and Palestine, started in October last year, continue with Israel's relentless attacks on Gaza, the war, affecting a wide geography, especially the Middle East, continues to be a serious factor of instability.

At the beginning of 2023, the main expectation was that the global economy would slow sharply, even possibly entering a recession, due to rising inflation and interest rates in 2022. However, by the end of the year, we observed that these predictions were inaccurate. This showed us the need to better understand the changing world and its dynamics. As a result, we started 2024 with a global economy that entered with a 'soft landing' in market terms, and inflation data falling stronger than expected. The decrease in inflation seems to indicate that it will bring interest rate cuts to support growth in the second half of next year.

When we look at the economy of our country, following the completion of the Presidential and Parliamentary General Elections in May last year, we all witnessed significant changes in economic policies, especially in monetary policy, starting from June. We have seen the positive outcomes of the tight monetary policy implemented. We started the year 2024, particularly with positive developments in financial markets. The rapid increase in the Central Bank's reserves and the record-breaking export figure of $255,809 billion in 2023 give hope that we will hopefully receive the positive results of the ongoing economic program.

In 2023, global trade surpassed $24 trillion, while global maritime transport exceeded 12.3 billion tons. Considering that approximately 86% of the world's cargo is transported by sea, all these figures highlight the absolute necessity for us to develop our maritime sector for our national interests. As we enter 2024, our National Merchant Fleet has reached approximately 1,962 ships and 47.9 million DWT, elevating us to the 12th place among countries with the largest fleets in the world. However, in the coming period, with our strategic position in the region, young population, maritime experience, and information infrastructure our most important goal should be to be among the world's top 10 maritime countries in order to gain a greater share of the world maritime industry. Our Maritime Sector Report for 2023 reveals the developments in the maritime sector both in Türkiye and the World.

While we present our annual report on the maritime sector, which is meticulously prepared every year with extensive efforts, providing the most up-to-date data and accurate information, I would like to extend my gratitude to everyone involved in its preparation and hope that our report will be encouraging to our industry and community.

Tamer KIRAN

Turkish Chamber of Shipping

Chairman of the Board of Directors

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ABBREVIATIONS

BOT	: Build-Operate-Transfer
BSEC	: Black Sea Economic Cooperation
CGT	: Compensated Gross Ton
DGFA	: Directorate General of Fisheries and Aquaculture
DWT	: Deadweight Tonnage
EU	: European Union
FAO	: United Nations Food and Agriculture Organization
FEE	: Foundation for Environmental Education
GT	: Gross Tonnage
IMO	: International Maritime Organization
ISL	: Institute of Shipping Economics and Logistics
LHD	: Multi-Purpose Amphibious Assault Ship
LNG	: Liquefied Natural Gas
LOA	: Length Overall
LPG	: Liquefied Petroleum Gas
MARRAP	: Marmara Report
OECD	: Organisation for Economic Co-operation and Development
SRR	: Ship Recycling Regulation
TEU	: Twenty-Foot Equivalent Unit
TL	: Turkish lira
TSVTS	: The Turkish Straits Vessel Traffic Service
TUBRAP	: Turkish Straits Reporting System
TURCEV	: The Environmental Education Foundation of Türkiye
TURKSTAT	: Turkish Statistical Institute
UNESCO	: United Nations Educational, Scientific and Cultural Organization
UNWTO	: World Tourism Organization
US	: United States
USD	: United States Dollar
VHF	: Very High Frequency
VTS	: Vessel Traffic Services
YTKB	: New Type Patrol Boat

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CHAPTER I

THE DEVELOPMENT OF THE TURKISH SHIPPING

1. THE DEVELOPMENT OF TURKISH SHIPPING

1.1. The Turkish Merchant Fleet

A detailed analysis of the Turkish merchant fleet has been made under the Turkish National Ship Registry and Turkish International Ship Registry. The values which were established for individual ship groups have been evaluated by number, tonnage and also by being imported or built in Türkiye.

In the analysis, ships of size 1000 GT or higher have been taken into consideration. Age and tonnage ranges have also been evaluated in their respective tables.

Number and tonnage values are as of 31 December 2023.

1.2. The Analysis of the Turkish Merchant Fleet by Number and Tonnage

A general analysis of the merchant fleet has been made according to number, tonnage, and place of build. Table 1 shows that Turkish merchant fleet consists of 500 ships of which 291 (5.8 million DWT) have been imported and 209 (1.4 million DWT) have been built in Türkiye.

500 ships are distributed by type as follows: 18.8% dry cargo ships, 14.4% chemical tankers, 10.4% container ships, 8.6% marine vehicles, 8.2% bulk carrier ships and 39.6% other types.

By DWT the fleet consists of; 25.8% bulk carriers, 20.9% oil tankers, 15.6% container ships, 14.5% chemical tankers, 9.1% dry cargo ships, and 14.1% other types.

By DWT, 5.6% of our fleet is registered in the National Ship Registry, 94.4% of the fleet is registered in the International Ship Registry. By GT, 7.6% of our fleet is registered in the National Ship Registry, 92.4% of the fleet is registered in the International Ship Registry. (Table 2)

The fleet registered in the International Ship Registry (6.8 million DWT) is composed of; bulk carriers (27.0%), oil tankers (22.0%), container ships (14.6%), chemical tankers (14.3%), dry cargo vessels (9.2%) and other types (12.8%). (Table 2)

Table 2 shows Turkish merchant fleet which consists of 500 ships. 12.4% of the total fleet (62 ships) is registered in the National Ship Registry and 87.6% of the total fleet (438 ships) is registered in the International Ship Registry.

The majority of the fleet registered in the National Ship Registry (404.865 DWT) is composed of container ships (33.2%), LNG tankers (23.1%), chemical tankers (17.2%), dry cargo ships (6.9%), service ships (4.9%) and other types (14.8%). (Table 2)

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

Ship Types	Cound				DWT				GT			
	Import	Build	Total	%	Import	Build	Total	%	Import	Build	Total	%
Dry Cargo	32	62	94	18.8	334,667	318,042	652,709	9.1	239,465	205,605	445,070	7.3
Bulk Carrier	37	4	41	8.2	1,682,171	169,685	1,851,856	25.8	971,291	101,520	1,072,811	17.6
Container	39	13	52	10.4	895,573	226,673	1,122,246	15.6	716,461	180,610	897,071	14.7
Dry Cargo/Container	7	2	9	1.8	54,423	13,392	67,815	0.9	51,078	8,663	59,741	1.0
Chemical Tankers	45	27	72	14.4	839,581	202,400	1,041,981	14.5	535,454	135,210	670,664	11.0
LPG Tankers	6	0	6	1.2	37,156	0	37,156	0.5	34,294	0	34,294	0.6
LNG Tankers	2	0	2	0.4	187,228	0	187,228	2.6	218,696	0	218,696	3.6
Asphalt Tankers	1	3	4	0.8	6,600	54,850	61,450	0.9	5,311	43,630	48,941	0.8
Ro-Ro Ships	19	1	20	4.0	233,950	17,183	251,133	3.5	579,063	60,465	639,528	10.5
Ro-Ro Ferry/Passenger	4	12	16	3.2	9,534	701	10,235	0.1	15,550	27,779	43,329	0.7
Ferry Boats	1	27	28	5.6	0	23,014	23,014	0.3	1,815	35,439	37,254	0.6
Train Ferries	0	5	5	1.0	0	2,960	2,960	0.0	0	7,916	7,916	0.1
Passenger and Cargo Ships	8	3	11	2.2	4,078	1,700	5,778	0.1	33,411	13,187	46,598	0.8
Fishing Boats	2	3	5	1.0	3,876	0	3,876	0.1	3,591	26,407	29,998	0.5
Scientific Research Vessel	2	1	3	0.6	2,690	0	2,690	0.0	8,038	4,789	12,827	0.1
Harbour Ferries	1	0	1	0.2	0	0	0	0.0	1,043	0	1,043	0.0
Harbour Car Ferries	0	4	4	0.8	0	1,264	1,264	0.0	0	4,874	4,874	0.1
Tugs	1	0	1	0.2	0	0	0	0.0	1,565	0	1,565	0.0
Service Ships	24	10	34	6.8	53,250	4,200	57,450	0.8	204,021	27,122	231,143	3.8
Oil Tankers	14	12	26	5.2	1,310,742	190,478	1,501,220	20.9	709,219	101,446	810,665	13.3
Container/Ro-Ro	1	0	1	0.2	13,059	0	13,059	0.2	9,991	0	9,991	0.2
Train Ferries/Ro-Ro	1	0	1	0.2	6,266	0	6,266	0.1	15,195	0	15,195	0.3
Vessels of Offshore Activity	17	3	20	4.0	99,950	41,021	140,971	2.0	148,843	56,075	204,918	3.4
Special Purpose Ships	1	0	1	0.2	5,552	0	5,552	0.1	10,763	0	10,763	0.2
Marine Vehicles	26	17	43	8.6	43,009	93,378	136,387	1.9	346,712	188,468	535,180	8.8
Grand Total	**291**	**209**	**500**	**100**	**5,823,355**	**1,360,941**	**7,184,296**	**100**	**4,860,870**	**1,229,205**	**6,090,075**	**100**

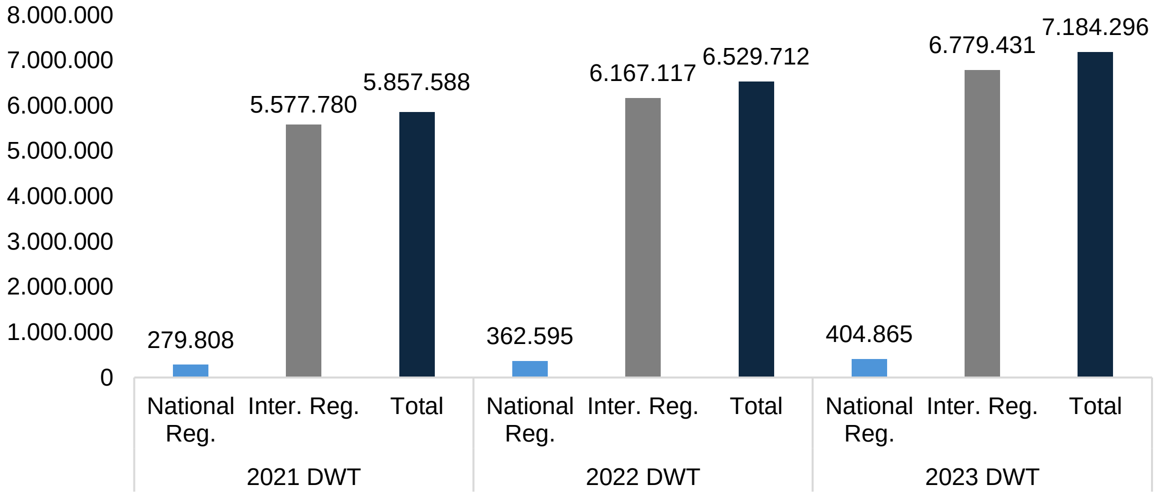
Source: Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping Statistics

Table 2. The General Examination of the Turkish Merchant Fleet by National and International Registries (1000 GT and Over)

Ship Types	Cound				DWT				GT			
	National Reg.	Inter. Reg.	Total	%	National Reg.	Inter. Reg.	Total	%	National Reg.	Inter. Reg.	Total	%
Dry Cargo	5	89	94	18.8	27,756	624,953	652,709	9.1	18,211	426,859	445,070	7.3
Bulk Carrier	1	40	41	8.2	18,640	1,833,216	1,851,856	25.8	11,529	1,061,282	1,072,811	17.6
Container	4	48	52	10.4	134,264	987,982	1,122,246	15.6	105,777	791,294	897,071	14.7
Dry Cargo/Container	0	9	9	1.8	0	67,815	67,815	0.9	0	59,741	59,741	1.0
Chemical Tankers	5	67	72	14.4	69,444	972,537	1,041,981	14.5	42,416	628,248	670,664	11.0
LPG Tankers	0	6	6	1.2	0	37,156	37,156	0.5	0	34,294	34,294	0.6
LNG Tankers	1	1	2	0.4	93,715	93,513	187,228	2.6	109,777	108,919	218,696	3.6
Asphalt Tankers	0	4	4	0.8	0	61,450	61,450	0.9	0	48,941	48,941	0.8
Ro-Ro Ships	1	19	20	4.0	1,500	249,633	251,133	3.5	19,638	619,890	639,528	10.5
Ro-Ro Ferry/Passenger	2	14	16	3.2	0	10,235	10,235	0.1	10,681	32,648	43,329	0.7
Ferry Boats	1	27	28	5.6	2,314	20,700	23,014	0.3	1,596	35,658	37,254	0.6
Train Ferries	5	0	5	1.0	2,960	0	2,960	0.0	7,916	0	7,916	0.1
Passenger and Cargo Ships	2	9	11	2.2	3,240	2,538	5,778	0.1	15,284	31,314	46,598	0.8
Fishing Boats	2	3	5	1.0	0	3,876	3,876	0.1	14,509	15,489	29,998	0.5
Scientific Research Vessel	0	3	3	0.6	0	2,690	2,690	0.0	0	12,827	12,827	0.1
Harbour Ferries	0	1	1	0.2	0	0	0	0.0	0	1,043	1,043	0.0
Harbour Car Ferries	0	4	4	0.8	0	1,264	1,264	0.0	0	4,874	4,874	0.1
Tugs	1	0	1	0.2	0	0	0	0.0	1,565	0	1,565	0.0
Service Ships	14	20	34	6.8	19,774	37,676	57,450	0.8	59,495	171,648	231,143	3.8
Oil Tankers	3	23	26	5.2	10,868	1,490,352	1,501,220	20.9	5,940	804,725	810,665	13.3
Container/Ro-Ro	1	0	1	0.2	13,059	0	13,059	0.2	9,991	0	9,991	0.2
Train Ferries/Ro-Ro	0	1	1	0.2	0	6,266	6,266	0.1	0	15,195	15,195	0.3
Vessels of Offshore Activity	0	20	20	4.0	0	140,971	140,971	2.0	0	204,918	204,918	3.4
Special Purpose Ships	0	1	1	0.2	0	5,552	5,552	0.1	0	10,763	10,763	0.2
Marine Vehicles	14	29	43	8.6	7,331	129,056	136,387	1.9	28,496	506,684	535,180	8.8
Grand Total	**62**	**438**	**500**	**100**	**404,865**	**6,779,431**	**7,184,296**	**100**	**462,821**	**5,627,254**	**6,090,075**	**100**

Source: Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping Statistics

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



Source: Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping Statistics

Table 3. Examination of Registries (DWT) 2021-2022-2023 (1000 GT and Over)

Ship Types	2021 DWT			2022 DWT			2023 DWT			2022-2023 DWT % Change
	National Reg.	Inter. Reg.	Total	National Reg.	Inter. Reg.	Total	National Reg.	Inter. Reg.	Total	
Dry Cargo	41,441	562,526	603,967	39,246	525,599	564,845	27,756	624,953	652,709	15.6
Bulk Carrier	18,640	1,518,458	1,537,098	18,640	1,774,387	1,793,027	18,640	1,833,216	1,851,856	3.3
Container	134,264	901,180	1,035,444	134,264	954,647	1,088,911	134,264	987,982	1,122,246	3.1
Dry Cargo/Container	2,356	36,776	39,132	0	34,839	34,839	0	67,815	67,815	94.7
Chemical Tankers	22,621	643,138	665,759	28,743	846,006	874,749	69,444	972,537	1,041,981	19.1
LPG Tankers	0	27,804	27,804	0	27,804	27,804	0	37,156	37,156	33.6
LNG Tankers	0	93,513	93,513	93,715	93,513	187,228	93,715	93,513	187,228	0.0
Asphalt Tankers	0	61,453	61,453	0	61,450	61,450	0	61,450	61,450	0.0
Ro-Ro Ships	0	122,276	122,276	1,500	249,633	251,133	1,500	249,633	251,133	0.0
Ro-Ro Ferry/Passenger	0	30,778	30,778	0	28,120	28,120	0	10,235	10,235	-63.6
Ferry Boats	2,314	20,700	23,014	2,314	20,700	23,014	2,314	20,700	23,014	0.0
Train Ferries	2,960	0	2,960	2,960	0	2,960	2,960	0	2,960	0.0
Passenger and Cargo Ships	3,761	2,538	6,299	3,240	2,538	5,778	3,240	2,538	5,778	0.0
Fishing Boats	0	3876	3876	0	3,876	3,876	0	3,876	3,876	0.0
Scientific Research Vessel	0	4,480	4,480	0	2,690	2,690	0	2,690	2,690	0.0
Harbour Ferries	0	0	0	0	0	0	0	0	0	-
Harbour Car Ferries	0	1,264	1,264	0	1,264	1,264	0	1,264	1,264	0.0
Tugs	0	0	0	0	0	0	0	0	0	-
Service Ships	19,774	147,917	167,691	19,774	31,384	51,158	19,774	37,676	57,450	12.3
Oil Tankers	10,868	1,256,231	1,267,099	10,868	1,293,224	1,304,092	10,868	1,490,352	1,501,220	15.1
Container/Ro-Ro	0	0	0	0	0	0	13,059	0	13,059	-
Train Ferries/Ro-Ro	0	6,266	6,266	0	6,266	6,266	0	6,266	6,266	0.0
Dry Cargo/Ro-Ro	13,478	128,606	142,084	0	0	0	0	0	0	-
Vessels of Offshore Activity	0	0	0	0	136,623	136,623	0	140,971	140,971	3.2
Special Purpose Ships	0	0	0	0	5,552	5,552	0	5,552	5,552	0.0
Marine Vehicles	7,331	8,000	15,331	7,331	67,002	74,333	7,331	129,056	136,387	83.5
Grand Total	**279,808**	**5,577,780**	**5,857,588**	**362,595**	**6,167,117**	**6,529,712**	**404,865**	**6,779,431**	**7,184,296**	**10.0**

Source: Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping Statistics

1.3. The Age Profile of the Turkish Merchant Fleet

Table 4 shows the age profile of the Turkish Merchant Fleet with respect to different ship types. The Merchant Fleet of ships with size 1.000 GT and above consists of 500 ships. The average age of these ships is 25 as of 31.12.2023.

The average age of dry cargo ships is 30, which makes 18.8% of the fleet. The average age of bulk carriers is 20 and makes up 8.2% of the total fleet. The average age of containers is 20, which is 10.4% of the fleet. The average age of chemical tankers is 20, which is 14.4% of the fleet. The average age of oil tankers is 20, which is 5.2% of the fleet.

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

Ship Types	Number	Tonnage (DWT)	Tonnage (GT)	Average Age
Dry Cargo	94	652,709	445,070	30
Bulk Carrier	41	1,851,856	1,072,811	20
Container	52	1,122,246	897,071	20
Dry Cargo/Container	9	67,815	59,741	29
Chemical Tankers	72	1,041,981	670,664	20
LPG Tankers	6	37,156	34,294	26
LNG Tankers	2	187,228	218,696	4
Asphalt Tankers	4	61,450	48,941	8
Ro-Ro Ships	20	251,133	639,528	18
Ro-Ro Ferry/Passenger	16	10,235	43,329	16
Ferry Boats	28	23,014	37,254	28
Train Ferries	5	2,960	7,916	50
Passenger and Cargo Ships	11	5,778	46,598	25
Fishing Boats	5	3,876	29,998	18
Scientific Research Vessel	3	2690	12,827	19
Harbour Ferries	1	0	1,043	72
Harbour Car Ferries	4	1264	4,874	31
Tugs	1	0	1,565	40
Service Ships	34	57,450	231,143	42
Oil Tankers	26	1,501,220	810,665	20
Container/Ro-Ro	1	13,059	9,991	27
Train Ferries/Ro-Ro	1	6,266	15,195	38
Vessels of Offshore Activity	20	140,971	204,918	16
Special Purpose Ships	1	5,552	10,763	25
Marine Vehicles	43	136,387	535,180	35
Grand Total	**500**	**7,184,296**	**6,090,075**	**25**

Source: Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping Statistics

Table 5 shows the Turkish Merchant Fleet grouped by different age and tonnage ranges. Turkish Merchant Fleet consists of 500 ships with a total of 7,184,296 DWT.

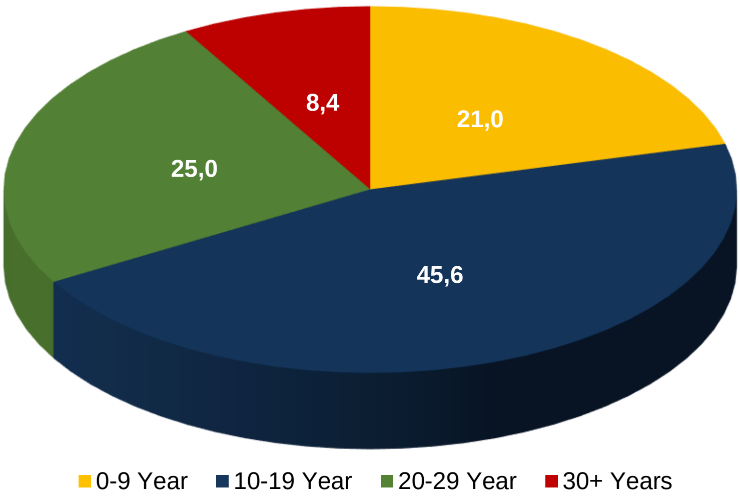
- 61 ships with total size 1,507,979 DWT are in the 0-9 age range,
- 165 ships with total size 3,273,042 DWT are in the 10-19 age range,
- 111 ships with total size 1,799,802 DWT are in the 20-29 age range,
- 163 ships with total size 603,473 DWT are of age 30 or older.

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

Divisions of Tonnage	0-9 Years			10-19 Years			20-29 Years			30+ Years			Total	
	NO	DWT	%	NO	DWT	%	NO	DWT	%	NO	DWT	%	NO	DWT
0-149	22	0	0.0	24	0	0.0	6	0	0.0	43	0	0.0	95	0
150-1499	0	0	0.0	8	6,543	0.2	6	3,872	0.2	16	10,443	1.7	30	20,858
1500-5999	6	25,111	1.7	37	135,364	4.1	29	109,853	6.1	76	252,612	41.9	148	522,940
6000-9999	6	41,424	2.7	17	128,956	3.9	17	138,600	7.7	15	112,869	18.7	55	421,849
10000-34999	12	224,457	14.9	50	919,868	28.1	34	653,632	36.3	12	184,361	30.5	108	1,982,318
35000-52999	8	309,684	20.5	11	497,266	15.2	17	767,868	42.7	1	43,188	7.2	37	1,618,006
53000-79999	0	0	0.0	10	620,991	19.0	2	125,977	7.0	0	0	0.0	12	746,968
80000-119999	3	292,399	19.4	4	363,512	11.1	0	0	0.0	0	0	0.0	7	655,911
120000+	4	614,904	40.8	4	600,542	18.4	0	0	0.0	0	0	0.0	8	1,215,446
Grand Total	**61**	**1,507,979**	**100**	**165**	**3,273,042**	**100**	**111**	**1,799,802**	**100**	**163**	**603,473**	**100**	**500**	**7,184,296**

Source: Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping Statistics

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



Source: Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping Statistics

The graph shows the age groups of the Turkish merchant fleet. 22.1% of the fleet is in the 0-9 age range, 44.4% of the fleet is in the 10-19 age range, 25.2% of the fleet is in the 20-29 age range and 8.3% is 30 years old or over.

The tables of different ship types below show the age profile of the Turkish merchant fleet and are organized according to size and age.

Table 6 shows the Dry Cargo segment (94 ships) which has a total size of 652,709 DWT.

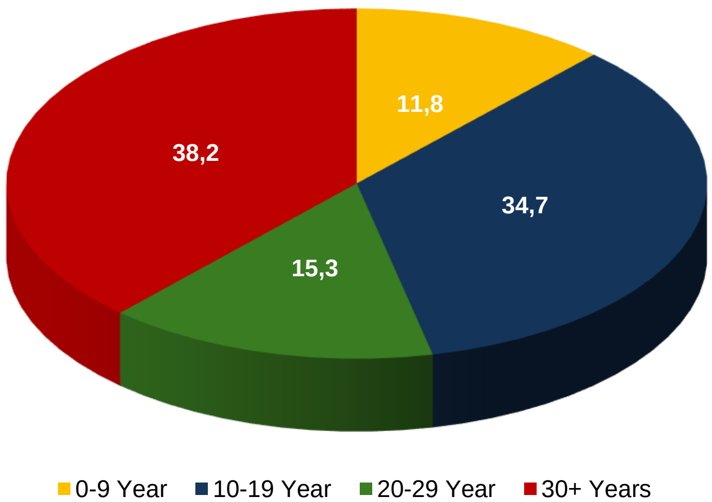
- 6 ships of size 77,294 DWT are in the 0-9 age range,
- 22 ships of size 226,366 DWT are in the 10-19 age range,
- 12 ships of size 99,575 DWT are in the 20-29 age range,
- 54 ships of size 249,474 DWT are 30 years or older.

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

Divisions of Tonnage	0-9 Years			10-19 Years			20-29 Years			30+ Years			Total	
	NO	DWT	%	NO	DWT	%	NO	DWT	%	NO	DWT	%	NO	DWT
150-1499	0	0	0.0	0	0	0.0	0	0	0.0	0	0	0.0	0	0
1500-5999	2	10,050	13.0	12	48,938	21.6	8	30,793	30.9	45	158,910	63.7	67	248,691
6000-9999	1	7,121	9.2	6	46,166	20.4	3	18,917	19.0	5	33,940	13.6	15	106,144
10000-34999	3	60,123	77.8	2	31,980	14.1	0	0	0.0	4	56,624	22.7	9	148,727
35000-52999	0	0	0.0	2	99,282	43.9	1	49,865	50.1	0	0	0.0	3	149,147
53000-79999	0	0	0.0	0	0	0.0	0	0	0.0	0	0	0.0	0	0
80000-119999	0	0	0.0	0	0	0.0	0	0	0.0	0	0	0.0	0	0
120000+	0	0	0.0	0	0	0.0	0	0	0.0	0	0	0.0	0	0
Grand Total	**6**	**77,294**	**100**	**22**	**226,366**	**100**	**12**	**99,575**	**100**	**54**	**249,474**	**100**	**94**	**652,709**

Source: Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping Statistics

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



Source: Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping Statistics

11.8% of Dry Cargo Ships are in the 0-9 age range; 34.7% are in the 10-19 age range; 15.3% are in the 20-29 age range and 38.2% are 30 years or older.

Table 7 shows the Bulk Carrier Segment (41 ships) with a total size of 1,851,856 DWT.

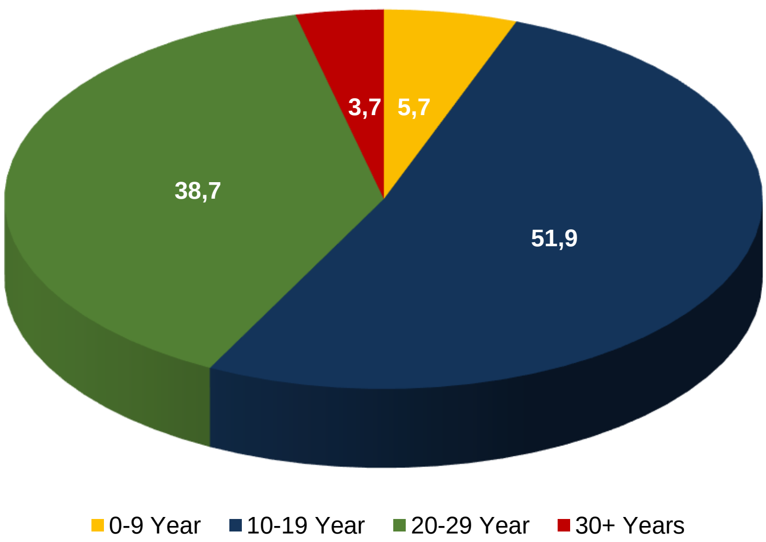
- 3 ships of size 105,526 DWT are in the 0-9 age range,
- 18 ships of size 960,531 DWT are in the 10-19 age range,
- 16 ships of size 716,484 DWT are in the 20-29 age range,
- 4 ships of size 69,315 DWT are 30 years or older.

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

Divisions of Tonnage	0-9 Years			10-19 Years			20-29 Years			30+ Years			Total	
	NO	DWT	%	NO	DWT	%	NO	DWT	%	NO	DWT	%	NO	DWT
0-9999	0	0	0.0	0	0	0.0	0	0	0.0	2	7,487	10.8	2	7,487
10000-39999 (Handysize)	3	105,526	100.0	6	153,514	16.0	5	148,356	20.7	1	18,640	26.9	15	426,036
40000-49999 (Handymax)	0	0	0.0	0	0	0.0	4	183,443	25.6	1	43,188	62.3	5	226,631
50000-59999 (Supramax)	0	0	0.0	6	335,615	34.9	6	312,514	43.6	0	0	0.0	12	648,129
60000-84999 (Panamax)	0	0	0.0	6	471,402	49.1	1	72,171	10.1	0	0	0.0	7	543,573
85000-149999 (Capesize)	0	0	0.0	0	0	0.0	0	0	0.0	0	0	0.0	0	0
150000+ (Capesize)	0	0	0.0	0	0	0.0	0	0	0.0	0	0	0.0	0	0
Grand Total	**3**	**105.526**	**100**	**18**	**960,531**	**100**	**16**	**716,484**	**100**	**4**	**69,315**	**100**	**41**	**1,851,856**

Source: Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping Statistics

Graph 4. Age Distribution of Bulk Carriers (DWT/%)



Source: Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping Statistics

5.7% of the bulk carriers are in the 0-9 age range; 51.9% are in the 10-19 age range; 38.7% are in the 20-29 age range and 3.7% are 30 years or older.

Table 8 shows Oil Tankers Segment (26 ships) with a total size of 1,501,220 DWT.

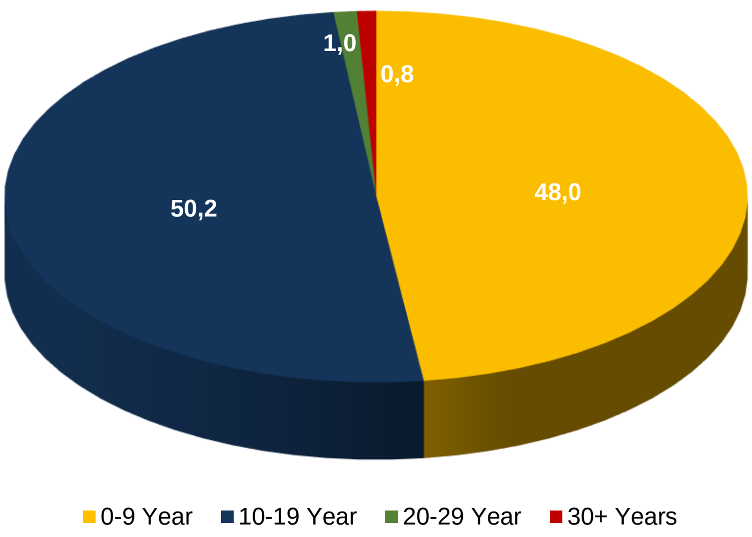
- 5 ships of size 720,075 DWT are in the 0-9 age range,
- 13 ships of size 753,376 DWT are in the 10-19 age range,
- 4 ships of size 15,164 DWT are in the 20-29 age range,
- 4 ships of size 12,605 DWT are 30 years or older.

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

Divisions of Tonnage	0-9 Years			10-19 Years			20-29 Years			30+ Years			Total	
	NO	DWT	%	NO	DWT	%	NO	DWT	%	NO	DWT	%	NO	DWT
0-4999	0	0	0.0	6	16,765	2.2	4	15,164	100.0	4	12,605	100.0	14	44,534
5000-7499	0	0	0.0	1	7,119	0.9	0	0	0.0	0	0	0.0	1	7,119
7500-9999	0	0	0.0	0	0	0.0	0	0	0.0	0	0	0.0	0	0
10000-39999 (Handysize)	0	0	0.0	1	13,002	1.7	0	0	0.0	0	0	0.0	1	13,002
40000-59999 (Handymax)	0	0	0.0	0	0	0.0	0	0	0.0	0	0	0.0	0	0
60000-79999 (Panamax)	0	0	0.0	0	0	0.0	0	0	0.0	0	0	0.0	0	0
80000-119999 (Aframax)	1	105,171	14.6	1	115,948	15.4	0	0	0.0	0	0	0.0	2	221,119
120000-199999 (Suezmax)	4	614,904	85.4	4	600,542	79.7	0	0	0.0	0	0	0.0	8	1,215,446
200000-324999 (VLCC)	0	0	0.0	0	0	0.0	0	0	0.0	0	0	0.0	0	0
325000+(ULCC)	0	0	0.0	0	0	0.0	0	0	0.0	0	0	0.0	0	0
Grand Total	**5**	**720,075**	**100**	**13**	**753,376**	**100**	**4**	**15.164**	**100**	**4**	**12.605**	**100**	**26**	**1,501,220**

Source: Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping Statistics

Graph 5. Age Distribution of Oil Tankers (DWT/%)



Source: Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping Statistics

48.0% of the oil tankers are in the 0-9 age range; 50.2% are in the 10-19 age range; 1.0% are in the 20-29 age range and 0.8% are 30 years old or older.

Table 9 shows the average age of the chemical tankers (72 ships) with a total size of 1.041,981 DWT.

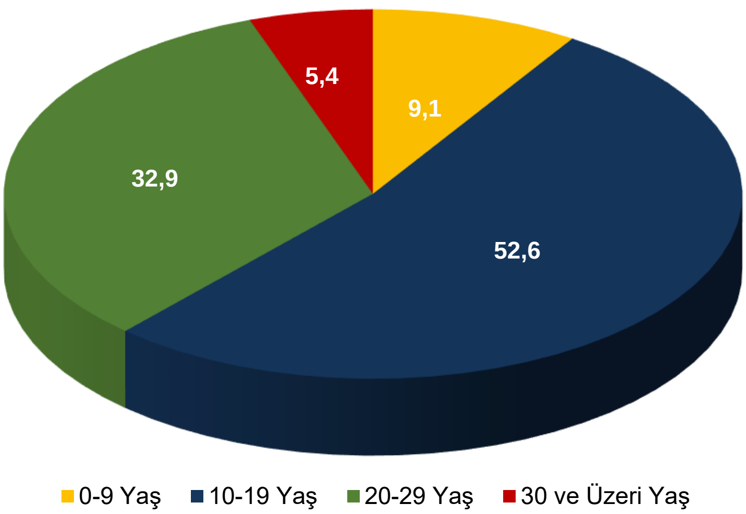
- 8 ships of size 94,111 DWT are in the 0-9 age range,
- 32 ships of size 548,396 DWT are in the 10-19 age range,
- 23 ships of size 342,915 DWT are in the 20-29 age range,
- 9 ships of size 56,559 DWT are 30 years or older.

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

Divisions of Tonnage	0-9 Years			10-19 Years			20-29 Years			30+ Years			Total	
	NO	DWT	%	NO	DWT	%	NO	DWT	%	NO	DWT	%	NO	DWT
0-4999	2	6,951	7.4	5	20,284	3.7	7	26,659	7.8	3	9,154	16.2	17	63,048
5000-7499	2	12,165	12.9	5	32,077	5.8	4	25,359	7.4	2	12,425	22.0	13	82,026
7500-9999	1	7,538	8.0	3	26,314	4.8	2	17,305	5.0	4	34,980	61.8	10	86,137
10000-39999 (Handysize)	3	67,457	71.7	14	222,595	40.6	8	187,223	54.6	0	0	0.0	25	477,275
40000-59999 (Handymax)	0	0	0.0	5	247,126	45.1	2	86,369	25.2	0	0	0.0	7	333,495
60000-79999 (Panamax)	0	0	0.0	0	0	0.0	0	0	0.0	0	0	0.0	0	0
80000-119999 (Aframax)	0	0	0.0	0	0	0.0	0	0	0.0	0	0	0.0	0	0
120000-199999 (Suezmax)	0	0	0.0	0	0	0.0	0	0	0.0	0	0	0.0	0	0
200000-324999 (VLCC)	0	0	0.0	0	0	0.0	0	0	0.0	0	0	0.0	0	0
325000+ (ULCC)	0	0	0.0	0	0	0.0	0	0	0.0	0	0	0.0	0	0
Grand Total	**8**	**94,111**	**100**	**32**	**548,396**	**100**	**23**	**342,915**	**100**	**9**	**56,559**	**100**	**72**	**1,041,981**

Source: Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping Statistics

Graph 6. Age Distribution of Chemical Tankers (DWT/%)



Source: Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping Statistics

9.1% of chemical tankers are in the 0-9 age range; 52.6% are in the 10-19 age range; 32.9% are in the 20-29 age range and 5.4% are 30 years or older.

Table 10 shows the average age of the Container Ships (52 ships) with a total size of 1,122,246 DWT.

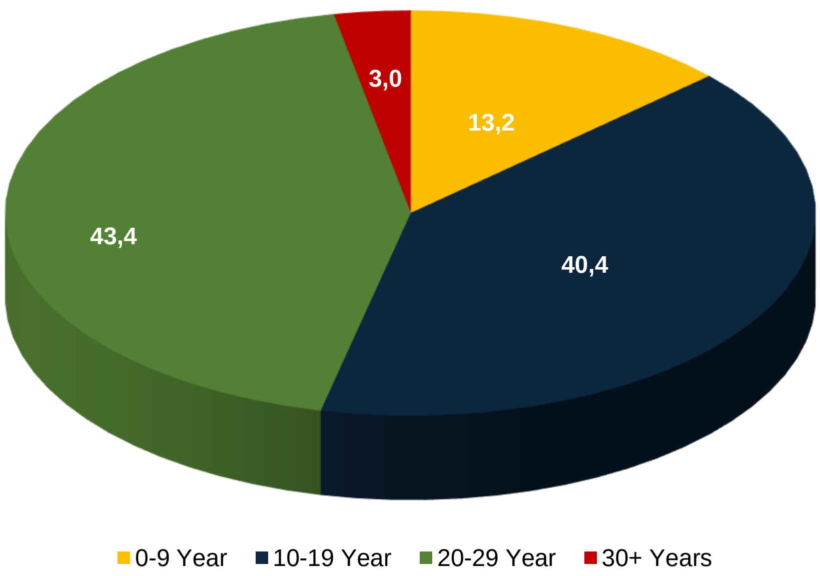
- 4 ships of size 147,996 DWT are in the 0-9 age range,
- 19 ships of size 452,822 DWT are in the 10-19 age range,
- 26 ships of size 487,262 DWT are in the 20-29 age range,
- 3 ship of size 34,166 DWT are 30 years or older.

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

Divisions of Tonnage	0-9 Years			10-19 Years			20-29 Years			30+ Years			Total	
	NO	DWT	%	NO	DWT	%	NO	DWT	%	NO	DWT	%	NO	DWT
150-1499	0	0	0.0	0	0	0.0	0	0	0.0	0	0	0.0	0	0
1500-5999	0	0	0.0	1	3,301	0.7	0	0	0.0	0	0	0.0	1	3,301
6000-9999	0	0	0.0	0	0	0.0	2	16,202	3.3	1	9,766	28.6	3	25,968
10000-34999	0	0	0.0	16	372,365	82.2	22	396,037	81.3	2	24,400	71.4	40	792,802
35000-52999	4	147,996	100.0	2	77,156	17.1	2	75,023	15.4	0	0	0.0	8	300,175
53000-79999	0	0	0.0	0	0	0.0	0	0	0.0	0	0	0.0	0	0
80000-119999	0	0	0.0	0	0	0.0	0	0	0.0	0	0	0.0	0	0
120000+	0	0	0.0	0	0	0.0	0	0	0.0	0	0	0.0	0	0
Grand Total	**4**	**147,996**	**100**	**19**	**452,822**	**100**	**26**	**487,262**	**100**	**3**	**34,166**	**100**	**52**	**1,122,246**

Source: Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping Statistics

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



Source: Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping Statistics

13.2% of Container ships are in the 0-9 age range; 40.4% are in the 10-19 age range; 43.4% are in the 20-29 age range and 3.0% are 30 years or older.

Table 11 shows the average age of the Ro-Ro Ships, (20 ships) with a total size of 251,133 DWT.

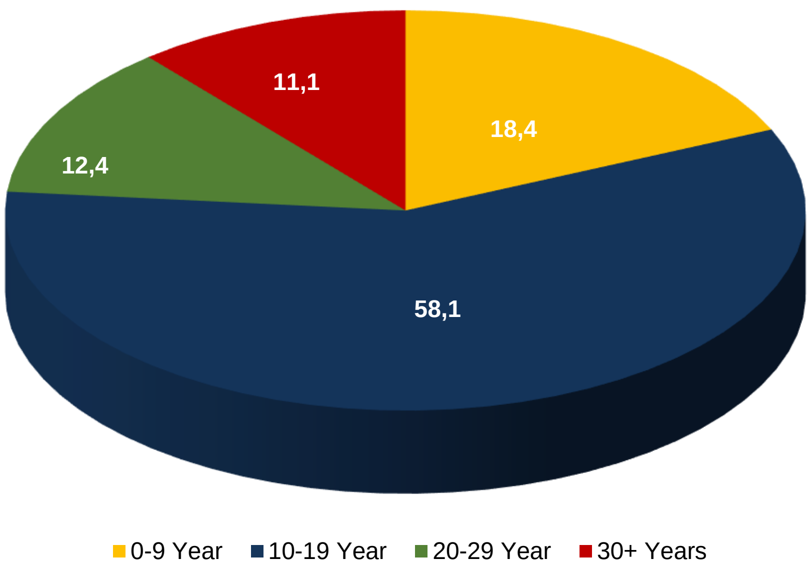
- 3 ships of size 46,110 DWT are in the 0-9 age range,
- 11 ships of size 145,896 DWT are in the 10-19 age range,
- 4 ship of size 31,095 DWT are in the 20-29 age range,
- 2 ships of size 28,032 DWT are 30 years or older.

Table 11. Ro-Ro Ships by Tonnage and Age Groups (1000 GT and Over)

Divisions of Tonnage	0-9 Years			10-19 Years			20-29 Years			30+ Years			Total	
	NO	DWT	%	NO	DWT	%	NO	DWT	%	NO	DWT	%	NO	DWT
150-1499	0	0	0.0	0	0	0.0	0	0	0.0	0	0	0.0	0	0
1500-5999	0	0	0.0	0	0	0.0	1	1,500	4.8	0	0	0.0	1	1,500
6000-9999	0	0	0.0	0	0	0.0	3	29,595	95.2	0	0	0.0	3	29,595
10000-34999	3	46,110	100.0	11	145,896	100.0	0	0	0.0	2	28,032	100.0	16	220,038
35000-52999	0	0	0.0	0	0	0.0	0	0	0.0	0	0	0.0	0	0
53000-79999	0	0	0.0	0	0	0.0	0	0	0.0	0	0	0.0	0	0
80000-119999	0	0	0.0	0	0	0.0	0	0	0.0	0	0	0.0	0	0
120000+	0	0	0.0	0	0	0.0	0	0	0.0	0	0	0.0	0	0
Grand Total	**3**	**46,110**	**100**	**11**	**145,896**	**100**	**4**	**31,095**	**100**	**2**	**28,032**	**100**	**20**	**251.133**

Source: Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping Statistics

Graph 8. Age Distribution of the Ro-Ro Ships (DWT/%)



Source: Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping Statistics

18.4% of Ro-Ro Ships are in the 0-9 age range; 58.1% are in the 10-19 age range; 12.4% are in the 20-29 age range and 11.1% are 30 years old or older.

1.4. Turkish Merchant Fleet by Number and Tonnage (1000 DWT and Over)[1]

Table 12 shows the numerical and tonnage values of ships which are 1000 DWT and over and are suitable for international transportation.

Table 13 shows that the Turkish merchant fleet consists of 463 ships. 13.4% of the total fleet (62 ships) is registered in National Ship Registry and 86.6% of the total fleet (401 ships) in the International Ship Registry. The total DWT and GT values of the ships over 1000 DWT are 7,321,986 DWT and 5,332,251 GT respectively. 6 classes make up the majority of this capacity. Bulk carriers lead with 25.3%, oil tankers follow with 21.0%, containers with 15.3%, chemical tankers with 14.2%, dry cargo with 9.5% and ro-ro ships with 3.4%. These 6 classes make up 88.7% of the total fleet based on DWT.

1% of the bulk carrier ships are registered in the National Ship Registry, and the rest 99% are registered in the International Ship Registry with a total weight of 1,851,856 DWT for the bulk carrier segment.

1.5% of the oil tankers are registered in the National Ship Registry, and the rest 98.5% are registered in the International Ship Registry with a total weight of 1,540,849 DWT for the oil tankers segment.

12% of the container ships are registered in the National Ship Registry, and the rest 88% are registered in the International Ship Registry with a total weight of 1,122,246 DWT for the container ship segment.

6.7% of the chemical tankers are registered in the National Ship Registry, and the rest 93.3% are registered in the International Ship Registry with a total weight of 1,041,981 DWT for the chemical tankers segment.

6.2% of the dry cargo ships are registered in the National Ship Registry, and the rest 93.8% are registered in the International Ship Registry with a total weight of 695,078 DWT for the dry cargo ship segment.

0.6% of the ro-ro ships are registered in the National Ship Registry, and the rest 99.4% are registered in the International Ship Registry with a total weight of 251,133 DWT for the service ships segment.

[1] Accepted International Seaborne Transportation Tonnage

Table 12. The General Examination of the Turkish Merchant Fleet by Number and Tonnage According to Import and Build (1000 DWT and Over)

Ship Types	Cound				DWT				GT			
	Import	Build	Total	%	Import	Build	Total	%	Import	Build	Total	%
Dry Cargo	36	86	122	26.3	340,393	354,685	695,078	9.5	242,867	225,770	468,637	8.8
Bulk Carrier	37	4	41	8.9	1,682,171	169,685	1,851,856	25.3	971,291	101,520	1,072,811	20.1
Container	39	13	52	11.2	895,573	226,673	1,122,246	15.3	716,461	180,610	897,071	16.8
Dry Cargo/Container	7	2	9	1.9	54,423	13,392	67,815	0.9	51,078	8,663	59,741	1.1
Chemical Tankers	45	27	72	15.6	839,581	202,400	1,041,981	14.2	535,454	135,210	670,664	12.6
LPG Tankers	6	0	6	1.3	37,156	0	37,156	0.5	34,294	0	34,294	0.6
LNG Tankers	2	0	2	0.4	187,228	0	187,228	2.6	218,696	0	218,696	4.1
Asphalt Tankers	1	3	4	0.9	6,600	54,850	61,450	0.8	5,311	43,630	48,941	0.9
Water Barges	0	1	1	0.2	0	1,027	1,027	0.0	0	488	488	0.0
Ro-Ro Ships	19	1	20	4.3	233,950	17,183	251,133	3.4	579,063	60,465	639,528	12.0
Ro-Ro Ferry/Passenger	2	1	3	0.7	9,077	1,339	10,416	0.1	10,523	975	11,498	0.2
Ferry Boats	0	10	10	2.2	0	18,516	18,516	0.3	0	14,280	14,280	0.3
Train Ferries	0	2	2	0.4	0	2,600	2,600	0.0	0	2,466	2,466	0.0
Passenger and Cargo Ships	2	1	3	0.7	31,182	1,700	32,882	0.5	5,132	10,583	15,715	0.3
Fishing Boats	1	0	1	0.2	3,307	0	3,307	0.1	2,184	0	2,184	0.0
Scientific Research Vessel	1	0	1	0.2	2,690	0	2,690	0.0	3,327	0	3,327	0.1
Service Ships	17	13	30	6.5	64,724	21,579	86,303	1.2	44,076	9,318	53,394	1.0
Oil Tankers	21	31	52	11.2	1,320,735	220,114	1,540,849	21.0	715,483	118,831	834,314	15.7
Container/Ro-Ro	1	0	1	0.2	13,059	0	13,059	0.2	9,991	0	9,991	0.2
Train Ferries/Ro-Ro	1	0	1	0.2	6,266	0	6,266	0.1	15,195	0	15,195	0.3
Dry Cargo/Ro-Ro	0	1	1	0.2	0	1,923	1,923	0.0	0	998	998	0.0
Vessels of Offshore Activity	13	3	16	3.5	99,950	41,021	140,971	2.0	91,591	56,075	147,666	2.8
Special Purpose Ships	1	0	1	0.2	5,552	0	5,552	0.1	10,763	0	10,763	0.2
Marine Vehicles	4	8	12	2.6	43,009	96,673	139,682	1.9	36,739	62,850	99,589	1.9
Grand Total	**256**	**207**	**463**	**100**	**5,876,626**	**1,445,360**	**7,321,986**	**100**	**4,299,519**	**1,032,732**	**5,332,251**	**100**

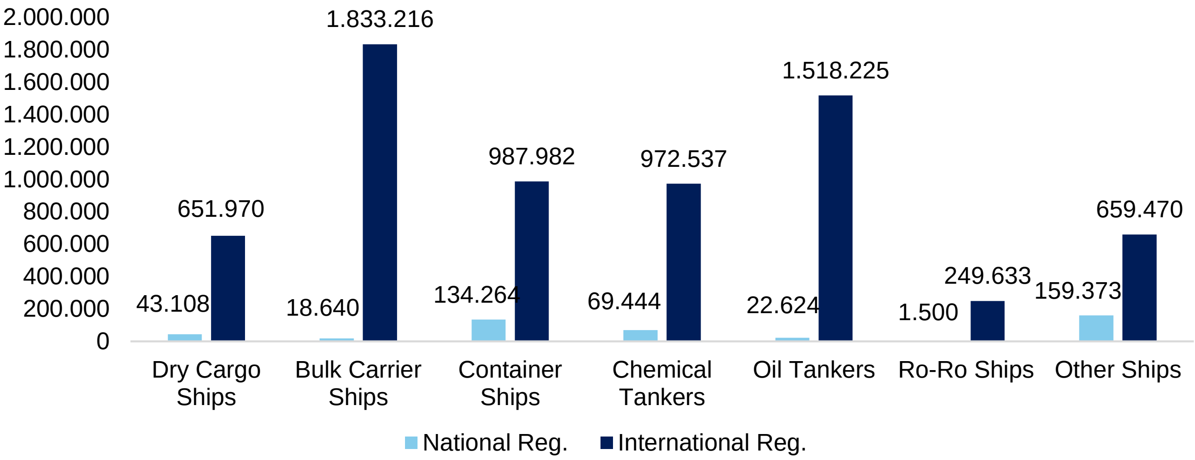
Source: Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping Statistics

Table 13. The General Examination of the Turkish Merchant Fleet by National and International Registries (1000 DWT and Over)

Ship Types	Cound				DWT				GT			
	National Reg.	Inter. Reg.	Total	%	National Reg.	Inter. Reg.	Total	%	National Reg.	Inter. Reg.	Total	%
Dry Cargo	16	106	122	26.3	43,108	651,970	695,078	9.5	26,791	441,846	468,637	8.8
Bulk Carrier	1	40	41	8.9	18,640	1,833,216	1,851,856	25.3	11,529	1,061,282	1,072,811	20.1
Container	4	48	52	11.2	134,264	987,982	1,122,246	15.3	105,777	791,294	897,071	16.8
Dry Cargo/Container	0	9	9	1.9	0	67,815	67,815	0.9	0	59,741	59,741	1.1
Chemical Tankers	5	67	72	15.6	69,444	972,537	1,041,981	14.2	42,416	628,248	670,664	12.6
LPG Tankers	0	6	6	1.3	0	37,156	37,156	0.5	0	34,294	34,294	0.6
LNG Tankers	1	1	2	0.4	93,715	93,513	187,228	2.6	109,777	108,919	218,696	4.1
Asphalt Tankers	0	4	4	0.9	0	61,450	61,450	0.8	0	48,941	48,941	0.9
Water Barges	0	1	1	0.2	0	1,027	1,027	0.0	0	488	488	0.0
Ro-Ro Ships	1	19	20	4.3	1,500	249,633	251,133	3.4	19,638	619,890	639,528	12.0
Ro-Ro Ferry/Passenger	0	3	3	0.7	0	10,416	10,416	0.1	0	11,498	11,498	0.2
Ferry Boats	1	9	10	2.2	2,314	16,202	18,516	0.3	1,596	12,684	14,280	0.3
Train Ferries	2	0	2	0.4	2,600	0	2,600	0.0	2,466	0	2,466	0.1
Passenger and Cargo Ships	2	1	3	0.7	3,240	29,642	32,882	0.5	15,284	431	15,715	0.3
Fishing Boats	0	1	1	0.2	0	3,307	3,307	0.1	0	2,184	2,184	0.0
Scientific Research Vessel	0	1	1	0.2	0	2,690	2,690	0.0	0	3,327	3,327	0.1
Service Ships	12	18	30	6.5	33,819	52,484	86,303	1.2	24,892	28,502	53,394	1.0
Oil Tankers	11	41	52	11.2	22,624	1,518,225	1,540,849	21.0	13,193	821,121	834,314	15.6
Container/Ro-Ro	1	0	1	0.2	13,059	0	13,059	0.2	9,991	0	9,991	0.2
Train Ferries/Ro-Ro	0	1	1	0.2	0	6,266	6,266	0.1	0	15,195	15,195	0.3
Dry Cargo/Ro-Ro	0	1	1	0.2	0	1,923	1,923	0.0	0	998	998	0.0
Vessels of Offshore Activity	0	16	16	3.5	0	140,971	140,971	2.0	0	147,666	147,666	2.8
Special Purpose Ships	0	1	1	0.2	0	5,552	5,552	0.1	0	10,763	10,763	0.2
Marine Vehicles	5	7	12	2.6	10,626	129,056	139,682	1.9	5,882	93,707	99,589	1.9
Grand Total	**62**	**401**	**463**	**100**	**448,953**	**6,873,033**	**7,321,986**	**100**	**389,232**	**4,943,019**	**5,332,251**	**100**

Source: Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping Statistics

Graph 9. Turkish Fleet According to Registries, 1000 DWT and Over



Source: Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping Statistics

Table 14 shows the age profile of the Turkish Merchant Fleet with respect to different ship types. The Merchant Fleet of ships with size 1000 DWT and above consists of 463 ships. The average age of these ships is 26 as of 31.12.2023.

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

Ship Types	Number	DWT	GT	Average Age
Dry Cargo	122	695,078	468,637	35
Bulk Carrier	41	1,851,856	1,072,811	20
Container	52	1,122,246	897,071	20
Dry Cargo/Container	9	67,815	59,741	29
Chemical Tankers	72	1,041,981	670,664	20
LPG Tankers	6	37,156	34,294	26
LNG Tankers	2	187,228	218,696	4
Asphalt Tankers	4	61,450	48,941	8
Water Barges	1	1,027	488	55
Ro-Ro Ships	20	251,133	639,528	18
Ro-Ro Ferry/Passenger	3	10,416	11,498	36
Ferry Boats	10	18,516	14,280	33
Train Ferries	2	2,600	2,466	51
Passenger and Cargo Ships	3	32,882	15,715	54
Fishing Boats	1	3,307	2,184	36
Scientific Research Vessel	1	2,690	3,327	38
Service Ships	30	86,303	53,394	39
Oil Tankers	52	1,540,849	834,314	20
Container/Ro-Ro	1	13,059	9,991	27
Train Ferries/Ro-Ro	1	6,266	15,195	38
Dry Cargo/Ro-Ro	1	1,923	998	40
Vessels of Offshore Activity	16	140,971	147,666	16
Special Purpose Ships	1	5,552	10,763	25
Marine Vehicles	12	139,682	99,589	24
Grand Total	**463**	**7,321,986**	**5,332,251**	**26**

Source: Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping Statistics

Table 15 shows the Turkish Merchant Fleet grouped by different age and tonnage ranges. Turkish Merchant Fleet consists of 463 ships with a total of 7,321,986 DWT.

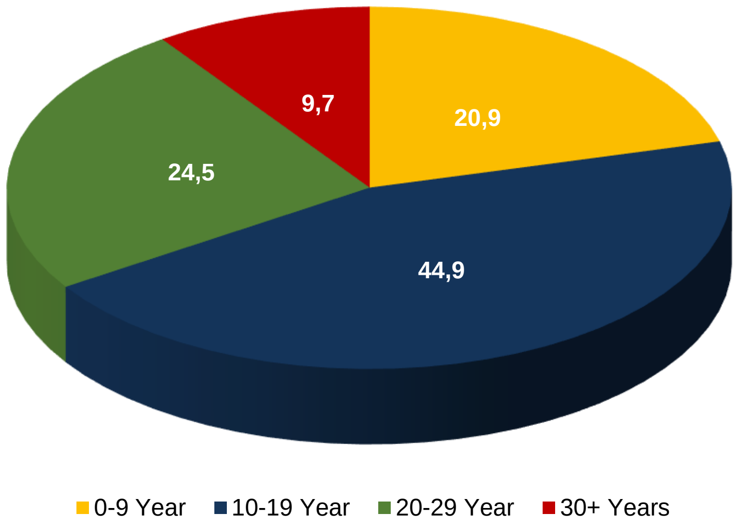
- 50 ships with total size 1,527,417 DWT are in the 0-9 age range,
- 145 ships with total size 3,283,938 DWT are in the 10-19 age range,
- 103 ships with total size 1,801,604 DWT are in the 20-29 age range,
- 165 ships with total size 709,027 DWT are of age 30 or older.

Table 15. Turkish Merchant Fleet Distribution by Tonnage and Age Groups (1000 DWT and Over)

Divisions of Tonnage	0-9 Years			10-19 Years			20-29 Years			30+ Years			Total	
	NO	DWT	%	NO	DWT	%	NO	DWT	%	NO	DWT	%	NO	DWT
150-1499	1	1,231	0.1	6	7,379	0.2	3	4,172	0.2	39	49,643	7.0	49	62,425
1500-5999	16	43,318	2.8	43	145,426	4.4	30	111,354	6.2	97	289,324	40.8	186	589,422
6000-9999	6	41,424	2.7	17	128,956	3.9	17	138,600	7.7	15	112,869	15.9	55	421,849
10000-34999	12	224,457	14.7	50	919,867	28.0	34	653,633	36.3	13	214,003	30.2	109	2,011,960
35000-52999	8	309,684	20.3	11	497,266	15.1	17	767,868	42.6	1	43,188	6.1	37	1,618,006
53000-79999	0	0	0.0	10	620,990	18.9	2	125,977	7.0	0	0	0.0	12	746,967
80000-119999	3	292,399	19.1	4	363,512	11.1	0	0	0.0	0	0	0.0	7	655,911
120000+	4	614,904	40.3	4	600,542	18.3	0	0	0.0	0	0	0.0	8	1,215,446
Grand Total	**50**	**1,527,417**	**100**	**145**	**3,283,938**	**100**	**103**	**1,801,604**	**100**	**165**	**709,027**	**100**	**463**	**7,321,986**

Source: Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping Statistics

Graph 10. Turkish Merchant Fleet Distribution by Age Groups (DWT/%)



Source: Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping Statistics

The graph shows the age groups of the Turkish merchant fleet. 20.9% of the fleet is in the 0-9 age range, 44.9% of the fleet is in the 10-19 age range, 24.5% of the fleet is in the 20-29 age range and 9.7% is 30 years old or over.

1.5. The Position of the Turkish Merchant Fleet within the World Fleet

As of January 1st, 2024, accounting only for ships with size 1000 GT and above, Turkish fleet under foreign flag is 42.0 million DWT, whereas the total fleet under both Turkish and foreign flag amounts to 48.0 million DWT.

On the other hand, the ratio distribution of the fleet regarding the flags of registration is as follows: 12.6% percent of these ships are registered under the Turkish flag and 87.4% are registered under the foreign flags.

Table 16. Turkish Ships under the National Flag and Foreign Flags (1000 GT and Over)

Years	National Flag			Foreign Flag			Total Fleet Controlled		Years DWT Change %
	No	1000 DWT	%	No	1000 DWT	%	No	1000 DWT	
1999	448	8,697	90.5	69	915	9.5	517	9,612	
2000	456	8,269	90.6	96	855	9.4	552	9,124	-5.1
2001	445	7,321	82.0	107	1,607	18.0	552	8,928	-2.1
2002	451	7,815	83.8	117	1,514	16.2	568	9,329	4.5
2003	432	7,045	79.9	147	1,772	20.1	579	8,817	-5.5
2004	408	6,556	75.2	163	2,159	24.8	571	8,715	-1.2
2005	420	6,427	70.2	237	2,725	29.8	657	9,152	5.0
2006	432	6,844	65.5	353	3,609	34.5	785	10,453	14.2
2007	446	6,464	58.2	424	4,650	41.8	870	11,114	6.3
2008	490	6,592	50.0	513	6,591	50.0	1,003	13,183	18.6
2009	520	6,736	43.9	636	8,592	56.1	1,156	15,328	16.3
2010	560	7,246	42.1	665	9,954	57.9	1,225	17,201	12.2
2011	547	7,797	39.7	672	11,863	60.3	1,219	19,660	14.3
2012	523	8,479	37.6	642	14,093	62.4	1,165	22,572	14.8
2013	627	9,488	31.3	842	20,838	68.7	1,469	30,326	34.4
2014	599	8,580	28.2	890	21,846	71.8	1,489	30,427	0.3
2015	564	8,297	30.2	834	19,209	69.8	1,398	27,507	-9.6
2016	551	8,272	28.4	984	20,879	71.6	1,535	29,151	6.0
2017	525	7,800	26.7	1,022	21,465	73.3	1,547	29,265	0.4
2018	483	7,288	25.5	1,028	21,323	74.5	1,511	28,611	-2.2
2019	457	6,831	23.9	1,027	21,758	76.1	1,484	28,589	-0.1
2020	410	6,194	21.1	1,074	23,157	78.9	1,484	29,352	2.7
2021	384	5,432	18.8	1,108	23,497	81.2	1,492	28,929	-1.4
2022	353	5,157	16.8	1,164	25,523	83.2	1,517	30,680	6.1
2023	345	5,447	14.3	1,352	32,649	85.7	1,697	38,096	24.2
2024	348	6,026	12.6	1,614	41,950	87.4	1,962	47,976	25.9

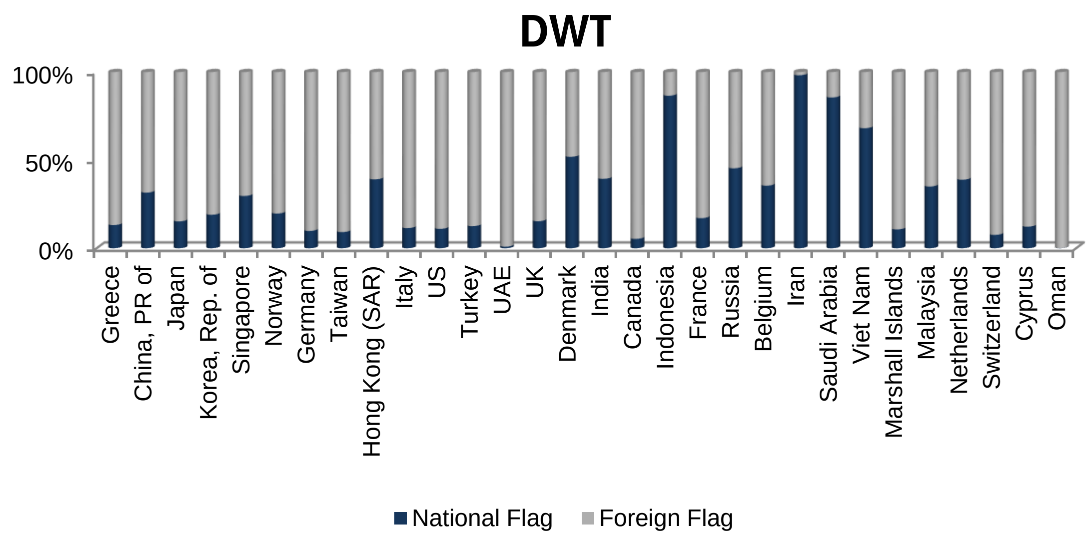
Source: ISL January-February 2024

Table 17. Total Fleet of the 30 Countries by National and Foreign Flags (01 January 2024) (1000 GT and Over)

Country of Control (DWT-Rank 2024)		National Flag				Foreign Flag				Total Fleet				Foreign Flag DWT Share (%)
		No	1000 DWT	1000 TEU	Age	No	1000 DWT	1000 TEU	Age	No	1000 DWT	1000 TEU	Age	
1	Greece	585	54,017	41	16.8	4,483	356,300	1.806	13.3	5,068	410.318	1.847	13.7	86.8
2	China, PR of	5,466	124,069	1.185	12.8	3,577	268,806	3.815	13.2	9,043	392.875	5.000	13.0	68.4
3	Japan	906	39,034	315	12.8	3,415	216,889	2.168	8.6	4,321	255.923	2.483	9.5	84.7
4	Korea, Rep. of	759	19,077	540	18.2	898	81,185	501	11.9	1,657	100.262	1.040	14.8	81.0
5	Singapore	694	24,911	413	11.3	912	58,991	757	14.5	1,606	83.901	1.171	13.1	70.3
6	Norway	668	15,948	85	16.9	1,017	64,955	439	15.2	1,685	80.903	524	15.9	80.3
7	Germany	136	7,346	631	19.7	2,044	67,188	2.835	14.7	2,180	74.534	3.466	15.0	90.1
8	Taiwan	125	5,725	227	15.3	894	56,617	1.599	12.3	1,019	62.342	1.826	12.7	90.8
9	Hong Kong (SAR)	385	22,068	28	12.5	769	34,363	77	19.4	1,154	56.431	105	17.1	60.9
10	Italy	369	6,343	61	22.0	854	48,993	2.788	15.9	1,223	55.335	2.849	17.7	88.5
11	US	214	6,088	94	24.5	932	49,166	122	15.6	1,146	55.253	216	17.3	89.0
12	Türkiye	348	6,026	72	23.3	1,614	41,950	252	21.7	1,962	47.976	324	22.0	87.4
13	UAE	50	384	7	15.9	900	43,125	244	19.3	950	43.509	251	19.1	99.1
14	UK	154	6,310	211	15.0	648	34,828	961	13.8	802	41.138	1.173	14.0	84.7
15	Denmark	353	21,114	1.324	16.2	390	19,548	1.151	15.7	743	40.663	2.475	15.9	48.1
16	India	696	15,482	15	16.5	319	23,786	9	18.0	1,015	39.268	24	16.9	60.6
17	Canada	142	1,735	12	24.5	374	30,797	1.539	12.8	516	32.532	1.551	16.0	94.7
18	Indonesia	2,196	25,174	174	25.5	130	3,901	70	19.3	2,326	29.075	244	25.1	13.4
19	France	112	3,820	308	15.0	306	18,546	1.478	13.8	418	22.366	1.786	14.1	82.9
20	Russia	1,288	9,340	140	30.7	277	11,235	31	24.6	1,565	20.575	171	29.6	54.6
21	Belgium	64	7,251	9	11.2	113	13,150	27	12.4	177	20.401	36	11.9	64.5
22	Iran	211	18,265	155	22.3	7	332	-	24.8	218	18.597	155	22.3	1.8
23	Saudi Arabia	113	13,929	8	14.7	31	2,345	0	14.0	144	16.274	8	14.6	14.4
24	Viet Nam	842	11,050	51	16.7	190	5,171	5	20.3	1,032	16.221	57	17.4	31.9
25	Marshall Islands	28	1,630	53	14.2	165	13,590	126	18.0	193	15.220	179	17.4	89.3
26	Malaysia	199	5,221	32	19.2	155	9,676	1	15.0	354	14.897	34	17.3	65.0
27	Netherlands	521	4,610	188	15.5	335	7,240	52	16.1	856	11.850	240	15.7	61.1
28	Switzerland	14	836	-	9.9	177	10,162	8	14.8	191	10.998	8	14.4	92.4
29	Cyprus	49	1,121	7	18.0	175	8,033	25	17.0	224	9.155	33	17.2	87.7
30	Oman	4	6	-	17.4	66	7,643	10	12.8	70	7.648	10	13.1	99.9
Total 30 Countries		17,691	477,930	6,385	17.6	26.167	1,608,510	22,897	14.3	43,858	2,086,440	29,283	15.6	77.1
Other		2,791	38,303	243	24.8	2.665	80,252	433	22.6	5,456	118,555	676	23.8	67.7
Subtotal		20,482	516,234	6,628	18.6	28.832	1,688,762	23,330	15.1	49,314	2,204,996	29,958	16.5	76.6
Unknown										943	30,100	158	24.7	
World Total										50,257	2,235,096	30,116	16.7	

Source: ISL January-February 2024

Graph 11. By Country of Domicile as of 1 January 2024 (1000 GT and Over)

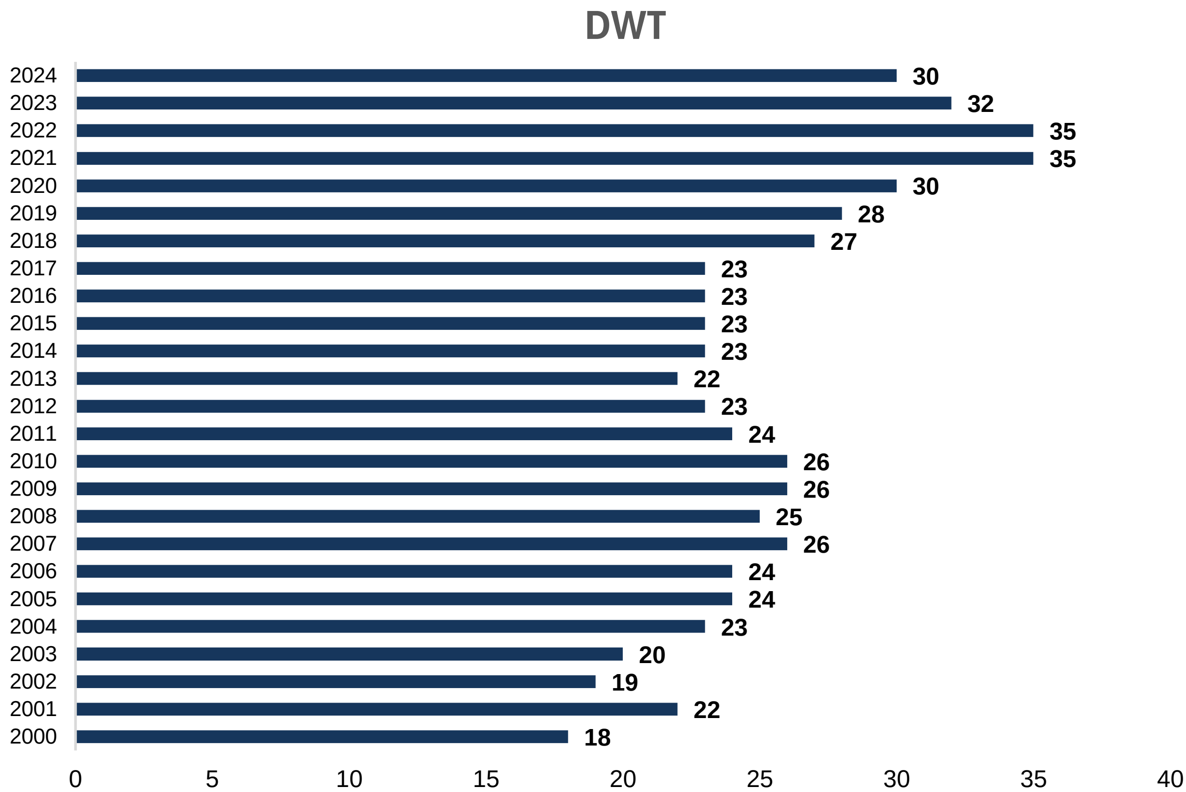


Source: ISL January-February 2024

The World fleet (300 GT and over) consists of 61,811 ships with a total size of 2,245,145,000 DWT based in 160 countries as of 01.01.2024. Turkish merchant fleet is positioned 30th in the world as shown in the Table.

Liberya leads with a share of 17.8%, Panama is second with 16.5% and Marshall Island is third with share of 13.4% of the total registry.

Graph 12. World Merchant Fleet Ranking by Turkish Flag (300 GT and Over)



Source: ISL January-February 2024

Table 18. World Merchant Fleet Ranking by Flag as of 1 January 2024 (300 GT and Over)

DWT Rank 2024	Flag	1 January 2023				1 January 2024				Total DWT Share%	Years DWT Change %
		No Of Ships	1000 GT	1000 DWT	1000 TEU	No Of Ships	1000 GT	1000 DWT	1000 TEU		
1	Liberia	4,619	227,799	370,398	5,155	5,001	251,496	400,403	6,457	17.8	8.1
2	Panama	6,881	233,815	358,423	3,898	6,984	240,183	370,499	3,665	16.5	3.4
3	Marshall Islands	3,892	177,673	291,454	1,140	3,960	182,114	299,970	1,036	13.4	2.9
4	Hong Kong (SAR)	2,382	126,469	199,649	3,669	2,321	127,517	199,633	3,946	8.9	0.0
5	Singapore	2,296	88,838	130,373	2,812	2,353	93,731	137,466	3,030	6.1	5.4
6	China, PR of	5,780	74,128	116,622	1,017	6,605	79,579	125,133	1,187	5.6	7.3
7	Malta	1,822	80,345	107,607	2,428	1,747	77,530	101,208	2,400	4.5	-5.9
8	Bahamas	1,054	52,608	58,627	187	1,036	52,249	57,868	214	2.6	-1.3
9	Greece	831	35,269	59,200	41	805	33,869	56,271	41	2.5	-4.9
10	Japan	2,796	29,982	40,694	313	2,805	30,872	42,043	320	1.9	3.3
11	Cyprus	822	20,625	30,502	402	801	20,255	29,787	390	1.3	-2.3
12	Portugal/Madeira	757	19,916	26,849	1,157	841	22,033	29,363	1,289	1.3	9.4
13	UK	510	20,771	29,288	419	489	20,378	28,709	432	1.3	-2.0
14	Portugal/Madeira	3,738	18,258	25,785	201	3,803	19,595	28,148	182	1.3	9.2
15	Denmark	542	22,324	25,360	1,435	538	22,220	25,024	1,431	1.1	-1.3
16	Korea, Rep. of	1,083	13,759	17,454	335	1,094	16,856	20,964	549	0.9	20.1
17	Iran	482	11,457	20,216	159	497	11,636	20,535	157	0.9	1.6
18	Norway	967	16,836	20,652	87	969	16,793	19,708	89	0.9	-4.6
19	India	944	10,245	17,137	59	958	10,395	17,360	58	0.8	1.3
20	Saudi Arabia	130	7,369	13,248	8	132	7,779	14,128	8	0.6	6.6
21	Viet Nam	1,437	6,979	11,592	51	1,411	7,227	12,104	52	0.5	4.4
22	Russia	1,603	7,541	9,587	138	1,606	8,001	10,315	149	0.5	7.6
23	France	220	8,015	8,273	384	234	9,236	9,369	385	0.4	13.2
24	US	385	7,932	8,705	273	397	8,393	9,331	282	0.4	7.2
25	Belgium	89	5,328	8,848	6	80	4,801	8,025	9	0.4	-9.3
26	Germany	214	6,807	7,103	563	204	7,718	7,907	677	0.4	11.3
27	Palau	323	3,249	5,173	26	424	4,768	7,694	33	0.3	48.7
28	Cameroon	142	3,629	6,502	6	227	4,170	7,318	14	0.3	12.6
29	Italy	593	13,172	8,572	91	570	12,235	7,121	86	0.3	-16.9
30	Türkiye	658	4,651	6,149	90	668	5,029	6,791	92	0.3	10.4
31	Antigua & Barbuda	583	4,750	6,292	308	596	4,875	6,480	318	0.3	3.0
32	Bermuda	112	9,713	6,681	56	102	9,350	6,180	48	0.3	-7.5
33	Barbados	252	2,737	4,489	21	323	3,764	6,103	36	0.3	36.0
34	Cayman Islands	112	3,744	5,971	21	104	3,682	6,081	21	0.3	1.8
35	Malaysia	435	5,219	5,924	37	441	5,145	5,980	34	0.3	1.0
36	Taiwan	210	4,711	6,550	253	203	4,230	5,830	229	0.3	-11.0
37	Netherlands	713	5,607	5,688	208	706	5,697	5,773	207	0.3	1.5
38	Philippines	1,266	4,014	5,820	50	1,267	3,944	5,628	51	0.3	-3.3
39	Gabon	67	1,013	1,745	0	99	3,028	5,493	0	0.2	214.7
40	Bangladesh	444	3,005	5,085	10	477	3,214	5,442	12	0.2	7.0
160	**Total**	**60,004**	**1,452,834**	**2,166,510**	**28,036**	**61,811**	**1,510,132**	**2,245,145**	**30,128**	**100.0**	3.6

Source: ISL January-February 2024

1.6. Comparison of the Turkish Merchant Fleet with the Neighbouring Countries

The capacity of the merchant fleet of Türkiye and the neighbouring countries are shown in the following Table (19).

Greece is in the 1st place being among the largest merchant fleets of the world. Southern Cyprus is 2nd, Iran is 3rd, Russia 4th and Türkiye is in 5th place.

In addition to the national flags, when ships 1000 GT and over operating under foreign flags are added to the home registry, Türkiye rises to 48.0 million DWT, Greece to 410.3 million DWT, Russia to 20.6 million DWT and Iran to 18.6 million DWT.

Table 19. Turkish Merchant Fleet and the Neighbouring Countries (300 GT and Over)

World DWT Rank	Country	No of Ships	1000 DWT	World DWT %	Years DWT Change %
9	Greece	805	56,271	2.5	-4.9
11	S. Cyprus	801	29,787	1.3	-2.3
17	Iran	497	20,535	0.9	1.6
22	Russia	1,606	10,315	0.5	7.6
30	Türkiye	668	6,791	0.3	10.4
54	Egypt	100	1,644	0.1	6.7
91	Ukraine	97	270	0.0	-0.4
100	Syria	7	143	0.0	-42.4
109	Bulgaria	24	96	0.0	0.0
120	Romania	16	41	0.0	-2.0
145	Georgia	4	3	0.0	-

Source: ISL January-February 2024

CHAPTER II

DEVELOPMENTS IN SEABORNE TRADE

2. DEVELOPMENTS IN SEABORNE TRADE

2.1. Developments in the Transportation of Foreign Trade Cargoes

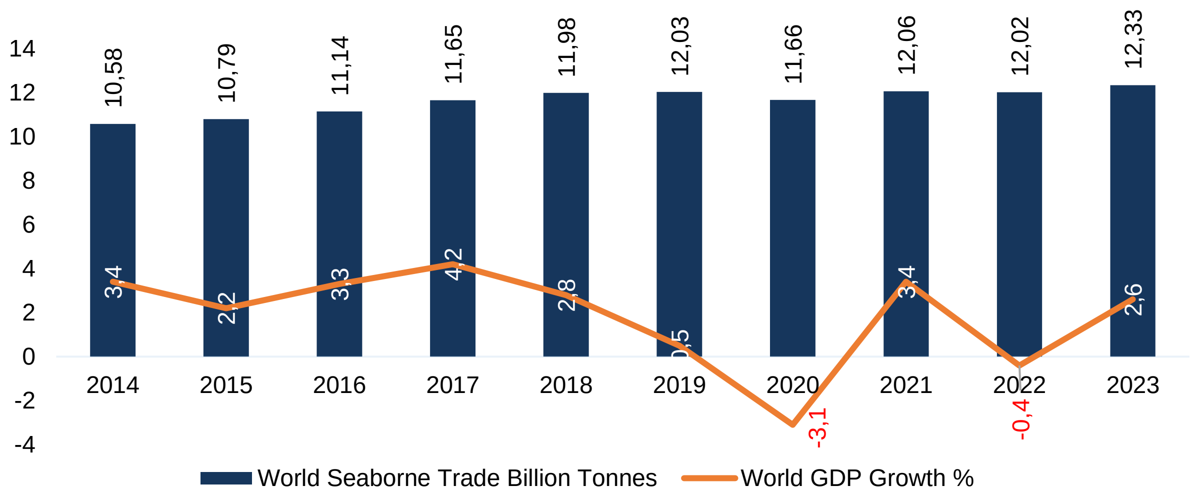
2023 was generally a positive year for global seaborne trade, with total seaborne trade volumes growing by 2.6% y-o-y to a new high of 12.3 bn tonnes supported by firm growth in major bulk (+4.8% y-o-y) and oil (+3.0% y-o-y) trade. Trade in tonne-miles grew by a firmer 4.4% on the back of shifts in trade patterns amid ongoing impacts from the Russia-Ukraine conflict and later on disruption at the Panama and Suez canals.

Table 20. World Total Trade and World Seaborne Trade

Year	World Total Trade (all modes) Billion Tonnes	World Seaborne Trade Billion Tonnes	Seaborn Trade as % Total
2014	12.5	10.5	84
2015	12.7	10.6	85
2016	12.9	11.14	86
2017	13.5	11.65	86
2018	13.9	11.98	86
2019	14.1	12.03	86
2020	13.3	11.66	88
2021	14.0	12.06	86
2022	14.1	12.02	85
2023	14.3	12.33	86

Source: World Seaborn Trade February 2024

Graph 13. Global Seaborn Trade Growth



Source: World Seaborn Trade February 2024

Estimated share of total world trade in 2023 (mt): sea 86%. land 14%. air <1%.

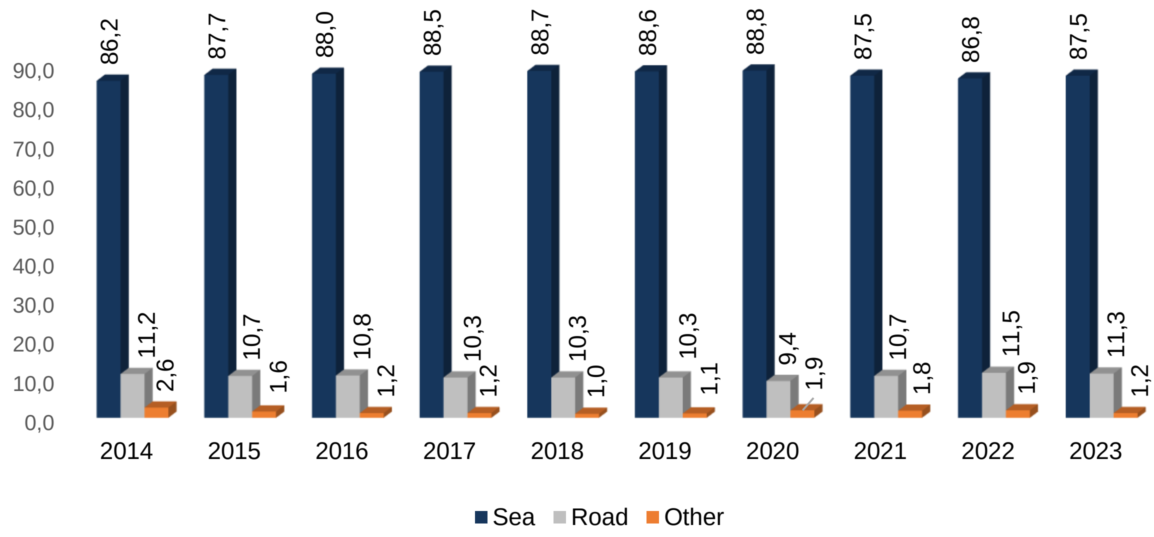
Table 21. Turkish Foreign Trade Transportation by Modes, (%)

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

Source: Turkish Statistical Institute

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

Graph 14. Foreign Trade Transportation by Modes (%)



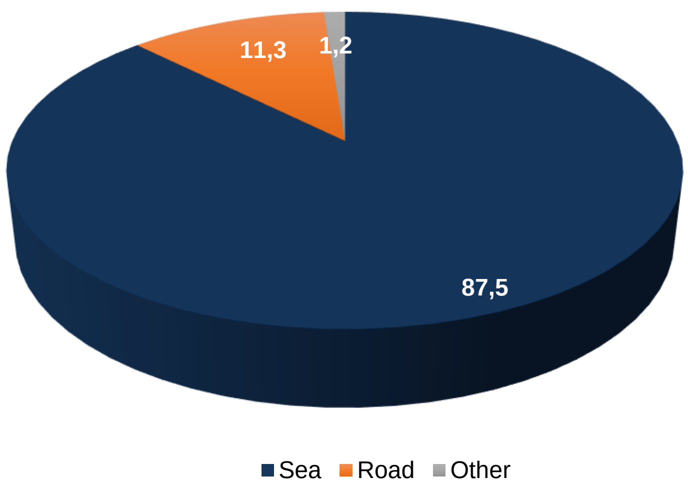
Source: Turkish Statistical Institute

Table 22. Foreign Trade Transportation by Modes (tons) and ($)

Modes	Export Quantity %	Import Quantity %	Seaborn Trade Quantity %	Export Value US $ %	Import Value US $ %	Seaborn Trade Value US $ %
Sea	78.8	93.0	87.5	56.0	53.9	54.8
Road	19.3	6.2	11.3	32.5	18.5	24.3
Air	0.9	0.1	0.4	10.0	14.9	12.8
Rail	0.8	0.3	0.5	0.8	0.6	0.6
Pipeline/Other	0.1	0.5	0.3	0.7	1.3	1.1
Unknown	0.0	0.0	0.0	0.0	10.8	6.3
Total	**99.9**	**100.1**	**100.0**	**100.0**	**100.0**	**100.0**

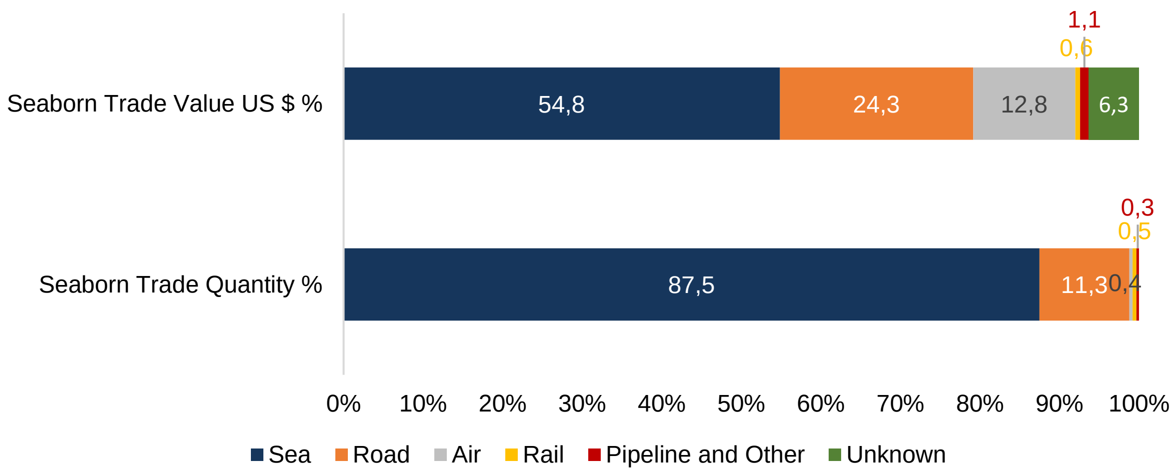
Source: Turkish Statistical Institute

Graph 15. Seaborn Trade Quantity (%)



Source: Turkish Statistical Institute

Graph 16. Foreign Trade Transportation by Modes Quantity and Value (%)



Source: Turkish Statistical Institute

55% of the volume of Türkiye's foreign trade transportation has been carried by sea; 24% has been carried by road; 1% has been carried by rail; 13% has been carried by air and 7% has been carried by other transportation modes.

2.2. Developments of Seaborne Trade

The progress of Türkiye's seaborne trade has been examined under two headings: maritime cabotage and international transportation.

2.3. Cabotage Transportation

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

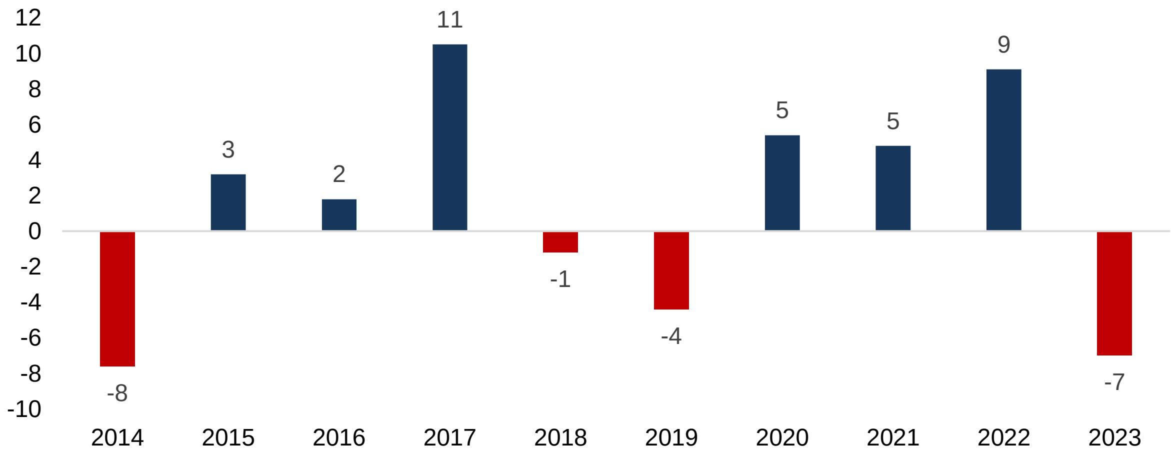
The number of cargoes carried bulk and partially between 2014-2023 in Turkish ports and wharves on ton basis is presented in Table 23.

Table 23. 2014-2023 Cabotage Transportation

Years	Cabotage Loading (Ton)	Annual Change %
2014	25,753,831	-8
2015	26,578,284	3
2016	27,050,225	2
2017	29,898,010	11
2018	29,550,554	-1
2019	28,251,017	-4
2020	29,763,556	5
2021	31,184,349	5
2022	34,027,952	9
2023	31,635,352	-7

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

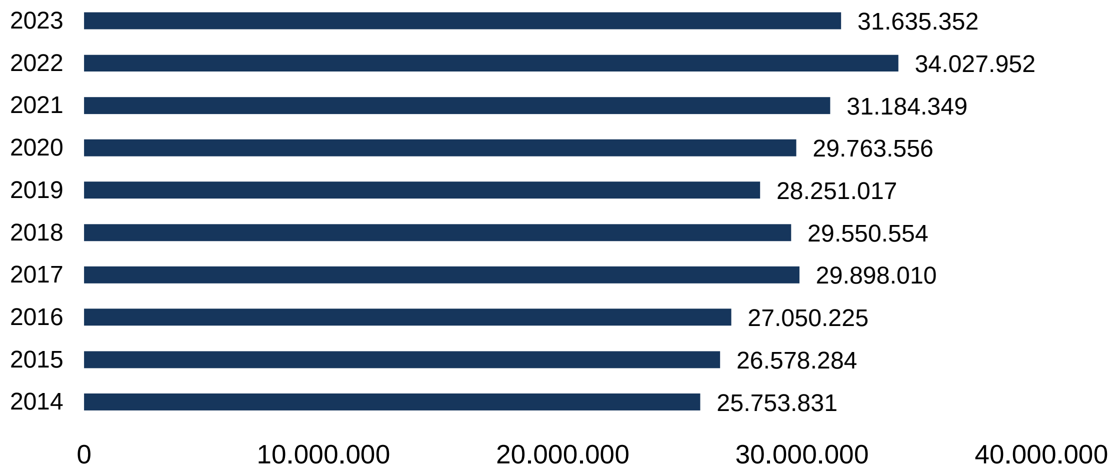
Graph 17. Rate of Change in Cabotage Transportation Between 2014-2023 (%)



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

The total cabotage transportation in 2023 is 31,635,352 tons cabotage transportation increased about 23% between the years of 2014-2023.

Graph 18. 2014-2023 Cabotage Transportation (Ton)



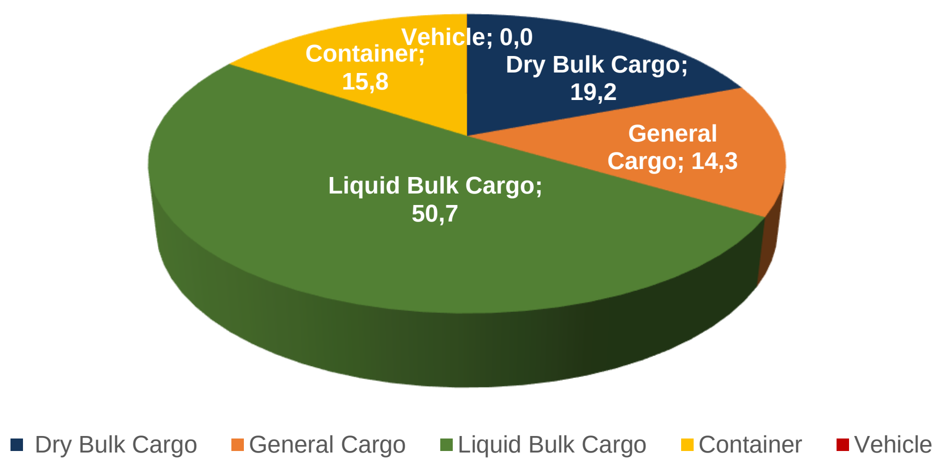
Source: General Directorate for Maritime Affairs - Department of Merchant Trade Development

Table 24. Cabotage Transportation by the Types of Cargoes in 2023 (mtons)

Cargo Type	Cabotage Loading	Cabotage Unloading	Cabotage Handling	%
Dry Bulk Cargo	6,050,661	5,980,438	12,031,099	19.2
General Cargo	4,598,017	4,354,854	8,952,871	14.3
Liquid Bulk Cargo	16,092,172	15,674,889	31,767,061	50.7
Container	4,889,340	4,980,168	9,869,508	15.8
Vehicle	5,162	1,392	6,554	0.0
Total	**31,635,352**	**30,991,741**	**62,627,093**	**100.0**

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

Graph 19. Cabotage Handling by the Types of Cargoes (%)



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

Table shows the cabotage transportation by cargo types. The first four cargo types are liquid bulk cargo 51%, dry bulk cargo 19%, general cargo 14% and container 16%.

The ports with the largest shares in cabotage handling in 2023 are Aliağa Port 19.2%, Kocaeli Port 18%, and Tekirdağ Port 10.6%.

Table 25. 2023 Cabotage Transportation in Ports

Harbour Master	Cabotage Loading	Cabotage Unloading	Cabotage Handling	Percentage of Total
Aliağa	8,807,883	3,199,453	12,007,336	19.2
Kocaeli	5,596,008	5,700,928	11,296,936	18.0
Tekirdağ	2,617,046	4,039,065	6,656,111	10.6
İskenderun	4,380,787	987,637	5,368,424	8.6
Antalya	653,553	2,668,414	3,321,967	5.3
Ambarlı	633,996	2,170,661	2,804,657	4.5
Gemlik	1,319,420	1,186,922	2,506,342	4.0
Samsun	1,028,634	1,462,709	2,491,343	4.0
İstanbul	77,182	2,391,398	2,468,580	3.9
Karadeniz Ereğli	238,618	1,677,789	1,916,407	3.1
Mersin	255,427	1,501,071	1,756,498	2.8
Marmara Adası	1,618,318	2,326	1,620,644	2.6
Karabiga	621,366	660,539	1,281,905	2.0
Çanakkale	1,105,365	49,384	1,154,749	1.8
İzmir	329,194	753,377	1,082,571	1.7
Ceyhan	589,876	216,037	805,913	1.3
Tuzla	349,086	358,849	707,935	1.1
Tirebolu	0	465,346	465,346	0.7
Bandıma	133,767	329,919	463,686	0.7
Ünye	322,540	140,405	462,945	0.7
Hopa	449,720	3,216	452,936	0.7
Trabzon	147,219	252,925	400,144	0.6
Rize	0	322,437	322,437	0.5
Zonguldak	124,717	141,155	265,872	0.4
İnebolu	184,445	0	184,445	0.3
Yalova	3,725	131,122	134,847	0.2
Göcek	0	51,361	51,361	0.1
Silivri	350	47,320	47,670	0.1
Çeşme	3,251	32,927	36,178	0.1
Fatsa	24,956	6,654	31,610	0.1
Taşucu	0	15,496	15,496	0.0
Giresun	6,255	2,817	9,072	0.0
Marmaris	0	8,591	8,591	0.0
Karasu	0	7,919	7,919	0.0
Alanya	0	5,021	5,021	0.0
Güllük	4,284	0	4,284	0.0
Datça	3,934	0	3,934	0.0
Bartın	2,580	0	2,580	0.0
Amasra	1,850	0	1,850	0.0
Enez	0	550	550	0.0
Erdek	0	1	1	0.0
Ayvalık	0	0	0	0.0
Dikili	0	0	0	0.0
Total	**31,635,352**	**30,991,741**	**62,627,093**	**100.0**

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

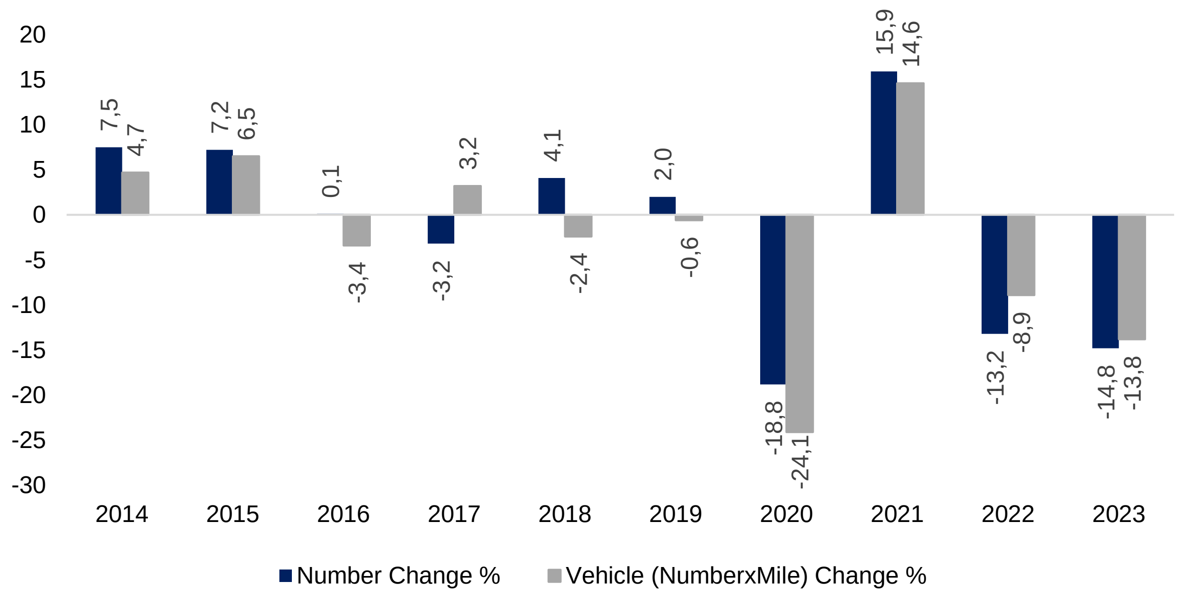
Table 26. Vehicle Transportation in Cabotage Lines, 2014-2023

Year	Vehicle Number	Vehicle Number Change %	Vehicle (NumberxMile)	Vehicle (NumberxMile) Change %
2014	12,166,505	7.5	89,322,962	4.7
2015	13,042,399	7.2	95,505,115	6.5
2016	13,050,241	0.1	92,267,227	-3.4
2017	12,638,289	-3.2	95,185,009	3.2
2018	13,159,820	4.1	92,868,442	-2.4
2019	13,420,802	2	92,289,144	-0.6
2020	10,892,467	-18.8	70,059,483	-24.1
2021	12,619,473	15.9	80,295,012	14.6
2022	10,958,382	-13.2	73,097,769	-8.9
2023	9,334,763	-14.8	62,999,948	-13.8

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

In Table 26 the changes in cabotage transportation of vehicles between the years 2014 and 2023 are being shown. The number of carried vehicles decreased 23% in total between 2014 and 2023.

Graph 20. Vehicle Transportation in Cabotage Lines, Annual Change %, 2014-2023



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

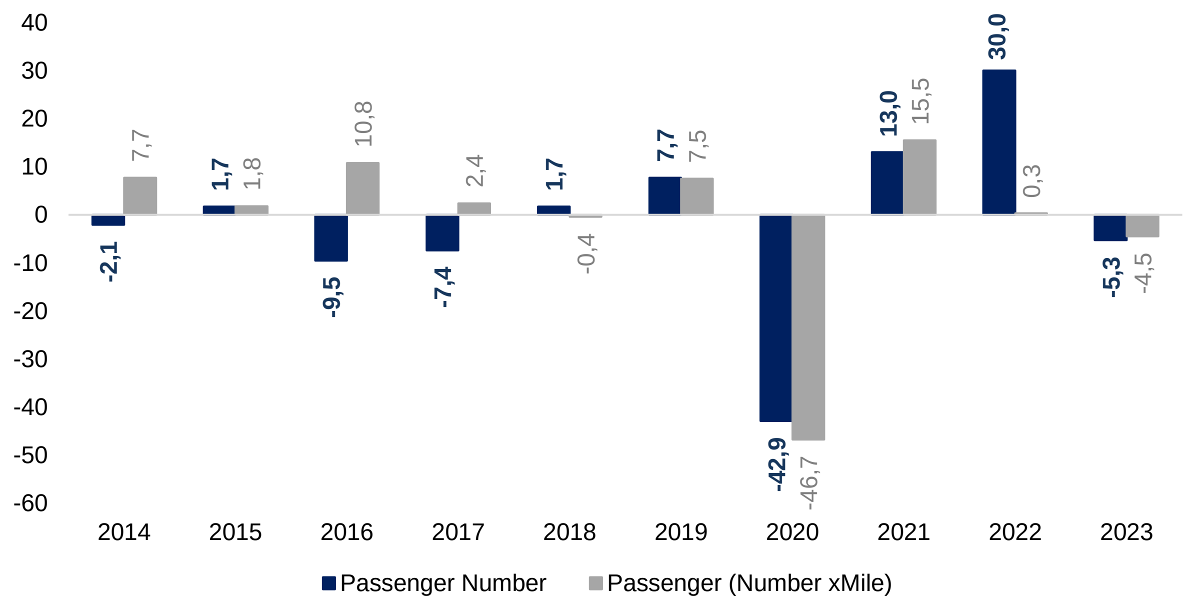
In table 27 the changes in cabotage transportation of passengers between the years 2014 and 2023 are being shown. The number of passengers carried decreased 26% in total between 2014 and 2023.

Table 27. Passenger Transportation in Cabotage Lines, 2014-2023

Year	Passenger Number	Annual Change %	Passenger (Number x Mile)	Annual Change %
2014	161,048,004	-2.1	974,923,011	7.7
2015	163,723,544	1.7	992,592,392	1.8
2016	148,101,589	-9.5	1,112,255,126	10.8
2017	137,195,691	-7.4	1,138,826,307	2.4
2018	139,556,332	1.7	1,134,349,263	-0.4
2019	150,312,216	7.7	1,218,893,742	7.5
2020	85,866,238	-42.9	650,022,306	-46.7
2021	97,045,463	13	751,019,255	15.5
2022	126,204,029	30.0	988,896,332	0.3
2023	119,512,485	-5.3	944,457,743	-4.5

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

Graph 21. Passenger Transportation in Cabotage Lines, Annual Change %, 2014-2023



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

2.4. Developments in International Sea Transportation

International sea transportation includes all transit cargoes that are loaded and unloaded in the harbors of Türkiye and Turkish exports and imports goods.

Table 28. Share of Turkish Flagged Vessels Within International Shipping (Tons)

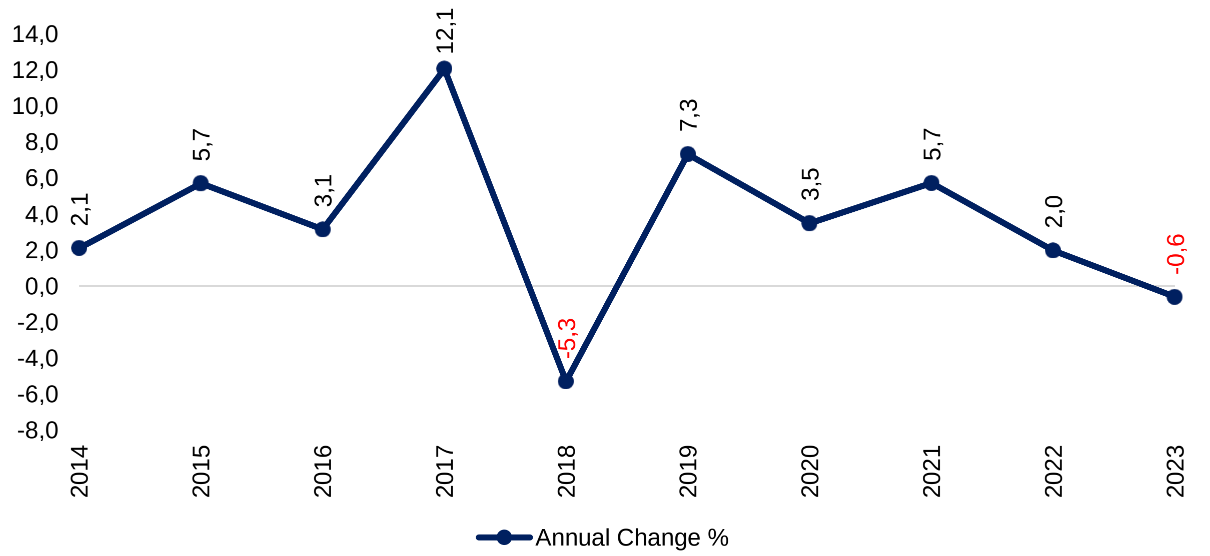
Year	Export	Import	Seaborn Trade Total	Annual Change %	Turkish Flag %	Foreign Flag %
2014	88,544,792	194,771,428	283,316,220	2.1	12	88
2015	92,152,622	208,326,308	300,478,930	5.7	12	88
2016	94,805,120	215,132,519	309,937,639	3.1	12	88
2017	113,692,068	233,656,024	347,348,092	12.1	11	89
2018	110,424,635	218,544,820	328,969,455	-5.3	11	89
2019	131,676,578	221,404,812	353,081,390	7.3	8	92
2020	138,902,823	226,539,473	365,442,296	3.5	8	92
2021	153,763,658	232,633,060	386,396,718	5.7	8	92
2022	150,172,902	243,917,119	394,090,021	2.0	7	93
2023	135,510,681	256,206,627	391,717,308	-0.6	7	93

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

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

A comparison between 2014 and 2023 of the transportation of foreign trade cargoes reveals that the total amount increased from 283 million tons in 2014 to 391 million tonnes in 2023. Import goods increased from 194 million tons to 256 million tons, whereas export goods increased from 88 million tons to 135 million tons.

Graph 22. Seaborne Trade Anual Change % (Tons)



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

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

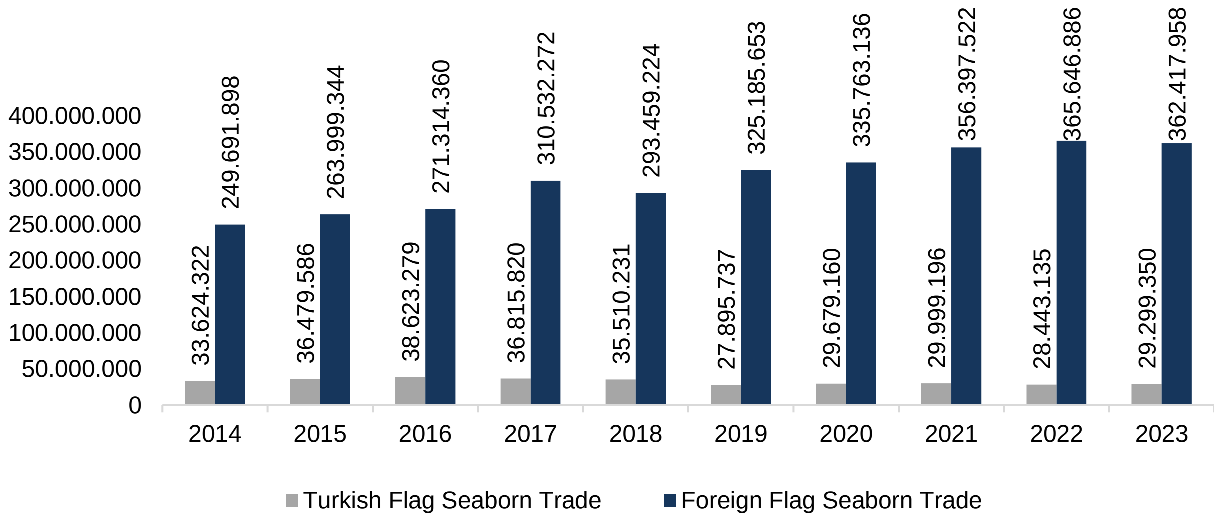
The transportation of foreign trade cargoes by Turkish flag vessels includes 6% of the total of 256 million tonnes imports and 10% of the total of 135 million tonnes exports.

Table 29. Foreign Trade Transportation by Flags (Tons)

Year	Turkish Flag					Foreign Flag				
	Import	%	Export	%	Seaborn Trade	Import	%	Export	%	Seaborn Trade
2014	20,880,367	11	12,743,955	14	33,624,322	173,891,061	89	75,800,837	86	249,691,898
2015	22,724,776	11	13,754,810	15	36,479,586	185,601,532	89	78,397,812	85	263,999,344
2016	23,350,424	11	15,272,855	16	38,623,279	191,782,095	89	79,532,265	84	271,314,360
2017	21,677,485	9	15,138,335	13	36,815,820	211,978,539	91	98,553,733	87	310,532,272
2018	19,850,109	9	15,660,122	14	35,510,231	198,694,711	91	94,764,513	86	293,459,224
2019	13,763,576	6	14,132,161	11	27,895,737	207,641,236	94	117,544,417	89	325,185,653
2020	16,098,249	7	13,580,911	10	29,679,160	210,441,224	93	125,321,912	90	335,763,136
2021	15,257,051	7	14,742,145	10	29,999,196	217,376,009	93	139,021,513	90	356,397,522
2022	14,634,461	6	13,808,674	9	28,443,135	229,282,658	94	136,364,228	91	365,646,886
2023	15,875,560	6	13,423,790	10	29,299,350	240,331,067	94	122,086,891	90	362,417,958

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

Graph 23. Turkish/Foreign Flag Shares (Tons)



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

The share of Turkish flag vessels in total foreign trade transportation increased to 13 million tons for exports and decreased to 15 million tons for imports in 2023 when compared to 12 and 20 million tons respectively in 2014.

The share of foreign flag vessels in total foreign trade transportation, increased to 122 million tons for exports and increased to 240 million tons for imports in 2023 when compared with the 75 and 173 million tons in 2014.

2.5. Developments in Foreign Trade Transportation by Types of Cargoes

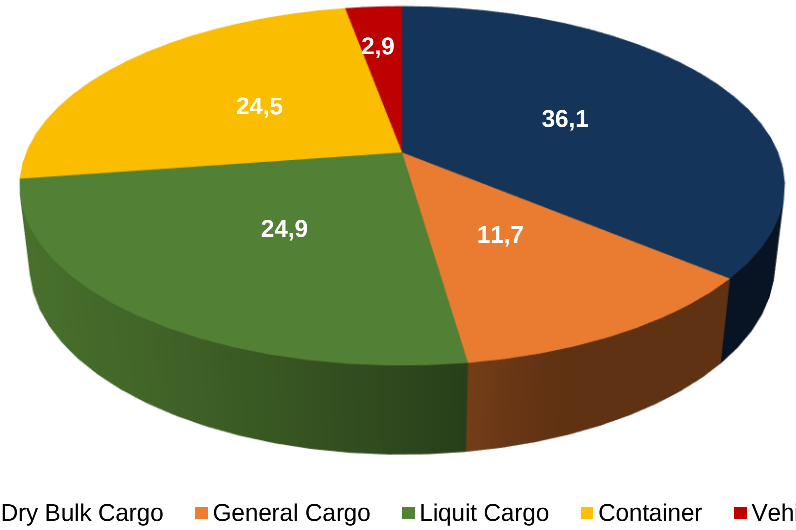
The major shipping segments of the 391 million tons seaborn trade and 66 million tons transit handling goods in 2023, are 36% Dry Bulk Cargo, 25% Liquid Bulk Cargo, 24% Container, 12% General Cargo and 3% Vehicles.

Table 30. Cargo Handling Statistics İn Turkish Ports By Cargo Types, 2023

Cargo Types	Export	Import	Seaborn Trade	Transit Handling	Total Handling
Dry Bulk Cargo	41,631,692	99,642,826	141,274,518	409,115	141,683,633
General Cargo	13,065,486	32,570,349	45,635,835	275,779	45,911,614
Liquit Cargo	21,071,795	76,585,220	97,657,015	38,363,994	136,021,009
Container	53,400,838	42,510,539	95,911,377	27,686,515	123,597,892
Vehicle	6,340,870	4,897,693	11,238,563	0	11,238,563
Total	**135,510,681**	**256,206,627**	**391,717,308**	**66,735,403**	**458,452,711**

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

Graph 24. Cargo Handling Export and Import in Turkish Ports By Cargo Types, 2023



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

2.6. The Progress in Seaborne Trade by Country Groups

In 2023, 68 million tons of exports and 77 million tons of imports, totally transit (loading-unloading) 35 million tons of transportation have been realized to the OECD countries. Table 31 shows the export and import values to the OECD countries.

Table 31. Seaborne Export/Import and Transit Handling of Türkiye and OECD Countries (Tons)

OECD Countries	Export	Import	Seaborn Trade	Transit Hangling	Cargo Handling	%
Italy	14,254,385	8,585,666	22,840,051	21,793,592	44,633,643	25
United States of America	11,906,537	15,622,787	27,529,324	837,920	28,367,244	16
Greece	7,322,651	10,816,563	18,139,214	4,100,086	22,239,300	12
Israel	9,580,352	5,389,092	14,969,444	1,636,276	16,605,720	9
Spain	7,939,720	3,138,640	11,078,360	2,203,934	13,282,294	7
Belgium	4,102,665	4,269,234	8,371,899	788,874	9,160,773	5
Netherlands	3,014,734	3,297,701	6,312,435	691,994	7,004,429	4
France	2,879,373	3,127,009	6,006,382	431,722	6,438,104	4
Colombia	108,325	5,330,404	5,438,729	0	5,438,729	3
Korea, South	714,944	3,602,205	4,317,149	696,483	5,013,632	3
Portugal	1,766,815	548,281	2,315,096	868,617	3,183,713	2
Australia	16,726	3,004,234	3,020,960	57,798	3,078,758	2
Norway	178,325	2,266,986	2,445,311	4,601	2,449,912	1
Canada	967,297	1,141,258	2,108,555	104,897	2,213,452	1
Germany	675,358	1,216,507	1,891,865	290,418	2,182,283	1
Denmark	148,259	1,065,881	1,214,140	0	1,214,140	1
Poland	441,635	388,913	830,548	99,681	930,229	1
Sweden	350,982	549,923	900,905	350	901,255	0
Ireland	171,656	32,791	204,447	633,258	837,705	0
Latvia	300,591	534,971	835,562	0	835,562	0
Lithuania	21,684	810,792	832,476	398	832,874	0
Japan	110,754	693,037	803,791	11,637	815,428	0
Mexico	229,157	530,884	760,041	8,766	768,807	0
Finland	99,121	541,015	640,136	6,334	646,470	0
Slovenia	423,053	143,290	566,343	3,895	570,238	0
Estonia	7,337	528,577	535,914	18,477	554,391	0
England	81,197	127,313	208,510	117	208,627	0
Iceland	117,864	0	117,864	0	117,864	0
Chile	59,587	533	60,120	6,416	66,536	0
New Zealand	0	0	0	793	793	0
Total	**67,991,084**	**77,304,487**	**145,295,571**	**35,297,334**	**180,592,905**	**100**

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

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

In the year 2023, 53 million tons of exports and 48 million tons of imports or totally 100 million tons of seaborne transportation have been realized to the EU countries.

Table 32. Seaborne Trade (Export-Import) to EU Countries and Transit Loading /Unloading (Tons)

EU Countries	Export	Import	Seaborn Trade	Transit Hangling	Cargo Handling	%
Italy	14,254,385	8,585,666	22,840,051	21,793,592	44,633,643	32
Greece	7,322,651	10,816,563	18,139,214	4,100,086	22,239,300	16
Spain	7,939,720	3,138,640	11,078,360	2,203,934	13,282,294	10
Romania	4,628,787	3,518,672	8,147,459	2,802,598	10,950,057	8
Belgium	4,102,665	4,269,234	8,371,899	788,874	9,160,773	7
Netherlands	3,014,734	3,297,701	6,312,435	691,994	7,004,429	5
France	2,879,373	3,127,009	6,006,382	431,722	6,438,104	5
Malta	2,147,410	2,263,063	4,410,473	1,264,831	5,675,304	4
Bulgaria	1,477,941	1,926,513	3,404,454	1,598,643	5,003,097	4
Portugal	1,766,815	548,281	2,315,096	868,617	3,183,713	2
Croatia	555,014	464,118	1,019,132	1,224,605	2,243,737	2
Germany	675,358	1,216,507	1,891,865	290,418	2,182,283	2
Denmark	148,259	1,065,881	1,214,140	0	1,214,140	1
Poland	441,635	388,913	830,548	99,681	930,229	1
Sweden	350,982	549,923	900,905	350	901,255	1
Ireland	171,656	32,791	204,447	633,258	837,705	1
Latvia	300,591	534,971	835,562	0	835,562	1
Lithuania	21,684	810,792	832,476	398	832,874	1
Finland	99,121	541,015	640,136	6,334	646,470	0
Slovenia	423,053	143,290	566,343	3,895	570,238	0
Estonia	7,337	528,577	535,914	18,477	554,391	0
Total	**52,729,171**	**47,768,120**	**100,497,291**	**38,822,307**	**139,319,598**	**100**

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

In 2023, 23 million tons of exports and 118 million tons of imports, totally 140 million tons seaborne transportation have been realized to the BSEC countries.

Table 33. Seaborne Export/Import and Transit Handling of Türkiye and BSEC Countries (Tons)

BSEC Countries	Export	Import	Seaborn Trade	Transit Handling	Cargo Handling	%
Russian Federation	4,471,402	93,550,499	98,021,901	4,979,036	103,000,937	66
Greece	7,322,651	10,816,563	18,139,214	4,100,086	22,239,300	14
Romania	4,628,787	3,518,672	8,147,459	2,802,598	10,950,057	7
Ukraine	1,732,979	5,911,965	7,644,944	100,984	7,745,928	5
Georgia	1,212,186	1,711,431	2,923,617	2,319,628	5,243,245	3
Bulgaria	1,477,941	1,926,513	3,404,454	1,598,643	5,003,097	3
Albania	959,714	37,146	996,860	11,741	1,008,601	1
Moldova	784,766	163,120	947,886	1,122	949,008	1
Azerbaijan	0	0	0	92,975	92,975	0
Total	**22,590,426**	**117,635,909**	**140,226,335**	**16,006,813**	**156,233,148**	**100**

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

2.7. World Container Fleet by Country of Domicile

The “country of domicile” examination (including container ships of 1000 GT and over) shows that of 2023, 25,744,000 TEU of the container capacity was not registered in the country of domicile of the owner but flagged out.

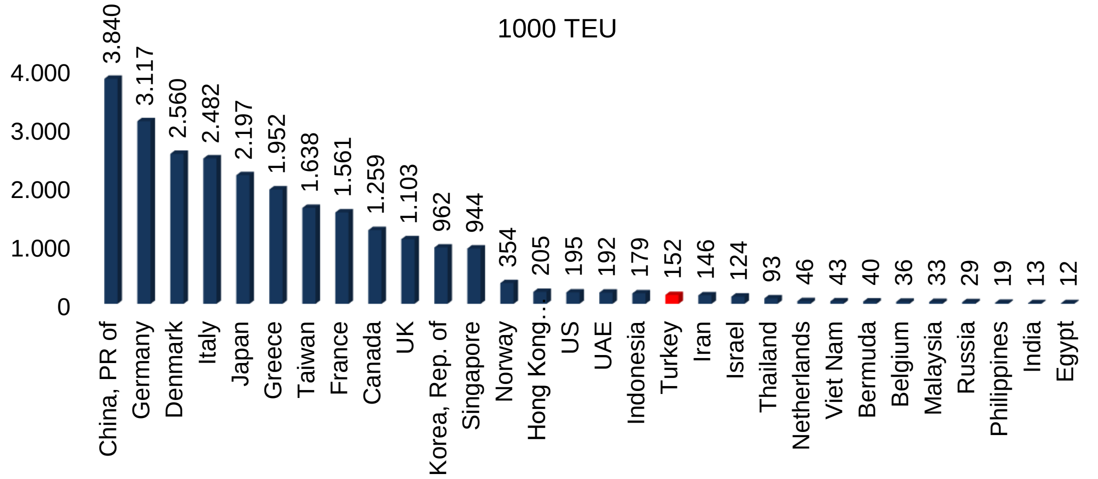
Table 34. Seaborne Export/Import and Transit Handling of Türkiye and EU Countries (Tons)

TEU Rank	Country of Control	No	1000 DWT	1000 TEU	Av.Age	Foreign Flag %	TEU Annual Change %
1	China, PR of	808	44,758		11.8	78.6	0.3
2	Germany	824	38,037	3,117	14.7	83.3	-5.3
3	Denmark	357	29,635	2,560	13.8	49.5	2.8
4	Italy	440	30,171	2,482	18.2	99.9	21.2
5	Japan	351	24,642	2,197	7.9	86.3	5.0
6	Greece	438	23,635	1,952	14.8	98.1	-8.7
7	Taiwan	354	19,314	1,638	11.7	84.7	20.6
8	France	223	17,963	1,561	12.2	80.5	7.8
9	Canada	143	14,338	1,259	10.0	99.9	8.5
10	UK	187	13,234	1,103	13.6	83.0	2.8
11	Korea,Rep.of	220	10,888	962	12.5	66.2	0.8
12	Singapore	237	11,101	944	13.3	66.3	5.6
13	Norway	59	4,187	354	12.3	100.0	6.2
14	Hong Kong (SAR	118	2,645	205	11.7	34.3	41.2
15	US	83	2,651	195	17.0	66.7	-16.4
16	UAE	95	2,542	192	19.7	97.4	12.4
17	Indonesia	225	2,606	179	17.9	24.4	-5.5
18	Türkiye	93	2,030	152	18.3	63.7	2.1
19	Iran	29	1,744	146	13.8	4.5	4.6
20	Israel	36	1,542	124	11.8	89.3	-2.3
21	Thailand	55	1,176	93	17.3	59.6	28.9
22	Netherlands	45	566	46	16.0	49.4	-0.1
23	Viet Nam	49	595	43	19.0	7.1	12.9
24	Bermuda	4	467	40	6.5	100.0	
25	Belgium	13	465	36	12.2	88.9	-15.9
26	Malaysia	37	460	33	20.5	2.7	6.1
27	Russia	28	370	29	20.9	59.1	4.9
28	Philippines	41	254	19	26.8	2.9	-8.3
29	India	7	178	13	16.2	-	-
30	Egypt	13	161	12	28.3	27.8	-0.4
Total 30 Countries		**5.612**	**302,355**	**25,527**	**13.9**	**80.0**	**4.2**
Others		121	1,427	107	22.2	60.9	-9.4
Unknown		43	1,399	109	20.0		
World Total		**5.776**	**305,181**	**25,744**	**14.2**		**4,3**

Source: ISL 2023

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

Graph 25. World Full Container Fleet by Country of Domicile (1000 GT and over) 2023



Source: ISL 2023

TEU based container transportations in 2023 realized as follows in their respective subgroups; exports became 4.9 million TEU, imports 4.8 million TEU, cabotage handling 759,611 TEU and transit handling 2 million TEU.

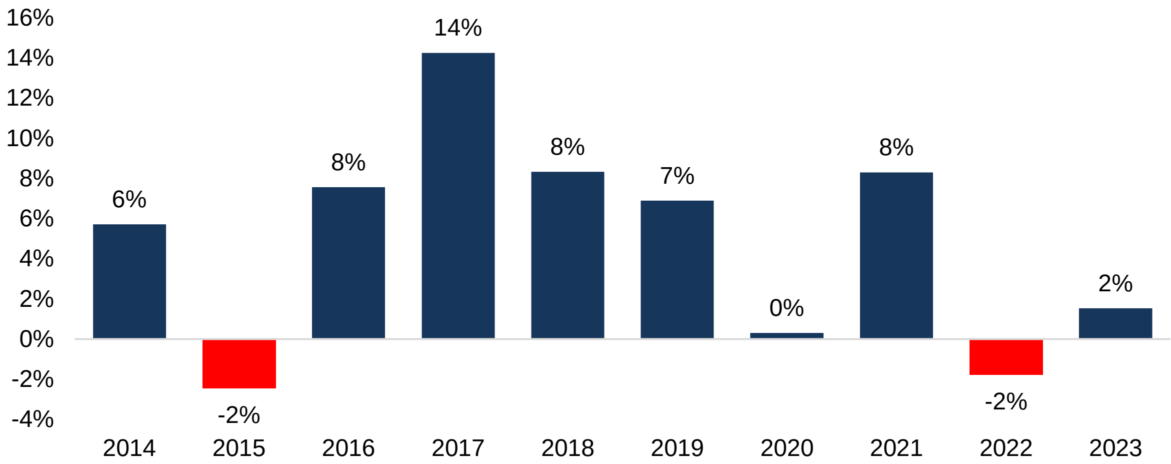
Transportation volume of Türkiye's container transports by seaway was 8.3 million TEU in 2014; in 2023 it became 12.5 million TEU, at the same period imports cargoes increased to 3.4 million TEU from 4.9 million TEU and the exports cargoes increased to 3.5 million TEU when compared with 4.8 million TEU in 2014.

Table 35. Container Handling Statistics At Turkish Ports 2014-2023 (TEU)

Years	Export	Import	Seaborn Trade	Cabotage Handling	Transit Handling	Total Handling	Change %
2014	3,488,008	3,581,811	7,069,819	527,064	754,238	8,351,121	6
2015	3,394,508	3,454,345	6,848,854	606,064	691,481	8,146,399	-2
2016	3,543,804	3,607,086	7,150,890	738,312	872,772	8,761,974	8
2017	3,866,874	3,975,205	7,842,079	935,521	1,232,937	10,010,537	14
2018	4,160,124	4,259,029	8,419,153	935,661	1,489,184	10,843,998	8
2019	4,594,647	4,540,201	9,134,849	753,267	1,703,722	11,591,838	7
2020	4,618,225	4,480,472	9,098,697	731,352	1,796,601	11,626,650	0
2021	4,677,414	4,744,227	9,421,640	831,987	2,337,843	12,591,470	8
2022	4,694,918	4,814,757	9,509,675	820,949	2,035,758	12,366,382	-2
2023	4,910,525	4,830,826	9,741,352	759,611	2,055,439	12,556,402	2

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

Graph 26. Yearly Change of Container Handling 2014-2023 (TEU %)



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

Table 36. Container Handling at Turkish Ports According to the Harbour Masters Area of Jurisdiction (TEU)

Port Authority	Export	Import	Seaborn Trade	Transit Handling	Total Container Handling	TEU %
Ambarlı	1,103,561	1,105,370	2,208,930	961,500	3,170,430	25
Kocaeli	1,032,143	994,033	2,026,176	132,985	2,159,160	17
Mersin	940,309	962,271	1,902,580	39,489	1,942,069	15
Tekirdağ	243,582	227,040	470,622	1,230,306	1,700,928	14
Aliağa	776,093	700,417	1,476,510	109,309	1,585,819	13
Gemlik	330,626	319,166	649,792	164,189	813,981	6
İskenderun	323,309	298,572	621,881	27,591	649,472	5
İzmir	102,365	141,183	243,548	46,904	290,452	2
Samsun	38,352	50,190	88,542	35,095	123,637	1
Antalya	14,616	22,089	36,705	49,155	85,859	1
Trabzon	936	4,034	4,970	11,031	16,001	0
İstanbul	4,488	5,241	9,729	3,409	13,138	0
Bandırma	0	0	0	2,298	2,298	0
Giresun	0	920	920	453	1,373	0
Marmara Adası	0	0	0	728	728	0
Karabiga	0	0	0	609	609	0
Bartın	0	211	211	0	211	0
Ünye	116	70	186	0	186	0
Karasu	26	0	26	0	26	0
Ceyhan	0	16	16	0	16	0
Tuzla	2	4	6	0	6	0
Yalova	2	0	2	0	2	0
Total	**4,910,525**	**4,830,826**	**9,741,352**	**2,815,050**	**12,556,401**	**100**

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

Table 37. Seaborne Export and Import, Transit Handling of Türkiye and Country 2023 TEU

Country	Export	Import	Seaborn Trade	Transit Loading	Transit Unloading	Total Handling
Egypt	580,651	525,446	1,106,097	72,261	46,050	1,224,408
Greece	393,161	646,375	1,039,537	33,691	82,113	1,155,340
Israel	329,304	714,214	1,043,517	22,193	50,721	1,116,431
Spain	380,605	156,066	536,670	45,089	40,736	622,495
Italy	306,502	210,656	517,157	62,961	25,849	605,968
Belgium	293,360	197,307	490,667	21,780	38,306	550,753
Chine	214,964	170,918	385,882	42,577	104,263	532,721
Russia	169,925	187,389	357,314	65,828	95,316	518,458
U.S.	175,832	269,079	444,911	29,342	23,257	497,510
Saudi Arabia	159,388	117,723	277,111	90,371	56,531	424,012
Morocco	281,648	95,366	377,015	20,277	5,094	402,386
Libya	123,933	174,323	298,256	14,714	5,718	318,687
Georgia	55,406	128,827	184,233	90,382	35,171	309,786
U.K.	193,262	82,109	275,371	13,172	8,326	296,868
Romania	69,086	52,809	121,895	80,068	88,871	290,834
Lebanon	48,595	203,038	251,632	21,225	10,640	283,497
Singapore	140,539	77,656	218,196	41,003	17,377	276,576
Korea Rep.of	106,978	112,015	218,992	22,181	34,130	275,303
Malta	50,272	211,491	261,763	2,170	5,082	269,015
U.A.E.	127,306	32,125	159,431	39,132	21,361	219,923
Other	494,204	449,827	944,031	204,352	206,083	1,354,465
Total	**4,694,919**	**4,814,757**	**9,509,675**	**1,034,766**	**1,000,993**	**11,545,434**

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

Table 38. Container Handling in Turkish Ports by Country Basis, 2023

Countries	Export	Import	Seaborn Trade	Transit Handling	Total Handling
Greece	408,784	752,283	1,161,066	144,167	1,305,233
Egypt	566,712	502,042	1,068,754	93,155	1,161,909
Israel	326,815	583,106	909,921	64,025	973,945
China	326,386	200,056	526,442	257,332	783,774
Russian Federation	225,605	238,763	464,368	235,477	699,845
Saudi Arabia	329,805	154,077	483,882	103,706	587,589
Italy	303,106	245,139	548,245	35,820	584,065
Georgia	87,892	225,926	313,818	195,308	509,126
Spain	277,673	134,724	412,397	55,571	467,968
Morocco	306,900	100,621	407,521	24,194	431,715
United States of America	175,443	175,629	351,072	69,835	420,907
Belgium	221,483	151,668	373,152	42,655	415,807
United Kingdom	241,975	91,485	333,460	13,219	346,679
Romania	109,262	49,715	158,977	162,212	321,189
Lebanon	54,967	235,404	290,371	11,292	301,662
Libya	109,515	159,261	268,776	16,523	285,299
Singapore	104,330	87,877	192,207	79,650	271,857
Korea, South	79,412	121,880	201,292	53,010	254,302
Malta	79,591	165,731	245,322	2,385	247,707
Bulgaria	49,438	54,444	103,882	105,828	209,709
Other Countries	525,432	400,997	926,429	290,077	1,216,506
Total	**4,910,525**	**4,830,826**	**9,741,352**	**2,055,439**	**11,796,791**

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

As of 2023, the countries which Türkiye performed foreign trade with / conducted transit container transportation are as follows: Greece, Egypt and Israel. The data of the foreign trade/transit container transportation of top 20 countries are shown in the Table 38.

2.8. Vehicle Transportation Through Ro-Ro Lines

Ro-Ro lines of Türkiye in 2023 are shown below. Table 39 above shows the amounts of the transported full vehicles (export and import) in the years 2023.

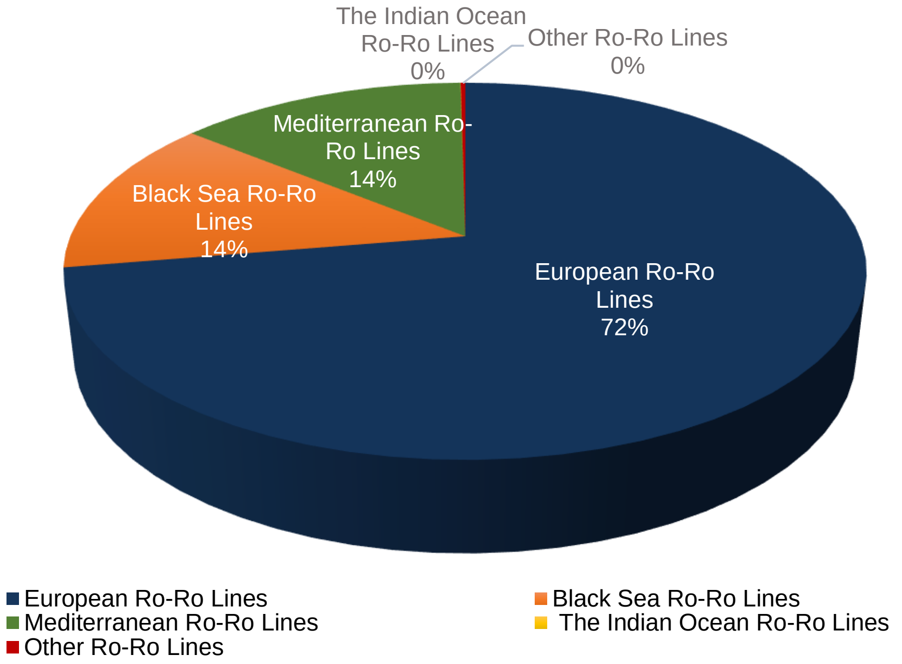
Table 39. Vehicle Transportation Through Regular İnternational Ro-Ro Lines, 2023

Region	Lines	Incoming Vehicle	Outbond Vehicle	Total Transported Vehicle
Europe	Tuzla (Pendik) - Trieste	132,393	107,659	240,052
	Yalova - Sete	61,083	56,353	117,436
	Çeşme - Trieste	34,327	35,037	69,364
	Mersin - Trieste	27,873	28,797	56,670
	Tuzla (Pendik) - Bari	3,362	4,029	7,391
	Tuzla (Pendik) - Patras	3,268	2,731	5,999
	İzmir- Sete	1,824	3,458	5,282
	Çeşme - Sakız Adası	175	800	975
	Kocaeli - Valensiya	475	1	476
	Kocaeli - Zeebrugge	15	450	465
	Kocaeli - Anvers	362	6	368
	Kocaeli - Bremerhaven	0	154	154
	Kocaeli - Koper	2	115	117
	Gemlik - Anvers	93	13	106
	Total European Ro-Ro Lines	**265,252**	**239,603**	**504,855**
Black Sea	Samsun - Tuapse	20,633	21,271	41,904
	Samsun - Novorossiysk	15,990	21,047	37,037
	Karasu - Tuapse	4,294	7,830	12,124
	Karasu - Novorossiysk	280	1,622	1,902
	İstanbul - Novorossiysk	73	978	1,051
	İstanbul - Tuapse	124	662	786
	Total Black Sea Ro-Ro Lines	**41,394**	**53,410**	**94,504**
Mediterranean	Mersin - Gazimağusa	20,482	21,662	42,144
	Taşucu - Girne	13,675	15,311	28,986
	Taşucu - Tripoli (Lübnan)	8,441	7,998	16,439
	Mersin - Hayfa	2,465	2,654	5,119
	Mersin - Girne	1,332	460	1,792
	İskenderun - Hayfa	716	721	1,437
	Taşucu - Gazimağusa	887	2	889
	Total Mediterranean Ro-Ro Lines	**47,998**	**48,808**	**96,806**
The Indian Ocean	İskenderun - Darüsselam	0	114	114
	Total The Indian Ocean Ro-Ro Lines	**0**	**114**	**114**
Other Ro-Ro Lines		897	657	1,554
Total		**355,541**	**342,592**	**698,133**

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

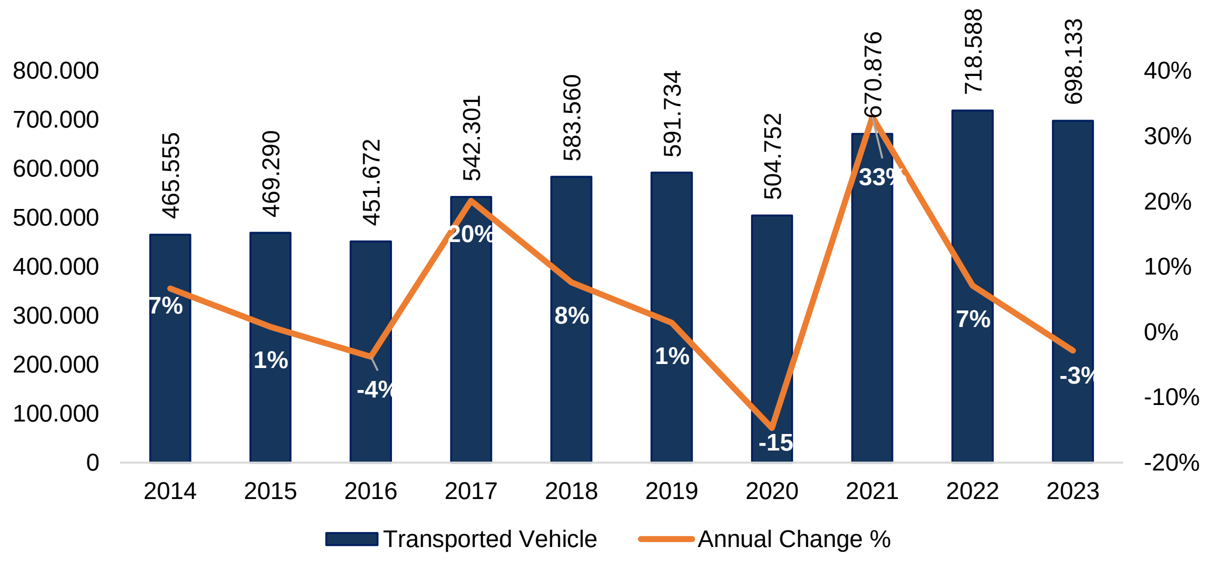
In the 14 European lines 504,855 vehicles have been transported in 2023. (72%)
In the 6 Black Sea lines 94,504 vehicles have been transported in 2023. (14%)
In the 7 Mediterranean lines 96,806 vehicles have been transported in 2023. (14%)
In the 3 Other lines 1,668 vehicles have been transported in 2023. (0%)

Graph 27. Ro-Ro Lines Transported Vehicles (2023)



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

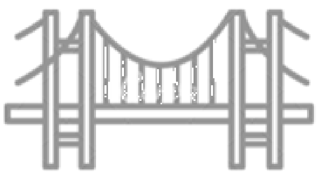
Graph 28. Ro-Ro Lines Transported Vehicles Number and Annual Change 2014-2023



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

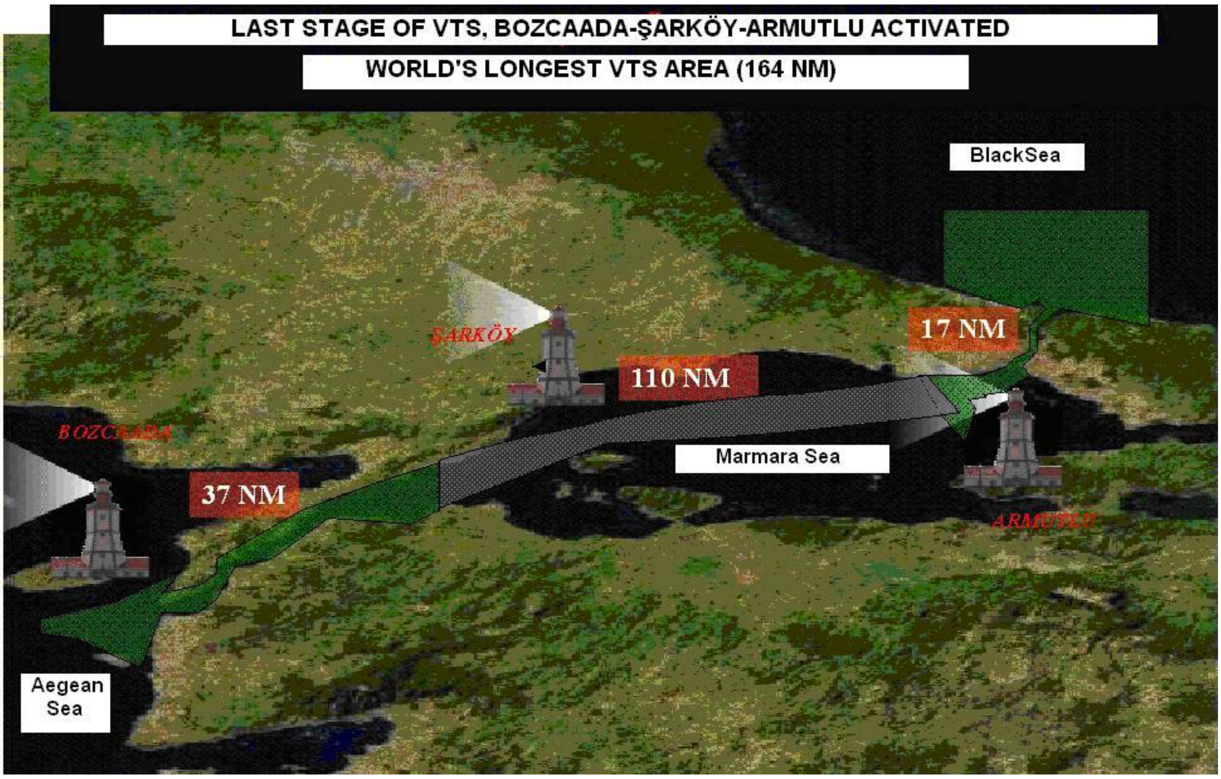
CHAPTER III

THE TURKISH STRAITS AND MARITIME TRAFFIC SYSTEMS



3. THE TURKISH STRAITS AND MARITIME TRAFFIC SYSTEMS

3.1. The Turkish Straits



The region consisting of the Turkish Straits, called Istanbul 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 İstanbul Strait and ending at the south exit of Çanakkale Strait, is a region that should be given high importance both from geomorphological and hydrographical aspects, especially for having 12 sharp turning points with 45º in front of İstanbul Strait-Kandilli and 80º in front of Yeniköy and with complex currents which reach to a relative speed of 7- 8 knots.

The Strait of İstanbul is unique as it runs through the city of İstanbul with more than 15 million inhabitants. The shoreline of İstanbul 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 İstanbul is more than 2500. More than 2.5 million people are daily in a movement at sea crossing from one side to another in İstanbul. İstanbul is a city with 3000 years of history. It is declared as a “world heritage city” by UNESCO.

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

The number of vessels that passed through the Turkish Straits between the years 2006-2023 are shown in Table below.

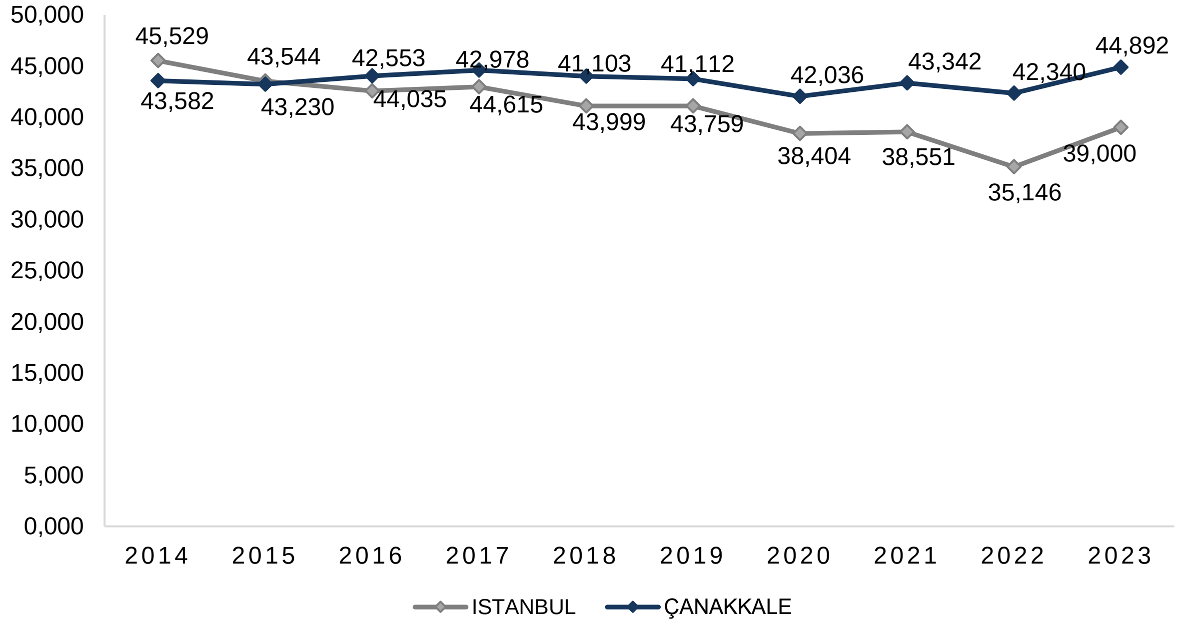
Table 40. Ships Passing Through the Turkish Straits (2006-2023)

Years	Istanbul			Canakkale		
	Number Of Vessels	GT	Number Of Vessels Change	Number Of Vessels	GT	Number Of Vessels Change
2006	54,880	475,796,880	-	48,915	595,826,240	-
2007	56,606	484,867,696	3.1%	49,913	611,885,819	2.0%
2008	54,396	515,639,614	-3.9%	48,978	657,396,892	-1.9%
2009	51,422	514,656,446	-5.5%	49,453	667,412,661	1.0%
2010	50,871	505,615,881	-1.1%	46,686	672,843,533	-5.6%
2011	49,798	523,543,509	-2.1%	45,379	705,412,518	-2.8%
2012	48,329	550,526,579	-2.9%	44,613	735,728,537	-1.7%
2013	46,532	551,771,780	-3.7%	43,889	745,567,671	-1.6%
2014	45,529	582,468,334	-2.2%	43,582	761,631,756	-0.7%
2015	43,544	565,216,784	-4.4%	43,230	777,989,382	-0.8%
2016	42,553	565,282,287	-2.3%	44,035	772,922,682	1.9%
2017	42,978	599,324,748	1.0%	44,615	823,460,636	1.3%
2018	41,103	613,088,166	-4.4%	43,999	849,140,218	-1.4%
2019	41,112	638,892,062	0.0%	43,759	872,312,222	-0.5%
2020	38,404	619,758,776	-6.6%	42,036	858,844,972	-3.9%
2021	38,551	631,920,375	0.4%	43,342	898,473,519	3.1%
2022	35,146	541,444,690	-8.8%	42,340	871,621,677	-2.3%
2023	39,000	621,638,378	11.0%	44,892	941,519,970	6.0%

Source: Ministry of Transport and Infrastructure, Republic of Türkiye and İMEAK Chamber of Shipping Calculations

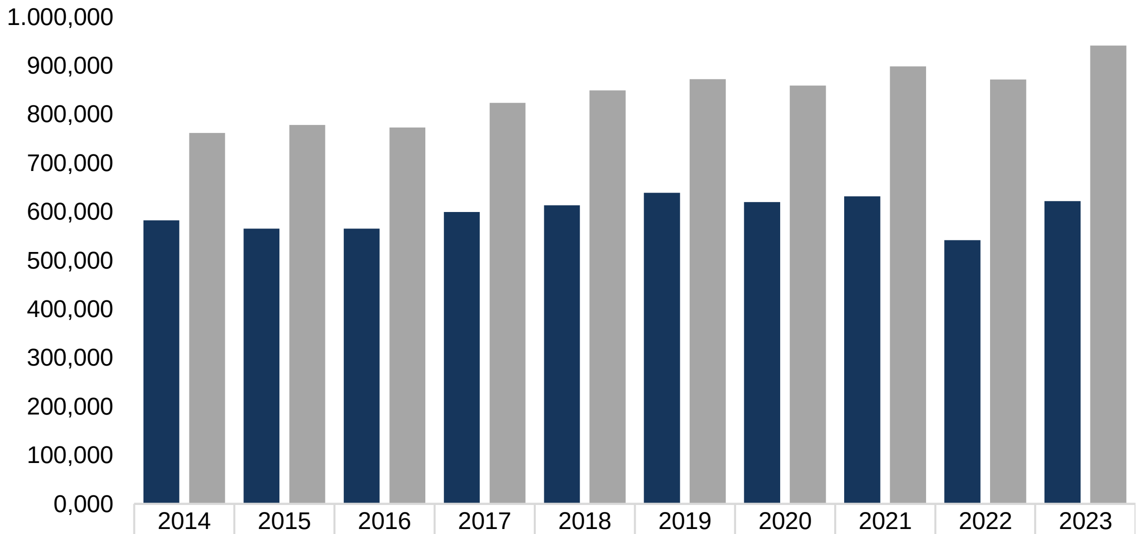
In the year 2023, 39,000 ships in total have passed through the İstanbul Strait with a monthly average of 3,250 ships; 44,892 ships in total have passed through the Çanakkale Strait with a monthly average of 3,741 ships.

Graph 29. Number of Ships Passing Through the Turkish Straits (2014-2023)



Source: Ministry of Transport and Infrastructure, Republic of Türkiye

Graph 30. 2014-2023 Ships Passing Through the Turkish Straits GT (1,000 GT)



	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
ISTANBUL	582,468	565,217	565,282	599,325	613,088	638,892	619,759	631,920	541,444	621,638
ÇANAKKALE	761,632	777,989	772,923	823,461	849,140	872,312	858,845	898,473	871,621	941,520

ISTANBUL ÇANAKKALE

Source: Ministry of Transport and Infrastructure, Republic of Türkiye

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

Table 41. Dangerous Passing Through the Turkish Straits

Years	Istanbul		Çanakkale	
	The Number of Tankers Carrying Hazardous Materials	The Amount of Hazardous Materials (Metric Tons)	The Number of Tankers Carrying Hazardous Materials	The Amount of Hazardous Materials (Metric Tons)
2006	10,153	143,452,500	9,567	152,726,000
2007	10,054	143,939,500	9,271	149,320,000
2008	9,303	140,357,500	8,758	149,052,000
2009	9,299	144,660,000	9,567	152,105,500
2010	9,274	146,750,500	9,252	156,929,000
2011	9,103	138,496,500	8,818	154,606,000
2012	9,028	131,123,000	8,998	151,040,000
2013	9,006	134,444,000	9,299	149,091,000
2014	8,745	133,961,000	9,250	152,286,000
2015	8,633	135,952,000	9,524	155,531,000
2016	8,703	136,100,000	9,481	156,203,000
2017	8,832	146,943,000	9,478	166,729,000
2018	8,587	147,375,459	9,247	164,583,997
2019	8,957	159,499,000	9,843	171,685,000
2020	8,435	139,244,513	9,372	157,193,034
2021	8,248	147,222,005	9,208	167,993,772
2022	8,653	146,904,132	9,904	166,774,727
2023	9,287	164,469,822	10,303	185,863,508

Source: Ministry of Transport and Infrastructure, Republic of Türkiye

The statistics of ships passing through Istanbul and Çanakkale Straits, according to length, piloting and on country basis are shown in the following tables.

Table 42. The Monthly Statistics of Vessels Passed Istanbul Strait According to Their Length and Pilot Request

Months	Number Of Vessels	Total Gross Tonnage	With Pilot	Sp1 Given	Non Call In Vessels	LOA Longer Than 200 M	Lower Than 500 GT	Total Tankers			Towaged
								TTA	LPG/LNG	TCH	
January	3,061	50,013,223	2,055	3,058	1,717	387	27	497	26	237	8
February	2,729	43,988,278	1,854	2,722	1,543	336	33	411	19	208	11
March	3,460	55,542,460	2,308	3,457	1,983	416	25	535	22	252	7
April	3,343	52,038,303	2,237	3,341	1,912	380	39	528	39	254	10
May	3,462	53,190,734	2,251	3,450	2,047	404	58	555	34	236	17
June	3,283	51,172,009	2,126	3,279	1,968	407	49	566	33	223	10
July	3,282	51,496,631	2,082	3,260	2,012	380	110	546	40	227	10
August	3,306	51,941,706	2,044	3,234	1,996	375	151	545	42	191	9
September	3,166	51,370,193	1,994	3,119	1,913	389	129	522	42	175	11
October	3,371	57,147,576	2,165	3,307	2,006	447	126	514	40	198	6
November	3,095	51,948,104	2,017	3,045	1,904	430	129	466	46	209	6
December	3,442	51,789,161	2,204	3,416	2,112	419	112	489	59	261	10
Total	**39,000**	**621,638,378**	**25,337**	**38,688**	**23,113**	**4,770**	**988**	**6,174**	**442**	**2,671**	**115**

Source: Ministry of Transport and Infrastructure, Republic of Türkiye

Table 43. The Monthly Statistics of Vessels Passed Çanakkale Strait According to Their Length and Pilot Request

Months	Number Of Vessels	Total Gross Tonnage	With Pilot	Sp1 Given	Non Call In Vessels	LOA Longer Than 200 M	Lower Than 500 GT	Total Tankers			Towaged
								TTA	LPG/LNG	TCH	
January	3,506	73,059,317	1,991	3,496	1,722	631	40	529	61	267	10
February	3,241	69,960,639	1,871	3,230	1,599	584	40	469	44	231	8
March	3,855	79,749,292	2,172	3,841	1,951	693	55	537	50	319	9
April	3,786	79,137,988	2,083	3,772	1,918	683	59	548	47	319	17
May	3,953	81,807,495	2,161	3,933	2,019	712	55	570	54	272	8
June	3,897	79,953,110	2,145	3,869	1,959	692	71	543	49	284	7
July	3,868	80,803,785	2,165	3,848	2,000	675	59	539	54	279	13
August	3,780	79,622,356	2,077	3,751	1,982	687	70	548	51	275	13
September	3,720	77,859,968	2,031	3,695	1,942	662	64	537	49	262	10
October	3,918	85,721,088	2,164	3,886	2,025	755	70	542	53	269	5
November	3,538	75,459,505	1,930	3,508	1,880	672	58	429	55	275	4
December	3,830	78,385,427	2,012	3,811	2,091	705	73	501	58	334	10
Total	**44,892**	**941,519,970**	**24,802**	**44,640**	**23,088**	**8,151**	**714**	**6,292**	**625**	**3,386**	**114**

Source: Ministry of Transport and Infrastructure, Republic of Türkiye

Table 44. (2019-2023) Statistics of Vessels Passed Istanbul Strait According to Their Ship Type

Ship Types	2019	2020	2021	2022	2023
General Cargo Ship	18,637	16,864	16,891	15,371	15,421
Bulk Carrier	8,811	8,592	8,684	7,076	8,285
Other Tanker, TTA	5,934	5,252	5,085	5,447	6,174
Container Ship	2,642	2,633	2,735	2,426	3,376
Chemical Tanker, TCH	2,462	2,653	2,701	2,782	2,671
Livestock Carrier	530	555	566	491	476
Roll on Roll of Vessel	266	222	268	274	462
Liquefied Petroleum Gas Tanker, LPG	561	530	462	424	442
Passenger Ship	250	74	217	85	407
Tug	270	175	214	234	314
Barge / Barge Carrier	9	15	13	34	278
Cement Carrier	9	18	46	38	49
Refrigerated Cargo Carrier	59	52	48	15	41
Naval	178	205	190	30	33
Vehicle Carrier	113	87	18	67	28
Ferry	2	1	2	1	0
Other	379	476	411	351	543

Source: Ministry of Transport and Infrastructure, Republic of Türkiye

Table 45. 2019-2023 Statistics of Vessels Passed Çanakkale Strait According to Their Ship Type

Ship Types	2019	2020	2021	2022	2023
General Cargo Ship	14,771	14,197	14,713	13,880	14,073
Bulk Carrier	9,204	9,170	9,349	8,049	8,833
Container Ship	5,238	5,219	5,502	5,767	6,604
Other Tanker, TTA	6,178	5,644	5,196	5,874	6,292
Chemical Tanker, TCH	2,996	3,057	3,385	3,414	3,386
Roll on Roll of Vessel	1,957	1,649	1,974	2,140	2,501
Passenger Ship	101	26	43	489	546
Livestock Carrier	592	593	607	521	519
Liquefied Petroleum Gas Tanker, LPG	539	542	498	477	512
Vehicle Carrier	644	498	448	443	369
Tug	365	306	341	337	338
Liquefied Natural Gas Tanker, LNG	130	129	129	139	113
Barge / Barge Carrier	75	109	179	60	50
Cement Carrier	10	17	45	47	49
Naval	216	211	206	34	46
Refrigerated Cargo Carrier	83	76	71	32	42
Ferry	26	26	29	9	14
Other	634	567	627	628	605

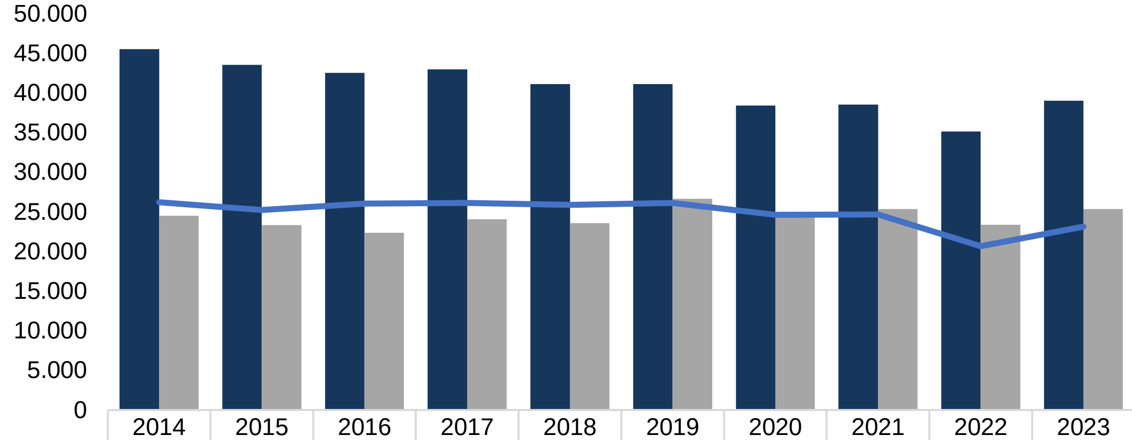
Source: Ministry of Transport and Infrastructure, Republic of Türkiye

Table 46. 2006-2023 Years of Vessels Passed Istanbul Strait According to Their Length and Pilot Request

Years	Number Of Vessels	Total Gross Tonnage	With Pılot	Sp1 Given	Non Call In Vessels	LOA Longer Than 200 M	Lower Than 500 GT	Total Tankers			Towaged
								TTA	LPG/LNG	TCH	
2006	54,880	475,796,880	26,589	53,324	31,880	3,653	2,176	7,659	814	1,680	111
2007	56,606	484,867,696	26,685	55,132	31,826	3,653	2,138	7,204	800	2,050	105
2008	54,396	515,639,614	27,001	53,232	31,762	3,911	1,800	6,564	764	1,975	119
2009	51,422	514,656,446	24,977	50,712	32,297	3,871	1,128	6,557	866	1,876	122
2010	50,871	505,615,881	26,035	50,020	28,668	3,623	1,377	6,464	1,099	1,711	115
2011	49,798	523,543,509	26,011	49,179	27,938	3,800	1,046	6,216	1,227	1,660	93
2012	48,329	550,526,579	24,812	47,638	27,345	3,866	1,064	5,913	1,336	1,779	98
2013	46,532	551,771,780	24,023	45,616	26,577	3,801	1,192	5,685	1,741	1,580	87
2014	45,529	582,468,334	24,508	44,928	26,212	4,295	928	5,587	1,540	1,618	90
2015	43,544	565,216,784	23,349	43,039	25,243	3,930	879	5,825	1,232	1,576	71
2016	42,553	565,282,287	22,356	42,132	26,050	3,873	522	6,033	989	1,681	73
2017	42,978	599,324,748	24,059	42,700	26,111	4,005	436	6,212	742	1,878	88
2018	41,103	613,088,166	23,565	40,844	25,884	4,106	508	6,014	623	1,950	116
2019	41,112	638,892,062	26,632	40,870	26,138	4,400	333	5,934	561	2,462	89
2020	38,404	619,758,776	24,754	38,175	24,623	4,952	374	5,252	530	2,653	67
2021	38,551	631,920,375	25,357	38,340	24,654	5,306	374	5,085	462	2,701	75
2022	35,146	541,444,690	23,380	35,083	20,670	4,079	388	5,447	424	2,782	96
2023	39,000	621,638,378	25,337	38,688	23,113	4,770	988	6,174	442	2,671	115

Source: Ministry of Transport and Infrastructure, Republic of Türkiye

Graph 31. The Statistics Summary of Vessels Passed Istanbul Strait Number of Vessel, with Pilot and Non Call in Vessel



	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Number Of Vessels	45.529	43.544	42.553	42.978	41.103	41.112	38.404	38.551	35.146	39.000
With Pilot	24.508	23.349	22.356	24.059	23.565	26.632	24.754	25.357	23.380	25.337
Non Call In Vessels	26.212	25.243	26.050	26.111	25.884	26.138	24.623	24.654	20.670	23.113

Number Of Vessels With Pilot Non Call In Vessels

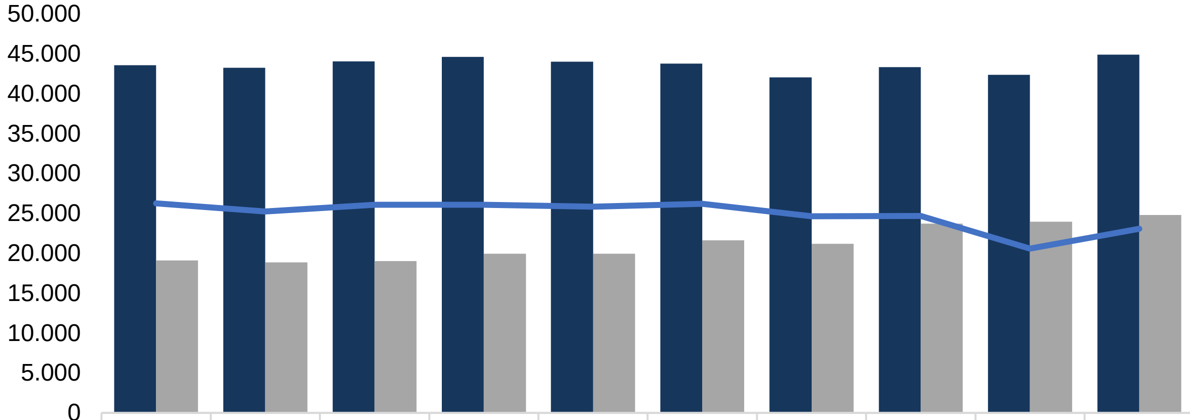
Source: Ministry of Transport and Infrastructure, Republic of Türkiye

Table 47. 2006-2023 Years of Vessels Passed Çanakkale Strait According to Their Length and Pilot Request

Years	Number Of Vessels	Total Gross Tonnage	With Pilot	Sp1 Given	Non Call In Vessels	LOA Longer Than 200 M	Lower Than 500 GT	Total Tankers			Towaged
								TTA	LPG/LNG	TCH	
2006	48,915	595,826,240	16,871	48,264	32,061	4,845	1,404	7,204	798	1,565	131
2007	49,913	611,885,819	16,885	48,802	31,981	4,945	1,873	6,527	754	1,990	138
2008	48,978	657,396,892	18,334	48,565	31,981	5,223	844	5,990	777	1,991	162
2009	49,453	667,412,661	18,588	49,210	32,559	5,176	615	6,293	842	2,432	146
2010	46,686	672,843,533	18,678	46,469	28,768	5,098	598	6,017	902	2,333	138
2011	45,379	705,412,518	18,920	45,196	27,983	5,494	572	5,661	974	2,183	159
2012	44,613	735,728,537	18,775	44,416	27,418	5,919	519	5,656	1,038	2,304	134
2013	43,889	745,567,671	18,924	43,579	26,534	5,824	448	5,822	1,380	2,097	123
2014	43,582	761,631,756	19,107	43,238	26,257	5,902	512	5,875	1,206	2,169	116
2015	43,230	777,989,382	18,843	42,755	25,220	5,842	581	6,009	1,036	2,479	122
2016	44,035	772,922,682	19,007	43,543	26,071	5,665	661	6,041	881	2,559	139
2017	44,615	823,460,636	19,925	43,888	26,087	6,197	755	6,145	734	2,599	149
2018	43,999	849,140,218	19,958	43,513	25,835	6,612	732	6,181	698	2,368	156
2019	43,759	872,312,222	21,616	43,321	26,184	7,010	714	6,178	669	2,996	138
2020	42,036	858,844,972	21,175	41,581	24,639	7,430	779	5,644	671	3,057	126
2021	43,342	898,473,519	23,706	42,896	24,668	7,855	820	5,196	627	3,385	131
2022	42,340	871,621,677	23,969	42,124	20,584	7,223	722	5,874	616	3,414	120
2023	44,892	941,519,970	24,802	44,640	23,088	8,151	714	6,292	625	3,386	114

Source: Ministry of Transport and Infrastructure, Republic of Türkiye

Graph 32. The Statistics Summary of Vessels Passed Çanakkale Strait Number of Vessel, with Pilot and Non Call in Vessel



	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Number Of Vessels	43.582	43.230	44.035	44.615	43.999	43.759	42.036	43.342	42.340	44.892
With Pilot	19.107	18.843	19.007	19.925	19.958	21.616	21.175	23.706	23.969	24.802
Non Call In Vessels	26.257	25.220	26.071	26.087	25.835	26.184	24.639	24.668	20.584	23.088

Number Of Vessels   With Pilot   Non Call In Vessels

Source: Ministry of Transport and Infrastructure, Republic of Türkiye

3.2. Turkish Straits Reporting System (TUBRAP)

Traffic Separation Scheme

The traffic separation scheme for the Turkish Straits and their approaches, which is prepared as per WGS 84 datum, established in accordance with Rule 10 of Convention on the International Regulations for Preventing Collisions at Sea, 1972 (COLREGs) and adopted by the IMO, has been established within the limits below.

On the North, the line connecting following points:
a) 41° 16'.330 N, 028° 54'.974 E
b) 41° 20'.944 N, 028° 54'.974 E
c) 41° 20'.944 N, 029° 15'.974 E
ç) 41° 13'.830' N, 029° 15'.974 E

On the South, the line connecting following points:
a) 40° 05'.021 N, 26° 11'.394 E
b) 40° 01'.940 N, 25° 54'.970 E
c) 39° 49'.940 N, 25° 52'.970 E
ç) 39° 43'.940 N, 25° 54'.970 E
d) 39° 43'.940 N, 26° 09'.129 E

Sailing Plan - 1 (SP-1) Report

Masters, owners or agents of the vessels carrying dangerous cargo or the vessels of 500 GT and more should submit a written SP-1 Report (Annex 1) and Checklist completed by Master (Annex 8) to the relevant TSVTS Centers at least 24 hours prior to entry into the Turkish Straits. Masters, owners or agents of the vessels with LOA between 200-300 meters and/or vessels with a draft over 15 meters should submit a written SP-1 Report (Annex 1) and Checklist completed by Master (Annex 8) to the relevant TSVTS Centers at least 48 hours prior to entry into Turkish Straits.

Owners or operators of vessels with LOA of 300 meters or more, vessels that are propelled by nuclear power and vessels carrying nuclear cargo or waste and hazardous and noxious goods or waste shall provide information regarding the vessel's characteristics and cargo to the Ministry/Administration during the planning stage of the voyage. Based on thisinformation about the vessels, the TSVTS Center and the Ministry / Administration, if necessary, taking into account the all characteristics of vessels including their dimensions and the maneuverability, the morphological and physical structure of the Turkish Straits, seasonal conditions, maritime traffic with the safety of life, property, sea and environment, shall notify the conditions and recommendations, if any, to the owner, operator or master of the vessel concerned, in order to ensure a safe passage through Turkish Straits. Those vessels which meet the necessary conditions for passage, shall submit the SP-1 Report and the Checklist (Annex-8) filled by the ship's master at least 72 hours in advance.

Vessels carrying dangerous cargo and vessels of 500 GT and more which will depart from ports in the Sea of Marmara, shall submit the SP-1 report at least 6 hours before departure.

In the event that there is a delay exceeding 2 hours in the time of entry of the vessels into Turkish Straits, which was declared in their SP-1 reports, this will be notified to the TSVTS Center by the relevant agency. The SP-1 report is very important for effective traffic management, and vessels that do not send SP-1 report on time or notify in case of possible delays may be excluded from the daily traffic planning, as they can lead to congestion of marine traffic, delays and waiting.

Sailing Plan - 2 (SP-2) Report

The ship masters, who gave the SP-1 Report and declared that their vessel is technically in conformity with Article 6 of Regulation, and the masters of warships and other non-commercial state-owned ships, shall submit SP-2 report (Annex-2) to the TSVTS via designated VHF channel, 2 hours before or 20 miles before entering the Turkish Straits, whichever occurs first.

After having submitted the SP 2 Report, vessels shall act by taking into account information provided by the relevant TSVTS and shall record in the ship’s log that they have submitted SP 2 Report and all information received regarding strait traffic.

The SP 2 report shall be submitted to the concerned sector of the relevant TSVTS area where the ship will enter into.

Position Report

Vessels of 20 meters and more in length which will enter the Turkish Straits shall submit the “Position Report" (Annex-3) to the TSVTS sector on the entrance side via VHF, containing information identifying themselves to the relevant VTS sector, at a distance of 5 nautical miles before entrances of the Strait.

Call Point Report

Vessels of 20 meters or more in a length passing through the Turkish Straits shall submit the “Call Point Report" (Annex-4) to the relevant TSVTS sector via VHF at designated locations. These positions are entry and exit points to the TSVTS system. In addition, the vessels shall submit this report to the sector they enter in through the VHF channel whenever they change the sector.

Marmara Report (MARRAP)

Active participant vessels that navigate between the ports in the Sea of Marmara using the TSVTS area or depart from a port in the Sea of Marmara and pass through the Strait, shall submit the Marmara Report (MARRAP) (Annex-5) to the sector where they enter the TSVTS area via VHF.

CHAPTER IV

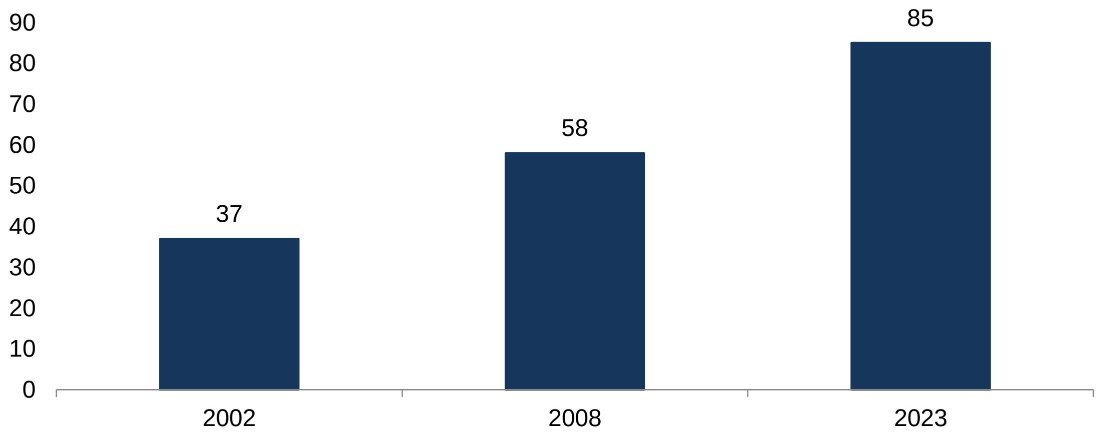
SHIPBUILDING INDUSTRY

4. SHIPBUILDING INDUSTRY

4.1. General Outlook of the Turkish Shipbuilding Industry

The shipyards, according to the facility definition in the local regulations, the under operation raised up to 85 as of March 2024 while it was only 37 in 2002. The quantity of shipyards under construction are 7 and 13 areas that are defined as shipyard investment areas of the same date mentioned above. The Covid-19 pandemic, within the the Global Economic Crisis, affected the Shipbuilding Sector adversely as well as many other sectors. The decrease in the order books caused a downfall both in employment and new investments, so most of the shipyards cancelled or postponed their modernization projects.

Graph 33. 2002 / 2023 Shipyards Under Operation



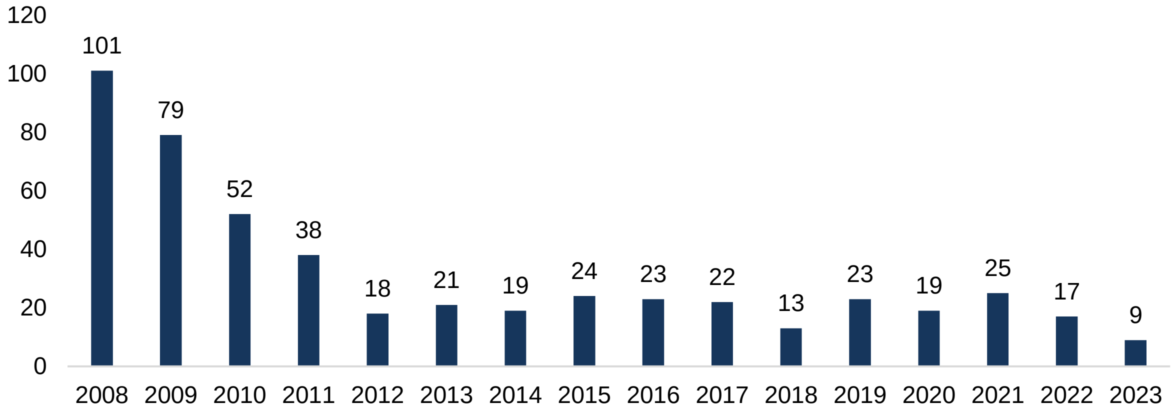
Source: Ministry of Transport and Infrastrucure 04/2024

Shipbuilding industry is a branch of heavy industry which provides;

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

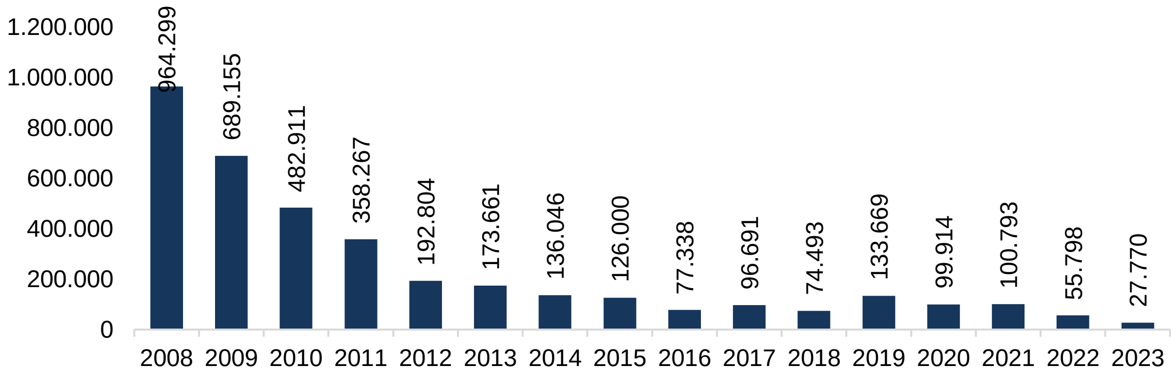
Some of the operative shipyards in Türkiye continue the modernization and extension operations but on the other hand, due to the global economic crisis, some of them suspend or cancel their modernization or extension projects because of the sanctions applied by the banks on the shipyards. In 2023, 9 ships DWT of 27,700 tons have been delivered in the Turkish Shipyard.

Graph 34. Number of Ships Delivered Between 2008-2023



Source: Clarkson Research Services 04/2024

Graph 35. DWT of Ships Delivered Between 2008-2023



Source: Clarkson Research Services 04/2024

The short-term shipbuilding market outlook appears positive, with stronger newbuilding interest having emerged and many yards now holding significant forward orderbook cover. However, some impacts could be seen from stronger newbuild pricing and ongoing uncertainty around fuelling and technology choices. Nevertheless, looking ahead, shipping's Fuelling Transition is likely to drive significant fleet renewal and ordering volumes into the longer-term. The EU Green Agreement has increased the orders for electric and hybrid ships to our shipyards, and our shipyards have also achieved significant success in the construction of special-purpose ships. Projects such as the first floating powership, electric tugboat, electric-hybrid cruise ships, electric-hybrid ferries, fishing vessels are among the achievements of our shipyards.

According to the records of the Ship, Yacht and Services Exporters' Association, there are 30 environmentally friendly ships to be delivered in the two-year period between 2022 and 2023. Of these 30 eco-friendly vessels, 9 are ferries, 8 are fishing vessels, 5 are tugboats, 4 are live fish carriers, 3 are cruise ships and 1 is ropax.

As a result, Türkiye is among the pioneering countries in projects such as the first floating energy ship (powership), the first remote-controlled ship, the first autonomous, first electric and first LNG-driven tugboats, and electric-hybrid passenger ships, electric-hybrid ferries, and fishing vessels that can travel to the poles.

Such firsts and orders received from developed countries such as the Netherlands, Norway and Finland have enabled our shipbuilding industry to become a world brand, and our shipyards are now fourth in the world in megayacht production, second in the world in tugboats, sixth in the world in ferries and tour boats, and first in the world in exports of fishing vessels.

Today, 45-65% of our country's shipbuilding industry production consists of green ships. Approximately 55-60% of these ships are exported to European countries. In order to ensure the sustainability of this positive trend, our shipyards need to be supported in R&D, innovation and clean production technologies against the competitive disadvantages.

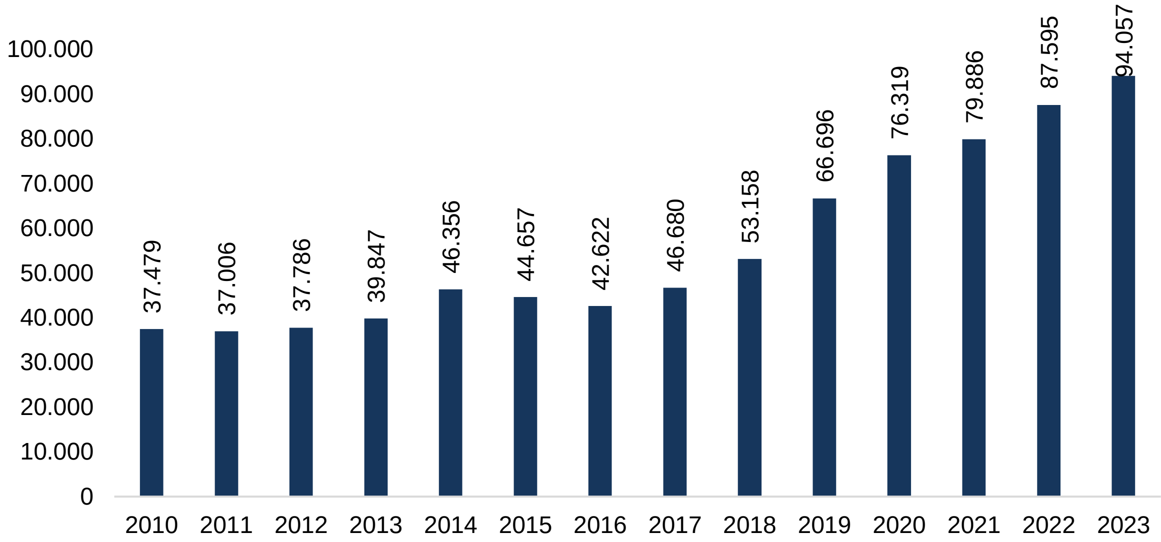
The shipbuilding market, which stagnated due to the effects of Covid-19 dominating most of 2020, showed a significant improvement in 2021. A strong start was made in the first eight months of 2021 with a total of 1060 ship orders with a volume of 85.6 million DWT and 63.7 million GT, which means the highest order since 2014 on a global scale. The big jump in container contracts since the last quarter of 2020 has been effective in the annual increase in DWT and GT scales, more than doubling the 2020 level.

Similarly, it is noted that the market, which quickly recovered from the negative effects of Covid-19, reached a 13% increase in terms of delivered ships on a DWT and CGT basis. In the first eight months of 2021, 1020 ships of 60.7 million DWT and 22.6 million CGT were delivered. Delays in ship deliveries have also decreased, with the rate of non-delivery on time remaining at only 12% at the beginning of 2021. The ship delivery size of 2023 is 1,901 ships of 115.8 million DWT and 44.1 million CGT.

According to the report which was published by the General Directorate of Shipyards and Coastal Structures, the figures for the first quarter of 2020 in our country;

- An average of 33% loss of workforce is experienced,
- 85% of the design / production re-scheduling obligation has arisen,
- The activity intensity of shipyards has decreased by 54% on average,
- Shipyards' contracts for March have mainly decreased by more than 30%,
- It is determined that our shipyards are experiencing supply and liquidity problems.

Graph 36. Employee Numbers in Turkish Shipyards by 2023



Source: Ministry of Transport and Infrastrucure 04/2024

The 2008 crisis, which had a very negative impact on the Turkish shipbuilding industry, like many other sectors, was also reflected in employment in the sector. While the number of employees employed in our ship-yacht construction and ship sub-industry, which contributes greatly to employment, was 37,479 people in 2010, it increased to 39,847 people in 2013, despite the order cancellations due to the economic crisis, and to 46,690 people as of 2017, following the partial recovery after the crisis. This number was 53,158 in 2018, 66,696 in 2019, 76,319 in 2020, 78,569 in 2021, 87,595 in 2022, and reached 94,057 in 2023

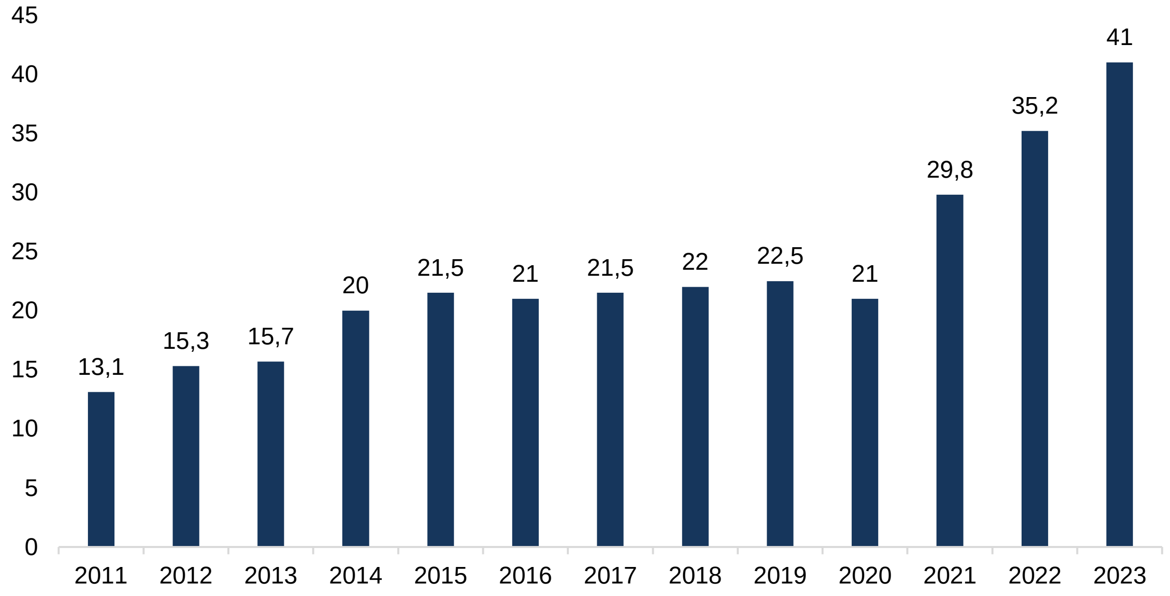
Most of the ships constructed in Turkish shipyards are built for export. Especially between 2002-2009, almost the total amount of these ships were exported to the EU member countries.

By the end of 2012, orders in our yards were decreased to 0.5 million DWT. Due to the lack of new orders, the shipyards are now mostly concerned, with repair and maintenance facilities. In 2013, in Turkish shipyards 15,755,206 DWT of repair and maintenance had been done. As of 2014, it was approximate 20,000,000 DWT, in 2020 21,000,000 DWT, in 2021 29,800,000 DWT, In 2022 35,200,000 DWT, in 2023 itraised up to 41,000,000 DWT.

Turkish Shipyard,

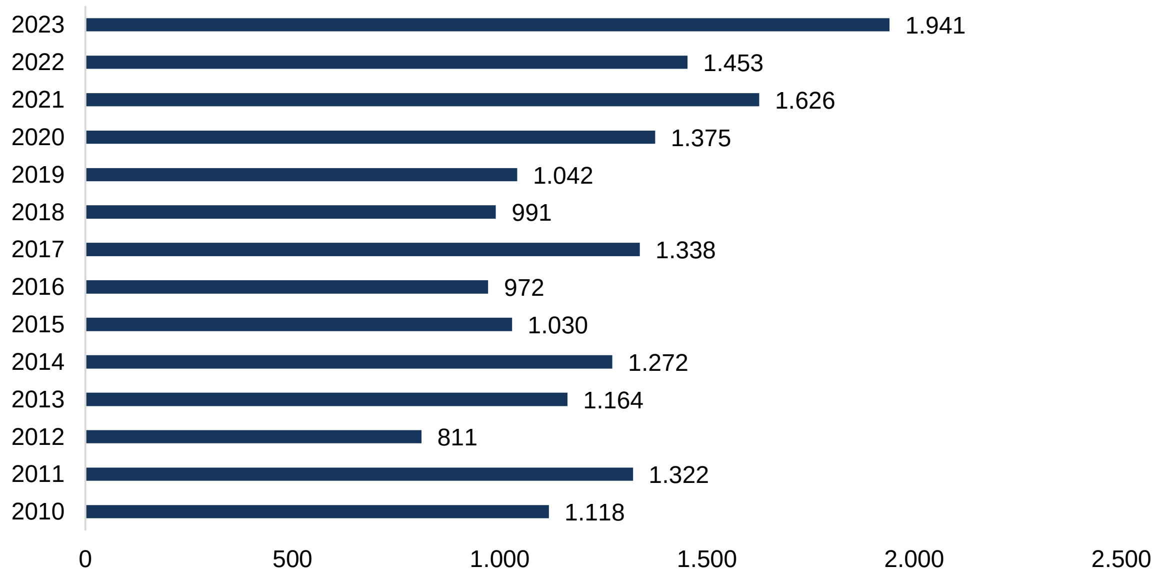
- 700,000 tons/year steel processing,
- 2 million DWT/year new ship construction,
- Construction of new ships up to 180,000 DWT in one piece,
- Building 60–70-meter mega yachts and pleasure boats,
- It has a maintenance and repair capacity of 41 million DWT/year.

Graph 37. Repair and Maintenance Facilities According to Years 2011-2023



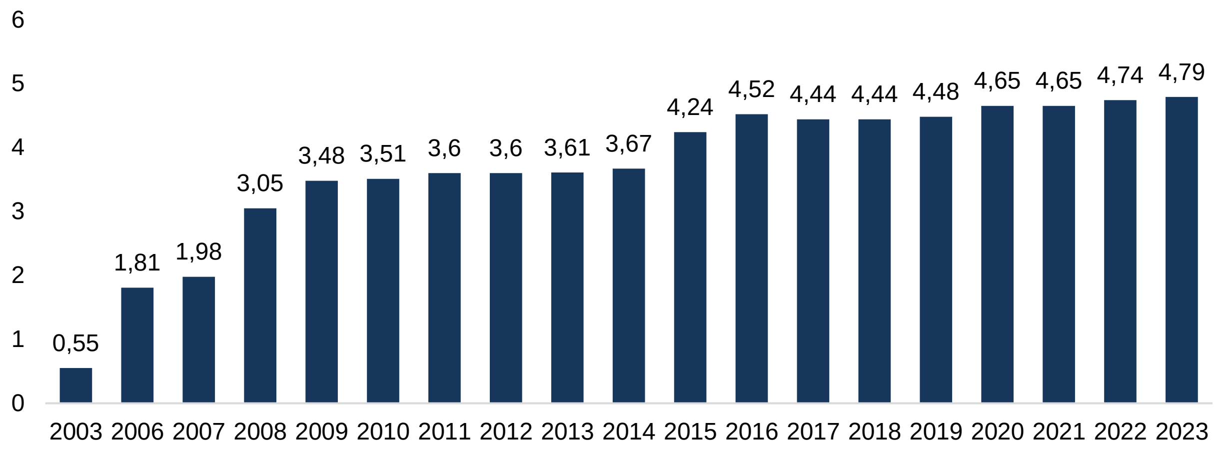
Source: GİSBİR Turkish Shipbuilders Association 04/2024

Graph 38. Export Figures of Turkish Shipbuilding Industry (2010-2023)



Source: Ship and Yacht Exporters Association (e-birlik.net) 04/2024

Graph 39. Shipyards Project Capacities Between 2003-2023 (Million DWT)



Source: Ministry of Transport and Infrastrucure 04/2024

In 2002, our shipyard's capacity was 550,000 DWT. In 2023 it has reached up to 4.79 million DWT which means a growth more over 8 times than 2002.

As of March 2023, 36 floating docks and 11 dry docks are operative in Türkiye.

Table 48. Dry Docks in Türkiye

NO	City	Operator	Dimensions
1	İstanbul	İstanbul Şehir Hatları (Haliç)	109x22.5
2	İstanbul	İstanbul Şehir Hatları (Haliç)	81.5x17
3	İstanbul	İstanbul Şehir Hatları (Haliç)	151x16
4	İstanbul	Ursa Gemicilik Bakım Onarım Tersanecilik SAN. TİC. AŞ.	56x14 m
5	İstanbul	İstanbul Tersane Komutanlığı (Pendik Tersanesi)	300X69
6	İstanbul	Tuzla Gemi Endüstrisi A.Ş.	300x53 m
7	İstanbul	Sedef Gemi İnşaatı A.Ş.	315x50 m
8	İstanbul	Deniz Endüstrisi A.Ş.	210x37 m
9	Yalova	Sefine Denizcilik Tersanecilik Turizm SAN. ve TİC. A.Ş.	240x40 m
10	Yalova	Beşiktaş Gemi (A-10)	235x40 m
11	Çanakkale	İçdaş Çelik Enerji Tersane ve Ulaşım San.. A.Ş.	370x70 m

Source: Ministry of Transport and Infrastrucure 04/2024

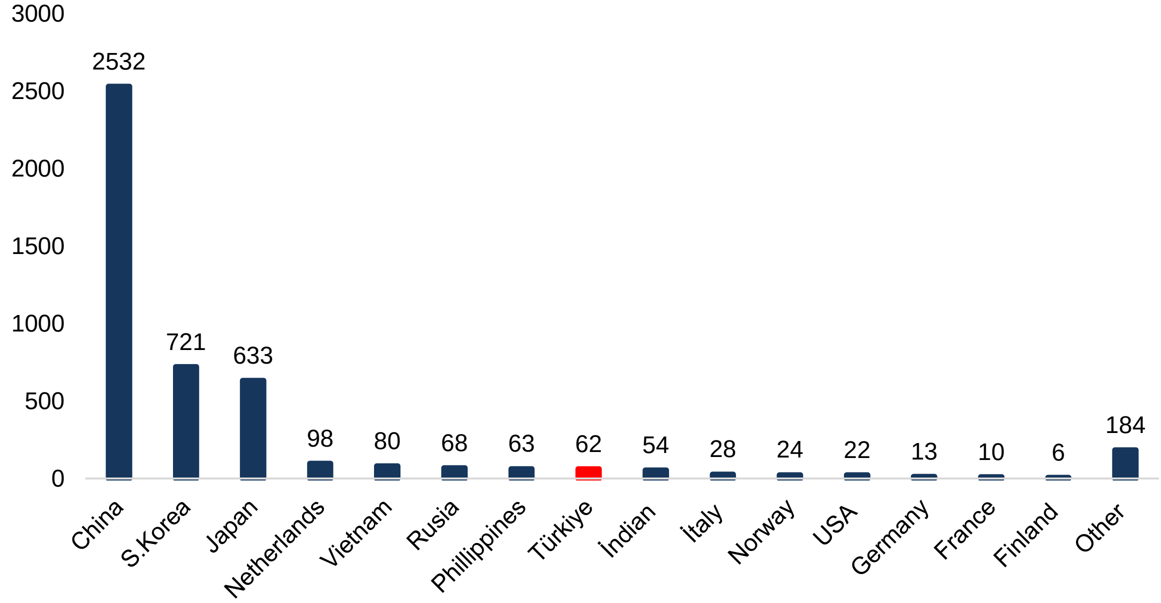
Table 49. Floating Docks in Türkiye

NO	City	Operator	Dimensions	Lifting Capacity (Tons)
1	İstanbul	Dentaş İnşa ve Onarım San. A.Ş.	144.2x30.1 m	5,000
2	İstanbul	Dentaş İnşa ve Onarım San. A.Ş.	190x40 m	14,000
3	İstanbul	Gisan Gemi İnşa San. ve Tic. A.Ş.	155x32 m	9,000
4	İstanbul	Çeksan Gemi İnşa Çelik Kons. San. ve Tic. A.Ş.	130x29 m	7,000
5	İstanbul	Art Gemi İnşa ve Tersanecilik Hizmetleri A.Ş. (2. Tesis -Aydıntepe)	190x41.6 m	13,500
6	İstanbul	Art Gemi ve Tersanecilik Hizmetleri A.Ş. (1. Tesis- Tuzla Şube)	219.5x45.14 m	20,000
7	İstanbul	Kuzeystar Shipyard	281x62 m	45,000
8	İstanbul	Kuzeystar Shipyard	217,5x43 m	18,000
9	İstanbul	İstanbul Denizcilik Gemi İnşa San. ve Tic. A.Ş.	95x28,40 m	3,600
10	İstanbul	SNR Gemi İnşa Sanayi A.Ş.	122.60x38.40 m	7,000
11	İstanbul	Desan Deniz İnşaat Sanayi A.Ş.	139.5x35.51 m	8,500
12	İstanbul	Desan Deniz İnşaat Sanayi A.Ş.	212.2x51.2	13,500
13	İstanbul	Desan Deniz İnşaat Sanayi Küçük Havuz Şubesi	170.11x36 m	17,000
14	İstanbul	Gemak Gemi İnşaat Sanayi ve Tic. A.Ş.	192x37.38 m	14,000
15	İstanbul	Gemak Gemi İnşaat Sanayi ve Tic. A.Ş.	223.97x45 m	28,000
16	İstanbul	Hidrodinamik Gemi San. ve Tic. A.Ş.	115,3x22 m	2,500
17	İstanbul	Çindemir Makine Gemi Onarım ve Tersanecilik A.Ş.	235x47.80m	16,000
18	İstanbul	Erkal Uluslararası Nakliyat ve Ticaret A.Ş.	350.47x79.26 m	65,000
19	İstanbul	Turquoise Yat San. AŞ	66x27 m	2,500
20	İstanbul	Tersan Tersanecilik ve Taşımacılık San. ve Tic. A.Ş.	130x30.5 m	6,500
21	İstanbul	Torlak Denizcilik San. ve Tic. A.Ş.	195X39.6 m	13,000
22	Yalova	Beşiktaş Gemi	353.28x66 m	72,000
23	Yalova	Beşiktaş Gemi	285x54.6 m	52,500
24	Yalova	Doğruyol Tersanecilik San. ve Tic. A.Ş.	128x30.2 m	5,500
25	Yalova	HAT-SAN Gemi İnşaa Bakım-Onarım Demir Nak. San. ve Tic. A.Ş.	240.4x46 m	25,000
26	Yalova	HAT-SAN Gemi İnşaa Bakım-Onarım Demir Nak. San. ve Tic. A.Ş.	227.5x43 m	22,500
27	Yalova	Hicri Ercili Tersanecilik San. ve Tic. A.Ş.	96x30.1 m	4,500
28	Yalova	Özata Denizcilik San. ve Tic. A.Ş.	183.9x33.6 m	10,000
29	Yalova	Özata Denizcilik San. ve Tic. A.Ş.	264x52	28,000
30	Yalova	Sanmar Tersanesi	83,8x33,5 m	3,000
31	Yalova	Sefine Denizcilik Tersanesi San. ve Tic. A.Ş.	282.2x57 m	36,857
32	Yalova	Seltaş Denizcilik San. ve Tic. A.Ş.	260x45 m	7,213
33	Yalova	Tersan Tersanecilik San ve Tic AŞ	178x35 m	9,000
34	Yalova	Tersan Tersanecilik San ve Tic AŞ	309.4x60.9 m	43,717
35	Kocaeli	Uzmar Gemi İnş. San. ve Tic. A.Ş.	68x38 m	2,000
36	Kastamonu	İnebolu Denizcilik San. ve Tic. A.Ş.	117.8x29 m	4,500

Source: Ministry of Transport and Infrastrucure 04/2024

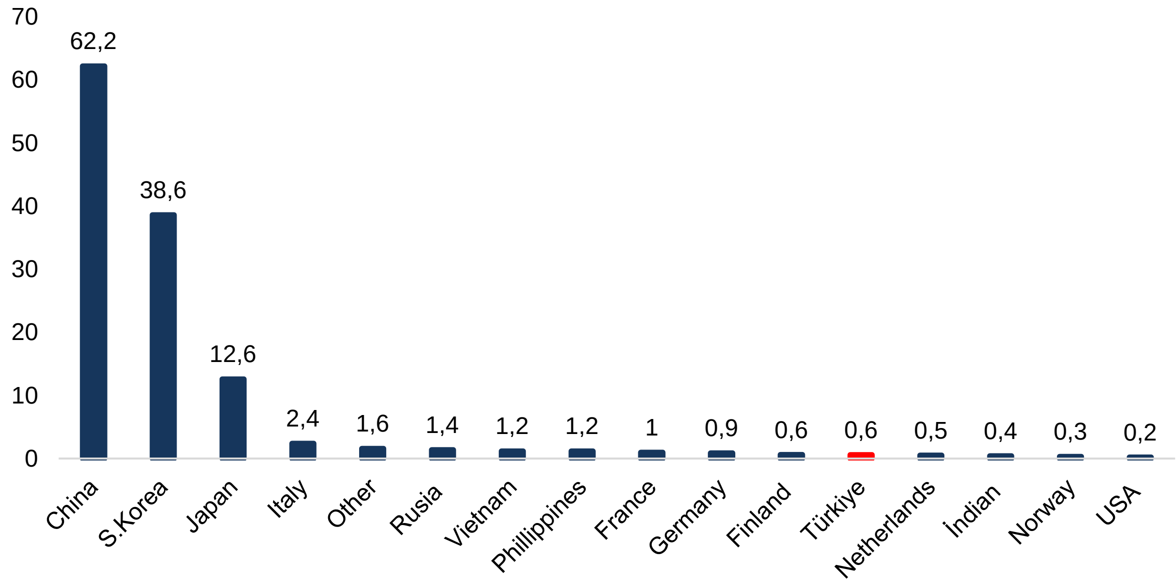
According to quantity, Turkish shipyards are in the 5th place in the world ranking according to quantity.

Graph 40. Orderbook by Builder Country (Quantity)



Source: Clarkson Research Services 04/2024

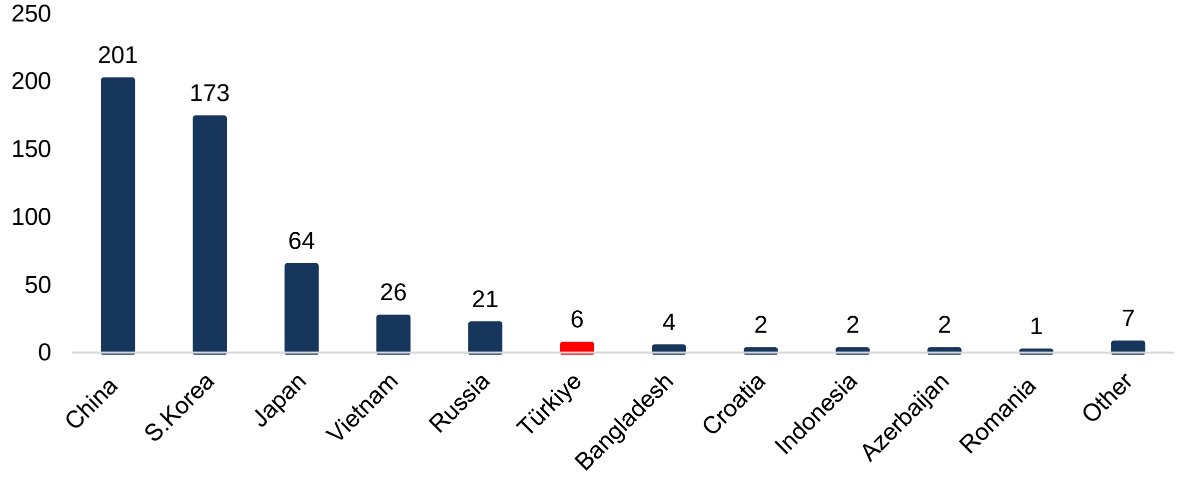
Graph 41. Orderbook by Builder Country (Tonnage- Million CGT)



Kaynak: Clarkson Research Services 04/2024

Our shipyards have a good reputation in building of small and medium tonnage chemical tankers. By 2023, Türkiye was in the 6th place according to quantity among the countries which take tanker orders.

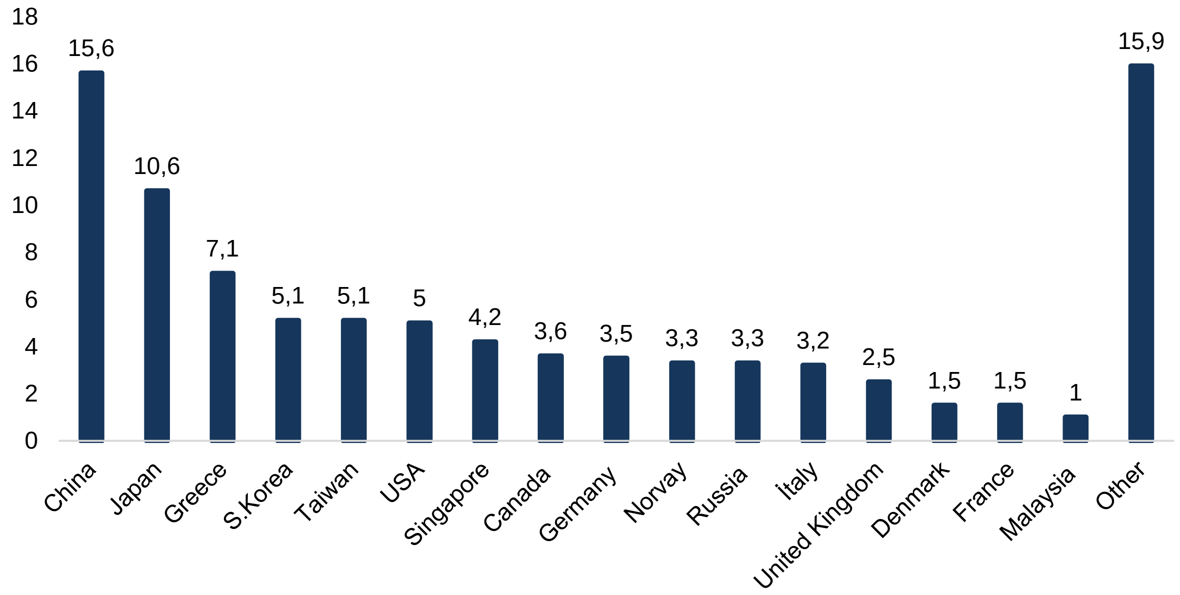
Graph 42. Tanker Orders by Builder Country (Quantity)



Source: Clarkson Research Services 04/2024

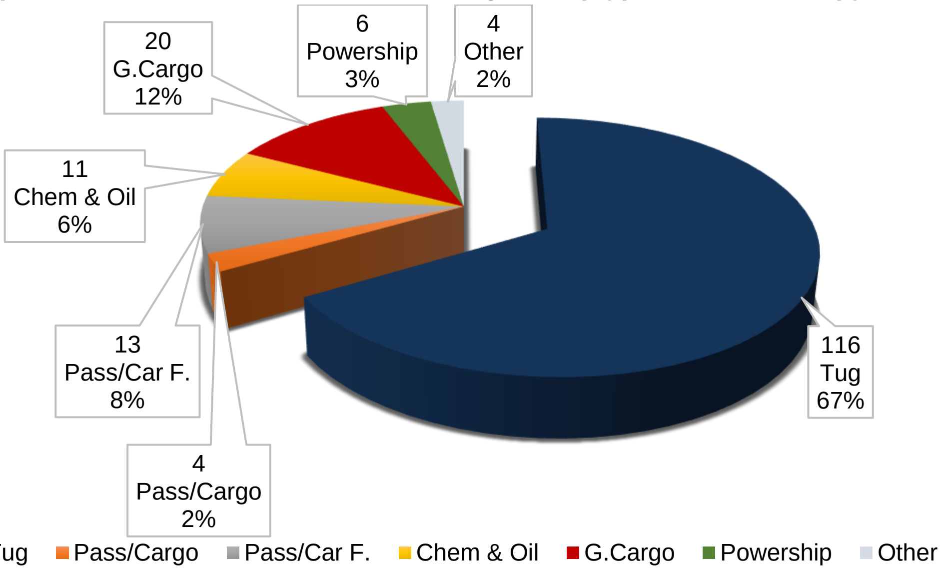
Turkish shipowners worldwide orders consist of 164 ships about 1,390,282 million CGT as of 2023.

Graph 43. Orderbook by Owner Country



Source: Clarkson Research Services 04/2024

Graph 44. Distribution of Orders According to Shiptype in Turkish Shipyards



Source: Clarkson Research Services 04/2024

4.2. Defence Industry Projects

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

Naval platform projects in the defence industry[2];

1. Multi-Purpose Amphibious Assault Ship (LHD)
2. Coast Guard Search & Rescue Boat
3. New Type Patrol Boat (YTKB)
4. New Type Submarıne Project
5. Barbaros Class Frigate Half-Life Modernization Project
6. Preveze Class Submarine Half-Life Modernization Project
7. Fast Patrol Boat Project

[2] For detailed information, visit the web site Presidency of The Republic of Türkiye Defence İndustry. (https://www.ssb.gov.tr/WebSite/contentlist.aspx?PageID=88&LangID=2)

8. Fast Attack Craft Project

9. Tanker Project

10. Logistics Support Ship Project

11. Unmanned Surface Vehicle Projects

4.3. Yacht and Boat Building Industry

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

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

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

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

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

Main disadvantages are;

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

Türkiye was in the third place in global order book by the total length of 3594 meters at the end of 2017. By 2019, moved to fourth place with the total length of 3000 meters. And in the February 2020, Türkiye back in the 3rd position in world ranking of order and under construction of yachts with 3071 meters of length. By 2021, Turkey keeping its position in the 3rd position with the total length of 3497 meters. According to the data of November 2023, it left the Netherlands behind and rose to second place with 5,838 m, and on a tonnage basis, it ranked 4th with 73,011 GT.

Table 50. Top Builder of Superyacht Projects on Order in 2023

Rank	Country	Total GT	Number of Projects	Avarage GT
1	İtaly	210,068	600	367
2	Germany	86,903	21	4,138
3	Netherlands	85,376	80	1,080
4	Türkiye	73,011	132	553
5	Norway	17,440	1	17,440

Source: Boat International (2024 Global Order Book)

4.4. Sub-Industry

In parallel with to the improvements of the recent years, theTurkish sub-industry is in progress, but still some of the items are imported by the shipyards due to the lack of production. Sub-industry which is 20% percent of the ship's price, is one of the most important branches in the shipbuilding industry. It has the highest employment value in sub-sectors. Main problem of sub-industry in Türkiye is to be made by local and small enterprises which cause problems about standardizing and approving the products.

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

Turkish Sub-industry is able to produce;

- Anchor, chain, bollard, locking equipments
- Windlass and equipments
- Valves and Central heating Systems
- Electric Panels and Tables
- Fire Fighting Systems
- Pumps
- Isolation Equipments
- Pipes
- Refrigerated Units
- Hatch Covers
- Diesel generator
- Boiler
- Carpenter and furnishings
- Paint

Main items imported in sub-industry can be summarized as;

- Sheet steel/iron and profiles
- Holland profiles
- Telecommunication systems
- Rudder Systems
- Bow /Stern thrusters.

Sub-industry creates employment as 1 to 3. In 2002 employment in sub-industry was 30,000 people and it raised to 103,500 but unfortunately due to the global economic crisis it decreased to 57,537 by the end of 2009. By February 2024, employement in the sub-industry declared to be 94,057 persons.

CHAPTER V

SHIP RECYCLING INDUTSRY

5. SHIP RECYCLING INDUTSRY

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

Generally a ship's useful economic life period ranges between 20-35 years and when scrap steel was recovered, it's estimated that,

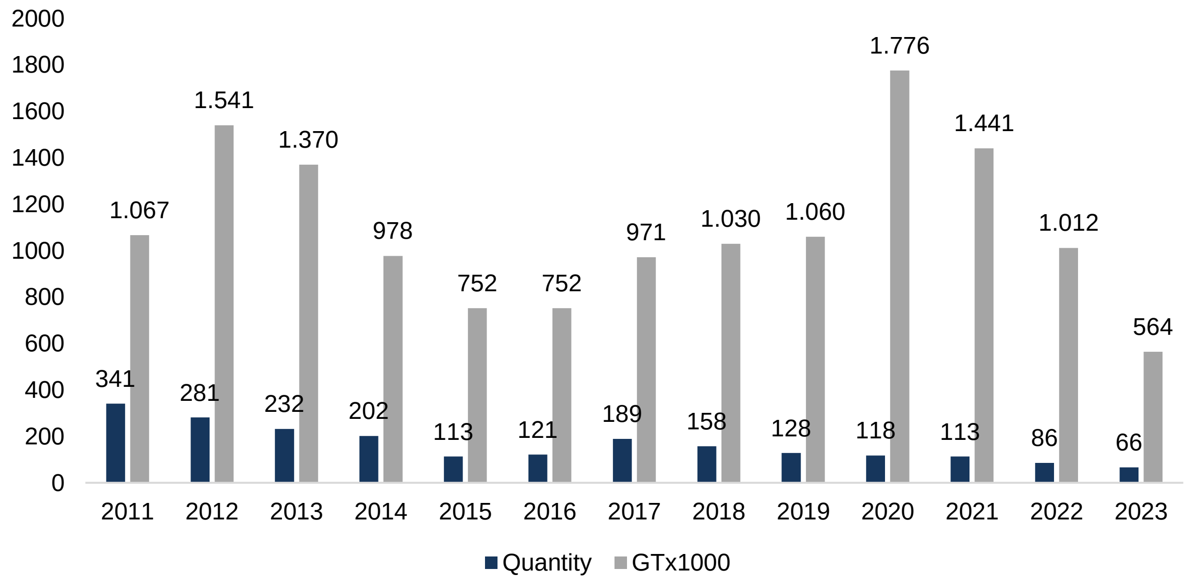
- Energy saving ratio is 74%, raw material resources preserved by 90%
- 40% less water consumption
- 76% less sewage pollution
- 86% less air pollution
- 97% less mine residue

observed.

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

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

Graph 45. Türkiye's Ship Recycling Values by the Year



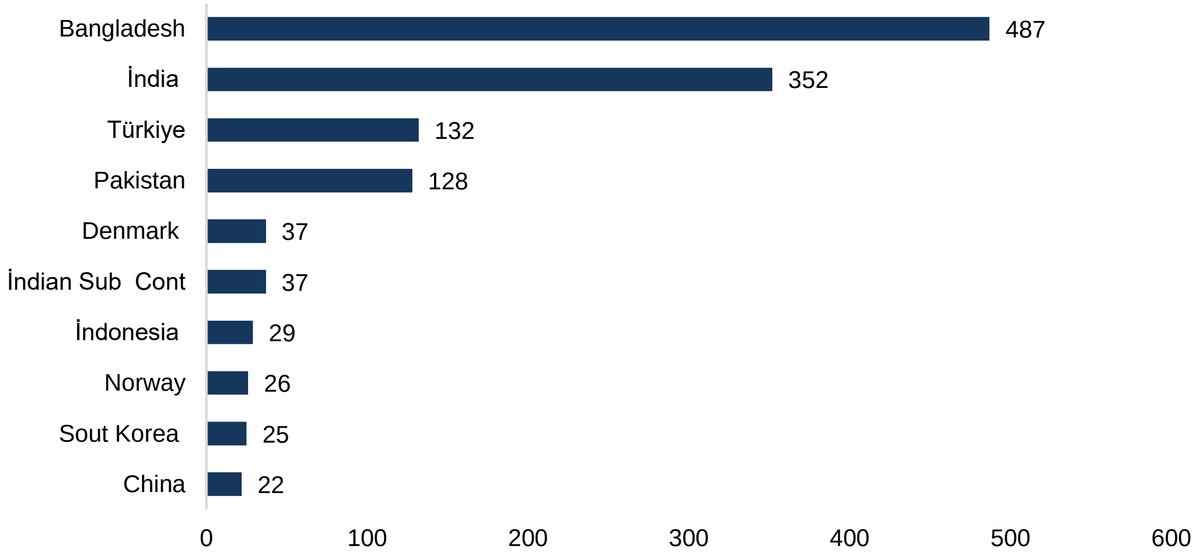
Source: Ministry of Transport and Infrastrucure 04/2024

Ship Recycling Industry makes positive impact to the dynamics within the maritime sector. By balancing the fleet tonnage it also effects the freight index. Provides new orders for shipbuilding industry. As a labor-intensive sector, Turkish ship recycling industry with the technical supports and advertising activities to raise international recognition, provides direct employment opportinity to 1400 persons and several times more by being a supplier and sub-contractor of iron-steel industry as of 2020.

By the EU Ship Recycling Regulation (EU SRR) which has came into force on 31 December 2018, its forbidden that EU flag vessels can not be recycled in the facilities that isn't in the list of "European List of Ship Recycling Facilities" At first Türkiye entered the above mentioned list with 3 facility then it raised up to 6 in 2023.

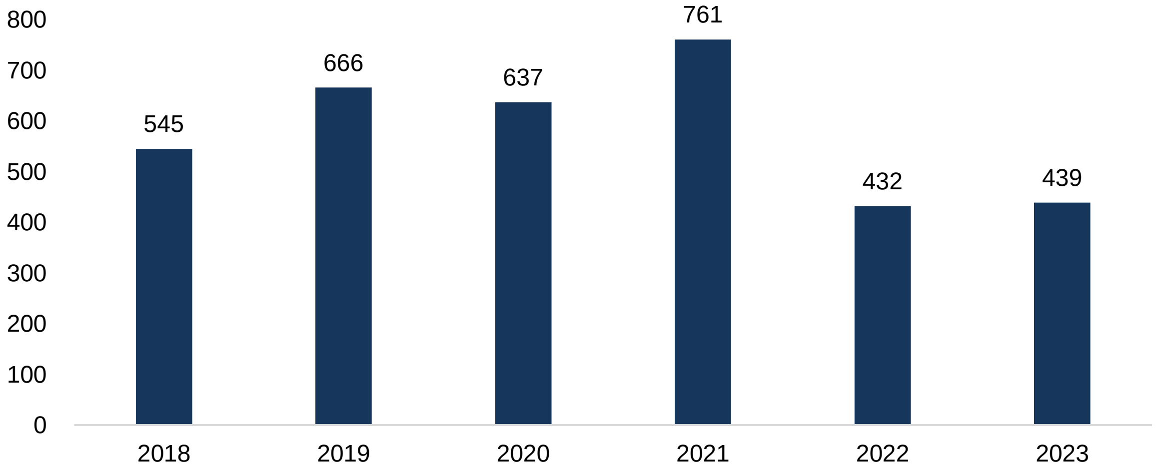
Accoardind to global data, Türkiye is in the 3th place in ranking according to quantity by the end of 2023.

Graph 46. Global Ship Recycling According to Quantity (Quantity)



Source: Clarksons Research Services Limited 04/2024

Graph 47. Recycled Ship Numbers by Years



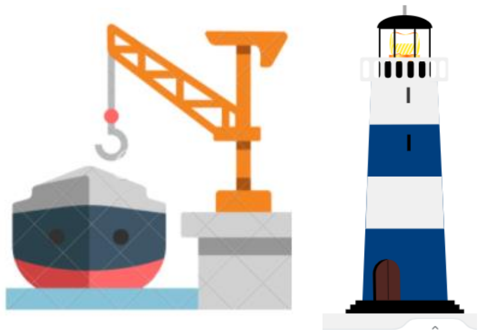
Source: Clarksons Research Services Limited 04/2024

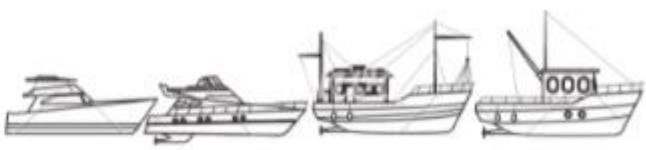
Like all other participants in the maritime sector, ship recycling has also effected from the Covid-19 global pandemic. In parallel to hygine and social distance precautions, employee numbers in ship recylcing industry reduced and it's estimated that the related sectors employees declined by half when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

By the end of 2023, Türkiye's ship recycling facilities achieved to recycle 66 ships with the tonnage of 564 GT

CHAPTER VI

COASTAL STRUCTURES





6. COASTAL STRUCTURES

6.1. General Situation of Coastal Structures in Our Country

Most of the seas and coasts of our country can be used to serve many different industries thanks to the dominant geographical structure and climatic features in the sea and land, as well as the characteristics that enable and support production such as geopolitical developments. As of December 2023, there are a total of 959 coastal structures, including port and pier facilities, marinas/marinas/berths, shipyards, boat manufacturing sites, boatyards, fishing coastal structures and shipbreaking facilities, and the total length of the coastal areas of our country, which is surrounded by seas on three sides, is (8,592) km.

In the 2024-2028 Strategic Plan published by the Ministry of Environment, Urbanization and Climate Change, it is stated that the studies on Integrated Coastal Zone Plans, which bring a new approach to coastal planning and implementation studies in our country, produce holistic and strategy-level decisions and balance the protection and use of the coast, are continuing, and in the 2030 sustainable development goals, it is stated that Integrated Coastal Zone plans should be created in coastal areas that have not yet been planned.

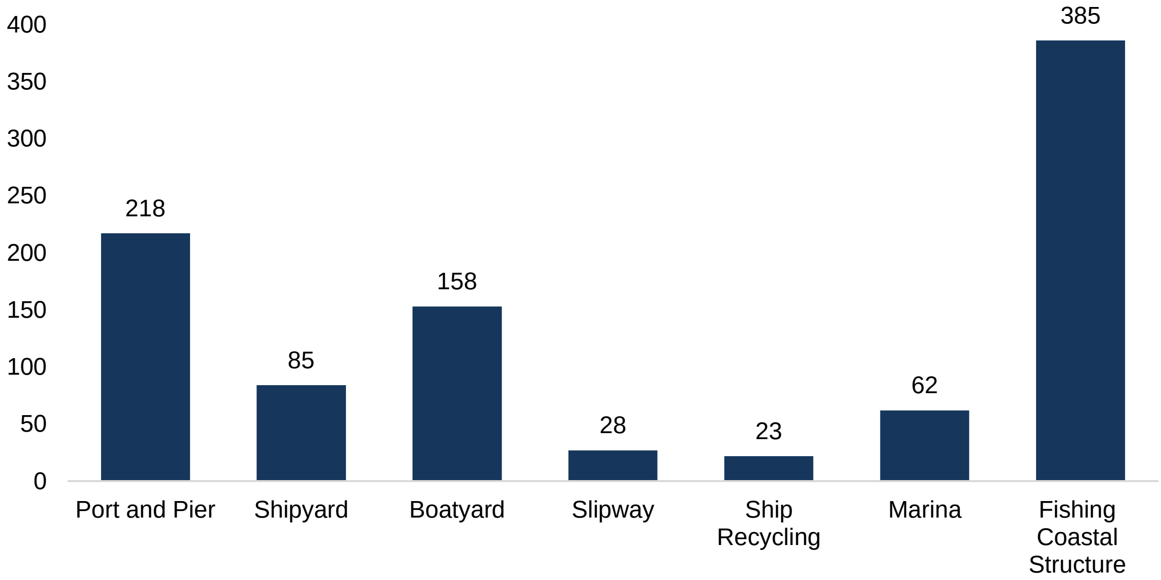
There have been great changes and developments in these coastal structures and especially in our ports in recent years. In the emergence of this development on our coasts; Certain economic developments and industrial demands, as well as some legal arrangements, have had a significant impact. Especially after 1997, there has been an explosion of demand in this area with the opening of private port investments on the coasts. In the process up to the present day, apart from the privatized public ports, there has also been a growth in port areas with the expansion projects of new port areas and piers in industrial zones on the seashore such as Kocaeli, İskenderun and Aliağa.

On the other hand, in order to determine the situation of the fishermen's shelters in our country and to complete the technical deficiencies needed by our fishermen's shelters, the "Fishermen's Shelters Needs Analysis Study" was prepared by the Ministry and an inventory was prepared. The increasing tourism potential of our country and the policies created to increase the share of yacht tourism in the Mediterranean basin increase the number of marinas. In addition, it is aimed to meet the targets envisaged for the tourism coastal structures that have been completed by the public and private sectors, and the capacity needed in addition to the marinas that are still in operation.

In order to meet the capacity needed in addition to the marinas that have been realized and are still operated by the public and private sectors in the maritime sector, it is of great importance to establish the mandatory infrastructure for yacht tourism with public facilities, Build-Operate-Transfer model and private sector dynamics and to determine the privileged role of our country in the region in terms of tourism.

When we look at the 2023 Strategic Plan published by the Ministry of Transport and Infrastructure; Within the scope of developing maritime and disseminating maritime culture, objectives such as increasing navigation, life, property and environmental safety in seas and inland waters, developing maritime culture in our country, planning coastal and marine structures in order to ensure effective and efficient use of the coasts, and contributing to the development of the maritime industry and ship industry have been determined.

Graph 48. Existing Coastal Structures in Our Country



Source: Ministry of Transport and Infrastructure

Coasts, which allow many types of use, are natural resources whose use can be increased with planned use and whose quality can be deteriorated by bad and incorrect use. In our country, where the concept of coastal area is of great importance, coastal areas should be approached with a more holistic approach in order to protect our existing coastal resources. In order to protect our coasts and ensure their effective use, primarily; The Ministry of Transport and Infrastructure has initiated a study in order to handle the pipeline and buoy systems, which are densely located in Samsun-Kirazlık, Ambarlı, Antalya, Mersin and Tekirdağ regions and built to handle fuel products, with separate pipelines over a common platform/terminal system, and survey-project studies for the Antalya Region are continuing.

The studies were also shared with the relevant institutions, and the support of the Ministry of Environment and Urbanization, the Ministry of Treasury and Finance and the Ministry of Commerce was received in this regard. In order to make the people of our country love the sea more and to ensure that our people benefit more from the sea, the "Survey Project of Safe Shelters and Mooring Systems on Our Coasts" has been carried out especially on the Aegean and Mediterranean coasts where the occupancy rates of marinas are high and subsequently for the whole of our country, and as a result, it is aimed to solve the mooring problem, which is the biggest problem of private boat owners.

In order to establish a legal infrastructure for the solution of some of the need for shelter and mooring places in our country and to facilitate the process, "vault systems" have been defined in the legislation. It is stipulated that the procedures and principles regarding the implementation of these systems will be determined by the work of the Ministry of Environment and Urbanization and the Ministry of Transport and Infrastructure. In this direction, especially in the coastal areas and bays where boat traffic is intense, we continue to work on legislation for the establishment and operation of vault systems that meet the necessary criteria in terms of navigation safety and maritime safety, suitable for navigation, life, property and environmental safety, without being subject to private ownership, without preventing the use of the coast for the public benefit.

6.1.1. Ports

6.1.1.1. Port Investment Projects in Türkiye

In 2010, the Transportation Coastal Structures Master Plan study was carried out and the plan in question; It has put forward the port needs analysis on the coasts of our country and the 3 main port projects (Filyos, Çandarlı, Mersin) planned by the Ministry of Transport and Infrastructure at the point of basic suggestions. When we look at the List of Important Projects Completed by the Ministry of Transport and Infrastructure of the Republic of Türkiye 2002-2022, which is in the publication of Reaching and Accessing Türkiye 2002-2022, it was stated that 15 port projects, especially Filyos, Çandarlı and Mersin Ports, were completed.

In the statement made by the Minister of Transport and Infrastructure, Abdülkadir Uraloğlu, it was stated that at the point of opening Filyos Port to maritime transportation, within a period of 2 years, Karabük will give the load to normal maritime trade and transportation and will use it intensively.

Filyos Port Project, Türkiye is working to increase the competitiveness of the industry, increase its productivity, and produce high value-added and advanced technology products in order to reach the 2023 vision set by Türkiye and to be among the top 10 economies in the world. For this purpose, it has started to create suitable physical infrastructure and facilities for production and trade.

Filyos Industrial Zone, Türkiye's first mega industrial zone, Filyos Free Zone in the south and Filyos Port, one of the largest ports in Türkiye, are also located in the Filyos Investment Basin and are a national investment project that Türkiye attaches great importance to. With the project, it is planned to create new transportation corridors, reduce the traffic load of the Istanbul and Dardanelles Straits, increase qualified production, and develop national and international transportation and trade.

Filyos Port is one of the three major investments planned to meet Türkiye's increasing foreign trade and to ensure that it becomes a regional transshipment hub. It is located on the Western Black Sea coast of Türkiye, within the borders of Zonguldak province.

Within the scope of the project;

- 2450 m long main breakwater,
- 1370 m long secondary breakwater,
- Dock 3000 m long (-14 m and -19 m deep),

The infrastructure construction works of Filyos Port, which is one of the large-scale regional main port projects, have been completed; It has a total cargo handling capacity of 25 million tons, including general cargo, Ro-Ro, dry bulk cargo and containers. It is also aimed to carry out the construction of the road and railway connection of the port, where survey project studies are being carried out. The port, which has an infrastructure cost of 2,226 million TL, was opened on June 4, 2021, and the tender of its superstructure with the BOT model has started.

6.1.1.2. Current Status of Ports

The number of ships calling at our ports in 2023 decreased by 3.7% increased to 2022 and reached 60,195. The number of foreign flagged ships calling at our ports increased by 2.0% compared to the previous year, and the number of Turkish flagged ships increased by 7.6%.

Table 51. Total Number of Calling Vessel, 2021-2023

Months	2021			2022			2023		
	Turkish Flag	Foreign Flag	Total	Turkish Flag	Foreign Flag	Total	Turkish Flag	Foreign Flag	Total
January	1,212	2,796	4,008	1,158	2,808	3,966	1,272	3,076	4,348
February	1,097	2,713	3,810	1,145	2,758	3,903	1,135	2,691	3,826
March	1,182	3,022	4,204	1,198	2,882	4,080	1,294	3,330	4,624
April	1,274	3,108	4,382	1,355	3,118	4,473	1,471	3,350	4,821
May	1,354	3,005	4,359	1,736	3,363	5,099	1,679	3,882	5,561
June	1,340	3,015	4,355	1,794	3,464	5,258	1,867	3,793	5,660
July	1,291	2,913	4,204	1,835	3,479	5,314	1,975	3,636	5,611
August	1,418	3,205	4,623	1,799	3,752	5,551	1,976	3,696	5,672
September	1,274	3,137	4,411	1,661	3,859	5,520	1,883	3,599	5,482
October	1,244	3,114	4,358	1,589	3,843	5,432	1,817	3,766	5,583
November	1,244	3,001	4,245	1,292	3,466	4,758	1,401	2,909	4,310
December	1,190	3,050	4,240	1,359	3,339	4,698	1,507	3,190	4,697
Total	**15,120**	**36,079**	**51,199**	**17,921**	**40,131**	**58,052**	**19,277**	**40,918**	**60,195**

Source: Ministry of Transport and Infrastructure

Table 52. Calling Vessel Statistics at Turkish Ports According to the Harbour Masters Area of Jurisdiction

Harbour Master	2021 Total		2022 Total		2023 Total	
	NO. of Ship	Gross Tonnage	NO. of Ship	Gross Tonnage	NO. of Ship	Gross Tonnage
Alanya	19	733,388	29	1,021,163	43	1,607,915
Aliağa	5,783	109,543,467	6,067	115,127,698	6,329	121,843,279
Amasra	2	1,985	10	310,441	22	773,125
Ambarlı	3,453	84,542,039	3,895	77,363,575	4,256	82,479,123
Anamur	1	2,491	0	0	0	0
Antalya	748	8,598,254	690	8,700,424	668	8,905,864
Ayvalık	15	5,881	477	168,959	650	245,150
Bandıma	1,040	5,479,378	1,061	5,648,654	899	5,168,277
Bartın	512	1,745,879	364	1,284,167	334	1,208,980
Bodrum	5	70,458	2,071	5,978,174	2,790	6,015,895
Bozcaada	8	22,838	11	409,360	20	471,827
Ceyhan	1,183	44,188,601	1,293	47,912,867	1,207	37,887,528
Cide	0	0	0	0	10	7,812
Çanakkale	468	3,364,611	522	3,998,991	593	4,079,733
Çeşme	505	4,877,177	1,458	7,083,367	2,040	7,415,477
Datça	0	0	1	43,188	5	4,723
Dikili	134	420,434	185	1,083,514	134	857,870

Harbour Master	2021 Total		2022 Total		2023 Total	
	NO. of Ship	Gross Tonnage	NO. of Ship	Gross Tonnage	NO. of Ship	Gross Tonnage
Enez	0	0	0	0	15	1,532,817
Erdek	56	15,594	0	0	1	1,462
Fatsa	37	95,076	40	89,319	29	72,638
Fethiye	73	516,702	413	660,115	462	475,124
Finike	1	2,659	2	998	1	2,643
Gemlik	3,504	60,977,094	3,485	57,398,019	3,405	57,110,096
Giresun	154	992,953	90	768,032	122	754,980
Göcek	14	27,972	23	47,454	26	53,448
Güllük	531	5,682,217	557	5,619,840	389	3,822,886
Hopa	146	487,989	140	509,520	162	529,137
İğneada	1	6,074	0	0	0	0
İnebolu	95	321,547	79	261,533	81	281,430
İskenderun	4,634	80,686,077	4,694	76,916,598	3,927	72,769,296
İstanbul	538	6,227,847	1,375	28,571,617	1,585	34,598,738
İzmir	1,530	22,619,154	1,586	22,482,893	1,607	21,827,035
Karabiga	940	9,449,840	996	8,984,559	864	8,421,771
Karadeniz Ereğli	883	9,532,736	818	7,869,189	612	7,410,125
Karasu	477	6,115,714	388	2,946,298	428	2,810,453
Karataş	0	0	0	0	1	6,881
Kaş	8	10,259	31	76,850	6	133,973
Kefken	0	0	0	0	1	834
Kocaeli	9,554	154,977,812	9,321	156,056,459	9,560	170,788,848
Kuşadası	33	1,071,672	967	26,003,369	1,236	31,481,494
Marmara Adası	791	1,113,540	734	1,031,163	1,199	1,463,291
Marmaris	39	2,005,793	367	932,833	563	1,831,430
Mersin	4,122	80,798,905	4,257	74,375,125	3,933	67,592,320
Mudanya	0	0	1	1,998	130	116,534
Rize	155	530,841	117	430,269	128	426,352
Samsun	2,711	16,880,372	2,789	17,644,182	2,814	17,932,941
Silivri	2	2,793	10	5,152	77	56,215
Sinop	0	0	17	551,629	13	471,412
Sürmene	3	682	10	4,153	1	420
Taşucu	790	6,309,202	989	7,665,864	1,157	7,875,563
Tekirdağ	2,712	63,031,782	2,845	60,305,866	2,918	63,515,954
Tirebolu	50	406,370	60	521,090	73	561,691
Trabzon	407	2,669,160	414	2,995,025	490	4,096,016
Tuzla	779	15,152,458	796	15,770,190	856	15,681,973
Ünye	284	839,965	253	865,167	290	1,451,262
Yalova	565	8,847,130	549	10,122,512	475	9,724,655
Zonguldak	704	7,615,241	705	8,710,208	558	7,403,227
Toplam	**51,199**	**829,618,101**	**58,052**	**873,329,628**	**60,195**	**894,059,943**

Source: Ministry of Transport and Infrastructure

According to the data of the Ministry of Transport and Infrastructure, Maritime Affairs and Communications, 521,079,804 tons of cargo were handled in our country's ports and piers in 2023.

Of the total cargo handled in 2023;

- 26.0% (135,510,681 tons) of export,
- 49.2% (256,206,627 tons) of import,
- 12.0% (62,627,093 tons) of cabotage,
- 12.8% (66,735,403 tons) of it was realized as transit.

Table 53. Cargo Handling Figures at Turkish Port, 2019-2023

Mode of Transport	Flag	2019	2020	2021	2022	2023
Export	Turkish Flag	14,132,161	13,580,911	14,742,145	13,808,674	13,423,790
	Foreign Flag	117,544,417	125,321,912	139,021,513	136,364,228	122,086,891
	Total	131,676,578	138,902,823	153,763,658	150,172,902	135,510,681
Import	Turkish Flag	13,763,576	16,098,249	15,257,051	14,634,461	15,875,560
	Foreign Flag	207,641,236	210,441,223	217,376,009	229,282,658	240,331,067
	Total	221,404,812	226,539,472	232,633,060	243,917,119	256,206,627
Cabotage	Turkish Flag	28,251,017	29,763,556	31,184,349	34,027,952	31,635,352
	Foreign Flag	27,861,707	29,033,828	30,716,773	33,473,324	30,991,741
	Total	56,112,724	58,797,384	61,901,122	67,501,276	62,627,093
Transit	Turkish Flag	64,960,731	60,490,257	62,603,531	65,949,720	50,808,302
	Foreign Flag	10,013,567	11,912,715	15,405,413	15,069,266	15,927,101
	Total	74,974,298	72,402,972	78,008,944	81,018,986	66,735,403
Total	**Turkish Flag**	**224,888,326**	**229,156,636**	**247,551,538**	**250,150,574**	**217,954,335**
	Foreign Flag	**259,280,086**	**267,486,015**	**278,755,246**	**292,459,709**	**303,125,469**
	Total	**484,168,412**	**496,642,651**	**526,306,784**	**542,610,283**	**521,079,804**

Source: Ministry of Transport and Infrastructure

Table 54. Cargo Handling Statistics at Turkish Ports According to the Harbour Masters Area of Jurisdiction

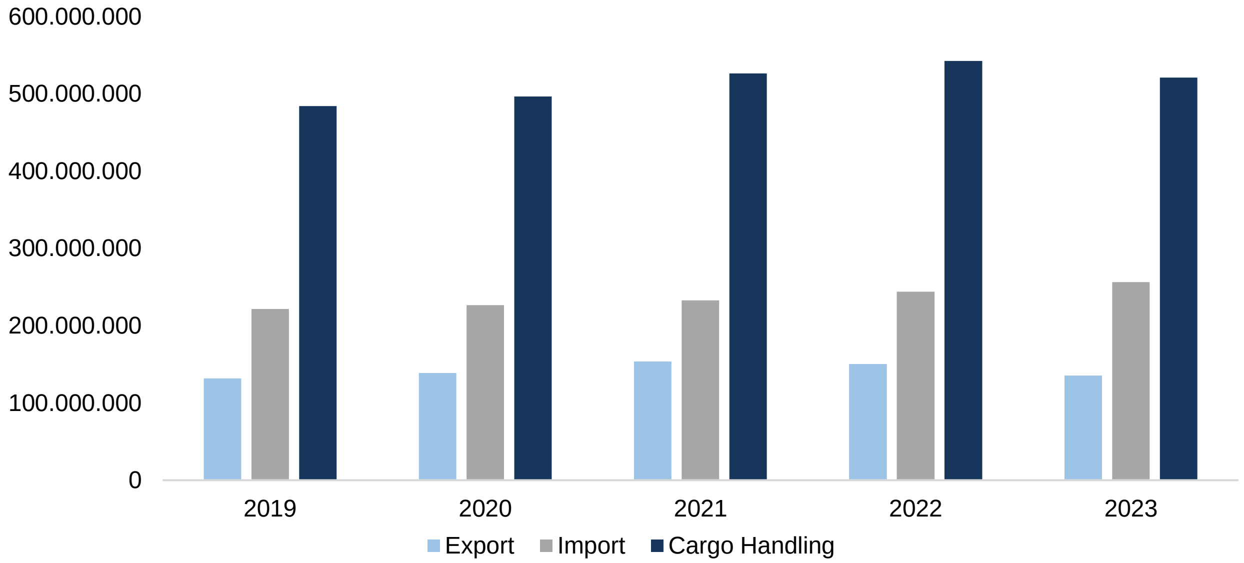
Harbour Master	2022			2023		
	Total Loading	Total Unloading	Cargo Handling	Total Loading	Total Unloading	Cargo Handling
Alanya	0	146,290	146,290	0	313,386	313,386
Aliağa	32,851,690	48,205,245	81,056,935	32,169,319	49,186,296	81,355,615
Amasra	1,695	0	1,695	1,850	0	1,850
Ambarlı	13,743,654	16,988,811	30,732,465	14,175,833	18,421,916	32,597,749
Antalya	3,716,333	3,036,790	6,753,123	2,699,643	3,621,645	6,321,288
Ayvalık	4,557	5	4,562	1,982	3	1,985
Bandıma	1,752,858	4,127,109	5,879,967	1,218,198	3,798,326	5,016,524
Bartın	757,590	698,350	1,455,940	705,402	681,550	1,386,952
Bodrum	0	1,847	1,847	0	0	0
Ceyhan	55,733,914	12,493,520	68,227,434	38,554,155	13,514,098	52,068,253
Çanakkale	3,862,491	541,190	4,403,681	3,869,467	348,668	4,218,135
Çeşme	885,972	831,168	1,717,140	864,259	808,981	1,673,240
Datça	0	0	0	4,335	0	4,335
Dikili	643,438	96,413	739,851	521,710	10,312	532,022
Enez	0	0	0	0	930,915	930,915
Erdek	0	0	0	0	1	1
Fatsa	84,230	29,639	113,869	80,580	16,285	96,865
Gemlik	8,276,184	7,116,927	15,393,111	6,899,650	7,659,267	14,558,917
Giresun	374,332	371,459	745,791	317,378	429,363	746,741
Göcek	0	44,950	44,950	0	51,361	51,361
Güllük	7,860,703	93,882	7,954,585	5,261,158	63,307	5,324,465
Hopa	412,873	203,081	615,954	549,641	147,790	697,431
İnebolu	158,919	82,910	241,829	184,445	115,572	300,017
İskenderun	26,570,580	41,064,957	67,635,537	23,647,419	40,098,651	63,746,070
İstanbul	367,266	3,036,652	3,403,918	141,405	3,505,453	3,646,858
İzmir	3,917,331	4,345,495	8,262,826	3,014,478	4,429,414	7,443,892
Karabiga	2,668,279	11,023,028	13,691,307	1,818,996	10,695,921	12,514,917
Karadeniz Ereğli	1,830,158	8,069,899	9,900,057	1,049,938	8,283,211	9,333,149
Karasu	198,042	1,282,977	1,481,019	188,426	1,191,024	1,379,450
Kocaeli	32,950,733	49,848,471	82,799,204	28,509,480	52,782,064	81,291,544
Marmara Adası	1,595,820	1,340	1,597,160	2,253,798	2,326	2,256,124
Marmaris	7	10,561	10,568	0	8,591	8,591
Mersin	17,561,677	21,334,890	38,896,567	18,063,061	24,652,196	42,715,257
Mudanya	0	700	700	0	0	0
Rize	119,732	383,772	503,504	70,700	427,834	498,534
Samsun	4,000,862	9,583,291	13,584,153	4,180,790	9,995,778	14,176,568
Silivri	0	3,360	3,360	350	47,320	47,670
Sürmene	65	0	65	0	0	0
Taşucu	3,961,428	832,051	4,793,479	3,544,515	754,084	4,298,599
Tekirdağ	16,114,787	28,058,026	44,172,813	16,934,019	28,141,084	45,075,103

Harbour Master	2022			2023		
	Total Loading	Total Unloading	Cargo Handling	Total Loading	Total Unloading	Cargo Handling
Tirebolu	0	400,710	400,710	0	512,071	512,071
Trabzon	395,947	2,073,720	2,469,667	478,736	2,253,205	2,731,941
Tuzla	2,999,121	3,086,844	6,085,965	2,793,764	2,859,565	5,653,329
Ünye	839,927	217,369	1,057,296	890,614	223,195	1,113,809
Yalova	1,305,960	2,238,286	3,544,246	1,141,919	2,177,272	3,319,191
Zonguldak	1,631,419	10,453,724	12,085,143	1,152,922	9,966,168	11,119,090
Total	**250,150,574**	**292,459,709**	**542,610,283**	**217,954,335**	**303,125,469**	**521,079,804**

Source: Ministry of Transport and Infrastructure

In 2023, compared to 2022, the amount of cargo handled at our ports decreased by 4.0% (21,530,479 tons).

Graph 49. Cargo Handling by Years, 2019-2023



Source: Ministry of Transport and Infrastructure

In 2023, the amount of containers screened at the ports and piers of our country was 12,558,424 TEU.

Container handling;

- 38% (4,910,525 TEU) export,
- 39.9% (4,830,826 TEU) import,
- 6.6% (759,611 TEU) of cabotage,
- 16.5% (2,055,439 TEU) was realized as transit.

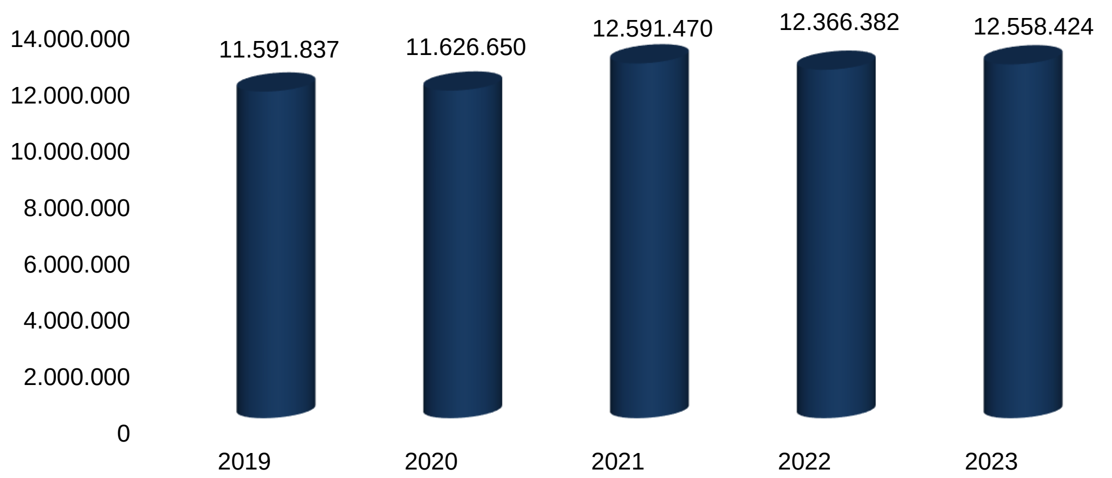
Table 55. Container Handling Figures at Turkish Ports (TEU), 2019-2023

Mode of Transport	2019	2020	2021	2022	2023
Export	4,594,647	4,618,225	4,677,414	4,694,918	4,910,525
Import	4,540,201	4,480,472	4,744,227	4,814,757	4,830,826
Cabotage	753,267	731,352	831,986	820,949	759,611
Transit	1,703,722	1,796,601	2,337,843	2,035,758	2,055,439
Grand Total	**11,591,837**	**11,626,650**	**12,591,470**	**12,366,382**	**12,558,424**

Source: Ministry of Transport and Infrastructure

In 2023, compared to 2022, the amount of containers handled at our ports increased by 1.6% (192,043 TEU).

Graph 50. Container Handling Figures at Turkish Ports (TEU), 2018-2023



Source: Ministry of Transport and Infrastructure, Republic of Türkiye

6.1.1.3. General Developments in World Ports

In 2021, Shangai port is still the port that handles the most containers with 47 million TEU. It is still the top 3 ports that handled the most containers in 2021 compared to the previous year.

Table 56. Most Container Handling Ports in the World (mteu)

Region/Port	2016	2017	2018	2019	2020	2021	2022
Busan	19.5	20.5	21.6	22.0	21.8	22.5	
Colombo	5.7	6.2	7.0	7.2	6.9	7.2	
Guangzhou	18.6	20.1	21.6	22.8	23.2	24.2	
Hong Kong	19.6	20.8	19.6	18.4	18.0	17.9	
Kaohsiung	10.5	10.3	10.4	10.4	9.6	9.9	
Keelung	1.4	1.6	1.5	1.5	1.5	1.6	
Kobe	2.8	2.9	2.9	2.9	2.6	2.8	
Manila	4.5	4.8	5.1	5.3	4.4	5.0	
Nagoya	2.7	2.8	2.9	2.8	2.5	2.7	
Ningbo	21.6	24.6	26.4	27.5	28.7	31.1	
Osaka	2.2	2.3	2.4	2.5	2.4	2.4	
Port Klang	13.2	12.0	12.3	13.6	13.2	13.8	
Qingdao	18.0	18.3	19.3	21.0	22.0	23.7	
Shanghai	37.1	40.2	42.0	43.3	43.5	47.0	
Shenzhen	24.1	25.3	25.7	25.8	26.6	28.8	
Singapore	30.9	33.7	36.6	37.2	36.9	37.5	37.3
Tanjung Priok	5.5	6.9	7.8	7.7	6.9	6.8	
Tianjin	14.5	15.0	16.0	17.3	18.4	20.3	
Tokyo	4.7	5.0	5.1	4.9	4.6	4.5	
Yokohama	2.8	2.9	3.0	3.0	2.7	2.8	
Asia	**396.5**	**422.7**	**446.5**	**459.5**	**459.0**	**493.1**	**485.1**
% y-o-y	*2%*	*7%*	*6%*	*3%*	*0%*	*7%*	*-2%*
Antwerp	10.0	10.5	11.1	11.9	12.0	12.0	
Bremen/Bremerhaven	5.5	5.5	5.5	4.9	4.8	4.8	
Felixstowe	4.1	4.3	3.9	3.6	3.5	3.7	
Hamburg	8.9	8.8	8.7	9.3	8.5	8.7	
Le Havre	2.5	2.9	2.9	2.8	2.4	2.8	
Rotterdam	12.4	13.7	14.5	14.8	14.3	15.3	
Southampton	2.0	2.0	2.0	1.9	1.8	1.9	
Algeciras	4.8	4.4	4.8	5.1	5.1	4.8	4.8
Barcelona	2.2	3.0	3.4	3.3	3.0	3.5	
Genoa	2.4	2.7	2.7	2.7	2.5	4.8	
La Spezia	1.3	1.5	1.5	1.4	1.1	1.3	
Marseilles/Fos	1.3	1.4	1.4	1.5	1.3	1.5	

NW and Med Europe	**132.6**	**139.3**	**146.5**	**149.4**	**144.8**	**152.6**	**142.1**
% y-o-y	*3%*	*5%*	*5%*	*2%*	*-3%*	*5%*	*-7%*
Charleston	2.0	2.2	2.3	2.4	2.3	2.8	2.8
Hampton Roads	2.7	2.8	2.9	2.9	2.8	3.5	
Long Beach	6.8	7.5	8.1	7.6	8.1	9.4	9.1
Los Angeles	8.9	9.3	9.5	9.3	9.2	10.7	9.9
Montreal	1.4	1.5	1.7	1.7	1.6	1.7	
New York/New Jersey	6.3	6.7	7.2	7.5	7.6	9.0	
Oakland	2.4	2.4	2.5	2.5	2.5	2.4	2.3
Seattle-Tacoma	3.6	3.7	3.8	3.8	3.3	3.7	3.4
Vancouver	2.9	3.3	3.4	3.4	3.5	3.6	3.6
N America	**59.9**	**64.9**	**68.5**	**69.4**	**67.6**	**78.0**	**77.3**
% y-o-y	*1%*	*8%*	*6%*	*%*	*-3%*	*15%*	*-1%*
Dubai	14.8	15.4	15.0	14.1	13.5	13.7	
Jawaharlal Nehru	4.5	4.7	5.1	5.1	4.5	5.6	6.0
Mundra	4.8	4.2	4.4	4.8	5.7	6.7	
Mittle East and ISC	**64.4**	**70.4**	**73.1**	**73.9**	**72.7**	**77.9**	**77.4**
% y-o-y	*2%*	*9%*	*4%*	*1%*	*-2%*	*7%*	*-1%*
Buenos Aires	1.4	1.5	1.8	1.5	1.4	1.4	
San Juan	1.3	1.2	1.4	1.5	1.5	1.4	
Santos	3.6	3.9	4.1	4.2	4.2	4.4	
C and S America	**43.5**	**45.4**	**47.7**	**47.6**	**47.4**	**52.3**	**50.4**
% yıllık değişim	*-2%*	*4%*	*5%*	*0%*	*0%*	*10%*	*-4%*
Sydney	2.4	2.5	2.6	2.6	2.5	2.8	
Melbourne	2.7	2.8	3.0	3.0	1.3	3.3	
Oceania	**11.7**	**12.2**	**12.9**	**12.9**	**12.7**	**12.5**	**12.3**
% y-o-y	*0%*	*5%*	*6%*	*0%*	*-2%*	*-2%*	*-2%*
Durban	2.6	2.7	3.0	2.8	2.6	2.4	
Mombasa	1.1	1.2	1.3	1.4	1.4	1.4	
Cape Town	0.9	0.9	0.9	0.9	0.8		
Africa	**14.1**	**15.6**	**16.4**	**16.4**	**16.0**	**16.6**	**16.4**
% y-o-y	*-2%*	*11%*	*5%*	*0%*	*-3%*	*4%*	*-1%*

Source: Clarksons Research, İMEAK Chamber of Shipping Images

6.1.2. Shipyard

The history of shipyards in our country dates back to the Seljuk period. It is known that Turkish shipyard in Anatolian lands has a history of about nine hundred years, starting with Çaka Bey, who is considered the first Turkish sailor and the founder of Turkish maritime. It can be defined as coastal structures where commercial or touristic passenger, cargo, war, industrial, etc. ships and yachts are built, modified, maintained and repaired, stagnant water can be supplied with breakwaters, floating docks, technical and social infrastructure, management and storage units. It begins with Emir Çaka Bey establishing the first shipyard in 1081 and building the first Turkish navy of 50 pieces.

The most important facility built in the field of maritime during the Seljuk period is the Alaiye (Alanya) shipyard. This shipyard, which was built in 1227, is still standing even though nearly eight centuries have passed since its construction.

The processes that started with the Gallipoli shipyard in 1390 and the Golden Horn shipyard in 1455 have continued in accordance with the changing technologies until today.

When a comparison is made between 2003 and 2022 regarding the active shipyards and shipbreaking facilities in our country, the number of shipyards, which was 37 in 2003, increased by 130% to 85 in 2023;

- In 2003, there were 37 shipyards and a project capacity of 550,000 DWT.
- In 2023, it is seen that 85 shipyards and a project capacity of 4.8 million DWT have been reached.

Figure 1. Distribution of Active Shipyard and Ship Dismantling Facilities by Province

Source: Ministry of Transport and Infrastructure

6.1.3. Ship Recycling Industry

Ship recycling sector; The withdrawal of ships that have completed their economic life from the voyages and the replacement of new ships find their place in a natural technological process that is safer and environmentally friendly, has more operational efficiency and reduces maritime risks.

Ship recycling is among the types of industries that protect the environment and is also called "green industry", which plays an active role in maintaining the ecological balance. The conversion process is undoubtedly the most "environmentally friendly" way of disposal of ships that have reached the end of their operating life, and almost every material within the ship can be recycled or reused as it is or overhauled.

While the ship recycling industry provides positive added value to economies, it involves serious risks in terms of health and safety. In this industry, it is necessary to conduct risk analysis and meet safety requirements in operations in order to prevent or at least reduce potential risks.

Since 1976, shipbreaking activities have been carried out only in Aliağa district of Izmir Province in our country, and 23 facilities belonging to private enterprises operate on the 1,300-meter coastline. According to the data obtained from the Ministry of Transport and Infrastructure, the tonnage of recycling ships, which was 557 GT in 2009, is 564 GT in 2023.

6.1.4. Marina, Boat Manufacturing and Boatyard

When we look at the 2023 targets for strengthening the marine tourism infrastructure within the framework of the regulations related to the transportation system of the Ministry of Culture and Tourism Türkiye Tourism Strategy; In order to include Brand Cities in the Cruise Tourism routes, there are issues such as increasing the number of cruise ports, developing public transportation systems and port backyard infrastructure that will provide urban connection with existing Piers and Ports, and developing infrastructures for the construction of reception facilities and floating collection systems in ports where yachts' sewage, bilge water and solid wastes will be given.

It is aimed to meet the needs of the marinas in addition to the marinas currently in operation with the targets envisaged for the tourism coastal structures whose construction has been completed by the public and private sectors. In line with this purpose, public facilities, the BOT model and private sector dynamics are of great importance for the creation of the mandatory infrastructure for yacht tourism and for determining the privileged role of our country in the region in terms of tourism. There are 62 marinas operated by the public and private sectors in our country. Our current berthing capacity is 18,545 yachts and the total yacht mooring capacity has exceeded 25,000 with the investments made by the private sector.

The construction of Aydıncık, Demre and Gazipaşa Marinas continues, and survey project works are continuing for Samsun Kurupelit and Özdere, Dikili, Çeşme Şifne, Çeşmealtı and Şakran marinas on the coasts of Izmir.

The number of Boat Manufacturing and Boatyards (including both in-scope and out-of-scope) increased by 19% to 984 in 2023 from 697 in 2016.

Table 57. Number of Boat Manufacturing and Boatyard Facilities by Years

Year	Number of Boat Manufacturing and Boatyard Facilities
2016	697
2017	724
2018	744
2019	780
2020	815
2021	819
2022	917
2023	984

Source: Ministry of Transport and Infrastructure
(Note: The relevant statistics include In-scope and out-of-scope Boat Manufacturing and Boatyard data.)

Izmir Çaltılıdere Boat Manufacturing and Boatyard Project, which is expected to become the largest boat manufacturing site in Europe, continues, and Bartın Kurucaşile Boat Manufacturing Site Project has been implemented and started its activities.

- İzmir Çaltılıdere Boat Manufacturing Place (Preliminary permission contract has been signed. The renewal of the EIA Not Required letter continues. The infrastructure will be built by the Ministry of Transport and Infrastructure.)
- Fethiye Karaot Boat Manufacturing and Boatyard (An application has been made to the General Directorate of Protection of Natural Assets by the relevant cooperative for the approval of the zoning plan.)
- Bodrum Ruins Boat Manufacturing and Boatyard (Preliminary permit contract has been signed and construction licenses have been obtained.
- Marmaris Bozburun Boat Manufacturing and Boatyard (After the geological survey report, the proposal plan will be submitted for approval.)
- Manavgat Boat Manufacturing and Boatyard (Preliminary permit contract was signed, plan approval process was started in February 2016. The Ministry of Culture and Tourism wants the project to be moved to an unsuitable alternative area.)
- Bartın Tekkeönü Boat Manufacturing and Boatyard (General Layout Plan has been approved by the Ministry. The site allocation process has been initiated through the relevant governorship.)
- Bartın Kurucaşile Boat Manufacturing and Boatyard (It has been deemed appropriate to allocate to the cooperative. However, the cooperative has not yet been established.

With the Build-Operate-Transfer model, 1 Golden Horn Marina and Complex project was completed until 2003, while the total number of Marinas whose construction has been completed and continues has been increased to 12 today.

6.1.5. Fishermen's Shelters

While there were 178 fishermen's shelters in our country in 2003, this number reached 385. In 18 years, 207 fishermen's shelters have been completed.

In order to carry out the works and transactions related to Fishermen's Shelters effectively throughout the country, the Fishermen's Shelters Needs Analysis Project has been prepared and included in the 2022 State Investment Program. At the same time, an action plan and necessary legal arrangements will be made for the introduction of fishermen's shelters in the Marmara and Black Sea to yacht tourism. (Ministry of Culture and Tourism Tükiye Tourism Strategy 2023)

On the other hand, in order to determine the situation for the fishermen's shelters in our country and to complete the technical deficiencies needed by our fishermen's shelters, the "Fishermen's Shelters Needs Analysis Study" was carried out by the Ministry of Transport and Infrastructure and an inventory was prepared.

Fishermen's Shelters Under Construction

- Giresun Fisherman's Shelter (DOKAP)
- Çayeli Fisherman's Shelter Supply Construction
- Iskenderun Fisherman's Shelter Repair Construction
- Construction of Iskenderun Fishermen's Shelter and Interaction Zone Part I
- Tarlaağzı Fisherman's Shelter Repair Construction

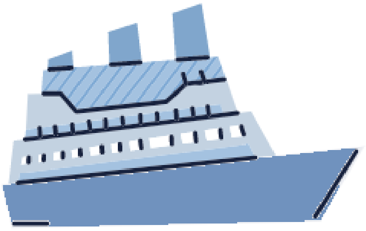
Ongoing Fishermen's Shelters Survey Project Works

- Anadolu Feneri Fisherman's Shelter Survey Project Works-Istanbul
- Garipçe Village Fisherman's Shelter Survey Project Works-Istanbul
- Anadolu Kavağı Fisherman's Shelter Survey Project Works-Istanbul
- Yalıköy Fisherman's Shelter Survey Project Works-Istanbul
- Körfez Atalar Fisherman's Shelter Survey Project Works-Kocaeli
- Tütünçiftlik Fisherman's Shelter Survey Project Works-Kocaeli
- Rumeli Kavağı Fisherman's Bar. Survey Project Works-Istanbul
- Poyrazköy Fisherman's Shelter Survey Project Works-Istanbul
- Narlıdere Fishermen's Shelter Breakwater Extension Zoning Plan and EIA Survey-İzmir
- Ahmetbeyli Fishermen's Shelter Final Project, Zoning Plan and Reports, Preparation of EIA and Feasibility Report-İzmir
- Doğanbey-Payamlı Fishermen's Shelter Conservation Zoning Plan Preparation-İzmir
- Erdek İlhanlar Fisherman's Shelter Beach Arrangement Sand Trap Spur EIA and Zoning Plan Study-Balıkesir
- Kilitbahir Fisherman's Shelter Survey Project Works-Çanakkle
- Koruköy Fisherman's Shelter Survey and Project Works-Yalova
- Çanakkale Lapseki Şevketiye Fishermen's Shelter Zoning Plan EIA and Final Project Preparation-Çanakkale

- Adana Karataş Fishermen's Shelter Development Construction and Karataş Pier Survey Project Works-Adana
- Tatvan Central Fishermen's Shelter Construction Survey Project Works-Bitlis
- Taşucu Fishermen's Shelter Development Construction Survey Project Works-Mersin
- Gazipaşa Uğrak-Yeşilöz Fisherman's Shelter Survey Project Works-Antalya
- Eğirdir Fisherman's Shelter Zoning Plan Preparation-Isparta
- Hatay Arsuz Fisherman's Shelter Survey Project Works-Hatay
- Taşucu Marina and Fisherman's Bar. EIA Research-Mersin
- Akçaabat Darıca Fishermen's Shelter Survey Project Works-Trabzon
- İnebolu Fishermen's Shelter Survey-Project Works-Kastamonu
- Kartal Fisherman's Shelter Survey Project Works-Istanbul
- Selimpaşa Fisherman's Shelter Survey Project Works-Istanbul
- Igneada Fisherman's Shelter Survey Project Works-Kırklarelı
- Bosphorus Fisherman's Shelter Survey Project Works-Muğla
- Çardak Fisherman's Shelter Survey Project Works-Çanakkale
- Iskenderun Fisherman's Shelter Survey Project Works-Hatay
- Trabzon Akyazı Fisherman's Shelter Survey Project Works-Trabzon
- Alaplı Fisherman's Shelter Spur Addition Survey Project Works-Zonguldak
- Araklı Fishermen's Shelter Survey Project Works-Trabzon
- Evrenye Fisherman's Bar. Dock Addition Survey Project Works-Kastamonu
- Çatalca Yalıköy Fisherman's Shelter Survey Project Works-Istanbul
- Sığacık (Girlen) Fisherman's Shelter Survey Project Works-İzmir
- New Port Fishermen's Shelter Zoning Plan and Çed Ören (Türkevleri) Fishermen's Shelter Survey Project Works-Muğla
- Anamur Fisherman's Shelter Survey Project Works-Mersin
- Preparation of Sarıidris Fishermen's Shelter Zoning Plan-Isparta
- Kumluca Mavikent-Karaöz Fisherman's Shelter Survey Project Works-Antalya
- Gerze Fishermen's Shelter Capacity Increase and Breakwater Extension ETP-Sinop
- Giresun Sailors Fishermen's Shelter Survey Project Works-Giresun
- Karabiga Port and Fisherman's Shelter Survey Project Works-Çanakkale
- Giresun Sailors and Üçkayalar Boatyard Supply Construction Etp-Giresun

CHAPTER VII

MARINE TOURISM



7. MARINE TOURISM

Marine Tourism consists of Yachting, Daily Boat Trip, Yacht Port and Cruise Port Administrations, Cruise and Ferryboat Administrations, Underwater Diving and Water Sports.

Vocational activities for tourism purposes carried out with various sea and water vehicles for excursion, sports and entertainment purposes in sea and inland waters are defined as "MARINE TOURISM".

Until today, developments in the Marine Tourism sector have increased and diversified the opportunities for people to benefit from the sea. Yachting, which was considered as a sport, sea-oriented entertainment and recreation tool for an elite group, has become a part of international tourism movements.

The Mediterranean basin, which is one of the important regions where world yacht tourism is concentrated, increases its attractiveness for both commercial and amateur yachtsmen day by day.

These developments in marine tourism have also positively affected our country, which has the cleanest and most beautiful coasts of the Mediterranean, with traces of history and unspoiled coves. Although yachting, which started as day trips with small boats or short boarding trips, has a long history compared to other types of tourism in Türkiye, it has become a part of mass tourism in the last twenty years and has shown a rapid development as a fleet with more than a thousand yachts and bed capacity.

Our Blue Voyage fleet, which is formed by our wooden yachts (gulets) built with traditional Mediterranean boat building methods, is the first and only in the world, and the Blue Voyage has become a unique tourism branch with a brand value that our country has given to world tourism.

Table 58. Yachting Companies Licenced by the Ministry of Culture and Tourism

Years	Number of Business			Number of Yacht			Number of Bed		
	Domestic	Foreign	Total	Domestic	Foreign	Total	Domestic	Foreign	Total
2002	96	10	106	725	369	1,094	6,774	2,457	9,231
2003	97	9	106	725	333	1,058	6,905	2,329	9,234
2004	83	8	91	699	294	993	6,377	2,11	8,487
2005	76	10	86	723	345	1,068	6,394	2,486	8,880
2006	60	11	71	666	395	1,061	5,398	2,764	8,162
2007	58	11	69	845	381	1,226	6,764	2,748	9,512
2008	61	15	76	990	431	1,421	8,051	3,116	11,167
2009	53	18	71	943	433	1,376	7,443	3,191	10,634
2010	59	17	76	521	438	959	4,851	3,240	8,091
2011	308	18	326	992	868	1,86	10,292	7,199	17,491
2012	944	10	954	1,246	829	2,075	13,203	6,567	19,770
2013	857	26	883	1,529	871	2,400	15,312	6,911	22,223
2014	857	27	884	1,529	838	2,367	15,312	6,674	21,986
2015	857	27	884	1,529	826	2,355	15,312	6,626	21,938
2016	1,142	26	1,168	1,538	608	2,146	16,030	5,100	21,130
2017	1,150	20	1,170	1,557	312	1,869	16,153	2,532	18,658
2018	1,159	18	1,177	1,572	251	1,823	16,150	2,043	18,193
2019	1,345	11	1,356	1,820	160	1,980	17,943	1,219	19,162
2020	1,451	-	1,451	1,947	-	1,947	18,576	-	18,576
2021	1,980	-	1,980	2,505	-	2,505	21,248	-	21,248
2022	2,221	-	2,221	2,745	-	2,745	23,055	-	23,055
2023	2,225	-	2,225	2,746	-	2,746	23,047	-	23,047

Source: Ministry of Culter & Tourism

Marine tourism service trade, which includes yacht investments and operations, marina investments and operations, scuba diving activities for sportive purposes, water sports, amateur maritime activities and daily excursions with sea vehicles, increases its capacity in the international arena day by day.

Marine tourism, which started to develop in our country after the 60s, has an important 25% place in the general tourism sector with its social and economic contribution as well as its contribution to promotional activities and the foreign exchange input it provides.

The most prominent success of the Turkish Chamber of Shipping has become to define and to establish the concept of "Maritime Tourism" in the Shipping Sector and also at various platforms.

7.1. Yacht Tourism

Yacht building industry in Türkiye, 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.

Table 59. Marine Tourism Vessels With Tourism Administration Certificate (2023)

Marine Tourism Vessels	Number of Business	Number of Yacht	Number of Beds
Business Tourism Documentation of Turkish Flag Yacht	2,218	2,742	23,047

Marine Tourism Vessels	Number of Business	Number of Vessels	Passenger Capacity
Business Tourism Documentation of One a Day Trip	2,085	2,218	117,508

Marine Tourism Vessels	Number of Business	Number of Vessels	Passenger Capacity (Summer/Winter)
Business Tourism Documentation of Restaurant Ship	38	38	17,076/12,588

Source: Ministry of Culter & Tourism

7.2. Blue Voyage

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

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

Since the 60’s Türkiye protects sustain in the building of these traditional boats in many areas on our coasts.

In the 60’s the sponge fisherman used to use the same boats for fishing purposes. The first blue cruises that were done by the Fisherman of Halicarnassus and his friends, the esteemed intellectuals of the time, went on cruises where there was no electricity no bathroom and kitchen

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

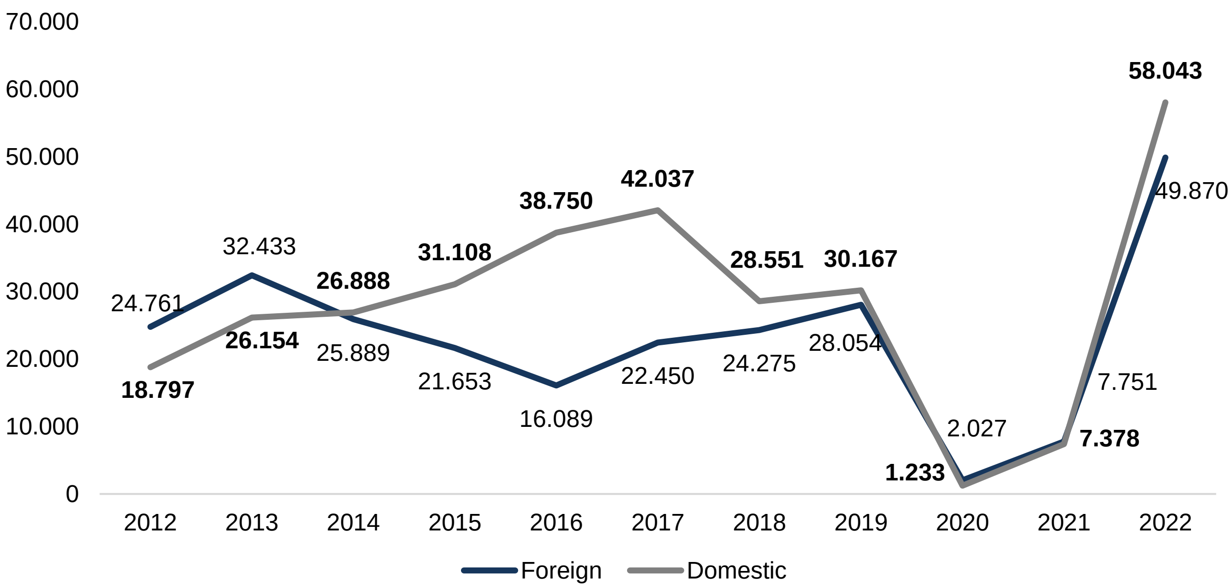
Blue Voyage Routes on the Aegean Routes

Blue Voyage Routes on the Mediterraean Routes

The route of the Blue Voyage from Bodrum down to Antalya covers and area of 264 sea miles. This route is shortened or lengthened according to the wish of the guests from aboard.

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

Graph 51. Distribution of the Yachtsmen and the Crew Members of the Flag Q Yacths (for Commercial + Private use) Arrived in Turkish Ports by Years



Source: Ministry of Transport and Infrastructure

Table 60. Distribution of the Yachtsmen and the Crew Members of the Flag Q Yachts Arrived in Turkish Ports by their Nationalities and Years 2022

Nationality	Yachtsmen		Crew Member		Total		TOTAL
	Commercial	Private	Commercial	Private	Commercial	Private	
Germany	2,259	877	285	414	2,544	1,291	**3,835**
Austria	288	258	48	55	336	313	**649**
Belgium	238	173	24	53	262	226	**488**
Denmark	147	34	17	35	164	69	**233**
Finland	50	13	9	11	59	24	**83**
France	594	623	78	313	672	936	**1,608**
Netherlands	995	222	117	119	1,112	341	**1,453**
U. Kingdom	5,213	1,090	792	1,533	6,005	2,623	**8,628**
Ireland	278	83	42	97	320	180	**500**
Spain	1,027	302	48	156	1,075	458	**1,533**
Sweden	97	83	29	97	126	180	**306**
Italy	780	680	125	494	905	1,174	**2,079**
Luxembourg	11	36	2	6	13	42	**55**
Portugal	171	165	8	64	179	229	**408**
Greece	238	530	495	580	733	1,110	**1,843**
Czech Rep.	65	51	13	7	78	58	**136**
Switzerland	384	340	36	105	420	445	**865**
Iceland	11	24	1	7	12	31	**43**
Hungary	55	60	11	16	66	76	**142**
Norway	58	58	5	15	63	73	**136**
U.S.A	2,726	1,085	68	194	2,794	1,279	**4,073**
Australia	575	209	44	204	619	413	**1,032**
Japan	12	6	1	2	13	8	**21**
Canada	299	304	9	104	308	408	**716**
Mexico	164	108	2	40	166	148	**314**
New Zealand	100	67	31	115	131	182	**313**
Serbia	23	42	22	140	45	182	**227**
Malta	59	38	4	10	63	48	**111**
Israel	540	977	43	205	583	1,182	**1,765**
Others	7,484	3,481	1,726	3,584	9,210	7,065	**16,275**
T. Foreign	**24,941**	**12,019**	**4,135**	**8,775**	**29,076**	**20,794**	49,870
Türkiye	17,471	15,010	13,227	12,335	30,698	27,345	**58,043**
Grand Total	**42,412**	**27,029**	**17,362**	**21,110**	**59,774**	**48,139**	**107,913**

Source: Ministery of Culture &Tourism

Five Blue Voyage Routes in Anatolia

Bodrum-Gökova

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

Orak Island, Çiftlik, and Bitez, the ships return to Bodrum.

Places: Bodrum in Türkiye

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

Datça-Bozburun

The boats take off from Datça Harbor and follow the path of the coves buried like so many treasures in the peninsula. The boat moves on to the Gulf of Hisarönü. Dişlice Island, at the entrance of Bencik Harbor, conceals small beaches on its shores. Orhaniye, our first stop on the Bozburun Peninsula, shines like a blue bead amid lush green forests. The walls on the island located in the middle of the cove were used as watchtowers during the Byzantine era. Kızkumu, one of the most favored beaches in the region, is a shallow sandbar that stretches out to the sea like an extended tongue. Selimiye, which boats reach after a dance with blue and green, is a small fishermen's village filled with seafood restaurants. After Bozburun-the center of the peninsula-the boats pass by Simi Island and reach Bozukkale. There are the ruins of the ancient city of Loryma in this cove, which is surrounded by steep hills. The next stop is Serçe Harbor, which has many sunken ships off its shores. After here, optionally, a route that visits Çiftlik, Kadırga, and Turunç respectively can be followed. All Blue Voyage vessels that hold permits to carry passengers for touristic purposes must comply to standards set by the Ministry of Cultur and Tourism. No voyages take place in weather and sea conditions seen as unfit by the Port Authorities, Coast Guard, and Meteorological Service.

Marmaris-Fethiye

Starting in Marmaris, which is one of the most important Blue Voyage centers in Anatolia, this route first stops by Ekincik Cove. İztuzu Beach-one of the most important habitats of the loggerhead (carettacaretta) sea turtle-is the port of entrance to Dalyan, which resembles a giant marine labyrinth. By boarding smaller boats here, you can go all the way out to Lake Köyceğiz.

Places: Göcek in Türkiye

The Kaunus Rock Tombs, with their marvelous panorama, are among the places worth seeing in the area. Dişibilmez Point and Manastır Point are two important stops before Göcek. It is known that ships were built on Tersane ("Shipyard") Island, located off the shores of Göcek, during the Byzantine era. Scattered among the olive trees of the shore of this bowl-shaped island are numerous ruins of houses. After such a pleasant day, the boats stop in Göcek for the night. The next day, the boats set out to the Ölüdeniz (the Blue Lagoon), gliding on the Mediterranean.It is forbidden to lay anchor in Ölüdeniz, a lagoon that resembles a giant lake with its clear, tranquil waters. It is possible to moor off its shores and go to the beach via boat. On Gemiler ("Ships") Island in the Gulf of Fethiye, there are ruins of an ancient church from the Byzantine era.

Capacity ranges from eight to thirty-six on cabin charter tours.

Antalya-Kaş

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

Places: Karolas-Kaş in Antalya

Antalya-Finike

The coves on this route promise a lovely voyage along which natural and historical beauties are intertwined. Starting in Antalya, which is one of the most important centers of tourism in the Mediterranean, the journey stops by a modern Anatolian marina in Kemer.

Places: Kaputaj Beach in Antalya

The ancient Lycian town of Phaselis is reached right after Asar Point. Established as a triple-harbored seaside town by sailors from Rhodes in the seventh century BC, Phaselis was famed in Roman times-its golden age-for its high-quality perfumes. As you wander the ancient streets connecting the harbors, your senses are delighted by a combination of the sound of the surf and the scent of the pines. Just a little ahead are Çıralı, Olimpos Beach, and Yanartaş, which are quite memorably beautiful. The name of the piece of land stretching northward from Taşlık Point is Çavuş Harbor. To the west of the bay, which is surrounded by green hills, there is a beach, and immediately behind it a plain. Finike, a protected harbor, is four miles northeast of Bunda Point.

Blue Voyage tours in Anatolia start in May and run through the end of October. Demand is at its most concentrated in the high season of July and August.

7.3. Marine Tourism Facility

Most of Türkiye'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. Tables below shows the Marine tourism facility and yacht marinas registered by the Ministry of Culture and Tourism.

Table 61. Marine Tourism Facility (2023)

Marine Tourism Facility				
Mooring Capacity Number Of Facility	Number of Facility	Yacht Capacity		
		Sea	Land	Total
Business Tourism Documantation of Yacht Harbour	30	9,671	3,045	12,716
Business Tourism DocumAntation of Yacht Slipway	5		827	827
Investment Tourism Documantation of Yacht Harbour	5	1,834	256	2,090
Grand Total	**40**	**11,505**	**4,128**	**15,631**

Source: Ministery of Culture &Tourism

Table 62. Marine Tourism Facility with Tourism Administration Certificate (2022)

NO	Port Name	City of	Capacity	
			At Sea	On Shore
1	Setur Kuşadası Yacht Port	Kuşadası/AYDIN	310	-
2	Ataköy Yacht Port	Ataköy/İSTANBUL	1,040	60
3	G-Marina Kemer	Kemer/ANTALYA	150	150
4	Marmaris Yacht Port	Marmaris/MUĞLA	676	122
5	Club Marinas	Göcek/MUĞLA	195	-
6	Setur Antalya Marinas	ANTALYA	200	150
7	Kumlubükü Yacht Club	Marmaris/MUĞLA	10	-
8	D-MarinTurgutreis Yacht Port	Bodrum/MUĞLA	455	100
9	Ece Marina	Fethiye/MUĞLA	230	-
10	Milta Bodrum Yacht Port	Bodrum/MUĞLA	425	50
11	My Marina Ekincik	Marmaris/MUĞLA	67	15
12	D-Marin Didim Marinas	Didim/AYDIN	576	600
13	D-Marin Port Göcek Marinas	Fethiye/MUĞLA	379	-
14	Alaçatı Yat limanı	Çeşme/İZMİR	260	100
15	Marintürk Göcek Village Port	Göcek-Fethiye/MUĞLA	116	200
16	SETUR Yalova Yacht Port	YALOVA	240	80
17	Alanya Yacht Port	Alanya/ANTALYA	287	160
18	Teos Marinas	Seferihisar/İZMİR	480	80
19	Port Iasos	Milas/MUĞLA	100	-
20	Skopea Marinas	Fethiye/MUĞLA	80	-
21	Marmaris Adaköy Marinas	Marmaris/MUĞLA	33	-
22	I&C Çeşme Yacht Port	Çeşme/İZMİR	377	100
23	West İstanbul Marinas	Beylikdüzü/İSTANBUL	600	370
24	SETUR Ayvalık Marinas	Ayvalık/BALIKESİR	200	150
25	Mersin Yacht Port	MERSİN	500	500
26	Güllük Yat Marin	Milas/MUĞLA	270	-
27	Gökova Ören Marinas	Milas/MUĞLA	416	130
28	Yalıkavak Marinas	Bodrum/MUĞLA	710	40
Total			**9,382**	**3,157**
General Total			**12,539**	

Source: Ministery of Culture &Tourism

Table 63. Business Tourism Documantaton of Yacht Slipway

NO	Port Name	City of	Capacity	
			At Sea	On Shore
1	Yat Lift Yacht Slipwa	Bodrum/MUĞLA		400
2	Ağanlar Yacht Slipway	Bodrum/MUĞLA	-	200
3	Neta Marinas Yacht Slipway	Bodrum/MUĞLA		21
4	Ege Yacht Slipway	Milas/MUĞLA		50
5	Albatros Yacht Slipway	Marmaris/MUĞLA	40	48
Total			**40**	**719**
General Total			**759**	

Source: Ministery of Culture &Tourism

Table 64. Yacht Harbour Investment Tourism Documantation

NO	Port Name	City of	Capacity	
			At Sea	On Shore
1	Meersea Körmen Yacht Port	Datça/MUĞLA	246	56
2	Ataport Yacht Port	Zeytinburnu/İSTANBUL	1,000	100
3	Mandalya Dock	Milas/MUĞLA	50	-
4	Tümsağ Kumkuyu Yacht Port	Erdemli/MERSİN	200	200
Total			**1,496**	**356**
General Total			**1,852**	

Source: Ministery of Culture &Tourism

7.4. Cruise Tourism in Türkiye

The cruise industry is a major player in the global tourism industry, and it continues to grow year after year. In this post, we'll take a look at some of the most interesting facts and figures about the cruise industry.

The global cruise market size was valued at USD 7.25 billion in 2021 and is expected to grow of 11.0% from 2022 to 2028. 4.8 million passengers took ocean cruises in 2022, with 1.75 million of those passengers visiting the Caribbean, the Bahamas, and Bermuda, making it the most popular destination. The cruise ship industry in the US saw a 76% increase in employment in 2021 after a sharp decrease in 2020 due to the pandemic, with 15,000 employees in 2021 and a forecast of 23,000 by 2022.

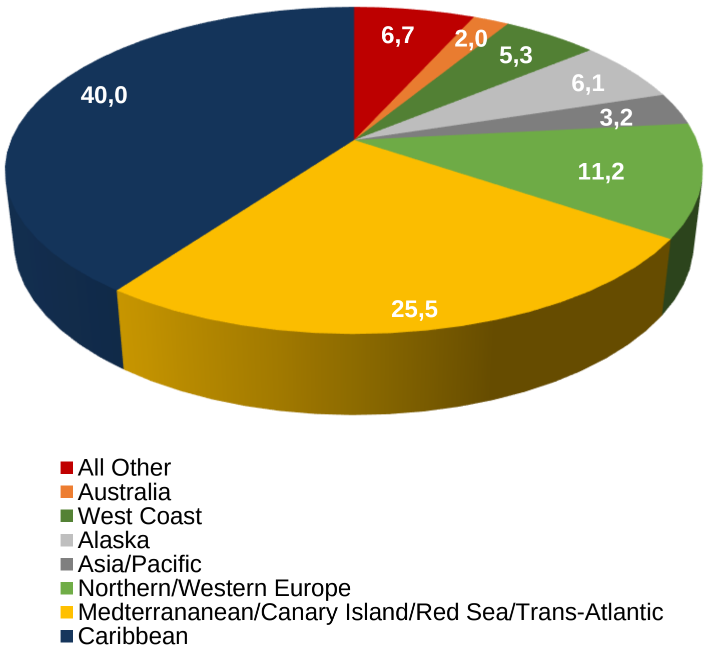
As a result of the COVID-19 pandemic, the market experienced a decline in passenger numbers. As per the Cruise Lines International Association, in 2020, worldwide passenger volume decreased by 80.0%. Due to the eruption of the COVID-19 pandemic, the majority of the cruises were stranded at various locations and other cruises were canceled. However, the industry is anticipated to witness a slow and healthy growth rate owing to the resumed activities and relaxed restrictions. In the wake of the pandemic, many holidaymakers are looking for small vacations as a getaway.

A vacation trip for multiple days, arranged on the cruise ship in the large inland waters or sea while visiting various destinations for tourism, following a particular route is known as a cruise. The focus in this sort of voyage is basically on staying aboard the ship along with eye-catching destinations for the tourists. The growing industry of hospitality & tourism is contributing to the market growth, thus driving the global cruises market.

Increasing leisure trips and voyages taken by generation Z along with the growing preference of a high population to live a luxury life is contributing to the market growth during the forecast period. The rising popularity of the river cruises is likely to drive the global cruises market. River cruises offer attractive packages that travel inside the countries and not just the coastal areas. These types of river cruises are becoming increasingly popular in European countries.

The total number of cruise passenger movements at Mediterrean Cruise Ports during 2023 reached almost 33,20 million, officially surpassing pre-pandemic results and marking a clear recovery of the cruise industry in the Mediterrean region, with a growth of 36.20% from 2022.
All in all, the cruise world did not remain unaffected by the pandemic that changed social and economic lives around the globe over the last years – justifying the comprehensive efforts developed by cruise ports in the region to generate conditions that secure their resilience to all types of crises. The total number of cruise ship calls was 14,672 in Mediterrean Cruise Ports in 2023 and is almost stagnant compared to 2022. The slight 0.56% decrease of calls reflects the facts that the ships' capacity visiting our ports and their onboard occupancies are increasing rather than the number of calls.

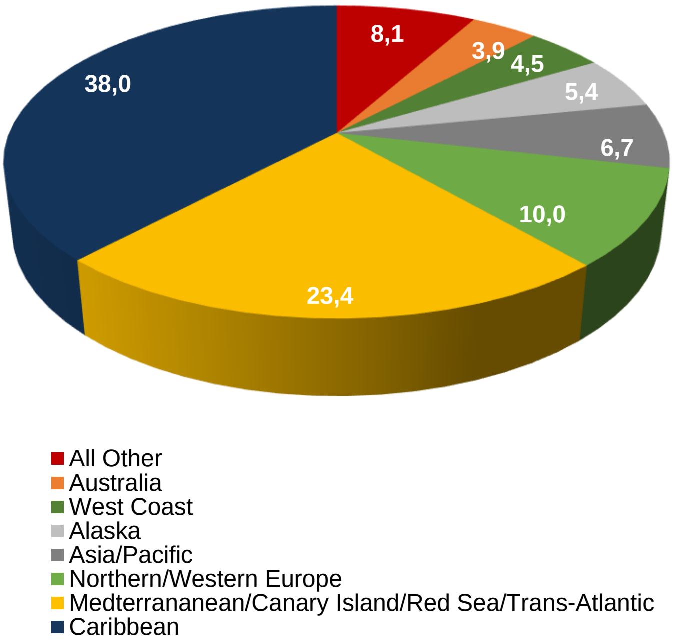
Graph 52. Global Deployment Shares, % (2022)



Source: Cruise Industry News, 2024 Annual Report

The Mediterranean continued in 2023 as the second-largest cruise market in the world. Mediterrean Cruise Ports represented a cruise vessel capacity deployed worldwide of 23.4% in the region in 2022.

Graph 53. Global Deployment Shares, % (2023)



Source: Cruise Industry News, 2024 Annual Report

In 2023 the 10 major MedCruise ports, in terms of cruise passenger movements, hosted more than 18 million passenger movements. All ports included in this list registered positive variations over 2020, with an increase in movements of 521.64% and an overall increase of 22.63% compared to 2019. (Source: Analysis of MedCruise Reports)

Table 65. Top 10 MedCruise Ports (2023)

No	Port	TP2023
1	Barcelona	3,568,901
2	Marseille	2,600,000
3	Genoa, Savona	2,560,388
4	Balearic Islands	2,519,427
5	Naples, Salerno, Castellammare di Stabia	1,744,338
6	Piraeus	1,484,788
7	Tenerife Ports	1,105,355
8	Palermo	952,470
9	Valletta	889,336
10	Kusadasi, Bodrum	874,106

Source: MedCruise Report

Global Cruise Market Expected To Be Worth $15 Billion by 2028

The Mediterranean Sea has numerous advantages over other cruising areas, with its diversity of cultures, people, languages and history. There are many ports ideally suited to cruise passengers, with something to interest everyone, in most cases situated close to where the Cruise ship docks.

Nowhere else can such a variety of culture and history be found in such a relatively small area.

While the weather from Spring to Autumn is almost invariably ideal, even in the winter months the weather is generally very mild. Some observers feel that within a couple of years, the Mediterranean will become a year-round cruise destination. Indeed, the advantages of cruising the area outside the peak periods are certainly attractive, with the prospect of fewer crowds visiting the must-see attractions.

In a nutshell, there is nowhere else on earth where one can cruise to so many different countries within a short period of time and to sample as many flavours, cultures and retrace the footsteps of history as one can in the Mediterranean Sea.

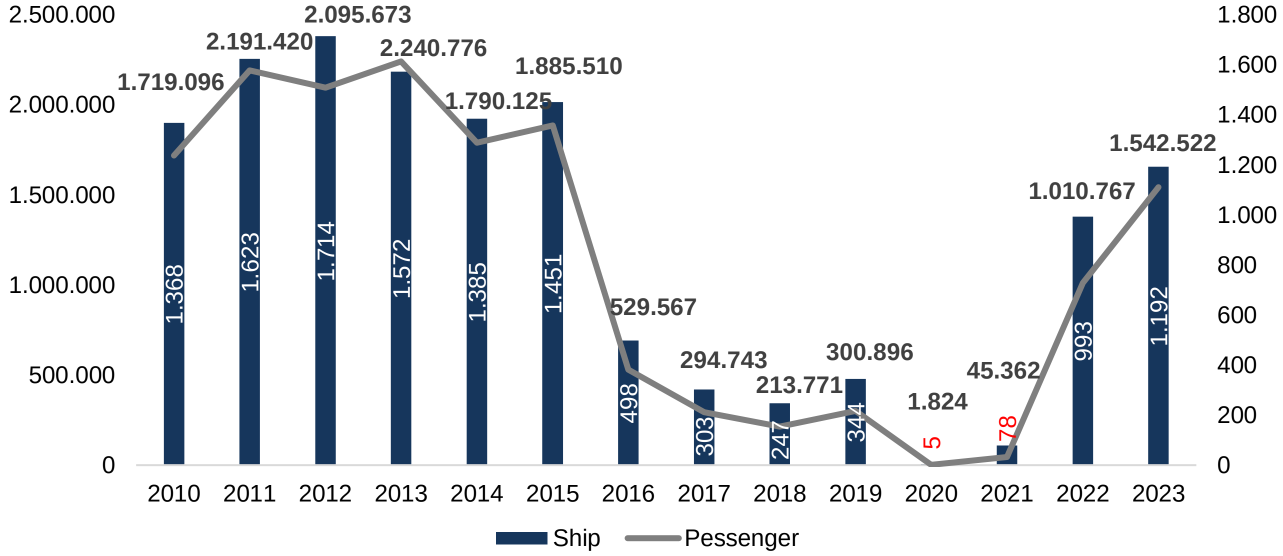
Luckily for cruise passengers, the choice and range of ships on which to so travel are getting wider each year

Every 1% increase in first-time cruise travelers (international travelers who have never cruised and are open to cruise) is equivalent to 4 million newto-cruise travelers. Source: Analysis of CLIA Passenger Data, 2019 – 2021, CLIA Cruise Forecast /Tourism Economics (Dec. 2022); and UNWTO international tourist arrivals data

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. Worldcruise tourism has been developing with a great acceleration with more ships and increasing capacities. Cruise industry today offers a market of 15 billion USD. Türkiye is located in a suitable region for crusing sector, which is the Mediterranean Basin.

World Cruise Companies Arrival-Departure Port of Istanbul, Kuşadası, Bodrum, İzmir and Çeşme (Turn-Around Port) as reported by declaring Al Development Program.

Graph 54. Statistics of Cruises and Passengers Arrived at Turkish Ports Between 2010-2023



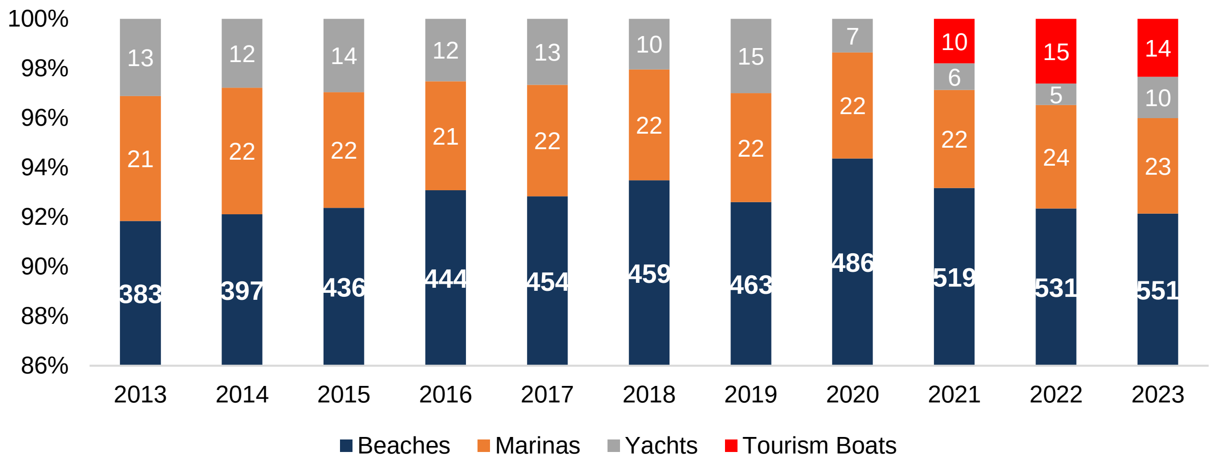
Source: Ministery of Culture &Tourism

In order to open İstanbul, one of the most important touristic centers of Türkiye, to Cruise and Mega Yacht Tourism Services, great effort sare being exerted to develop the ports of Galataport, Yenikapı and Ataköy Marinas.

7.5. Blue Flag Compaign

Blue Flag Programme is owned and run by the independent non-profit organisation Foundation for Environmental Education (FEE). One national FEE member is responsible for the implementation of programme, which is TURCEV (Foundation for Environmental Education in Türkiye) in Türkiye.

Graph 55. Blue Flag Data (2023)



Source: Foundation for Environmental Education of Türkiye

Nominees are evaluated by a national, then a European jury, after which the successful ones are awarded the Blue Flag for one year. The sea-water analysis is performed every 15 days during the high season by the local department of the Ministry of Health, and funded by the Ministry of Culture and Tourism, and taking into account the physical, pH and microbiological parameters[3].

7.6. Underwater Diving

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

Above the water and diving off the coast of our country engaged in tourism business we have around 300 certified and authorized.

[3] Source: Ministry of Culture and Tourism

7.7. Equipped Diving Rules

Forbidden Zones

Al 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 19/08/1989 date and 20257 numbered Official Gazette issued Decision of Board of Ministers, according to 35th article of 863 numbered Cultural and Natural Wealth Protection Law.

Certificate

Sportive aimed equipped divers should have the sufficiency certificate (diving card) issued by Underwater Sports, Life Guarding and Water Ski Federation. But certificates issued by organizations educating under international standards, are also valid. These certificates can be turned into sufficiency certificate (diving card) with application to federation. Sportive dives, diving disciplinary authorizations, technical specifications and authorization certificates of Turks are issued complying with the principles determined and accepted by Youth and sports General Directorate, Underwater Sports Life Guarding and Water Ski Federation. For sportive aimed dives of 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 belongs to divers, but all of the responsibilities of course participant's during training belongs to lecturer. In dives of Turks, taking guide skin diver is under request. Foreign divers should take guide skin diver during their dives. During diving, 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.

But all kinds of problems exist before diving and due to the personal mistakes of divers who violates the diving rules is not under the responsibility of skin diver.

Material

There is no equipment limit during sportive aimed dives. Whilst equipped sportive dives, balance vest (life vest, BC), tube pressure monitor, depth monitor and time hour usage is obligatory. But usage of lifting balloon or same aimed materials are forbidden.

Decompressed dives are absolutely forbidden. Presence of high pressurized tube filling compressor in land or in ships, which took required permissions from corresponding authorities during dives is free.

Diving organizing agency, club, establishment, hotel, holiday village, school etc. places as well as ships should provide first aid material in stock. Underwater photographing, video camera usage during dives is free. All kinds of materials for taking picture or video recording can be used.

Material Maintenance

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

Ships To Be Used During Dives

During underwater dives, usage of Turk ships is basis. But dives are possible on condition that required permissions should be taken for foreign groups who wishes to dive from their boats as well as foreign divers who come with their ships.

Diving Permission

Sportive aimed equipped dives are subjected to permission excluding forbidden zones. Dives, organized to places excluding forbidden zones in group by club, organization or institutions, should be informed to City Tourism Directorates or authorized organization. This information is submitted to Regional Coast Guard Headquarters (or authority within the region) by correspondent organization.

All kinds of equipped sportive dives are subject to permission for foreign divers. Authorities which will issue these permissions are City Tourism Directorate or authorized organizations. One copy of permission forms to be issued will be submitted to Harbor Directorate and one copy of it is submitted to Regional Coast Guard Headquarters (or authority within the region) by permission issuing organization. Permission certificate, whose one copy remains at permission holding organization, should be shown to authorities during controls. Information submission and permission taking is not obligatory during dives with the aim of training as well as two persons friend system dives (excluding forbidden zones). (Source Ministry of Culture and Tourism)

7.8. Water Sports

While Türkiye's water sports can be enjoyed year-round, the peak season typically runs from April to November. During this period, the country hosts a range of water sports competitions, attracting enthusiasts worldwide.

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CHAPTER VIII

TURKISH FISHING SECTOR

8. TURKISH FISHING SECTOR

8.1. Introduction

As the worl’s population increases, the limited availability of protein sources in human nutrition has led o a focus on aquatic products. Fish and other aquatic products are harvested and cultivated from water sources. The increasing industrialization and technological advancements have led to the gradual pollution of oceans and inland waters, resulting in a decrase in the utilization of these resources. For this reason, there has recently been a significant increase in the importance and interest given to aquaculture both in our country and in the world (Yonar, 2008; Akyıldız, 2013).

Our country is located within a geography surrounded by seas that are determined by hydrography (continental or island boundaries) and hydrology (temperature, salinity, currents) on three sides. Our seas have a total coastline length of 8333 km. Our country, by its location, has the characteristic of being a natural bridge between Europe, Asia and the Middle East countries. The fact that three sides of our country are surrounded by seas and nourished by many rivers allows our seas to have different characteristics in terms of temperature and salinity, and ensures high marine biodiversity, species numbers, and population.

Türkiye is one of the most important fishing countries in the Mediterranean with its marine and inland fisheries. Its proximity to the Middle East and Europe is a strategic advantage for Türkiye. These characteristics increase the importance of sustainable policies for our seas in terms of strategic location in international waters and the diversity of product varieties of various pelagic and demersal species in our inland waters. Steps taken with different countries in the fishing sector, advancing equipment used in fishing boats with developing industry, international import and export initiatives in aquatic products contribute to our country's economy and increase our importance in the world.

In a report published by the Organization for Economic Cooperation and Development (OECD) in 2016, it was noted that aquaculture production showed the fastest growth among agricultural products. Similarly, in the 2020 report by the United Nations Food and Agriculture Organization (FAO), it was stated that the aquaculture sector has shown the most development in the agricultural sector in recent years (Department of Agricultural Economy and Policy Research, 2023).

While the production of aquaculture products was mostly done by hunting in the past, the fact that the production made by hunting does not fully meet the needs today has led to the development of aquaculture. In recent years, total production in our marine and inland waters has been the fastest growing sector among all food productions. According to the data of the Turkish Statistical Institute (Turkstat) in the last fishing season, the amount of aquaculture production in 2022 was 301,747 tons at sea and 33,256 tons in inland waters, totaling 335,003 tons. Aquaculture production is 368,742 tons at sea, 146,063 tons in inland waters and 514,805 tons in total. Türkiye's total aquaculture production was 849,808 tons.

Population growth, overfishing, pollution of the seas, and environmental effects are affecting population dynamics and causing rapid depletion of fish resources in the long run. The desire of people to access high-nutrient products has resulted in product demands that have continued throughout human history. The high volume of domestic and foreign trade in the fisheries sector and the utilization of unused water resources for economic gain are other factors that trigger an increase in fish production worldwide. Seas and numerous rivers, lakes, ponds, and reservoirs offer vast opportunities for fisheries. Aquaculture continues to develop worldwide. Technological advances, the development of solutions to fishermen's problems, support from public institutions, NGO's and universities contribute to the sector's progress and rapid development.

One of the important issues we need to mention is the effect of animal proteins on human health. The richness of fish meat in taste and vitamin, mineral, and omega-3 fatty acids is due to the latter. It contains vitamins A, D, B, K, calcium, phosphorus, and many other rich minerals.

In developed and developing countries, the advancement of technology in fishing vessels has led to problems that affect population dynamics due to overfishing. In order to protect our water resources, our seas and to ensure sustainability, the fishing pressure in the seas must be reduced and the fish stock should increase in the future, considering that population dynamics are constantly changing. Our fishery resources should be effectively and efficiently utilized and managed.

The report on the Maritime Sector covers the current situation of fisheries in the world and Türkiye, the production of fish through fishing and aquaculture, foreign trade, and the state of the fisheries sector.

8.2. Current Status of Aquatic Products

8.2.1. Aquaculture Production in Türkiye

The geographical location and natural resources of Türkiye offer suitable opportunities for the production of aquatic products through fishing and aquaculture. Türkiye is surrounded by seas with different characteristics and production potentials on three sides: the Black Sea, the Aegean, and the Mediterranean. Our country also has the entire Marmara Sea, an inland sea. There are many rivers in 25 river basins, 200 natural lakes, 318 dam lakes, and about 1,300 ponds (Eleventh Development Plan 2019-2023).

Türkiye is both an importer and exporter of aquatic products and has a positive trade balance in this area. The production quantity and value of aquatic products in 2022 were 335,003 tons and 6,931,544,788 TL for fishing, and 514,805 tons and 42,047,930,280 TL for aquaculture, respectively. The total quantity and value were 849,808 tons and 48,979,475,068 TL (Turkstat; DGFA).

According to provisional data from TIS, Türkiye's aquatic product imports and exports in 2022 were 251,416 tons and 27,480,845,109 TL in value for exports, and 115,189 tons and 5,292,097,820 TL in value for imports (Turkstat; DGFA).

Aquaculture production increased by 6.2% in 2022 compared to the previous year, reaching 849,808 tons. Of this production, 30% were marine fish obtained through fishing, 5.6% were freshwater fish obtained through fishing 3.9%, and 60.6% were obtained through aquaculture. (Turkstat) Aquatic product fishing decreased by 2.1% in 2022. Total production obtained through fishing was 335,003 tons, while production obtained through aquaculture was 514,805 tons. Marine fishing decreased by 2.3% compared to the previous year, while freshwater fishing increased by 0.4% (Turkstat).

Table 66. Aquaculture Production in Türkiye (Tonnes)

Years	Capture Productıon (tonnes)			Aquaculture Productıon (tonnes)			Total (Tonnes)
	Sea	Freshwater	Total	Sea	Freshwater	Total	
2015	397,731	34,176	431,907	138,879	101,455	240,334	672,241
2016	301,464	33,856	335,320	151,794	101,601	253,395	588,715
2017	322,173	32,145	354,318	172,492	104,010	276,502	630,820
2018	283,955	30,139	314,094	209,370	105,167	314,537	628,631
2019	431,572	31,596	463,168	256,930	116,426	373,356	836,524
2020	331,281	33,119	364,400	293,175	128,236	421,411	785,811
2021	295,018	33,140	328,158	335,644	136,042	471,686	799,844
2022	301,747	33,256	335,003	368,742	146,063	514,805	849,808

Source: Turkish Statistical Institute, Directorate General of Fisheries and Aquaculture.

Production of aquatic products in Türkiye is carried out through fishing and aquaculture, and the production is obtained from both marine and inland waters. The highest increase rate in the last seven years occurred in 2019 with a total production of 836,524 tons. While an annual increase is observed in aquaculture production in our seas and inland waters, fishing production shows fluctuations from year to year.

8.2.2. Fisheries

Fisheries in our country are carried out through fishing and aquaculture in seas and inland waters. The total amount of fishery in 2015 in seas and inland waters was 431,907 tons, while this total was measured as 335,003 tons in 2022. It is observed that the values of fisheries in seas and inland waters varied from year to year between 2015 and 2022 and decreased gradually over the years. It is observed that the highest production was achieved both in the sea and inland waters in 2019. The amount of the most caught sea fish was 254,535 tons. The least caught sea fish in the last seven years was 222,024 tons in 2018.

Table 67. Production Quantity of Fishery Products

Years	Sea (Tonnes)			Freshwater (Tonnes)			Total
	Fishes	Other	Total	Fishes	Other	Total	
2015	345,765	51,966	397,731	32,376	1,800	34,176	431,907
2016	263,725	37,739	301,464	31,509	2,347	33,856	335,320
2017	269,676	52,496	322,173	29,396	2,749	32,145	354,318
2018	222,024	61,931	283,955	27,607	2,532	30,139	314,094
2019	374,726	56,846	431,572	28,618	2,978	31,596	463,168
2020	291,910	39,371	331,281	30,150	2,969	33,119	364,400
2021	262,290	32,728	295,018	31,248	1,972	33,140	328,158
2022	254,535	47,212	301,747	31,338	1,918	33,256	335,003

Source: Turkish Statistical Institute, Directorate General of Fisheries and Aquaculture, 2023.

The most commonly caught pelagic fish in fishing are anchovy, sardine, horse mackerel, bonito, bluefish, and brisling. When the distribution of caught fish by species is examined, anchovy is the most caught fish with a quantity of 125,980 tons. Anchovy fish was followed by bonito with 49 thousand 892 tons and sardine with 16 thousand 729 tons (Table 68).

According to data obtained from Turkstat, Türkiye has the largest share in Black Sea fishery. Of the 125,980 tons of anchovy caught in 2022, only 72,163 tons were caught in the Eastern Black Sea. The amount of anchovy caught in the Western Black Sea was 28,750 tons. While 212,253 tons of anchovy were caught in the Eastern Black Sea in 2019, fluctuations in anchovy fishing have been observed over the years.

Table 68. Production Amounts (Tons) of the Most Commonly Caught Pelagic Fish Species

Years	Anchovy	Sardine	Horse Mackerel*	Bonito	Bluefish	Brisling
2015	193,492	16,693	16,664	4,573	4,136	76,996
2016	102,595	18,162	11,148	39,460	9,574	50,225
2017	158,094	23,426	12,985	7,578	1,936	33,950
2018	96,452	18,854	20,678	30,920	5,767	20,057
2019	262,544	19,119	19,505	1,578	1,214	38,078
2020	171,253	21,265	12,349	22,743	3,722	26,804
2021	151,598	15,800	24,006	2,595	5,804	28,041
2022	125,980	16,729	14,930	49,892	5,495	11,162

Source: Directorate General of Fisheries and Aquaculture, 2023.

According to the data obtained from the General Directorate of Fisheries and Aquaculture, as of the end of 2022, the number of licensed fishing vessels for fishing of aquatic products is 18,444 in total, with 15,236 in seas and 3,208 in inland waters. Among the vessels in our seas, 944 are between 10-12 meters and 15,816 are small-scale fishing vessels under 10 meters. The number of licensed fishing vessels in inland waters is 3,185 (Table 69).

Table 69. Size Distribution of Fishing Boats (2022) (Number of Boats)

Field of Activity	Height Group (ft)							Total
	0-4.9	5-7.9	8-9.9	10-11.9	12-19.9	20-29.9	30+	
Sea	680	8,561	3,449	923	861	467	295	15,236
Freshwater	437	2,332	357	21	61	0	0	3,208
Total	**1,117**	**10,893**	**3,806**	**944**	**922**	**467**	**295**	**18,476**

Source: Directorate General of Fisheries and Aquaculture, 2023.

The most commonly caught demersal marine fish are the species of haddock, hake, mullet, red mullet, and turbot. In demersal fishery, the annual variation is less than that of pelagic fishery. Among demersal species, the catch of whiting has shown the most significant variation, with annual catch ranging from 8.2 to 13.1 thousand tons between 2015 and 2022. In recent years, there has been a slight increase in production compared to other years. The catch of red mullet has been partially fluctuating between 1.2-1.7 thousand tons over the last seven years, while the catch of mullet (2-3.4 thousand tons) and hake (average of 1 thousand tons) has shown an increasing trend. The catch of turbot, another important demersal species, has fluctuated between 139 and 491 tons in recent years (Table 70), according to the data from the General Directorate of Fisheries and Aquaculture.

Table 70. Production Quantities of Most Commonly Caught Demersal Fish in Tons

Years	Haddock	Hake	Mullet	Red Mullet	Turbot
2015	13,158	706	3,476	1,255	239
2016	11,541	784	3,047	1,454	221
2017	8,248	1,011	2,074	1,406	167
2018	6,814	1,019	2,915	1,399	139
2019	8,941	1,270	2,342	1,719	272
2020	9,364	1,149	2,775	1,604	412
2021	10,380	839	3,072	1,359	487
2022	7,690	1,084	1,304	1,169	491

Source: Turkish Statistical Institute, Directorate General of Fisheries and Aquaculture, 2023.

The most commonly caught other sea products are razor clams, sea snails, shrimp, black mussels, and squid. Among them, razor clam is the most caught other sea product. The species that provide the highest catch in the production of other sea products in our country, apart from fish, is white razor clam caught mostly in the Western Black Sea (Eleventh Development Plan 2019-2023).

Table 71. Production Quantities of the Most Caught Other Sea Products (Tonne)

Years	Sand mussels*	Sea snails	Shrimps**	Land mussels	Cuttlefish
2015	37,409	8,795	3,995	240	745
2016	20,937	10,354	4,501	78	925
2017	34,941	9,194	4,730	536	986
2018	44,534	9,672	4,536	604	1,042
2019	36,627	11,646	5,137	1,170	940
2020	21,881	8,461	5,204	1,035	961
2021	16,824	7,008	5,494	1,371	837
2022	28,333	7,905	4,585	3,221	714

Source: Turkish Statistical Institute, Directorate General of Fisheries and Aquaculture, 2023.

8.2.3. Aquaculture

Aquaculture production, which was first recorded in statistics in 1986 with a production of 3 thousand tons, has shown a more or less continuous increase between 1986 and 2016, except for the years 2001-2002. Aquaculture production has continued to grow steadily since 2003 (Eleventh Development Plan 2019-2023).

In global aquaculture production, total capture in marine and inland waters was 91,202,982 tons, while total aquaculture production in marine and inland waters was 90,863,706 tons in 2021 (Turkstat).

Aquaculture production in our country was 368,742 tons, accounting for 71.6% of the total, while inland waters accounted for 146,063 tons, or 28.4% of the total, resulting in a total of 514,805 tons, with a share of 9.1% in the change compared to the previous year (Table 72) (Turkstat).

Table 72. Production Quantity of Marine and Inland Aquaculture

Years	Aquaculture Productions				Total (Tonne)	Change compared to the previous year (%)
	Sea (Tonne)	Share in total (%)	Freshwater (Tonne)	Share in total (%)		
2015	138,879	57.8	101,455	42.2	240,334	2.2
2016	151,794	59.9	101,601	40.1	253,395	5.4
2017	172,492	62.4	104,010	37.6	276,502	9.1
2018	209,370	66.6	105,167	33.4	314,537	13.8
2019	256,930	68.8	116,426	31.2	373,356	18.7
2020	293,175	69.6	128,236	30.4	421,411	12.9
2021	335,644	71.2	136,042	28.8	471,686	11.9
2022	368,742	71.6	146,063	28.4	514,805	9.1

Source: Turkish Statistical Institute, Directorate General of Fisheries and Aquaculture.

In recent years, total production in our seas and inland waters has been the fastest-growing sector among all food production. According to Turkstat data from the last fishing season, the production of seafood from fishing amounted to 301,747 tons in the sea and 33,256 tons in our inland waters, with a total of 335,003 tons. The production of aquaculture was 368,742 tons in the sea and 146,063 tons in our inland waters, totaling 514,805 tons. Türkiye's total seafood production was 849,808 tons.

The most commonly grown species in Türkiye are trout, sea bream, and sea bass. Trout production has increased year by year in our seas and inland waters since 2015. Of the total production of 108,038 tons in 2015, 101,000 tons were obtained from our inland waters. The second most commonly grown species is sea bass with 156,602 tons, followed by sea bream with 152,469 tons in 2022. It is observed that the share of sea-based trout farming in production has been increasing over the years (Table 73).

Table 73. Production Quantities of the Most Cultivated Species in Türkiye (Tons)

Years	Trout			Bream	Perch
	Freshwater	Sea	Total		
2015	101,166	6,872	108,038	51,844	75,164
2016	101,297	5,716	107,013	58,254	80,847
2017	103,705	5,952	109,657	61,090	99,971
2018	104,887	9,610	114,497	76,680	116,915
2019	116,053	9,92	125,745	99,730	137,419
2020	126,101	18,182	144,283	109,749	148,907
2021	135,732	31,554	167,286	133,476	155,151
2022	145,649	45,454	191,103	152,469	156,602

Source: Turkish Statistical Institute, Directorate General of Fisheries and Aquaculture, 2022.

Tükiye has suitable cultivation facilities, technology, and human resources for the development of aquaculture production. Our country is one of the leading countries in aquaculture among the Middle East, Caucasus, and European Union countries due to its location (Eleventh Development Plan, 2019-2023).

Most of our aquaculture facilities, especially our inland facilities, are small-scale family businesses (Eleventh Development Plan, 2019-2023).

As of the end of 2022, there are a total of 2,382 aquaculture facilities, including 533 in the seas and 1,829 in inland waters. The number of facilities with a capacity between 0-50 tons/year is 154 in the seas (Table 74).

Table 74. Distribution of Aquaculture Facilities by Capacities (2022)

Group	Capacity Group (Tonne)	Number of Facilities (Piece)	Total Project Capacity (Tonne/Year)
Sea	Hatchery*	**28**	-
	0-50	154	3,543
	51-100	13	1,065
	101-250	19	3,164
	251-500	52	18,256
	501-1000	167	152,644
	1001>	148	347,140
	Total	**553**	**525,812**
Freshwater	Hatchery*	**88**	-
	0-50	1,179	19,152
	51-100	129	11,517
	101-250	248	49,514
	251-500	143	62,458
	501-1000	128	111,511
	1001>	2	4,900
	Total	**1,829**	**259,052**

Source: Turkish Statistical Institute, Directorate General of Fisheries and Aquaculture.

According to the 2022 TSI data on the distribution of aquaculture facilities by capacity, there are 28 marine fish hatcheries in our country (Turkstat; DGFA, 2022).

8.3. Economic Evaluation of Aquaculture Sector

8.3.1. Production Quantity and Value of Aquatic Products

The production quantity and value of aquatic products in 2022 are 335,003 tons and 6,931,544,788 TL for fishing, and 514,805 tons and 42,047,930,280 TL for aquaculture, with a total quantity of 849,808 tons and a total value of 48,979,475,068 TL (Table 75) (Turkstat; DGFA).

Table 75. Production Quantity and Value of Aquaculture Products

Years	Fishing		Aquaculture		Total	
	Quantity (Tonne)	Value (₺)	Quantity (Tonne)	Vaule (₺)	Quantity (Tonne)	Vaule (₺)
2015	431,907	1,245,020,381	240,334	2,569,208,590	672,241	3,814,228,971
2016	335,320	1,340,878,317	253,395	3,239,320,980	588,715	4,580,199,297
2017	354,318	1,535,702,592	276,502	4,049,199,270	630,820	5,584,901,862
2018	314,094	1,852,664,426	314,537	5,606,828,410	628,631	7,459,492,836
2019	463,168	2,380,414,908	373,356	7,694,124,480	836,524	10,694,124,480
2020	364,400	2,848,969,147	421,411	10,859,581,980	785,811	13,708,511,127
2021	328,158	3,614,772,762	471,686	18,482,440,710	799,844	22,097,213,472
2022	335.003	6.931.544.788	514.805	42.047.930.280	849.808	48.979.475.068

Source: Turkish Statistical Institute, Directorate General of Fisheries and Aquaculture

8.3.2. Türkiye's Import and Export of Aquatic Products

According to the 2022 TSI data, which are temporary, Türkiye's seafood export and import figures are as follows: exports amount to 251,416 tons with a value of 27,480,845,109 TL, while imports amount to 115,189 tons with a value of 5,292,097,820 TL (Table 76) (Turkstat; DGFA).

Table 76. Türkiye's Aquaculture Import and Export

Years	Export			Import		
	Quantity (Tonne)	Value ($)	Value (₺)	Quantity (Tonne)	Value ($)	Value (₺)
2015	121,053	692,220,595	1,879,701,163	110,761	250,969,660	685,467,749
2016	145,469	790,303,664	2,398,269.,090	82,074	180,753,629	548,878,092
2017	156,681	854,731,829	3,128,112,446	100,444	230,111,248	841,383,610
2018*	177,500	951,793,070	4,578,607,932	98,315	188,965,220	898,860,692
2019	200,226	1,025,617,723	5,818,776,189	90,684	189,438,745	1,076,277,706
2020	201,375	1,064,877,338	7,525,105,681	85,269	156,929,169	1,101,957,132
2021**	238,732	1,376,291,922	12,405,903,730	104,708	217,179,174	1,962,837,828
2022	251.416	1.651.496.218	27.480.845.109	115.189	312.980.444	5.292.097.820

Source: Turkish Statistical Institute, Directorate General of Fisheries and Aquaculture.

8.3.3. Production and Consumption in Aquaculture

Fish and other aquatic products are an important animal food with many superior properties, such as protein, energy, vitamins, and minerals, as well as digestibility. It is essential for people of all ages to consume this high-quality food (Eleventh Development Plan, 2019-2023).

In 2022, the production was 849,808 tons, exports were 251,416 tons, and imports were 115,189 tons. According to the data of the Turkish Statistical Institute (Turkstat), the consumption of fish and seafood was evaluated as 620,229 tons in terms of tonnage, and fishmeal/oil production was 92,063 tons (Table 77).

Table 77. Production, Export, Import, and Consumption of Aquatic Products

Years	Production (Tonne)	Export (Tonne)	Import (Tonne)	Consumption (Tonne)		Evaluated (Tonne)	Per capita consumption (Kg)
				Domestic consumption	Fishmeal/oil*		
2015	672,241	121,053	110,761	479,741	176,138	6,070	6.1
2016	588,715	145,469	82,074	426,085	93,096	3,992	5.5
2017	630,820	156,681	100,444	441,573	130,917	2,080	5.5
2018**	628,631	177,500	98,315	498,959	47,276	3,115	6.1
2019	836,524	200,226	90,684	514,640	209,109	2,850	6.3
2020	785,811	201,157	85,269	559,932	107,223	2,768	6.8
2021	799,844	238,732	104,708	554,284	110,209	1,277	6.6
2022	849,808	251,416	115,189	620,229	92,063	1,289	7.3

Source: Turkish Statistical Institute, Directorate General of Fisheries and Aquaculture
Note: *Amount processed in fishmeal and fish oil factories
**Starting from 2018, import and export figures include the GTİP codes 010690009011 and 020890700000.

The portion of seafood used for human consumption as fresh, chilled, frozen, or processed varies according to fluctuations in fishing amounts and the amount processed in the fishmeal and fish oil industry. The amount produced and imported into the country minus the exported products gives the domestic consumption amount. From this amount, the quantity going to fishmeal and fish oil production or not utilized is subtracted to obtain the seafood for human consumption. When divided by the population, the per capita consumption value is determined (Eleventh Development Plan, 2019-2023).

Fish consumption worldwide was 9 kg per capita in 1961 and reached 20.5 kg in 2019. In 2019, 75% of per capita seafood consumption was derived from fish, 12% from mollusks, and 13% from crustaceans. While fish consumption varies across regions and countries, certain trends such as consumer behavior and dietary culture have been identified. In 2019, per capita fish consumption was determined to be 5.4 kg in low-income, food-deficit countries, 15.2 kg in middle-income countries, and 26.5 kg in high-income countries (FAO, 2022; Department of Agricultural Economy and Policy Research, 2022).

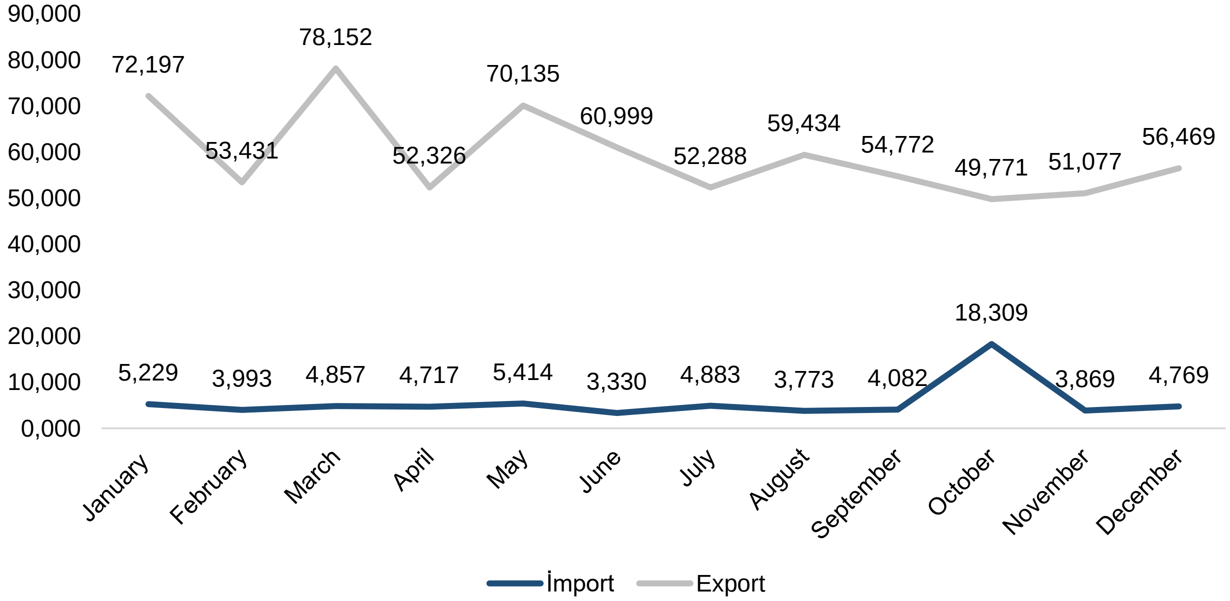
Per capita fish consumption was 6.8 kg in 2020, 6.6 kg in 2021, and 7.3 kg in 2022. The low level of per capita consumption in Türkiye is due to various factors such as consumption habits, dietary culture, the desire to consume seafood fresh and in season, and low demand for processed seafood products. Seafood consumption in Türkiye varies by region but should be accessible to everyone from age 7 to 70 (Table 77).

In 2019, 72% of the 157 million tons of seafood consumed was in Asia. China, Indonesia, India, the United States, and Japan were the top five countries in seafood consumption. It is reported that 17% of the global animal protein requirement was met by fish in 2019, and this figure corresponds to 7% of all consumed proteins (FAO, 2022; Department of Agricultural Economy and Policy Research, 2022).

8.3.4. Foreign Trade

The developments in foreign trade for the fisheries and aquaculture sector in the year 2023 are as follows: the export amount for the fisheries and aquaculture sector from January to December was a total of 711 million 051 thousand dollars, while the import amount was a total of 68 million 411 thousand dollars. In December 2023, the export amount for the fisheries and aquaculture sector was 56 million 469 thousand dollars, and the import amount was 4 million 769 thousand dollars. Looking at economic activities, the share of the agriculture, forestry, and fisheries sector in exports in December was 5.1%, while the share of this sector in exports from January to December in terms of economic activities was 3.8% (Graph 56).

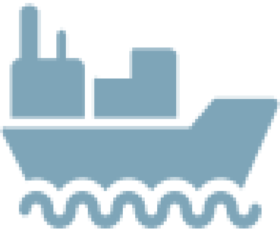
Graph 56. Export and Import Values (Thousand US$) of Fisheries and Aquaculture Sector, January-December 2023



Source: Turkish Statistical Institute

CHAPTER IX

SHIP AGENCY



9. SHIP AGENCY

9.1. Ship Agency

The Definition of Ship Agents and Ship Agency Services

Ship agents are real persons or legal entities who are paid to protect the rights and interests against the third parties of the ship owners, ship's masters, ship-operators and ship-charterers; relating to the cargo and passenger operations of naval and commercial vessels and vehicles within the area of their appointment.

Ship Agency Services means the fulfilment of operations regarding passenger, cargo, maintenance/repair, survey, supply, change of personnel, loading/discharging, having pilot/tugboat services and etc. of all kinds of naval and commercial vessels and vehicles which are calling at Turkish ports, in the presence of relevent individuals, instutitions and authorities and providing complete application of the rules that are implemented by the Laws of the Republic of Türkiye and giving all kinds of information regarding such business accurately and completely.

The Legislation on Ship Agency Activitiy

Shipping agency companies operating in our country are subject to the provisions of the Turkish Commercial Code No.6102, in particular, the Regulation on Ship Agencies dated 05.03.2012 and numbered 28224, and Communiqué Regarding Wage Tariff of Shipping Agency Services (Ship Agency Services Tariff) dated 19.09.2023 and numbered 32314.

According to the Regulation on Ship Agencies, a company wishing to operate as a ship agency in our country must obtain a ship agency authorization certificate from the Ministry of Transport and Infrastructure, General Directorate of Maritime Affairs.

Data on Shipping Agencies

According to the data of the Ministry of Transport and Infrastructure, as of 31.12.2023, there are a total of 1293 shipping agency companies operating in our country with a ship agency authorization certificate. This number reaches 1563 with the shipping agency companies that have the branch authorization certificate.

Shipping agency companies operate in a total of 26 provinces, and it is seen that 82% of the companies operate in İstanbul, Muğla, İzmir, Mersin, Kocaeli and Hatay (6 provinces in total), where ship agency services are carried out intensively.

Table 78. Data of Ship Agencies Authorized by Years

Years	Head Office	Branch Office	Total	%
2014	800	194	994	0.2
2015	872	201	1,073	7.9
2016	937	196	1,113	5.6
2017	985	212	1,197	5.6
2018	1,008	221	1,229	2.6
2019	1,082	213	1,295	5.1
2020	1,074	222	1,296	---
2021	1,117	229	1,346	3.7
2022	1,207	247	1,454	8
2023	1,186	248	1,434	**-1.5**
2024	1,293	269	1,563	**2.8**

Source: Ministry of Transport and Infrastructure (31.12.2023)

Table 79. Distrubion of Ship Agencies By 6 Provinces

Number	Name Of Province	Head Office	Branch Office	Total Number of Company	%
1	İstanbul	557	32	589	37.0
2	İzmir	117	62	179	12.0
3	Muğla	160	19	179	12.0
4	Mersin	102	47	149	10.0
5	Hatay	86	31	117	7.0
6	Kocaeli	61	27	88	6.0

Source: Ministry of Transport and Infrastructure (31.12.2023)

Table 80. Distrubion of Ship Agencies By 4 Regions

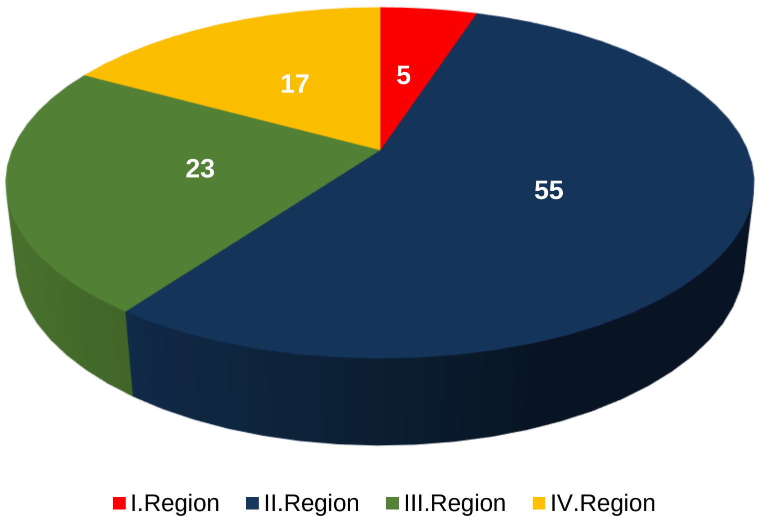
Regions	**Head Office**	**Branch Office**	**Total Number of Company**	**%**
I.Region (Black Sea)	58	17	75	5.0
II.Region (Marmara Sea)	724	80	728	55.0
III.Region (Agea)	297	85	352	23.0
IV.Region (Mediterranean)	215	87	279	17.0
Total	1293	269	1.563	

Source: Ministry of Transport and Infrastructure (31.12.2023)

More than half of a total of 1,293 shipping agency companies operate in the 2nd Region, where the industrial cities Istanbul, Kocaeli and Bursa are located.

It is observed that 23% of the shipping agency companies operate in the 3rd Region, which includes Muğla Province, where ship agency services are provided to yachts, and İzmir and Aydın provinces, where agency services are intensively provided to cruise ships.

Graph 57. Distrubion of Ship Agencies By 4 Regions (%)



Source: Ministry of Transport and Infrastructure (31.12.2023)

9.2. Freight Forwarders

Freight forwarding companies operate with the freight forwarder authorization certificate they have received in accordance with the Freight Organization Regulation published in the Official Gazette dated 27.08.2022 and numbered 31,936.

In order to have a freight forwarder authorization certificate, companies must have a capital of at least 150,000 Turkish Lira and pay the freight forwarder authorization certificate to Ministry of Transport and Infrastructure, fee of 273,244 TL for 2024.

Currently, there are 7,586 freight forwarding companies authorized by the Ministry of Transport and Infrastructure.

9.3. Maritime Trade Inspection Service Activities

In our country, maritime trade inspection services are provided with the maritime inspection authorization certificate obtained from the Ministry of Transport and Infrastructure, the General Directorate of Maritime Affairs, within the framework of the Maritime Trade Inspection Services Regulation dated 19.11.2019 and numbered 30953.

Currently, there are 156 marine inspection companies authorized by the Ministry of Transport and Infrastructure.

Marine inspection service areas according to the Maritime Trade Inspection Services Regulation;

1) Ship inspeciton services have been as;

a) Ship purchase and sale survey,

b) Ship's charter survey,

c) Fuel and oil indication survey,

d) Cargo supply survey,

e) Ship dismantling Survey.

2) Inspection services for loading and unloading;

a) Ship loading/unloading and transshipment survey,

b) Port and tank area survey,

c) Container stock control and stowage safety survey at the port area and coastal facility

d) Pre-loading check.

determined.

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- Republic of Türkiye Ministry of Culture & Tourism
- Republic of Türkiye Ministry of Transport and Infrastructure
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