İSTANBUL & MARMARA, AEGEAN, MEDITERRANEAN, BLACK SEA REGIONS

CHAMBER OF SHIPPING

MARITIME SECTOR REPORT

İstanbul 2025

TURKISH CHAMBER OF SHIPPING

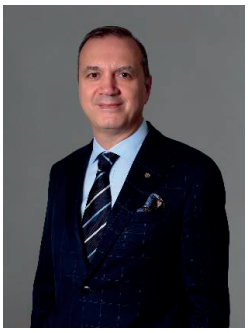
ISTANBUL & MARMARA, AEGEAN, MEDITERRANEAN, BLACK SEA REGIONS

MARITIME SECTOR REPORT

ISTANBUL - 2025

ISTANBUL & MARMARA, AEGEAN, MEDİTERRANEAN, BLACK SEA REGIONS CHAMBER OF SHIPPING

THE BOARD OF DIRECTORS



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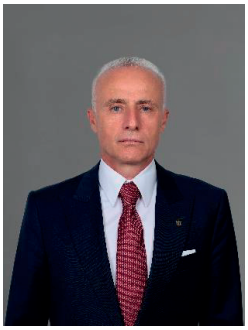

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FOREWORD

The U.S. presidential elections have been one of the most widely discussed topics in the global economy throughout the year 2024. Indeed, with his election as President in November, the effects of Trump's second term continue to reverberate across the world.

Following the pandemic we have experienced in the recent past, we are living in days when uncertainty in the global economy has reached its highest point. The uncertainty which reached a peak after Trump administration's announcement of reciprocity based tariffs and pessimism in financial markets, continue as many countries he opposes take the same dose of retaliation. Undoubtedly, tariff negotiations between the US and countries will be the most important factor determining the global economy throughout 2025.

From the perspective of the Turkish economy, 2024 has been marked by a stronger trend toward macroeconomic stabilization compared to the previous year. While big rating agencies upgraded their ratings and revised their outlooks for Turkiye during the year, there have been significant decreases in CDS rates that measure country risk premiums. While our Central Bank successfully increased both its gross and net reserves, the current account deficit improved considerably.

As we enter 2025, we anticipate that inflation will be one of the most pressing issues on Turkiye's economic agenda. In the coming period, a policy framework supported by tight fiscal policy and comprehensive structural reforms across all sectors will be one of the crucial elements for achieving macroeconomic balance.

When we examine maritime markets, we can state that last year, except for the final quarter, was a positive year for global maritime trade. In 2024, 88% of global trade was conducted via maritime routes, with global seaborne trade reaching 12.6 billion tons with 2.2% increase.

In the Middle East, a region affected by major conflicts and crises, the Israel-Palestine war and Red Sea attacks by the Yemen-based group have forced shifts in trade routes. As a result, 2024 was a strong year for container shipping, with global container trade volume increasing by 5.6% in TEU terms. Due to disruptions in the Red Sea, annual growth in container trade measured in TEU-miles reached 17.8%.

The global merchant fleet, comprising vessels of 100 GT and above, grew by 3.4% in DWT terms, reaching 2.4 billion DWT with 112,489 vessels. In 2024, while Turkish maritime sector focused on growth and transformation, Turkish owned merchant marine fleet advanced to 11th place among the countries controlling the world's largest fleets, with a carrying capacity of 52 million DWT.

It is also worth emphasizing that Türkiye continues to be a key hub in logistics and maritime transportation with its strategic location between Asia and Europe, its annual container processing volume exceeding 12 million TEU and its foreign trade volume exceeding 600 billion dollars.

Our Maritime Sector Report for 2024 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
EIA	: Environmental Impact Assessment
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
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

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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 2024.

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 507 ships of which 298 (5.8 million DWT) have been imported and 209 (1.3 million DWT) have been built in Türkiye.

507 ships are distributed by type as follows: 19.3% dry cargo ships, 12.6% chemical tankers, 11.0% container ships, 8.5% marine vehicles, 8.1% bulk carrier ships and 40.5% other types.

By DWT the fleet consists of; 25.8% bulk carriers, 21.1% oil tankers, 17.4% container ships, 11.8% chemical tankers, 9.5% dry cargo ships, and 14.4% other types.

By DWT, 5.8% of our fleet is registered in the National Ship Registry, 94.2% 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 (6.6 million DWT) is composed of; bulk carriers (25.9%), oil tankers (22.3%), container ships (16.8%), chemical tankers (12.4%), dry cargo vessels (9.7%) and other types (12.9%) (Table 2).

Table 2 shows Turkish merchant fleet which consists of 507 ships. 11.8% of the total fleet (60 ships) is registered in the National Ship Registry and 88.2% of the total fleet (447 ships) is registered in the International Ship Registry.

The majority of the fleet registered in the National Ship Registry (410.945 DWT) is composed of container ships (27.3%), bulk carriers (24.6%), LNG tankers (22.8%), dry cargo ships (6.0%), service ships (4.8%) and other types (14.5%) (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	Count				DWT				GT			
	Import	Build	Total	%	Import	Build	Total	%	Import	Build	Total	%
Dry Cargo	39	59	98	19.3	336,564	332,176	668,740	9.5	231,492	213,698	445,190	7.4
Bulk Carrier	37	4	41	8.1	1,642,717	177,278	1,819,995	25.8	947,662	105,363	1,053,025	17.4
Container	43	13	56	11.0	1,004,321	225,736	1,230,057	17.4	800,082	179,217	979,299	16.1
Dry Cargo/Container	8	4	12	2.4	67,292	30,472	97,764	1.4	59,739	20,640	80,379	1.3
Chemical Tankers	40	24	64	12.6	645,857	189,483	835,340	11.8	420,235	126,493	546,728	9.1
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	2.7	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	3.9	233,950	17,183	251,133	3.6	579,063	60,465	639,528	10.6
Ro-Ro Ferry/Passenger	4	14	18	3.6	9,534	2,417	11,951	0.2	15,550	30,724	46,274	0.8
Ferry Boats	1	28	29	5.7	0	24,118	24,118	0.3	1,816	36,909	38,725	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	7	3	10	2.0	4,078	1,945	6,023	0.1	27,278	13,399	40,677	0.7
Fishing Boats	2	5	7	1.4	3,876	3,829	7,705	0.1	3,592	31,799	35,391	0.6
Scientific Research Vessel	2	1	3	0.6	2,690	0	2,690	0.0	8,038	4,789	12,827	0.2
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	25	10	35	6.9	55,583	4,200	59,783	0.8	206,407	27,122	233,529	3.9
Oil Tankers	12	12	24	4.7	1,300,052	190,478	1,490,530	21.1	701,883	101,446	803,329	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
Dry Cargo/Ro-Ro	1	0	1	0.2	620	0	620	0.0	1,281	0	1,281	0.0
Vessels of Offshore Activity	16	4	20	3.9	96,855	42,336	139,191	2.0	145,421	57,840	203,261	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	28	15	43	8.5	64,582	32,331	96,913	1.4	368,677	153,359	522,036	8.7
Grand Total	**298**	**209**	**507**	**100**	**5,724,432**	**1,333,056**	**7,057,488**	**100**	**4,815,074**	**1,219,683**	**6,034,757**	**100**

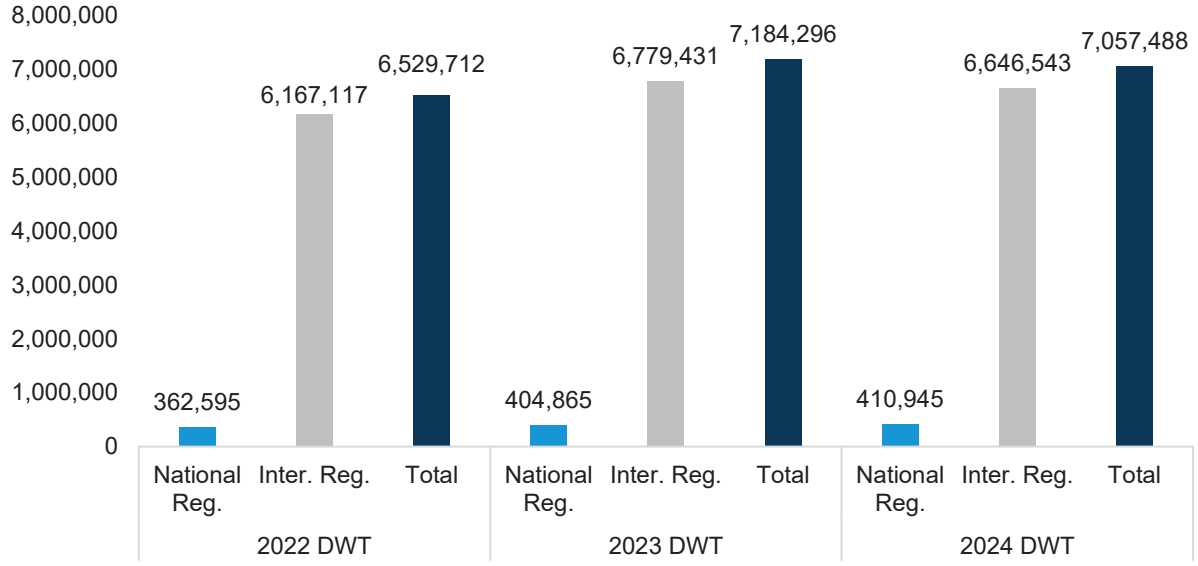
Source: Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping Statistics

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

Ship Types	Count				DWT				GT			
	National Reg.	Inter. Reg.	Total	%	National Reg.	Inter. Reg.	Total	%	National Reg.	Inter. Reg.	Total	%
Dry Cargo	4	94	98	19.3	24,576	644,164	668,740	9.5	16,084	429,106	445,190	7.4
Bulk Carrier	2	39	41	8.1	101,257	1,718,738	1,819,995	25.8	57,361	995,664	1,053,025	17.4
Container	3	53	56	11.0	112,274	1,117,783	1,230,057	17.4	88,090	891,209	979,299	16.1
Dry Cargo/Container	0	12	12	2.4	0	97,764	97,764	1.4	0	80,379	80,379	1.3
Chemical Tankers	2	62	64	12.6	9,497	825,843	835,340	11.8	6,441	540,287	546,728	9.1
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	2.7	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	3.9	1,500	249,633	251,133	3.6	19,638	619,890	639,528	10.6
Ro-Ro Ferry/Passenger	2	16	18	3.6	0	11,951	11,951	0.2	10,681	35,593	46,274	0.8
Ferry Boats	1	28	29	5.7	2,314	21,804	24,118	0.3	1,596	37,129	38,725	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	8	10	2.0	3,240	2,783	6,023	0.1	15,284	25,393	40,677	0.7
Fishing Boats	3	4	7	1.4	0	7,705	7,705	0.1	16,007	19,384	35,391	0.6
Scientific Research Vessel	0	3	3	0.6	0	2,690	2,690	0.0	0	12,827	12,827	0.2
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	21	35	6.9	19,774	40,009	59,783	0.8	59,495	174,034	233,529	3.9
Oil Tankers	3	21	24	4.7	10,868	1,479,662	1,490,530	21.1	5,940	797,389	803,329	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
Dry Cargo/Ro-Ro	0	1	1	0.2	0	620	620	0.0	0	1,281	1,281	0.0
Vessels of Offshore Activity	0	20	20	3.9	0	139,191	139,191	2.0	0	203,261	203,261	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	15	28	43	8.5	15,911	81,002	96,913	1.4	32,134	489,902	522,036	8.7
Grand Total	**60**	**447**	**507**	**100**	**410,945**	**6,646,543**	**7,057,488**	**100**	**458,000**	**5,576,757**	**6,034,757**	**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) 2022-2023-2024 (1000 GT and Over)

Ship Types	2022 DWT			2023 DWT			2024 DWT			2023-2024 DWT
	National Reg.	Inter. Reg.	Total	National Reg.	Inter. Reg.	Total	National Reg.	Inter. Reg.	Total	% Change
Dry Cargo	39,246	525,599	564,845	27,756	624,953	652,709	24,576	644,164	668,740	2.5
Bulk Carrier	18,640	1,774,387	1,793,027	18,640	1,833,216	1,851,856	101,257	1,718,738	1,819,995	-1.7
Container	134,264	954,647	1,088,911	134,264	987,982	1,122,246	112,274	1,117,783	1,230,057	9.6
Dry Cargo/Container	0	34,839	34,839	0	67,815	67,815	0	97,764	97,764	44.2
Chemical Tankers	28,743	846,006	874,749	69,444	972,537	1,041,981	9,497	825,843	835,340	-19.8
LPG Tankers	0	27,804	27,804	0	37,156	37,156	0	37,156	37,156	0.0
LNG Tankers	93,715	93,513	187,228	93,715	93,513	187,228	93,715	93,513	187,228	0.0
Asphalt Tankers	0	61,450	61,450	0	61,450	61,450	0	61,450	61,450	0.0
Ro-Ro Ships	1,500	249,633	251,133	1,500	249,633	251,133	1,500	249,633	251,133	0.0
Ro-Ro Ferry/Passenger	0	28,120	28,120	0	10,235	10,235	0	11,951	11,951	16.8
Ferry Boats	2,314	20,700	23,014	2,314	20,700	23,014	2,314	21,804	24,118	4.8
Train Ferries	2,960	0	2,960	2,960	0	2,960	2,960	0	2,960	0.0
Passenger and Cargo Ships	3,240	2,538	5,778	3,240	2,538	5,778	3,240	2,783	6,023	4.2
Fishing Boats	0	3,876	3,876	0	3,876	3,876	0	7,705	7,705	98.8
Scientific Research Vessel	0	2,690	2,690	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	31,384	51,158	19,774	37,676	57,450	19,774	40,009	59,783	4.1
Oil Tankers	10,868	1,293,224	1,304,092	10,868	1,490,352	1,501,220	10,868	1,479,662	1,490,530	-0.7
Container/Ro-Ro	0	0	0	13,059	0	13,059	13,059	0	13,059	0.0
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	0	0	0	0	0	0	0	620	620	-
Vessels of Offshore Activity	0	136,623	136,623	0	140,971	140,971	0	139,191	139,191	-1.3
Special Purpose Ships	0	5,552	5,552	0	5,552	5,552	0	5,552	5,552	0.0
Marine Vehicles	7,331	67,002	74,333	7,331	129,056	136,387	15,911	81,002	96,913	-28.9
Grand Total	**362,595**	**6,167,117**	**6,529,712**	**404,865**	**6,779,431**	**7,184,296**	**410,945**	**6,646,543**	**7,057,488**	**-1.8**

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 507 ships. The average age of these ships is 26 as of 31.12.2024.

The average age of dry cargo ships is 29, which makes 19.3% of the fleet. The average age of bulk carriers is 22 and makes up 8.1% of the total fleet. The average age of containers is 22, which is 11.0% of the fleet. The average age of chemical tankers is 21, which is 12.6% of the fleet. The average age of oil tankers is 20, which is 4.7% 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	98	668,740	445,190	29
Bulk Carrier	41	1,819,995	1,053,025	22
Container	56	1,230,057	979,299	22
Dry Cargo/Container	12	97,764	80,379	25
Chemical Tankers	64	835,340	546,728	21
LPG Tankers	6	37,156	34,294	27
LNG Tankers	2	187228	218,696	5
Asphalt Tankers	4	61,450	48,941	9
Ro-Ro Ships	20	251,133	639,528	19
Ro-Ro Ferry/Passenger	18	11,951	46,274	16
Ferry Boats	29	24,118	38,725	29
Train Ferries	5	2,960	7,916	51
Passenger and Cargo Ships	10	6,023	40,677	26
Fishing Boats	7	7,705	35,391	14
Scientific Research Vessel	3	2,690	12,827	20
Harbour Ferries	1	0	1,043	73
Harbour Car Ferries	4	1,264	4,874	32
Tugs	1	0	1,565	41
Service Ships	35	59,783	233,529	43
Oil Tankers	24	1,490,530	803,329	20
Container/Ro-Ro	1	13,059	9,991	28
Train Ferries/Ro-Ro	1	6,266	15,195	39
Dry Cargo/Ro-Ro	1	620	1,281	21
Vessels of Offshore Activity	20	139,191	203,261	18
Special Purpose Ships	1	5552	10,763	26
Marine Vehicles	43	96,913	522,036	37
Grand Total	**507**	**7,057,488**	**6,034,757**	**26**

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 507 ships with a total of 7,057,488 DWT.

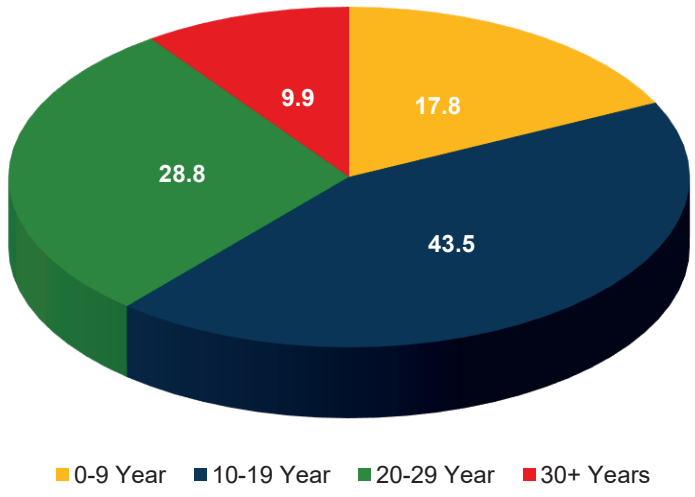
- 53 ships with total size 1,257,957 DWT are in the 0-9 age range,
- 163 ships with total size 3,066,075 DWT are in the 10-19 age range,
- 125 ships with total size 2,035,145 DWT are in the 20-29 age range,
- 166 ships with total size 698,311 DWT are of age 30 or older.

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	18	0	0.0	26	0	0.0	6	0	0.0	45	0	0.0	95	0
150-1499	1	244	0.0	7	5,536	0.2	7	4,065	0.2	17	11,757	1.7	32	21,602
1500-5999	7	26,086	2.1	37	136,956	4.5	32	116,632	5.7	73	242,998	34.8	149	522,672
6000-9999	6	41,504	3.3	17	132,757	4.3	20	168,324	8.3	16	121,288	17.4	59	463,873
10000-34999	9	163,818	13.0	46	793,877	25.9	40	715,112	35.1	13	197,984	28.4	108	1,870,791
35000-52999	6	224,173	17.8	14	577,535	18.8	16	685,605	33.7	1	41,667	6.0	37	1,528,980
53000-79999	0	0	0.0	8	500,188	16.3	3	195,408	9.6	0	0	0.0	11	695,596
80000-119999	2	187,228	14.9	5	468,683	15.3	0	0	0.0	1	82,617	11.7	8	738,528
120000+	4	614,904	48.9	3	450,543	14.7	1	149,999	7.4	0	0	0.0	8	1,215,446
Grand Total	**53**	**1,257,957**	**100**	**163**	**3,066,075**	**100**	**125**	**2,035,145**	**100**	**166**	**698,311**	**100**	**507**	**7,057,488**

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. 17.8% of the fleet is in the 0-9 age range, 43.5% of the fleet is in the 10-19 age range, 28.8% of the fleet is in the 20-29 age range and 9.9% 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 (98 ships) which has a total size of 668,740 DWT.

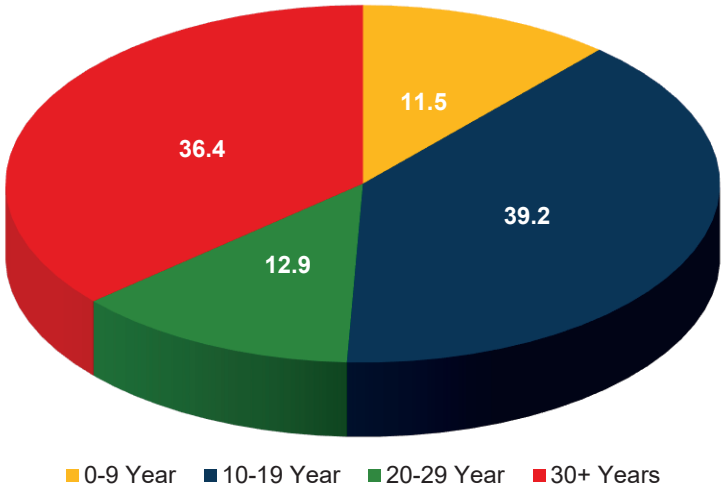
- 7 ships of size 76,987 DWT are in the 0-9 age range,
- 22 ships of size 262,165 DWT are in the 10-19 age range,
- 17 ships of size 86,016 DWT are in the 20-29 age range,
- 52 ships of size 243,572 DWT are 30 years or older.

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	3	13,907	18.1	10	43,223	16.5	11	40,360	46.9	43	153,008	62.8	67	250,498
6000-9999	2	15,201	19.7	6	45,060	17.2	6	45,656	53.1	5	33,940	13.9	19	139,857
10000-34999	2	47,879	62.2	4	74,600	28.5	0	0	0.0	4	56,624	23.3	10	179,103
35000-52999	0	0	0.0	2	99,282	37.8	0	0	0.0	0	0	0.0	2	99,282
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	**7**	**76.987**	**100**	**22**	**262.165**	**100**	**17**	**86.016**	**100**	**52**	**243.572**	**100**	**98**	**668.740**

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

11.5% of Dry Cargo Ships are in the 0-9 age range; 39.2% are in the 10-19 age range; 12.9% are in the 20-29 age range and 36.4% are 30 years or older.

Table 7 shows the Bulk Carrier Segment (41 ships) with a total size of 1,819,995 DWT.

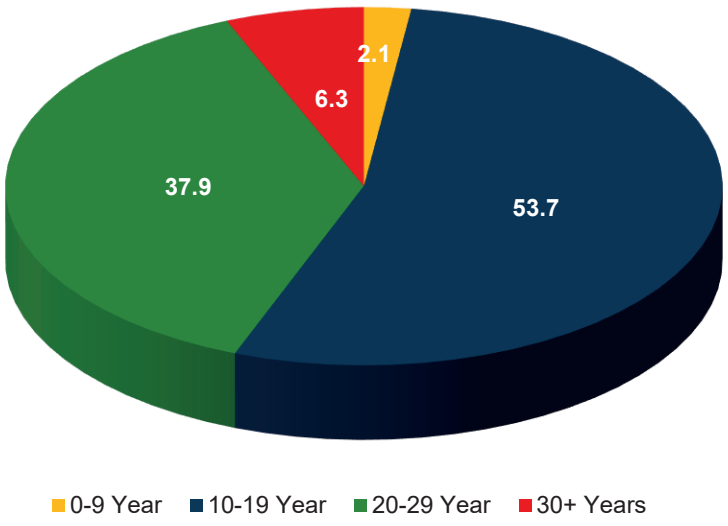
- 1 ships of size 38,595 DWT are in the 0-9 age range,
- 20 ships of size 977,733 DWT are in the 10-19 age range,
- 15 ships of size 689,907 DWT are in the 20-29 age range,
- 5 ships of size 113,760 DWT are 30 years or older.

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	1	8,232	0.8	0	0	0.0	3	12,503	11.0	4	20,735
10000-39999 (Handysize)	1	38,595	100.0	8	234,737	24.0	5	148,356	21.5	1	18,640	16.4	15	440,328
40000-49999 (Handymax)	0	0	0.0	1	48,549	5.0	3	139,779	20.3	0	0	0.0	4	188,328
50000-59999 (Supramax)	0	0	0.0	5	279,812	28.6	5	260,170	37.7	0	0	0.0	10	539,982
60000-84999 (Panamax)	0	0	0.0	5	406,403	41.6	2	141,602	20.5	1	82,617	72.6	8	630,622
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	**1**	**38,595**	**100**	**20**	**977,733**	**100**	**15**	**689,907**	**100**	**5**	**113,760**	**100**	**41**	**1,819,995**

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

2.1% of the bulk carriers are in the 0-9 age range; 53.7% are in the 10-19 age range; 37.9% are in the 20-29 age range and 6.3% are 30 years or older.

Table 8 shows Oil Tankers Segment (24 ships) with a total size of 1,490,530 DWT.

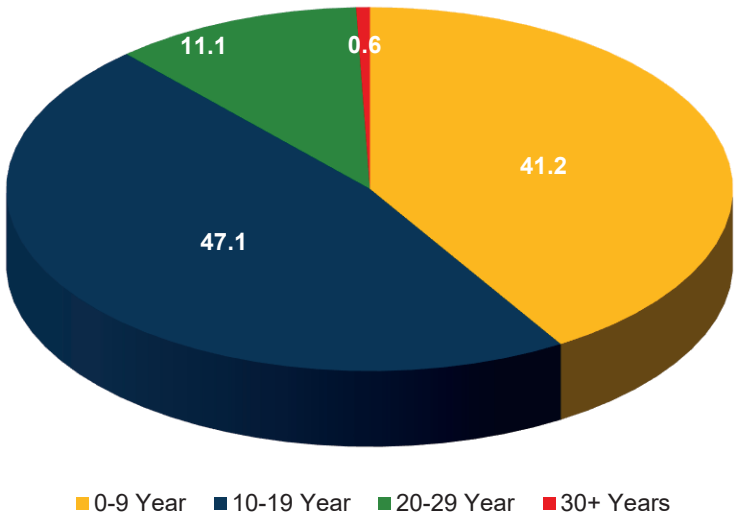
- 4 ships of size 614,904 DWT are in the 0-9 age range,
- 12 ships of size 701,429 DWT are in the 10-19 age range,
- 5 ships of size 165,163 DWT are in the 20-29 age range,
- 3 ships of size 9,034 DWT are 30 years or older.

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	2.4	4	15,164	9.2	3	9,034	100.0	13	40,963
5000-7499	0	0	0.0	0	0	0.0	0	0	0.0	0	0	0.0	0	0
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	1.9	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)	0	0	0.0	2	221,119	31.5	0	0	0.0	0	0	0.0	2	221,119
120000-199999 (Suezmax)	4	614,904	100.0	3	450,543	64.2	1	149,999	90.8	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	**4**	**614,904**	**100**	**12**	**701,429**	**100**	**5**	**165,163**	**100**	**3**	**9,034**	**100**	**24**	**1,490,530**

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

41.2% of the oil tankers are in the 0-9 age range; 47.1% are in the 10-19 age range; 11.1% are in the 20-29 age range and 0.6% are 30 years old or older.

Table 9 shows the average age of the chemical tankers (64 ships) with a total size of 835,340 DWT.

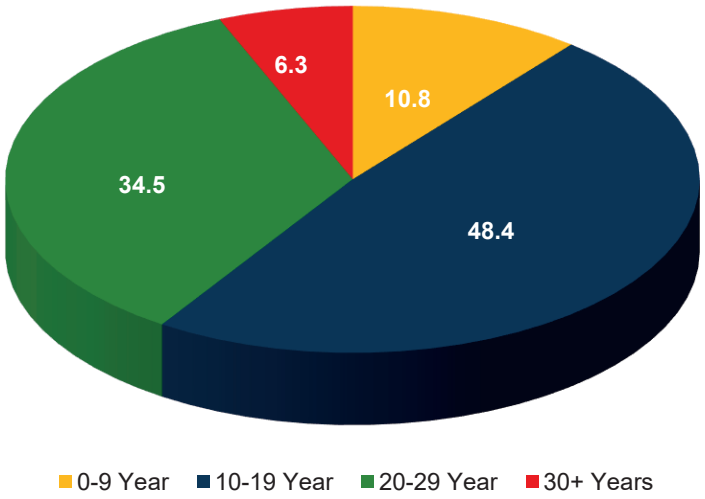
- 7 ships of size 90,498 DWT are in the 0-9 age range,
- 27 ships of size 404,318 DWT are in the 10-19 age range,
- 22 ships of size 288,154 DWT are in the 20-29 age range,
- 8 ships of size 52,370 DWT are 30 years or older.

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	1	3,338	3.7	3	12,435	3.1	7	27,857	9.7	2	5,126	9.8	13	48,756
5000-7499	2	12,165	13.4	3	18,855	4.7	4	26,075	9.0	2	12,264	23.4	11	69,359
7500-9999	1	7,538	8.3	4	35,330	8.7	3	25,826	9.0	4	34,980	66.8	12	103,674
10000-39999 (Handysize)	3	67,457	74.6	15	236,176	58.4	7	162,140	56.2	0	0	0.0	25	465,773
40000-59999 (Handymax)	0	0	0.0	2	101,522	25.1	1	46,256	16.1	0	0	0.0	3	147,778
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	**7**	**90,498**	**100**	**27**	**404,318**	**100**	**22**	**288,154**	**100**	**8**	**52,370**	**100**	**64**	**835,340**

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

10.8% of chemical tankers are in the 0-9 age range; 48.4% are in the 10-19 age range; 34.5% are in the 20-29 age range and 6.3% are 30 years or older.

Table 10 shows the average age of the Container Ships (56 ships) with a total size of 1,230,057 DWT.

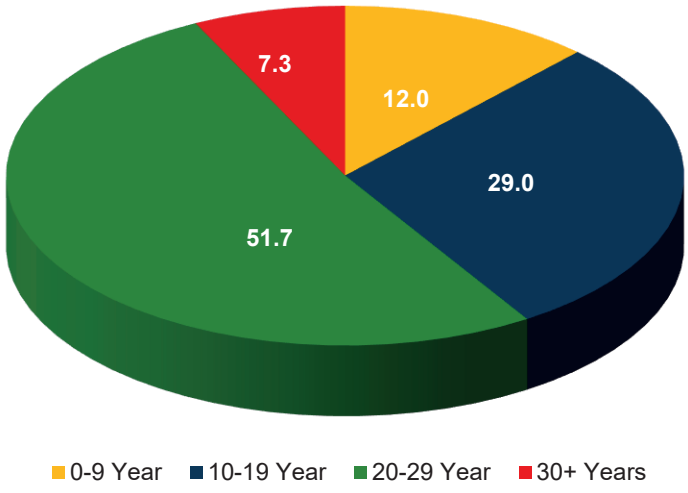
- 4 ships of size 147,996 DWT are in the 0-9 age range,
- 15 ships of size 356,217 DWT are in the 10-19 age range,
- 32 ships of size 636,388 DWT are in the 20-29 age range,
- 5 ships of size 89,456 DWT are 30 years or older.

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	0.9	0	0	0.0	0	0	0.0	1	3,301
6000-9999	0	0	0.0	0	0	0.0	1	9,950	1.6	1	9,766	10.9	2	19,716
10000-34999	0	0	0.0	10	206,317	57.9	26	447,692	70.3	3	38,023	42.5	39	692,032
35000-52999	4	147,996	100.0	4	146,599	41.2	5	178,746	28.1	1	41,667	46.6	14	515,008
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**	**15**	**356,217**	**100**	**32**	**636,388**	**100**	**5**	**89,456**	**100**	**56**	**1,230,057**

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

12.0% of Container ships are in the 0-9 age range; 29.0% are in the 10-19 age range; 51.7% are in the 20-29 age range and 7.3% 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.

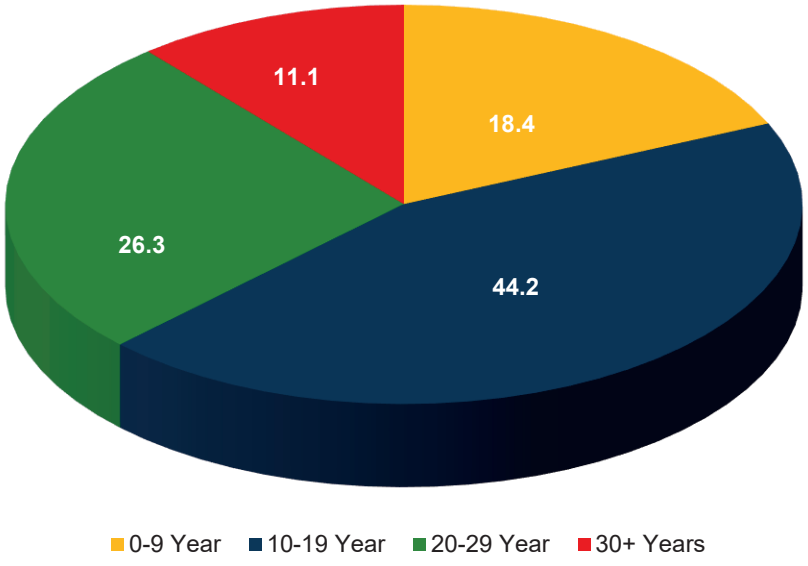
- 3 ships of size 46,110 DWT are in the 0-9 age range,
- 8 ships of size 110,988 DWT are in the 10-19 age range,
- 7 ships of size 66,003 DWT are in the 20-29 age range,
- 2 ships of size 28,032 DWT are 30 years or older.

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	2.3	0	0	0.0	1	1,500
6000-9999	0	0	0.0	0	0	0.0	3	29,595	44.8	0	0	0.0	3	29,595
10000-34999	3	46,110	100.0	8	110,988	100.0	3	34,908	52.9	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**	**8**	**110,988**	**100**	**7**	**66,003**	**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; 44.2% are in the 10-19 age range; 26.3% 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 474 ships 13.1% of the total fleet (62 ships) is registered in the National Ship Registry and 86.9% of the total fleet (412 ships) in the International Ship Registry. The total DWT and GT values of ships over 1000 DWT are 7,203,231 DWT and 5,275,139 GT respectively. 6 classes make up the majority of this capacity. Bulk carriers lead with 25.1%, oil tankers follow with 21.2%, containers with 17.1%, chemical tankers with 11.6%, dry cargo with 9.9% and ro-ro ships with 3.5%. These 6 classes make up 88.4% of the total fleet based on DWT.

5.6% of the bulk carrier ships are registered in the National Ship Registry, and the rest 94.4% are registered in the International Ship Registry with a total weight of 1,819,995 DWT for the bulk carrier segment.

1.4% of the oil tankers are registered in the National Ship Registry, and the rest 98.6% are registered in the International Ship Registry with a total weight of 1,530,859 DWT for the oil tankers segment.

9.1% of the container ships are registered in the National Ship Registry, and the rest 90.9% are registered in the International Ship Registry with a total weight of 1,230,057 DWT for the container ship segment.

1.1% of the chemical tankers are registered in the National Ship Registry, and the rest 98.9% are registered in the International Ship Registry with a total weight of 835,340 DWT for the chemical tankers segment.

6.0% of the dry cargo ships are registered in the National Ship Registry, and the rest 94.0% are registered in the International Ship Registry with a total weight of 714,056 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	Count				DWT				GT			
	Import	Build	Total	%	Import	Build	Total	%	Import	Build	Total	%
Dry Cargo	42	87	129	27.2	340,640	373,416	714,056	9.9	233,916	236,453	470,369	8.9
Bulk Carrier	37	4	41	8.8	1,642,717	177,278	1,819,995	25.1	947,662	105,363	1,053,025	19.9
Container	43	13	56	11.8	1,004,321	225,736	1,230,057	17.1	800,082	179,217	979,299	18.6
Dry Cargo/Container	8	4	12	2.5	67,292	30,472	97,764	1.4	59,739	20,640	80,379	1.5
Chemical Tankers	40	24	64	13.5	645,857	189,483	835,340	11.6	420,235	126,493	546,728	10.4
LPG Tankers	6	0	6	1.3	37,156	0	37,156	0.5	34,294	0	34,294	0.7
LNG Tankers	2	0	2	0.4	187,228	0	187,228	2.6	218,696	0	218,696	4.2
Asphalt Tankers	1	3	4	0.8	6,600	54,850	61,450	0.9	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	4.2	233,950	17,183	251,133	3.5	579,063	60,465	639,528	12.1
Ro-Ro Ferry/Passenger	2	1	3	0.6	9,077	1,716	10,793	0.2	10,523	1,896	12,419	0.2
Ferry Boats	0	11	11	2.3	0	20,048	20,048	0.3	0	15,751	15,751	0.3
Train Ferries	0	2	2	0.4	0	2,600	2,600	0.0	0	2,466	2,466	0.1
Passenger and Cargo Ships	2	1	3	0.6	31,182	1,700	32,882	0.5	5,132	10,583	15,715	0.3
Fishing Boats	1	1	2	0.4	3,307	3,829	7,136	0.1	2,184	3,894	6,078	0.1
Scientific Research Vessel	1	0	1	0.2	2,690	0	2,690	0.0	3,327	0	3,327	0.1
Service Ships	19	15	34	7.2	67,057	24,446	91,503	1.3	59,715	10,775	70,490	1.3
Oil Tankers	18	32	50	10.7	1,309,045	221,814	1,530,859	21.2	707,453	119,828	827,281	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	1	0	1	0.2	6,266	0	6,266	0.1	15,195	0	15,195	0.3
Dry Cargo/Ro-Ro	0	2	2	0.4	0	3,262	3,262	0.1	0	1,973	1,973	0.0
Vessels of Offshore Activity	12	4	16	3.4	96,855	42,336	139,191	1.9	88,169	57,840	146,009	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	5	7	12	2.5	64,582	37,602	102,184	1.4	37,329	28,605	65,934	1.3
Grand Total	**261**	**213**	**474**	**100**	**5,774,433**	**1,428,798**	**7,203,231**	**100**	**4,248,779**	**1,026,360**	**5,275,139**	**100**

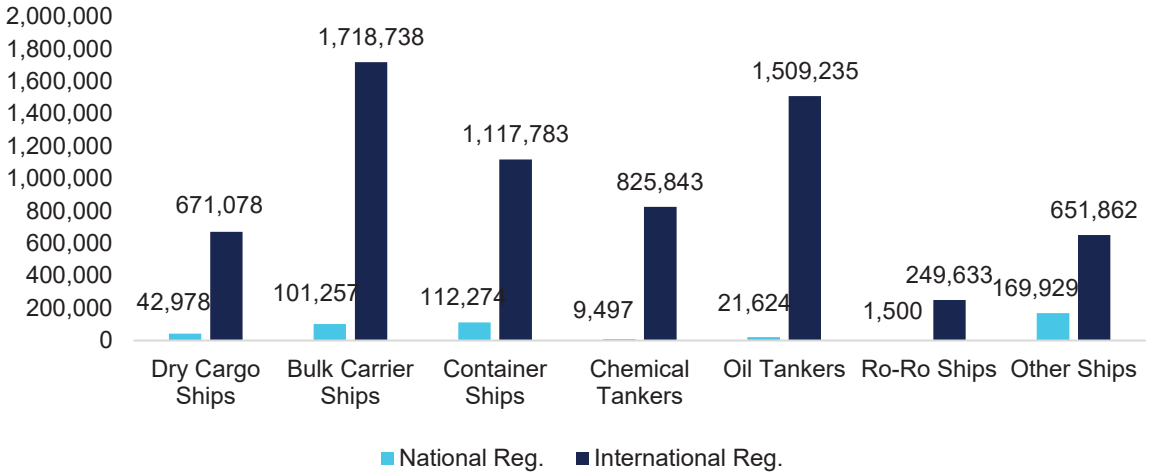
Source: Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping Statistics

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

Ship Types	Count				DWT				GT			
	National Reg.	Inter. Reg.	Total	%	National Reg.	Inter. Reg.	Total	%	National Reg.	Inter. Reg.	Total	%
Dry Cargo	18	111	129	27.2	42,978	671,078	714,056	9.9	26,348	444,021	470,369	8.9
Bulk Carrier	2	39	41	8.8	101,257	1,718,738	1,819,995	25.1	57,361	995,664	1,053,025	19.9
Container	3	53	56	11.8	112,274	1,117,783	1,230,057	17.1	88,090	891,209	979,299	18.6
Dry Cargo/Container	0	12	12	2.5	0	97,764	97,764	1.4	0	80,379	80,379	1.5
Chemical Tankers	2	62	64	13.5	9,497	825,843	835,340	11.6	6,441	540,287	546,728	10.4
LPG Tankers	0	6	6	1.3	0	37,156	37,156	0.5	0	34,294	34,294	0.7
LNG Tankers	1	1	2	0.4	93,715	93,513	187,228	2.6	109,777	108,919	218,696	4.2
Asphalt Tankers	0	4	4	0.8	0	61,450	61,450	0.9	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	4.2	1,500	249,633	251,133	3.5	19,638	619,890	639,528	12.1
Ro-Ro Ferry/Passenger	0	3	3	0.6	0	10,793	10,793	0.2	0	12,419	12,419	0.2
Ferry Boats	1	10	11	2.3	2,314	17,734	20,048	0.3	1,596	14,155	15,751	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	0.6	3,240	29,642	32,882	0.5	15,284	431	15,715	0.3
Fishing Boats	0	2	2	0.4	0	7,136	7,136	0.1	0	6,078	6,078	0.1
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	22	34	7.2	33,819	57,684	91,503	1.3	24,892	45,598	70,490	1.3
Oil Tankers	10	40	50	10.7	21,624	1,509,235	1,530,859	21.2	12,499	814,782	827,281	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	2	2	0.4	0	3,262	3,262	0.1	0	1,973	1,973	0.0
Vessels of Offshore Activity	0	16	16	3.4	0	139,191	139,191	1.9	0	146,009	146,009	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	7	5	12	2.5	21,182	81,002	102,184	1.4	10,384	55,550	65,934	1.3
Grand Total	**62**	**412**	**474**	**100**	**459,059**	**6,744,172**	**7,203,231**	**100**	**384,767**	**4,890,372**	**5,275,139**	**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 474 ships. The average age of these ships is 31 as of 31.12.2024.

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

Ship Types	Number	DWT	GT	Average Age
Dry Cargo	129	714,056	470,369	35
Bulk Carrier	41	1,819,995	1,053,025	22
Container	56	1,230,057	979,299	22
Dry Cargo/Container	12	97,764	80,379	25
Chemical Tankers	64	835,340	546,728	21
LPG Tankers	6	37,156	34,294	27
LNG Tankers	2	187,228	218,696	5
Asphalt Tankers	4	61,450	48,941	9
Water Barges	1	1,027	488	56
Ro-Ro Ships	20	251,133	639,528	19
Ro-Ro Ferry/Passenger	3	10,793	12,419	35
Ferry Boats	11	20,048	15,751	31
Train Ferries	2	2,600	2,466	52
Passenger and Cargo Ships	3	32,882	15,715	55
Fishing Boats	2	7,136	6,078	19
Scientific Research Vessel	1	2,690	3,327	39
Service Ships	34	91,503	70,490	38
Oil Tankers	50	1,530,859	827,281	20
Container/Ro-Ro	1	13,059	9,991	28
Train Ferries/Ro-Ro	1	6,266	15,195	39
Dry Cargo/Ro-Ro	2	3,262	1,973	31
Vessels of Offshore Activity	16	139,191	146,009	18
Special Purpose Ships	1	5,552	10,763	26
Marine Vehicles	12	102,184	65,934	28
Grand Total	**474**	**7,203,231**	**5,275,139**	**31**

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 474 ships with a total of 7,203,231 DWT.

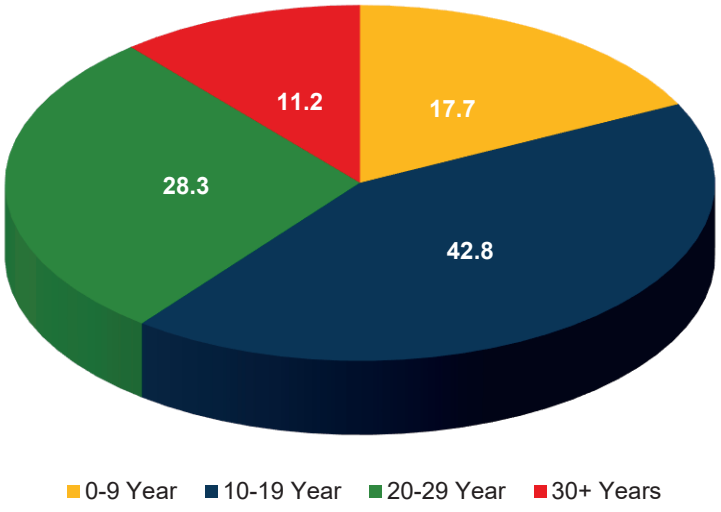
- 44 ships with total size 1.275.026 DWT are in the 0-9 age range,
- 145 ships with total size 3,083,584 DWT are in the 10-19 age range,
- 118 ships with total size 2,040,023 DWT are in the 20-29 age range,
- 167 ships with total size 804,598 DWT are of age 30 or older.

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	7,398	0.3	4	5,386	0.2	41	51,979	6.4	52	65,994
1500-5999	16	42,168	3.3	46	152,603	4.9	34	120,189	5.9	94	279,421	34.7	190	594,381
6000-9999	6	41,504	3.3	17	132,758	4.3	20	168,324	8.3	16	121,288	15.1	59	463,874
10000-34999	9	163,818	12.8	49	897,570	29.1	42	783,814	38.4	14	227,626	28.3	114	2,072,828
35000-52999	6	224,173	17.6	11	473,842	15.4	14	616,903	30.2	1	41,667	5.2	32	1,356,585
53000-79999	0	0	0.0	8	500,187	16.2	3	195,408	9.6	0	0	0.0	11	695,595
80000-119999	2	187,228	14.7	5	468,683	15.2	0	0	0.0	1	82,617	10.3	8	738,528
120000+	4	614,904	48.2	3	450,543	14.6	1	149,999	7.4	0	0	0.0	8	1,215,446
Grand Total	**44**	**1,275,026**	**100**	**145**	**3,083,584**	**100**	**118**	**2,040,023**	**100**	**167**	**804,598**	**100**	**474**	**7,203,231**

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. 17.7% of the fleet is in the 0-9 age range, 42.8% of the fleet is in the 10-19 age range, 28.3% of the fleet is in the 20-29 age range and 11.2% is 30 years old or over.

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

As of January 1st 2025, accounting only for ships with size 1000 GT and above, Turkish fleet under foreign flag is 46.4 million DWT, whereas the total fleet under both Turkish and foreign flag amounts to 51.9 million DWT.

On the other hand, the ratio distribution of the fleet regarding the flags of registration is as follows: 10.7% percent of these ships are registered under the Turkish flag and 89.3% are registered under the foreign flags.

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

	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
2025	343	5,564	10.7	1,749	46,380	89.3	2,092	51,943	8.3

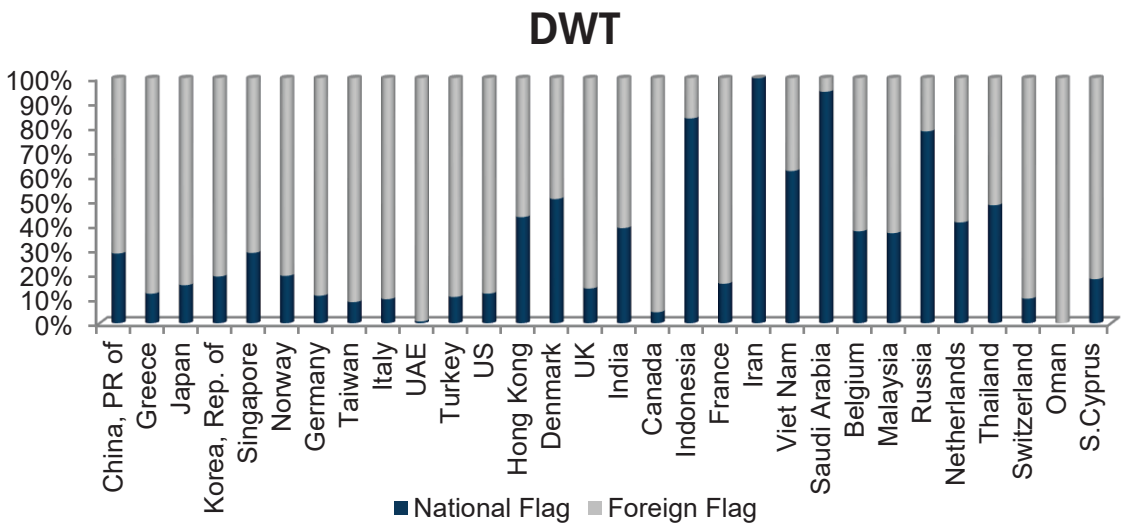
Source: ISL January-February 2025

Table 17. Total Fleet of the 30 Countries by National and Foreign Flags (01 January 2025)
(1000 GT and Over)

Country of Control (DWT-Rank 2025)		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	China, PR of	5,876	125,001	1.348	13.0	4,394	314,821	4.378	13.5	10,270	439,822	5,726	13.2	71.6
2	Greece	569	51,361	40	17.5	4,749	375,094	2.047	13.7	5,318	426,455	2,087	14.1	88.0
3	Japan	903	39,875	323	13.2	3,460	217,359	2.315	9.0	4,363	257,234	2,638	9.8	84.5
4	Korea, Rep. of	753	19,393	645	18.3	911	82,407	661	12.0	1,664	101,800	1,306	14.9	80.9
5	Singapore	696	25,118	458	11.5	937	62,453	811	14.6	1,633	87,571	1,269	13.3	71.3
6	Norway	677	15,540	84	17.8	968	64,896	450	15.3	1,645	80,436	534	16.3	80.7
7	Germany	138	8,028	712	19.9	1,944	63,559	2.720	14.9	2,082	71,587	3,431	15.2	88.8
8	Taiwan	122	5,604	226	15.8	912	59,579	1.903	12.0	1,034	65,184	2,130	12.4	91.4
9	Italy	352	5,972	66	22.2	946	54,944	3.271	16.3	1,298	60,916	3,337	17.9	90.2
10	UAE	49	387	6	15.4	1,075	51,670	283	19.6	1,124	52,057	290	19.4	99.3
11	Türkiye	343	5,564	71	23.9	1,749	46,380	265	21.9	2,092	51,943	335	22.2	89.3
12	US	222	6,107	99	24.6	829	44,507	116	16.5	1,051	50,614	215	18.2	87.9
13	Hong Kong (SAR)	346	20,523	21	13.6	574	26,918	70	19.6	920	47,441	91	17.3	56.7
14	Denmark	339	21,807	1.356	15.7	404	21,250	1.186	16.2	743	43,057	2,542	16.0	49.4
15	UK	154	5,891	183	16.0	660	35,794	994	14.4	814	41,684	1,176	14.7	85.9
16	India	691	15,375	15	17.2	350	24,256	10	17.5	1,041	39,632	25	17.3	61.2
17	Canada	133	1,662	5	24.4	422	35,421	1.971	12.4	555	37,083	1,975	15.3	95.5
18	Indonesia	2,237	26,251	173	26.0	169	5,185	75	17.5	2,406	31,437	248	25.4	16.5
19	France	118	4,374	328	14.6	354	22,791	1.836	12.9	472	27,165	2,163	13.4	83.9
20	Iran	209	18,377	154	23.5	7	17		28.0	216	18,394	154	23.6	0.1
21	Viet Nam	804	10,028	52	17.5	263	6,124	13	19.6	1,067	18,151	65	18.0	44.8
22	Saudi Arabia	129	16,913	11	13.7	24	1,005	0	15.1	153	17,919	12	14.0	5.6
23	Belgium	59	5,706	9	9.7	100	9,512	19	12.9	159	15,218	28	11.7	62.5
24	Malaysia	203	5,442	42	19.3	159	9,380	3	16.5	362	14,823	45	18.0	63.3
25	Russia	1,289	10,617	140	31.2	156	2,953	19	28.6	1,445	13,570	159	30.9	21.8
26	Netherlands	523	4,642	183	15.7	334	6,651	53	16.8	857	11,292	236	16.1	58.9
27	Thailand	296	3,878	48	28.2	92	4,183	95	17.3	388	8,061	143	25.6	51.9
28	Switzerland	12	767		10.4	123	6,892	6	14.9	135	7,659	6	14.5	90.0
29	Oman	3	1		11.9	62	7,322	10	14.3	65	7,323	10	14.2	100.0
30	S.Cyprus	50	1,285	7	17.8	161	5,866	29	18.0	211	7,150	36	18.0	82.0
Total 30 Countries		**18,295**	**481,489**	**6,804**	**18.0**	**27,288**	**1,671,188**	**25,608**	**14.5**	**45,583**	**2,152,677**	**32,412**	**15.9**	**77.6**
Other		**2,509**	**34,866**	**202**	**24.7**	**2,738**	**81,354**	**396**	**23.0**	**5,247**	**116,220**	**597**	**23.8**	**70**
Subtotal		**20,804**	**516,355**	**7,005**	**18.8**	**30,026**	**1,752,543**	**26,004**	**15.3**	**50,830**	**2,268,897**	**33,009**	**16.7**	**77.2**
Unknown										**1,289**	**50,430**	**199**	**24.4**	
World Total										**52,119**	**2,319,328**	**33,208**	**16.9**	

Source: ISL January-February 2025

Graph 11. By Country of Domicile as of 1 January 2025 (1000 GT and Over)

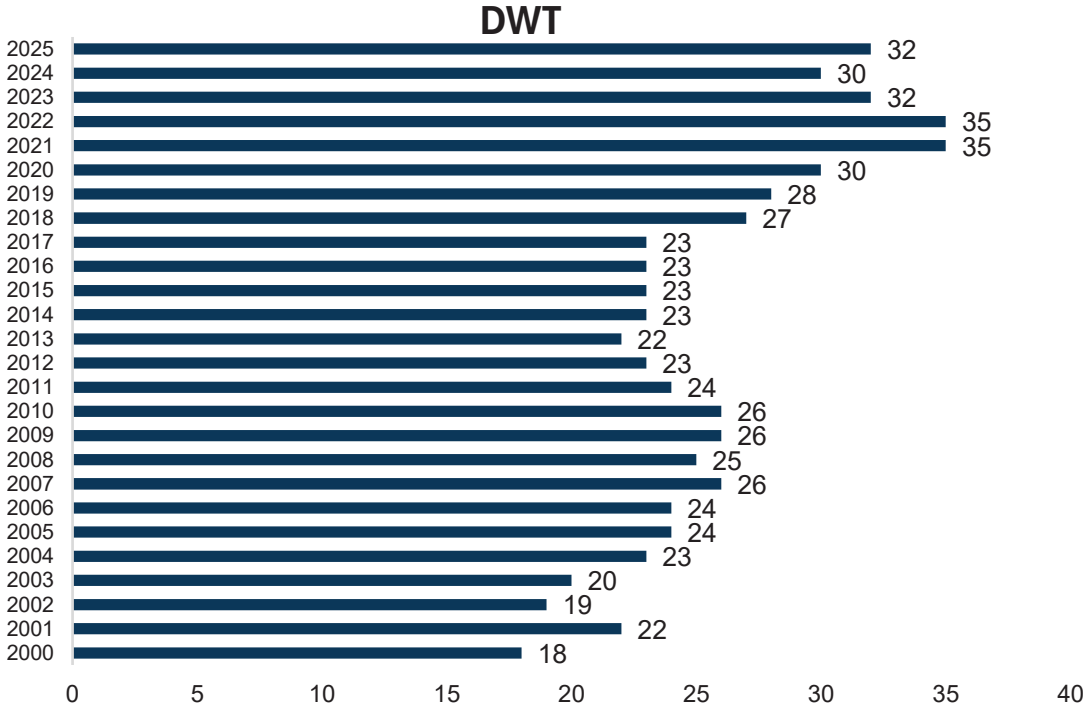


Source: ISL January-February 2025

The World fleet (300 GT and over) consists of 63,914 ships with a total size of 2,329,534,000 DWT based in 158 countries as of 01.01.2025. Turkish merchant fleet is positioned 32th in the world as shown in the Table 18.

Liberya leads with a share of 17.9%, Panama is second with 15.8% and Marshall Island is third with share of 12.8% of the total registry.

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



Source: ISL January-February 2025

Table 18. World Merchant Fleet Ranking by Flag as of 1 January 2025 (300 GT and Over)

DWT Rank 2025	Flag	1 January 2024				1 January 2025				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	5,001	251,496	400,403	6,457	5,263	266,335	415,947	7,491	17.9	3.9
2	Panama	6,984	240,183	370,499	3,665	7,257	239,311	367,125	3,648	15.8	-0.9
3	Marshall Islands	3,960	182,114	299,970	1,036	3,911	181,540	297,511	1,034	12.8	-0.8
4	Hong Kong (SAR)	2,321	127,517	199,633	3,946	2,346	131,260	202,143	4,460	8.7	1.3
5	Singapore	2,353	93,731	137,466	3,030	2,420	102,521	149,398	3,520	6.4	8.7
6	China, PR of	6,605	79,579	125,133	1,187	7,218	81,243	127,137	1,353	5.5	1.6
7	Malta	1,747	77,530	101,208	2,400	1,830	85,639	111,846	2,795	4.8	10.5
8	Bahamas	1,036	52,249	57,868	214	1,022	51,681	55,070	232	2.4	-4.8
9	Greece	805	33,869	56,271	41	794	32,715	53,329	41	2.3	-5.2
10	Japan	2,805	30,872	42,043	320	2,785	31,427	42,886	328	1.8	2.0
11	Portugal/Madeira	841	22,033	29,363	1,289	980	25,984	35,627	1,407	1.5	21.3
12	S.Cyprus	801	20,255	29,787	390	833	22,617	33,518	428	1.4	12.5
13	Indonesia	3,803	19,595	28,148	182	3,877	20,374	29,305	182	1.3	4.1
14	Portugal	489	20,378	28,709	432	465	19,994	28,796	400	1.2	0.3
15	Denmark	538	22,220	25,024	1,431	522	22,831	25,735	1,473	1.1	2.8
16	Korea, Rep. of	1,094	16,856	20,964	549	1,084	17,184	20,929	660	0.9	-0.2
17	Iran	497	11,636	20,535	157	514	11,794	20,819	156	0.9	1.4
18	Norway	969	16,793	19,708	89	961	16,491	18,723	89	0.8	-5.0
19	Barbados	323	3,764	6,103	36	468	10,687	18,375	40	0.8	201.1
20	India	958	10,395	17,360	58	953	10,149	17,058	58	0.7	-1.7
21	Saudi Arabia	132	7,779	14,128	8	145	9,228	16,972	11	0.7	20.1
22	Russia	1,606	8,001	10,315	149	1,642	9,418	12,741	152	0.5	23.5
23	Viet Nam	1,411	7,227	12,104	52	1,385	6,707	11,147	53	0.5	-7.9
24	France	234	9,236	9,369	385	245	10,104	9,982	409	0.4	6.5
25	Antigua & Barbuda	596	4,875	6,480	318	641	6,488	9,421	318	0.4	45.4
26	US	397	8,393	9,331	282	408	8,507	9,281	275	0.4	-0.5
27	Netherlands	706	5,697	5,773	207	736	7,539	8,932	204	0.4	54.7
28	Germany	204	7,718	7,907	677	205	8,443	8,567	758	0.4	8.3
29	Palau	424	4,768	7,694	33	440	4,905	7,555	36	0.3	-1.8
30	Italy	570	12,235	7,121	86	550	11,974	6,693	95	0.3	-6.0
31	Belgium	80	4,801	8,025	9	75	3,992	6,411	15	0.3	-20.1
32	Türkiye	668	5,029	6,791	92	659	4,798	6,379	98	0.3	-6.1
33	Bermuda	102	9,350	6,180	48	106	9,942	6,377	48	0.3	3.2
34	Malaysia	441	5,145	5,980	34	460	5,323	6,322	44	0.3	5.7
35	Guyana Rep. Of	43	409	741	0	80	3,248	6,136	0	0.3	728.2
36	Bangladesh	477	3,214	5,442	12	489	3,477	5,979	12	0.3	9.9
37	Gabon	99	3,028	5,493	0	106	3,330	5,964	0	0.3	8.6
38	Taiwan	203	4,230	5,830	229	197	4,135	5,706	228	0.2	-2.1
39	Cayman Islands	104	3,682	6,081	21	97	3,379	5,512	21	0.2	-9.4
40	Sierra Leone	478	1,529	2,309	16	516	3,330	5,363	54	0.2	132.2
158	**Total**	**61,811**	**1,510,132**	**2,245,145**	**30,128**	**63,914**	**1,577,233**	**2,329,534**	**33,220**	**100.0**	**3.8**

Source: ISL January-February 2025

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 51,9 million DWT, Greece to 426,5 million DWT, Russia to 13,6 million DWT and Iran to 18,4 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**	794	53,329	2.3	-5.2
12	**S. Cyprus**	833	33,518	1.4	12.5
17	**Iran**	514	20,819	0.9	1.4
22	**Russia**	1,642	12,741	0.5	23.5
32	**Türkiye**	659	6,379	0.3	-6.1
59	**Egypt**	102	1,733	0.1	5.4
93	**Ukraine**	87	238	0.0	-11.6
105	**Bulgaria**	24	131	0.0	36.5
126	**Romania**	15	29	0.0	-29.2
133	**Georgia**	6	16	0.0	444.3
145	**Syria**	5	6	0.0	-95.8

Source: ISL January-February 2025

CHAPTER II

DEVELOPMENTS IN SEABORNE TRADE

2. DEVELOPMENTS IN SEABORNE TRADE

2.1. Developments in the Transportation of Foreign Trade Cargoes

Global seaborne trade Is currently expected to grow by 1.4% in 2025 to a new high of 12.8bn tonnes, a slightly more 'moderate' pace than the +2.2% seen in 2024. However, there is a growing range of complexities in the outlook for seaborne trade and a number of factors have potential to impact global trading patterns ahead.

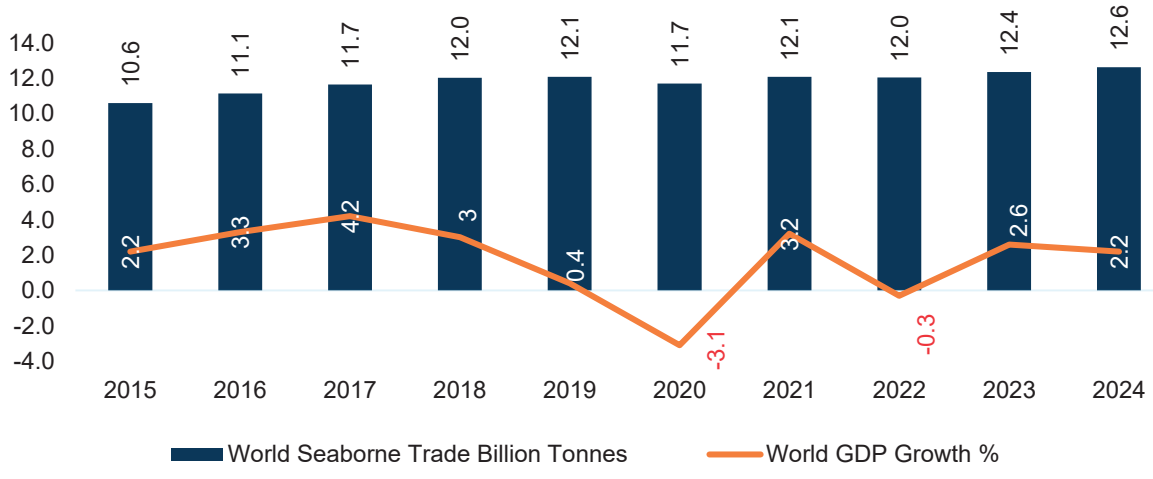
Following the announcement of the Israel-Hamas ceasefire in January, prospects for easing of Red Sea disruption have increased. Vessel rerouting away from the Red Sea in response to vessel attacks last year helped drive a >6% increase in seaborne trade in tonne-miles terms in 2024, the fastest pace of expansion in 14 years, but there is now some potential for 'normalisation' in trading patterns, with our base case now assuming disruption unwinds gradually across 2025. On this basis, global tonne-mile trade could grow by <1% this year, though there is still significant uncertainty, and a range of scenarios exist.

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
2015	12.7	10.6	85
2016	12.9	11.1	86
2017	13.5	11.7	86
2018	14.0	12.0	86
2019	14.0	12.1	86
2020	13.3	11.7	88
2021	14.0	12.1	86
2022	14.1	12.0	86
2023	14.0	12.4	88
2024	14.4	12.6	88

Source: World Seaborn Trade February 2025

Graph 13. Global Seaborn Trade Growth



Source: World Seaborn Trade February 2025

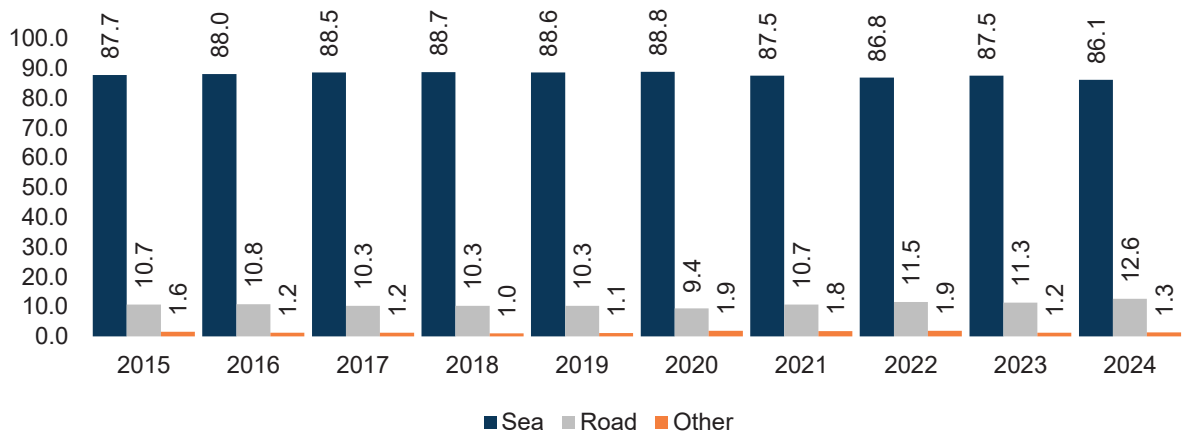
Table 21. Turkish Foreign Trade Transportation by Modes, (%)

Year	Sea	Road	Pipeline / Other	Rail	Air
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
2024	86.1	12.6	0.2	0.6	0.5

Source: Turkish Statistical Institute

86.1% of Türkiye's foreign trade is being realised by maritime transportation. The progress between the years of 2015-2024 is shown in the Table below by the modes of transportation.

Graph 14. Foreign Trade Transportation by Modes (%)



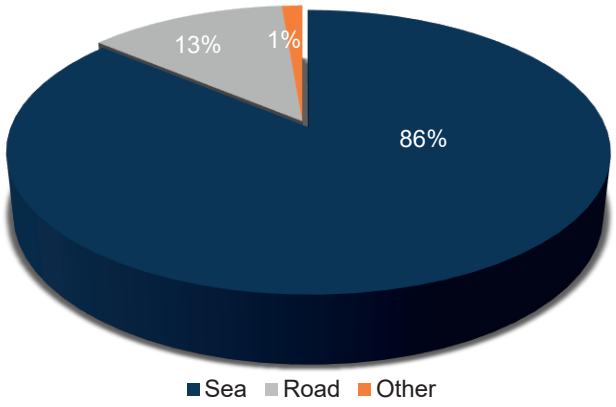
Source: Turkish Statistical Institute

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	77.0	92.4	86.1	55.9	54.6	55.1
Road	21.0	6.8	12.6	32.8	19.2	25.1
Air	1.0	0.1	0.5	9.9	13.8	12.1
Rail	0.9	0.4	0.6	0.7	0.8	0.8
Pipeline/Other	0.1	0.3	0.2	0.7	1.2	1.0
Unknown	0.0	0.0	0.0	0.0	10.4	5.9
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

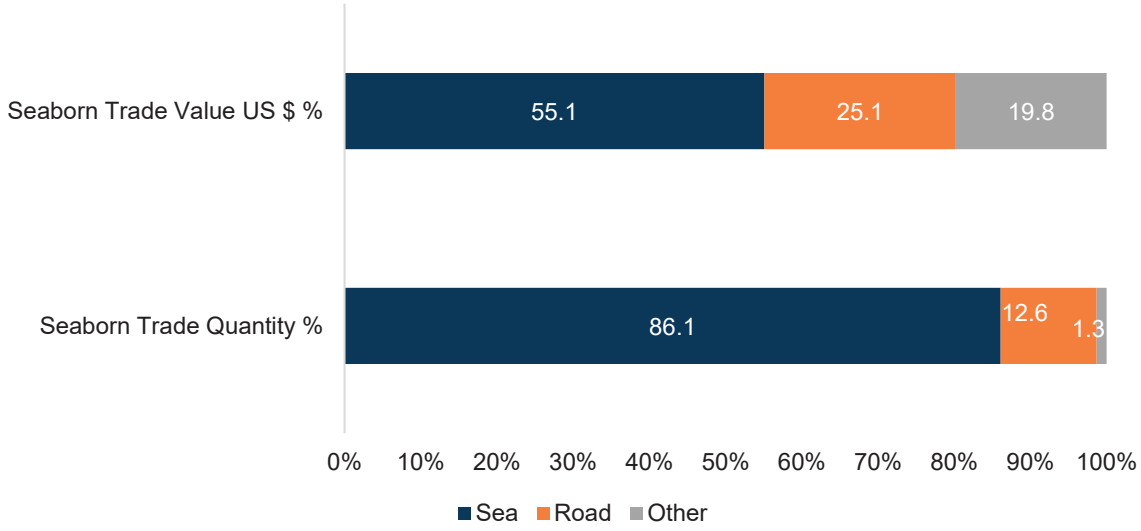
Source: Turkish Statistical Institute

Graph 15. Seaborn Trade Quantity (%)



Source: Turkish Statistical Institute

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



Source: Turkish Statistical Institute

55.1% of the volume of Türkiye's foreign trade transportation has been carried by sea; 25.1% has been carried by road; 0.8% has been carried by rail; 12.1% has been carried by air and 1% 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.

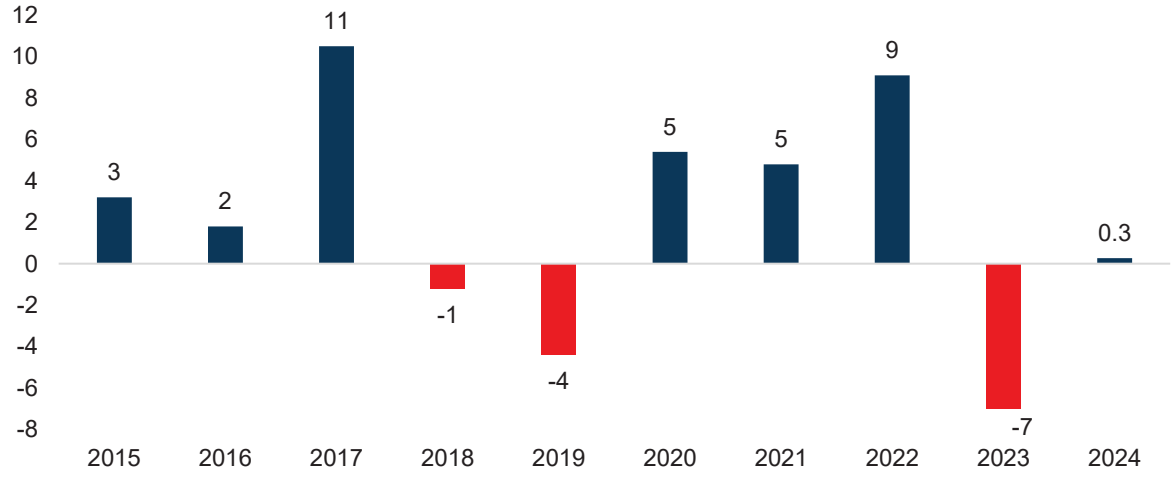
The number of cargoes carried bulk and partially between 2015-2024 in Turkish ports and wharves on ton basis is presented in Table 23.

Table 23. 2015-2024 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
2024	31,721,545	0.3

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

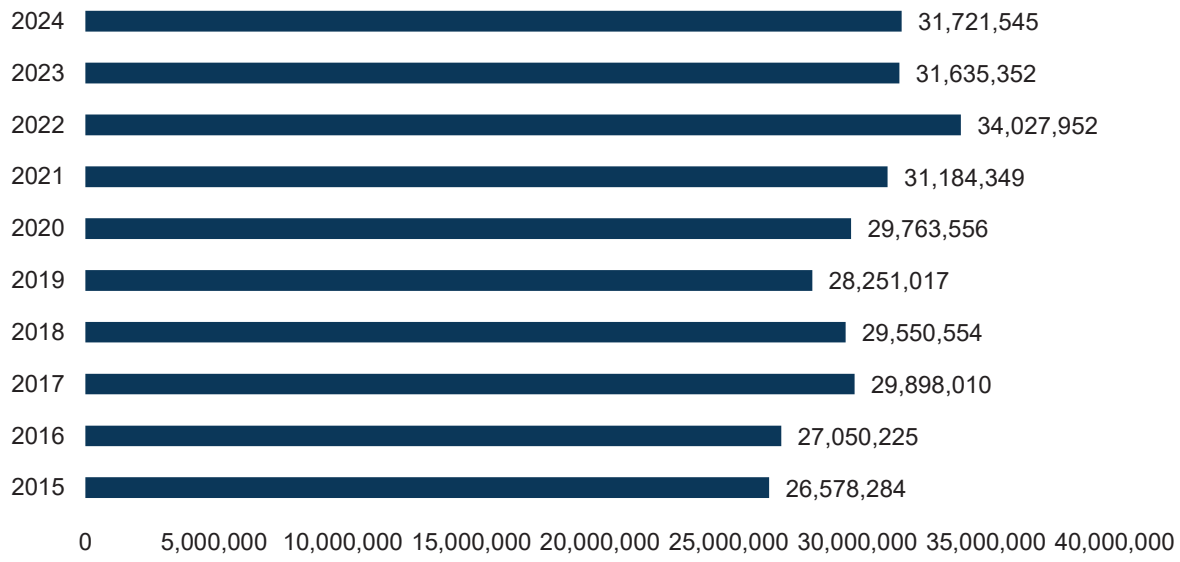
Graph 17. Rate of Change in Cabotage Transportation Between 2015-2024 (%)



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

Total cabotage transportation in 2024 is 31,721,545 tons, and the average of cabotage transportation between 2015 and 2024 is 30 million tons.

Graph 18. 2015-2024 Cabotage Transportation (Ton)



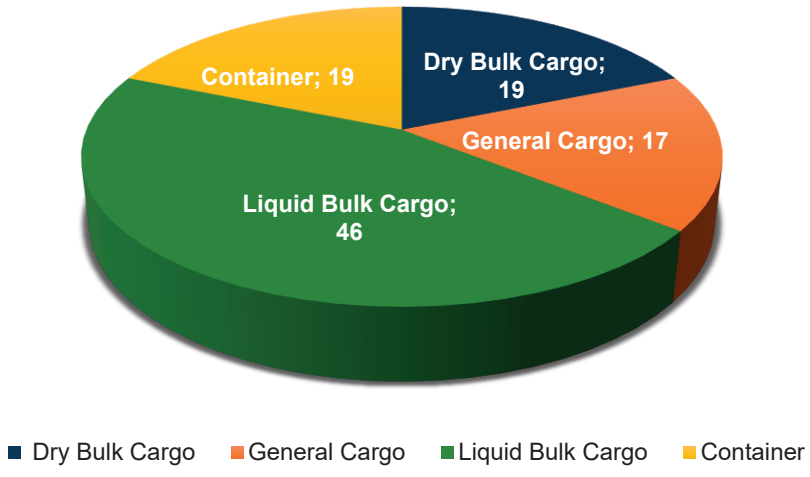
Source: General Directorate for Maritime Affairs - Department of Merchant Trade Development

Table 24. Cabotage Transportation by the Types of Cargoes in 2024 (mtons)

Cargo Type	Cabotage Loading	Cabotage Unloading	Cabotage Handling	%
Dry Bulk Cargo	5,895,097	5,823,989	11,719,086	19%
General Cargo	5,511,558	5,312,717	10,824,275	17%
Liquid Bulk Cargo	14,445,710	14,532,104	28,977,814	46%
Container	5,849,609	5,855,085	11,704,694	19%
Vehicle	19,371	13,200	32,571	0%
Total	31,721,345	31,537,095	63,258,440	100%

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 46%, dry bulk cargo 19%, general cargo 17% and container 16%.

The ports with the largest shares in cabotage handling in 2024 are Aliağa Port 18.8%, Kocaeli Port 17.1%, and Tekirdağ Port 11.6%.

Table 25. 2024 Cabotage Transportation in Ports

Harbour Master	Cabotage Loading	Cabotage Unloading	Cabotage Handling	Percentage of Total
Aliağa	8,577,265	2,985,139	11,562,404	18.28%
Kocaeli	5,396,423	5,458,230	10,854,653	17.16%
Tekirdağ	3,071,143	4,269,627	7,340,770	11.60%
İskenderun	4,106,647	1,465,255	5,571,902	8.81%
Antalya	745,967	2,681,383	3,427,350	5.42%
Ambarlı	659,388	2,551,681	3,211,069	5.08%
Gemlik	1,700,735	1,299,163	2,999,898	4.74%
İstanbul	21,852	2,589,635	2,611,487	4.13%
Marmara Adası	1,982,350	0	1,982,350	3.13%
Samsun	732,435	1,157,088	1,889,523	2.99%
Mersin	246,193	1,642,352	1,888,545	2.99%
Karadeniz Ereğli	325,476	1,477,252	1,802,728	2.85%
Karabiga	691,841	539,117	1,230,958	1.95%
Çanakkale	1,171,477	4,810	1,176,287	1.86%
Tuzla	240,150	756,078	996,228	1.57%
İzmir	370,053	588,107	958,160	1.51%
Ünye	502,224	158,263	660,487	1.04%
Tirebolu	0	531,309	531,309	0.84%
Rize	8,955	453,034	461,989	0.73%
Bandıma	140,669	273,105	413,774	0.65%
Hopa	341,128	0	341,128	0.54%
Trabzon	254,852	77,983	332,835	0.53%
İnebolu	177,186	0	177,186	0.28%
Giresun	155,529	17,906	173,435	0.27%
Ceyhan	21,905	150,375	172,280	0.27%
Zonguldak	59,830	110,606	170,436	0.27%
Yalova	1,148	112,331	113,479	0.18%
Göcek	2,590	69,174	71,764	0.11%
Çeşme	0	33,556	33,556	0.05%
Karasu	0	19,200	19,200	0.03%
Alanya	0	17,927	17,927	0.03%
Bartın	0	17,317	17,317	0.03%
Marmaris	0	11,638	11,638	0.02%
Erdek	2,734	7,940	10,674	0.02%
Fatsa	9,000	0	9,000	0.01%
Taşucu	0	7,890	7,890	0.01%
Güllük	4,200	0	4,200	0.01%
Enez	0	2,624	2,624	0.00%
Total	**31,721,345**	**31,537,095**	**63,258,440**	**100.00%**

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

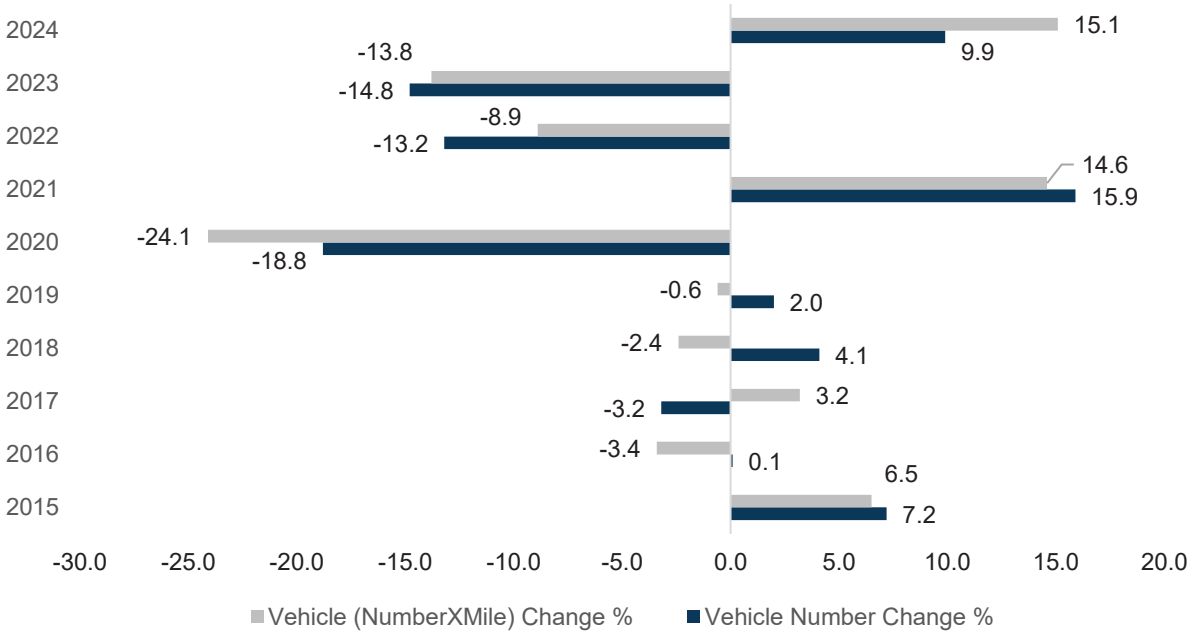
Table 26. Vehicle Transportation in Cabotage Lines, 2015-2024

Year	Vehicle Number	Vehicle Nımber Change %	Vehicle (NumberxMile)	Vehicle (NumberxMile) Change %
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
2024	10,259,903	9.9	72,540,020	15.1

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

In Table 26 the changes in cabotage transportation of vehicles between the years 2015 and 2024 are being shown. Between 2015 and 2024, an average of 12 million vehicles were transported in cabotage.

Graph 20. Vehicle Transportation in Cabotage Lines, Annual Change %, 2015-2024



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

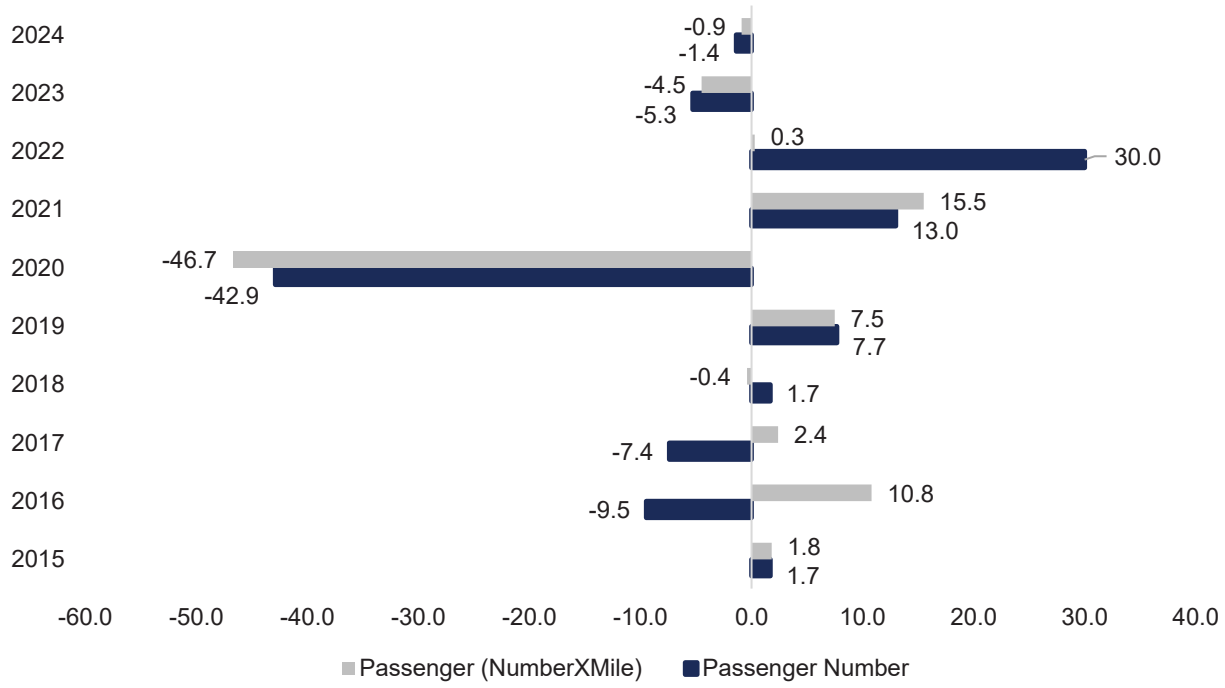
In Table 27 the changes in cabotage transportation of passengers between the years 2015 and 2024 are being shown. Between 2015 and 2024, an average of 130 million passengers were transported by cabotage.

Table 27. Passenger Transportation in Cabotage Lines, 2015-2024

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
2024	117,832,340	-1.4	936,214,715	-0.9

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

Graph 21. Passenger Transportation in Cabotage Lines, Annual Change %, 2015-2024



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)

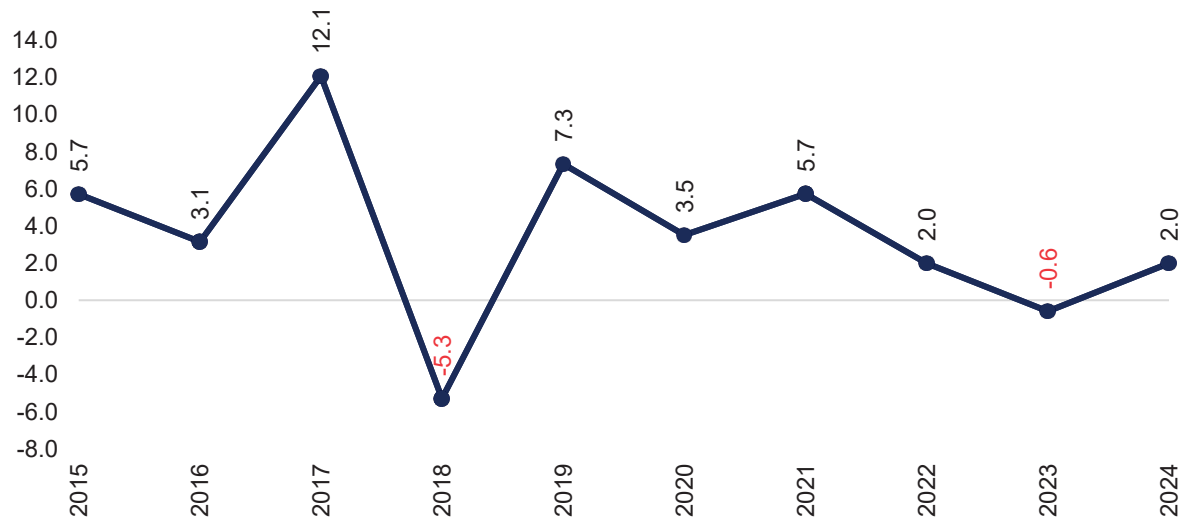
Year	Export	Import	Seaborn Trade Total	Turkish Flag	Turkish Flag %	Foreign Flag %
2015	92,152,622	208,326,308	300,478,930	36,479,586	12	88
2016	94,805,120	215,132,519	309,937,639	38,623,279	12	88
2017	113,692,068	233,656,024	347,348,092	36,815,820	11	89
2018	110,424,635	218,544,820	328,969,455	35,510,231	11	89
2019	131,676,578	221,404,812	353,081,390	27,895,737	8	92
2020	138,902,823	226,539,473	365,442,296	29,679,160	8	92
2021	153,763,658	232,633,060	386,396,718	29,999,196	8	92
2022	150,172,902	243,917,119	394,090,021	28,443,135	7	93
2023	135,510,681	256,206,627	391,717,308	29,299,350	7	93
2024	142,278,137	257,136,420	399,414,557	30,059,943	8	92

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

Compared with the previous year, export shipments increased to 142 million tons, import shipments increased to 257 million tons in 2024. The share of Turkish flag vessels transporting foreign trade cargoes has been realized as 8% on average.

A comparison between 2015 and 2024 of the transportation of foreign trade cargoes reveals that the total amount increased from 300 million tons in 2015 to 399 million tonnes in 2024. Import goods increased from 208 million tons to 257 million tons, whereas export goods increased from 92 million tons to 142 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 2015-2024 has been realized as 9% on the average.

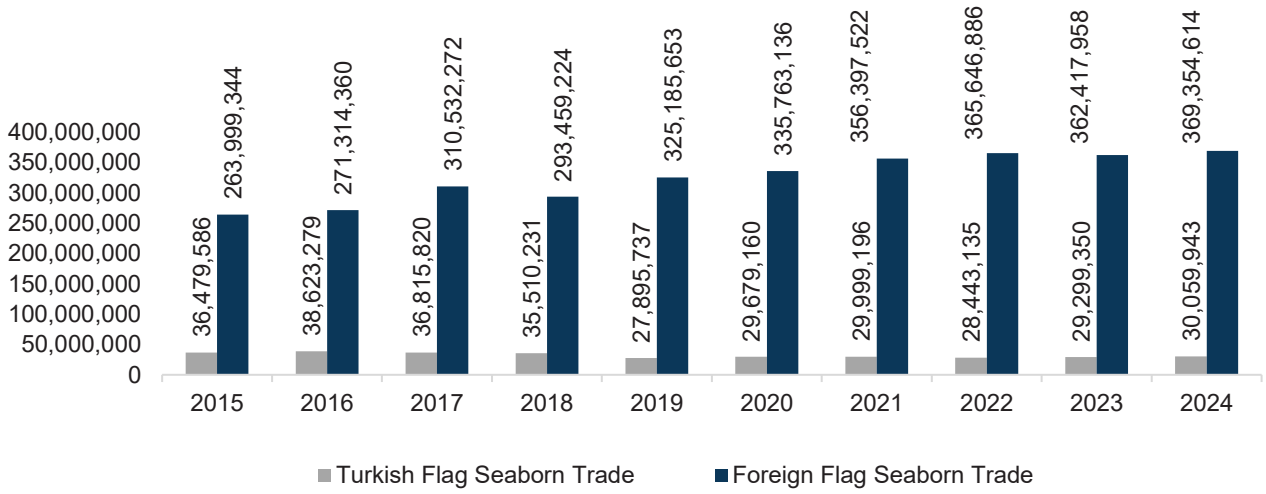
The transportation of foreign trade cargoes by Turkish flag vessels includes 6% of the total of 257 million tonnes imports and 10% of the total of 142 million tonnes exports.

Table 29. Foreign Trade Transportation by Flags (Tons)

Year	Turkish Flag					Foreign Flag				
	Import	%	Export	%	Seaborn Trade	Import	%	Export	%	Seaborn Trade
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
2024	15,868,396	6	14,191,547	10	30,059,943	241,268,024	94	128,086,590	90	369,354,614

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 14 million tons for exports and decreased to 15 million tons for imports in 2024 when compared to 13 and 22 million tons respectively in 2015.

The share of foreign flag vessels in total foreign trade transportation, increased to 128 million tons for exports and increased to 241 million tons for imports in 2024 when compared with the 78 and 185 million tons in 2015.

2.5. Developments in Foreign Trade Transportation by Types of Cargoes

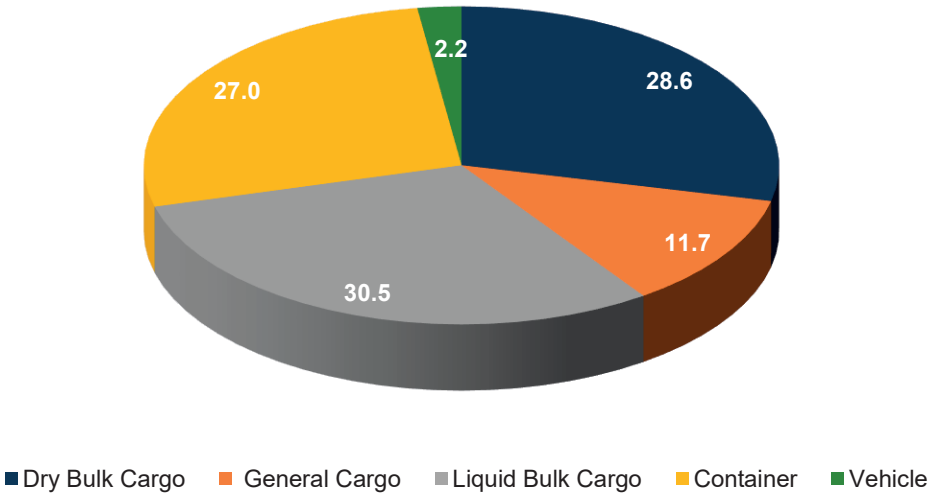
The major shipping segments of the 399 million tons seaborn trade and 69 million tons transit handling goods in 2024, are 26% Dry Bulk Cargo, 25% Liquid Bulk Cargo, 25% Container, 15% General Cargo and 9% Vehicles.

Table 30. Cargo Handling Statistics İn Turkish Ports By Cargo Types, 2024

Cargo Types	Export	Import	Seaborn Trade	Cabotage Handling	Transit Handling	Cargo Handling
Dry Bulk Cargo	41,817,703	97,929,354	139,747,057	11,719,086	730,505	203,736,002
General Cargo	14,562,088	36,525,555	51,087,643	10,824,275	188,197	114,534,280
Liquit Cargo	24,467,266	76,778,722	101,245,988	28,977,814	31,991,186	196,495,614
Container	54,768,606	40,730,004	95,498,610	11,704,694	36,154,362	194,911,412
Vehicle	6,662,474	5,172,785	11,835,259	32,571	111	75,093,810
Total	**142,278,137**	**257,136,420**	**399,414,557**	**63,258,440**	**69,064,361**	**531,737,358**

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

Graph 24. Cargo Handling Export and Import in Turkish Ports By Cargo Types, 2024



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

2.6. The Progress in Seaborne Trade by Country Groups

In 2024, 70 million tons of exports and 79 million tons of imports, totally transit (loading-unloading) 32 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 Country	Export	Import	Foreign Trade	Transit Handling	Cargo Handling
Italy	17,236,977	8,538,495	25,775,472	18,947,838	44,723,310
United States of America	13,098,353	19,646,552	32,744,905	837,282	33,582,187
Greece	7,268,455	8,569,399	15,837,854	4,303,547	20,141,401
Spain	10,349,990	3,713,150	14,063,140	1,500,031	15,563,171
Belgium	4,968,802	4,695,082	9,663,884	1,132,129	10,796,013
Netherlands	3,821,437	4,475,591	8,297,028	842,639	9,139,667
Colombia	141,994	7,388,216	7,530,210	20,169	7,550,379
Korea, South	1,162,669	4,661,916	5,824,585	1,296,610	7,121,195
France	3,079,290	3,265,197	6,344,487	588,416	6,932,903
Israel	2,739,340	1,831,043	4,570,383	472,060	5,042,443
Portugal	2,001,904	376,974	2,378,878	1,396,802	3,775,680
Australia	12,245	2,947,014	2,959,259	17,115	2,976,374
Germany	947,890	1,558,898	2,506,788	217,230	2,724,018
Canada	1,222,063	802,337	2,024,400	90,208	2,114,608
Norway	234,639	1,695,385	1,930,024	3,413	1,933,437
Denmark	137,176	1,027,436	1,164,612	16,505	1,181,117
Lithuania	73,692	988,434	1,062,126	27,167	1,089,293
Poland	394,876	515,969	910,845	2,700	913,545
Slovenia	464,533	262,663	727,196	57,546	784,742
Sweden	270,014	489,029	759,043	0	759,043
Latvia	95,602	490,736	586,338	34,010	620,348
Finland	52,773	546,708	599,481	6,340	605,821
Japan	220,188	192,338	412,526	32,543	445,069
Ireland	141,572	26,661	168,233	267,401	435,634
Estonia	74,191	308,725	382,916	0	382,916
United Kingdom	118,692	98,225	216,917	352	217,269
Mexico	160,919	7,128	168,047	192	168,239
Iceland	126,830	0	126,830	0	126,830
Chile	41,325	0	41,325	0	41,325
New Zealand	798	0	798	16,354	17,152
Total	**70,659,229**	**79,119,301**	**149,778,530**	**32,126,599**	**181,905,129**

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

In 2024, the seaborne trade volume between Türkiye and the OECD countries was 181 million metric tons of which 149 million metric tons were import-exports while 32 million metric tons were transit cargoes.

In the year 2024, 61 million tons of exports and 49 million tons of imports or totally 110 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 Country	Export	Import	Foreign Trade	Transit Handling	Cargo Handling
Italy	17,236,977	8,538,495	25,775,472	18,947,838	44,723,310
Greece	7,268,455	8,569,399	15,837,854	4,303,547	20,141,401
Spain	10,349,990	3,713,150	14,063,140	1,500,031	15,563,171
Romania	4,951,591	2,696,294	7,647,885	3,484,570	11,132,455
Belgium	4,968,802	4,695,082	9,663,884	1,132,129	10,796,013
Netherlands	3,821,437	4,475,591	8,297,028	842,639	9,139,667
France	3,079,290	3,265,197	6,344,487	588,416	6,932,903
Malta	2,676,619	3,744,841	6,421,460	262,323	6,683,783
Bulgaria	1,991,788	2,332,345	4,324,133	1,937,182	6,261,315
Portugal	2,001,904	376,974	2,378,878	1,396,802	3,775,680
Croatia	655,154	500,993	1,156,147	1,796,947	2,953,094
Germany	947,890	1,558,898	2,506,788	217,230	2,724,018
Denmark	137,176	1,027,436	1,164,612	16,505	1,181,117
Lithuania	73,692	988,434	1,062,126	27,167	1,089,293
Poland	394,876	515,969	910,845	2,700	913,545
Slovenia	464,533	262,663	727,196	57,546	784,742
Sweden	270,014	489,029	759,043	0	759,043
Latvia	95,602	490,736	586,338	34,010	620,348
Finland	52,773	546,708	599,481	6,340	605,821
Ireland	141,572	26,661	168,233	267,401	435,634
Estonia	74,191	308,725	382,916	0	382,916
Total	**61,654,326**	**49,123,620**	**110,777,946**	**36,821,323**	**147,599,269**

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

In 2024, 23 million tons of exports and 114 million tons of imports, totally 138 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	Foreign Trade	Transit Handling	Cargo Handling
Russian Federation	4,270,742	91,937,087	96,207,829	4,708,548	100,916,377
Greece	7,268,455	8,569,399	15,837,854	4,303,547	20,141,401
Romania	4,951,591	2,696,294	7,647,885	3,484,570	11,132,455
Ukraine	1,900,911	7,091,122	8,992,033	392,378	9,384,411
Georgia	1,991,788	2,332,345	4,324,133	1,937,182	6,261,315
Bulgaria	1,572,951	1,736,438	3,309,389	2,176,616	5,486,005
Albania	1,548,643	29,354	1,577,997	8,143	1,586,140
Moldova	321,549	239,989	561,538	0	561,538
Azerbaijan	60,000	0	60,000	3,220	63,220
Total	**23,886,630**	**114,632,028**	**138,518,658**	**17,014,204**	**155,532,862**

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 2024, 27,820,000 TEU of the container capacity was not registered in the country of domicile of the owner but flagged out.

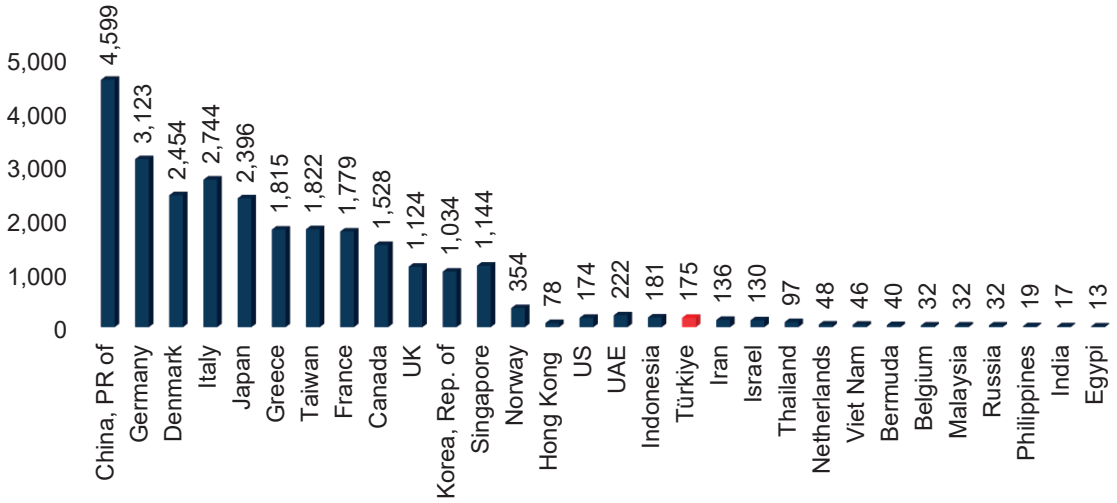
Table 34. World Full Container Fleet by Country of Domicile (1000 GT and over) 2024

TEU-rank	Country	No	1000 DWT	1000 TEU	Av. Age	Foreign Flag %	TEU Annual Change %
1	China, PR of	1,043	54,194	4,599	10.7	**78.6**	19.8
2	Germany	808	37,795	3,123	14.9	**80.1**	0.2
3	Denmark	341	28,459	2,454	14.6	**46.3**	-4.1
4	Italy	484	33,279	2,744	18.6	**99.7**	10.5
5	Japan	381	26,765	2,396	8.2	**87.1**	9.0
6	Greece	403	21,886	1,815	15.4	**98.0**	-7.0
7	Taiwan	361	21,175	1,822	10.5	**87.6**	11.2
8	France	248	20,518	1,779	12.6	**82.9**	14.0
9	Canada	159	17,181	1,528	9.5	**99.9**	21.4
10	UK	177	13,449	1,124	14.4	**81.9**	1.9
11	Korea, Rep. of	227	11,614	1,034	12.2	**48.1**	7.5
12	Singapore	253	13,280	1,144	12.3	**65.3**	21.3
13	Norway	58	4,177	354	12.6	**100.0**	-0.1
14	Hong Kong	35	964	78	18.4	**80.6**	-61.8
15	US	81	2,397	174	17.8	**62.5**	-11.0
16	UAE	106	2,928	222	18.5	**97.3**	15.7
17	Indonesia	226	2,632	181	18.2	**35.8**	1.2
18	**Türkiye**	112	2,327	175	19.5	**67.7**	15.1
19	Iran	27	1,616	136	14.5	0	-6.8
20	Israel	36	1,632	130	12.5	**96.3**	4.8
21	Thailand	47	1,200	97	15.8	**54.6**	4.2
22	Netherlands	47	595	48	16.5	**53.0**	5.3
23	Viet Nam	50	625	46	19.4	**8.8**	4.8
24	Bermuda	4	467	40	7.6	**100.0**	0
25	Belgium	11	409	32	11.3	**76.8**	-11.3
26	Malaysia	37	446	32	20.6	**2.8**	-4.3
27	Russia	33	401	32	20.5	**44.3**	9.4
28	Philippines	40	248	19	27.9	**3.0**	-2.7
29	India	9	229	17	20.0	**23.3**	29.3
30	Egypi	13	168	13	28.5	**22.6**	4,3
Total 30 Countries		**5,857**	**323,057**	**27,387**	**13.9**	**79.7**	**7.3**
Other		**170**	**3,792**	**300**	**21.1**	**64.6**	**179.4**
Unknown		56	1719	133	20.9	0	0
WORLD TOTAL		**6,083**	**328,566**	**27,820**	**14.1**	**-**	**8.1**

Source: ISL 2024

With respect to the owner countries. Chine shipowners' control by far the largest part of the world container fleet, namely 4.5 million TEU (1,043 container vessels) followed by Germany 3.1 million TEU (808 container vessels) and Denmark 2.4 million TEU (341 container vessels).

Graph 25. World Full Container Fleet by Country of Domicile (1000 GT and over) 2024



Source: ISL 2024

TEU based container transportations in 2024 realized as follows in their respective subgroups; exports became 4.9 million TEU, imports 4.8 million TEU, cabotage handling 903,194 TEU and transit handling 2.7 million TEU.

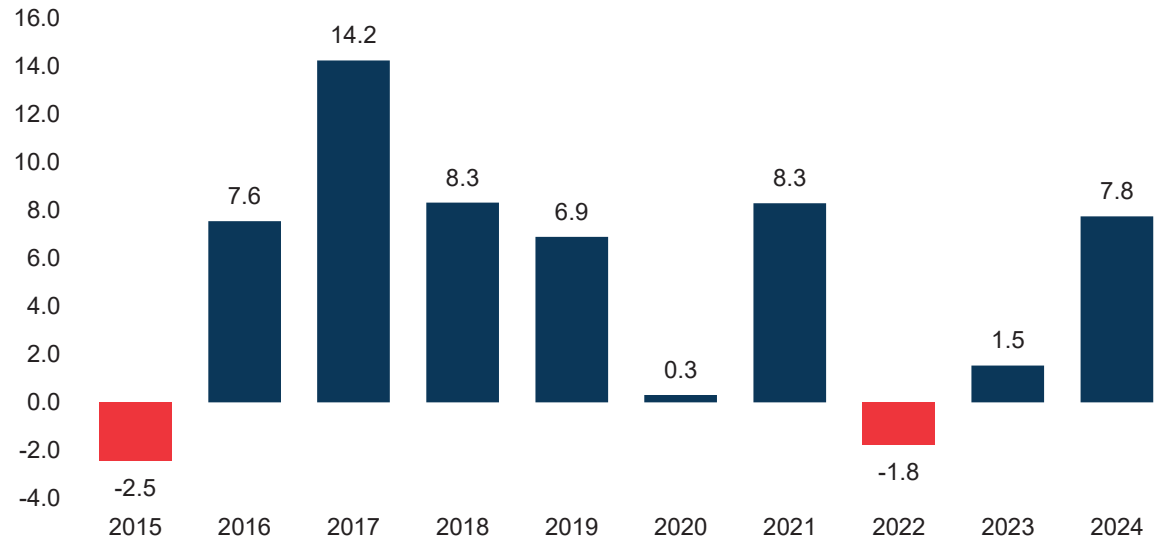
Transportation volume of Türkiye's container transports by seaway was 8.1 million TEU in 2015; in 2024 it became 13.5 million TEU, at the same period imports cargoes increased to 3.4 million TEU from 4.9 million TEU and the exports cargoes increased to 3.4 million TEU when compared with 4.9 million TEU in 2015.

Table 35. Container Handling Statistics At Turkish Ports 2015-2024 (TEU)

Years	Export	Import	Seaborn Trade	Cabotage Handling	Transit Handling	Total Handling	Change %
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
2021	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
2024	4,987,903	4,875,265	9,863,168	903,194	2,763,368	13,529,729	8

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

Graph 26. Yearly Change of Container Handling 2015-2024 (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	Foreign Trade	Cabotage Handling	Transit Handling	Total Container Handling
Ambarlı	1,057,536	1,032,808	2,090,343	127,605	791,776	3,009,724
Kocaeli	1,059,450	992,931	2,052,381	55,029	214,740	2,322,150
Aliağa	815,983	737,163	1,553,146	75,460	490,615	2,119,221
Tekirdağ	303,537	279,045	582,582	283,515	1,166,579	2,032,676
Mersin	901,254	930,912	1,832,165	34,531	23,164	1,889,860
Gemlik	363,544	335,759	699,303	125,170	65,003	889,475
İskenderun	376,104	367,946	744,050	28,787	10,874	783,711
İzmir	77,628	134,699	212,327	49,041	548	261,916
Samsun	26,774	38,999	65,773	24,394	0	90,167
Antalya	2,195	11,398	13,593	59,005	0	72,598
Trabzon	482	1,768	2,250	19,468	0	21,718
Giresun	0	9,338	9,338	11,760	0	21,098
İstanbul	2,619	1,817	4,436	2,545	10	6,991
Bandırma	0	0	0	5,210	0	5,210
Karabiga	0	0	0	1,655	0	1,655
Ceyhan	584	574	1,158	0	0	1,158
Karasu	151	35	186	20	58	264
Bartın	0	54	54	0	0	54
Zonguldak	34	0	34	0	3	37
Tuzla	27	0	27	0	0	27
Taşucu	0	20	20	0	0	20
Yalova	1	0	1	0	0	1
Total	**4,987,903**	**4,875,265**	**9,863,168**	**903,194**	**2,763,368**	**13,529,729**

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

Table 37. Container Handling in Turkish Ports by Country Basis, 2024

Country	Export	Import	Seaborn Trade	Transit Handling	Total Handling
Egypt	574,713	586,452	1,161,164	141,773	1,302,937
Greece	358,813	677,222	1,036,035	145,021	1,181,055
China	420,111	354,579	774,690	343,375	1,118,065
Russian Federation	198,891	205,211	404,103	337,768	741,871
Spain	364,031	186,894	550,925	78,546	629,471
Italy	325,361	224,277	549,638	68,769	618,407
Belgium	295,292	191,758	487,050	70,483	557,533
United States of America	195,472	227,116	422,587	78,932	501,519
Singapore	207,579	167,743	375,322	123,016	498,338
Georgia	89,719	215,131	304,851	181,112	485,963
Korea, South	145,909	210,476	356,385	108,825	465,210
Morocco	263,788	86,451	350,238	54,208	404,446
Israel	121,404	235,849	357,253	21,290	378,543
Saudi Arabia	144,534	98,971	243,505	115,242	358,747
Libya	130,216	182,238	312,455	42,886	355,341
United Kingdom	249,354	81,907	331,261	16,975	348,236
Malta	148,454	181,278	329,732	9,672	339,404
Romania	27,910	75,865	103,775	181,270	285,044
Bulgaria	51,410	64,557	115,967	123,331	239,298
Other	674,943	621,292	1,296,235	520,876	1,817,111
Total	**4,987,903**	**4,875,265**	**9,863,168**	**2,763,368**	**12,626,536**

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

As of 2024, the countries which Türkiye performed foreign trade with / conducted transit container transportation are as follows: Egypt, Greece and China. The data of the foreign trade/transit container transportation of top 19 countries are shown in the Table 39.

2.8. Vehicle Transportation Through Ro-Ro Lines

Table 38 shows below the amounts of vehicles transported (export and import) in the years 2024.

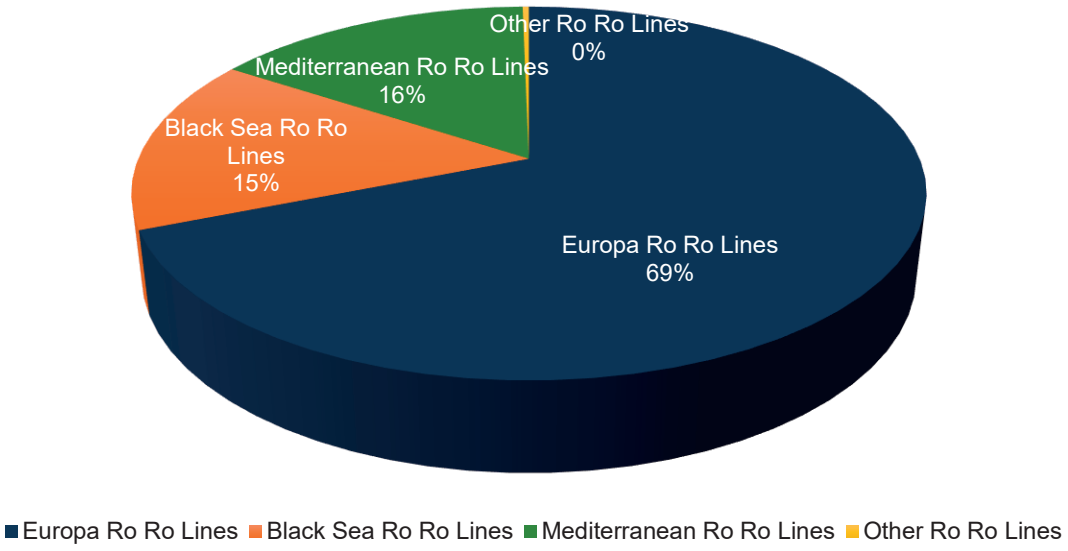
Table 38. Vehicle Transportation Through Regular International Ro-Ro Lines, 2024

Region	Lines	Incoming Vehicle	Outbond Vehicle	Total Vehicle
Europe	Tuzla (Pendik) - Trieste	100,782	91,096	191,878
	Yalova- Sete	67,351	62,161	129,512
	Çeşme- Trieste	33,638	33,903	67,541
	Mersin- Trieste	30,350	29,236	59,586
	Tuzla (Pendik)- Bari	4,463	5,397	9,860
	Ambarlı- Trieste	2,846	3,893	6,739
	Tuzla (Pendik)- Patras	3,740	2,497	6,237
	Yalova- Trieste	200	5,354	5,554
	İzmir- Sete	999	3,422	4,421
	Tekirdağ- Trieste	302	1,613	1,915
	Çeşme- Chios	309	1,167	1,476
	Gemlik- Marseille	0	550	550
	Tekirdağ- Sete	0	529	529
	Kocaeli- Vigo	367	4	371
	Ambarlı- Patras	249	72	321
	İstanbul- Vigo	319	0	319
	Kocaeli- Antwerpen	208	39	247
	Kocaeli- Barcelona	0	138	138
	Kocaeli- Zeebrugge	0	112	112
	Total European Ro-Ro Lines	**246,123**	**241,183**	**487,306**
Black Sea	Samsun- Tuapse	22,233	22,532	44,765
	Samsun- Novorossiysk	10,159	16,261	26,420
	Karasu- Tuapse	5,311	13,020	18,331
	Karasu- Constanta	4,064	6,066	10,130
	İstanbul- Tuapse	2,141	4,283	6,424
	Zonguldak- Tuapse	40	501	541
	Karasu- Novorossiysk	8	454	462
	Gemlik- Novorossiysk	227	0	227
	İzmir- Constanta	0	102	102
	Total Black Sea Ro-Ro Lines	**44,183**	**63,219**	**107,402**
Mediterranean	Mersin- Gazimağusa	27,132	27,252	54,384
	Taşucu- Kyrenia	14,306	17,730	32,036
	Taşucu- Tripoli (Lebanon)	7,217	6,922	14,139
	Mersin- Haifa	1,954	2,198	4,152
	Mersin- Kyrenia	2,030	366	2,396
	Taşucu- Gazimağusa	1,535	74	1,609
	İskenderun- Haifa	487	375	862
	Total Mediterranean Ro-Ro Lines	**54,661**	**54,917**	**109,578**
The Red Sea	İstanbul- Jeddah	0	227	227
	Mersin- Jeddah	0	165	165
	Mersin- Aqaba	0	139	139
	İskenderun- Aqaba	0	129	129
	Total The Red Sea Ro-Ro Lines	**0**	**660**	**660**
Other Lines		566	875	1,441
TOTAL		**345,533**	**360,854**	**706,387**

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

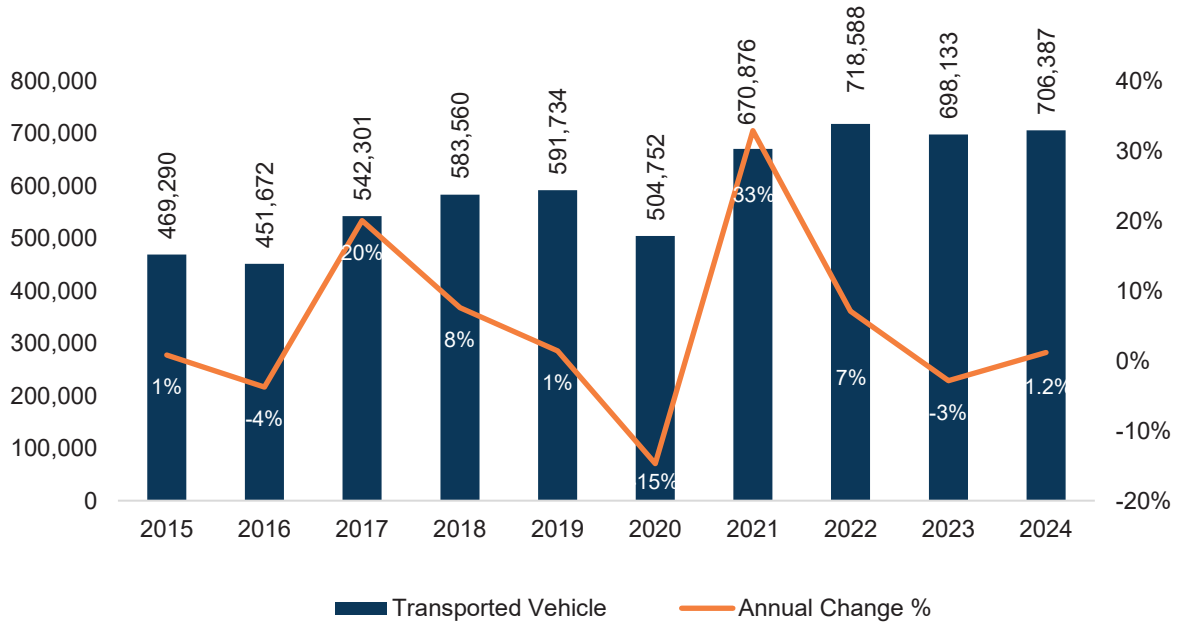
In the 19 European lines 487,306 vehicles have been transported in 2024.
In the 9 Black Sea lines 107,402 vehicles have been transported in 2024.
In the 7 Mediterranean lines 109,578 vehicles have been transported in 2024.
In the 7 The Red Sea lines 660 vehicles have been transported in 2024.
Other lines 1,441vehicles have been transported in 2024.

Graph 27. Ro-Ro Lines Transported Vehicles (2024)



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

Graph 28. Ro-Ro Lines Transported Vehicles Number and Annual Change 2015-2024



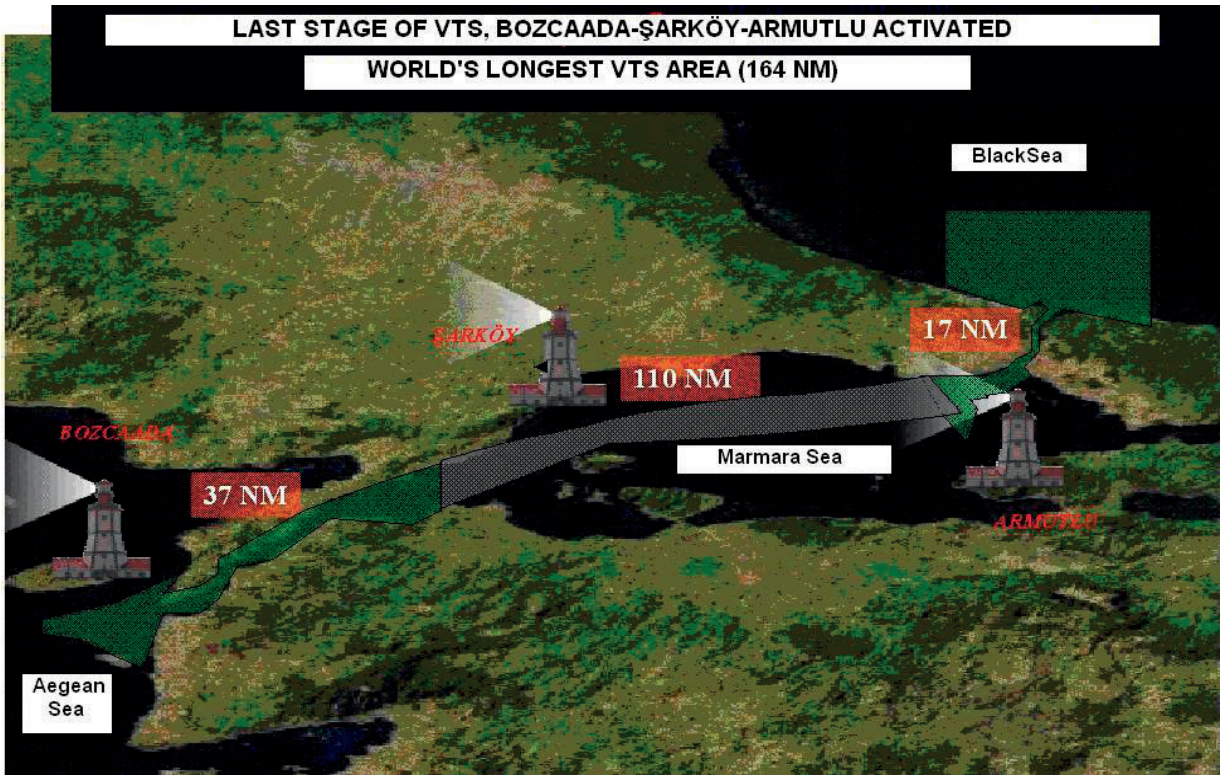
Source: General Directorate for Maritime Affairs - Department of Merchant Trade Development

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.

3.2. Maritime Traffic in The Straits

The number of vessels that passed through the Turkish Straits between the years 2015-2024 are shown in Table below.

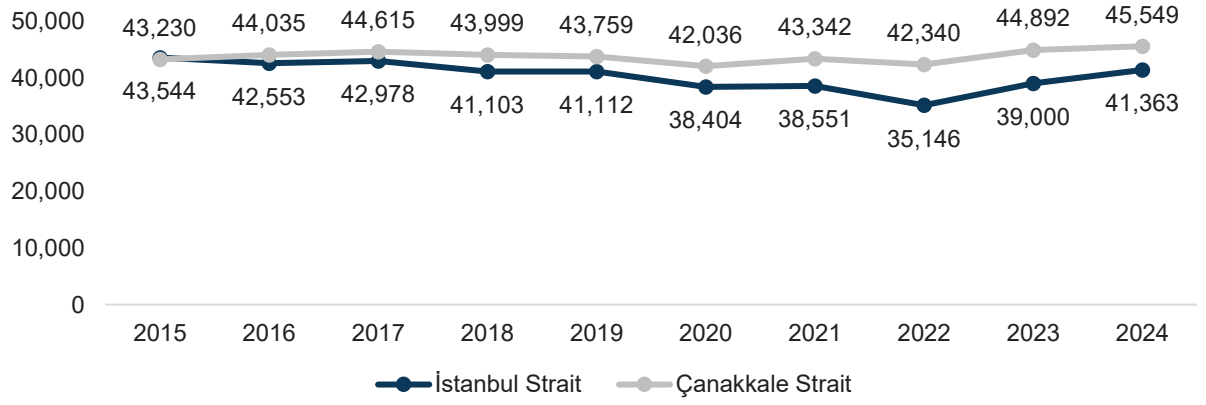
Table 39. Vessels Passing Through the Turkish Straits (2015-2024)

Years	Istanbul			Canakkale		
	Number Of Vessels	GT	Number Of Vessels Change	Number Of Vessels	GT	Number Of Vessels Change
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%
2024	41,363	639,773,180	6.1%	45,549	958,384,821	1.5%

Source: Ministry of Transport and Infrastructure, Republic of Türkiye

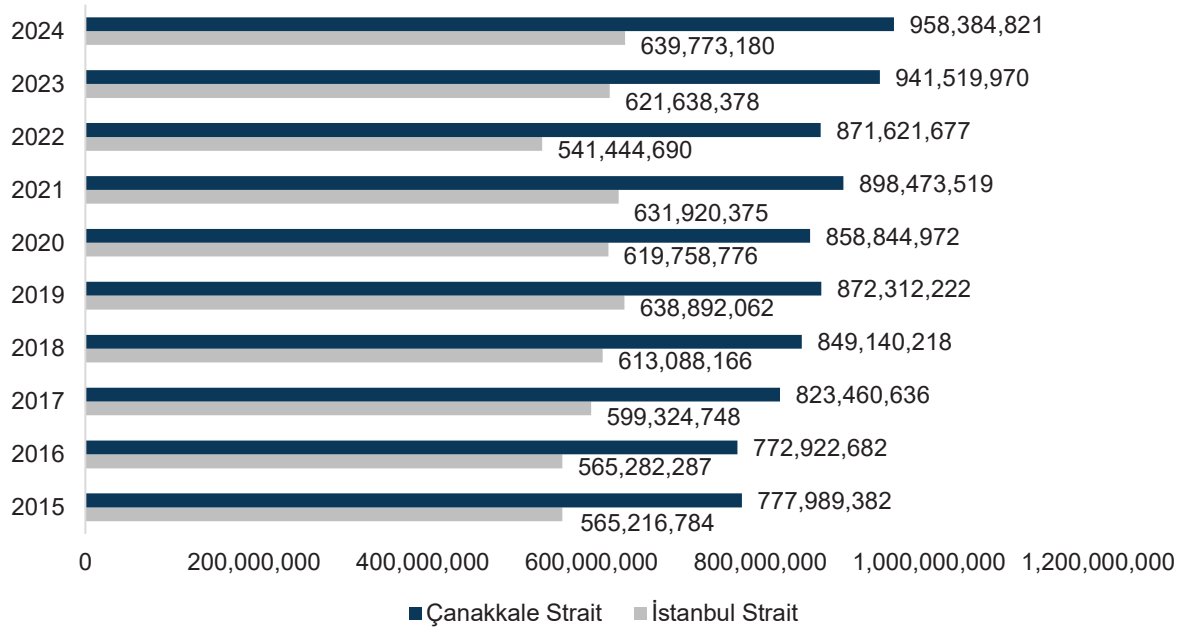
In the year 2024, 41,363 ships in total have passed through the İstanbul Strait with a monthly average of 3,447 ships; 45,549 ships in total have passed through the Çanakkale Strait with a monthly average of 3,821 ships.

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



Source: Ministry of Transport and Infrastructure, Republic of Türkiye

Graph 30. 2015-2024 Vessels Passing Through The Turkish Straits GT



Source: Ministry of Transport and Infrastructure, Republic of Türkiye

Table 40. (2020-2024) Statistics of Vessels Passed Istanbul Strait According To Their Ship Type

Ship Types	2020	2021	2022	2023	2024	Pay %
General Cargo Ship	16,864	16,891	15,371	15,421	15,490	37%
Bulk Carrier	8,592	8,684	7,076	8,285	8,777	21%
Other Tanker, TTA	5,252	5,085	5,447	6,174	6,233	15%
Container Ship	2,633	2,735	2,426	3,376	3,533	9%
Chemical Tanker, TCH	2,653	2,701	2,782	2,671	2,910	7%
Passenger Ship	74	217	85	407	756	2%
Barge / Barge Carrier	15	13	34	278	731	2%
Roll on Roll of Vessel	222	268	274	462	526	1%
LPG	530	462	424	442	526	1%
Livestock Carrier	555	566	491	476	468	1%
Tug	175	214	234	314	300	1%
Vehicle Carrier	87	18	67	28	87	0%
Cement Carrier	18	46	38	49	45	0%
Ferry	1	2	1	0	44	0%
Naval	205	190	30	33	32	0%
Refrigerated Cargo Carrier	52	48	15	41	7	0%
Other	476	411	351	543	898	2%
Total	**38,404**	**38,551**	**35,146**	**39,000**	**41,363**	**100%**

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

Table 41. 2020-2024 Statistics of Vessels Passed Çanakkale Strait According To Their Ship Type

Ship Types	2020	2021	2022	2023	2024	Annual Share
General Cargo Ship	14,197	14,713	13,880	14,073	14,337	31%
Bulk Carrier	9,170	9,349	8,049	8,833	9,619	21%
Container Ship	5,219	5,502	5,767	6,604	6,497	14%
Other Tanker, TTA	5,644	5,196	5,874	6,292	6,315	14%
Chemical Tanker, TCH	3,057	3,385	3,414	3,386	3,500	8%
Roll on Roll of Vessel	1,649	1,974	2,140	2,501	2,423	5%
LPG	542	498	477	512	531	1%
Livestock Carrier	593	607	521	519	515	1%
Vehicle Carrier	498	448	443	369	461	1%
Passenger Ship	26	43	489	546	432	1%
Tug	306	341	337	338	323	1%
Cement Carrier	17	45	47	49	109	0%
LNG	129	129	139	113	104	0%
Barge / Barge Carrier	109	179	60	50	66	0%
Naval	211	206	34	46	42	0%
Ferry	26	29	9	14	14	0%
Refrigerated Cargo Carrier	76	71	32	42	14	0%
Other	567	627	628	605	547	1%
Total	**42,036**	**43,342**	**42,340**	**44,892**	**45,849**	**100%**

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

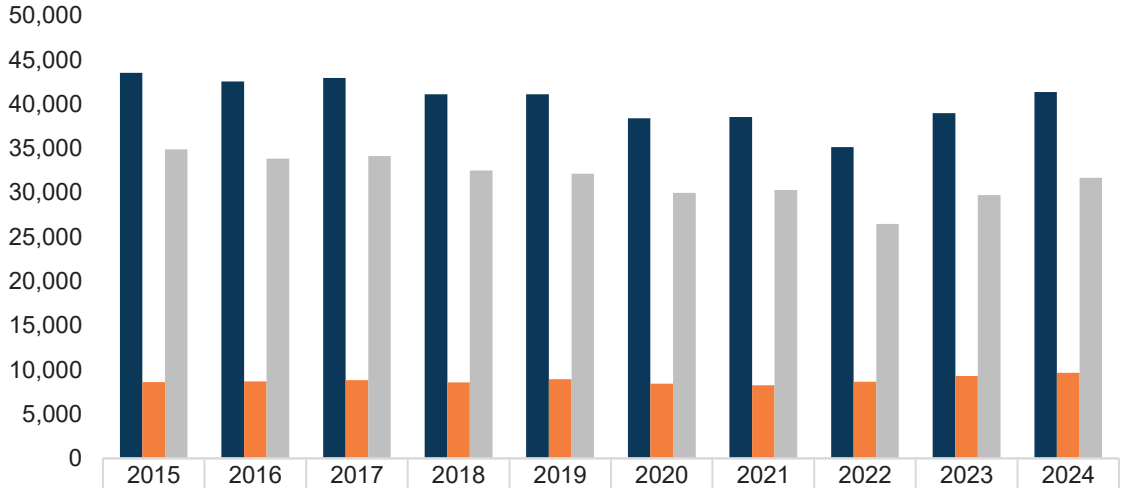
The statistics of ships passing through Istanbul and Çanakkale Straits, according to length, piloting and on country basis are shown in the following tables.

Table 42. 2015-2024 Years of Vessels Passed Istanbul Strait According to Their Length and Pilot Request

Years	Number of Vessels	Total Gross Tonnage	With Pilot	Non Call In Vessels	LOA Longer Than 200 M	Lower Than 500 GT	Total Tankers			Towaged
							TTA	LPG/LNG	TCH	
2015	43,544	565,216,784	23,349	25,243	3,930	879	5,825	1,232	1,576	71
2016	42,553	565,282,287	22,356	26,050	3,873	522	6,033	989	1,681	73
2017	42,978	599,324,748	24,059	26,111	4,005	436	6,212	742	1,878	88
2018	41,103	613,088,166	23,565	25,884	4,106	508	6,014	623	1,950	116
2019	41,112	638,892,062	26,632	26,138	4,400	333	5,934	561	2,462	89
2020	38,404	619,758,776	24,754	24,623	4,952	374	5,252	530	2,653	67
2021	38,551	631,920,375	25,357	24,654	5,306	374	5,085	462	2,701	75
2022	35,146	541,444,690	23,380	20,670	4,079	388	5,447	424	2,782	96
2023	39,000	621,638,378	25,337	23,113	4,770	988	6,174	442	2,671	115
2024	41,363	639,773,180	25,327	25,499	4,736	1,855	6,233	526	2,910	87

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

Graph 31. The Statistics Summary Of Vessels Passed Istanbul Strait Number of Vessel



	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Total Vessels	43,544	42,553	42,978	41,103	41,112	38,404	38,551	35,146	39,000	41,363
Total Tankers	8,633	8,703	8,832	8,587	8,957	8,435	8,248	8,653	9,287	9,669
Other Vessels	34,911	33,850	34,146	32,516	32,155	29,969	30,303	26,493	29,713	31,694

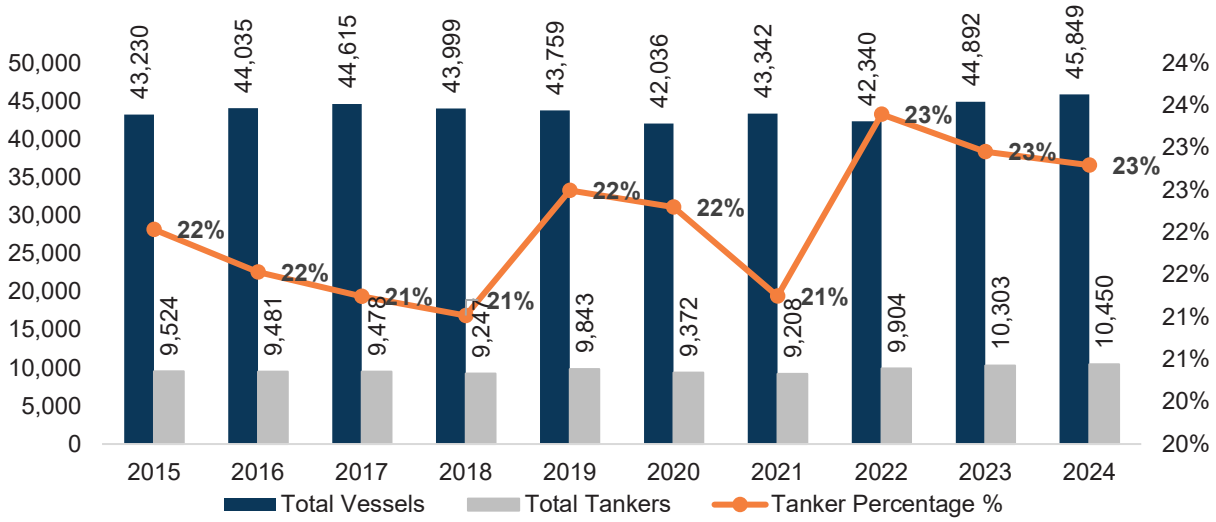
Source: General Directorate for Maritime Affairs -Department of Merchant Trade Development

Table 43. 2015-2024 Years of Vessels Passed Çanakkale Strait According to Their Length and Pilot Request

Years	Number of Vessels	Total Gross Tonnage	With Pilot	Non Call In Vessels	LOA Longer Than 200 M	Lower Than 500 GT	Total Tankers			Towaged
							TTA	LPG/LNG	TCH	
2015	43,230	777,989,382	18,843	25,220	5,842	581	6,009	1,036	2,479	122
2016	44,035	772,922,682	19,007	26,071	5,665	661	6,041	881	2,559	139
2017	44,615	823,460,636	19,925	26,087	6,197	755	6,145	734	2,599	149
2018	43,999	849,140,218	19,958	25,835	6,612	732	6,181	698	2,368	156
2019	43,759	872,312,222	21,616	26,184	7,010	714	6,178	669	2,996	138
2020	42,036	858,844,972	21,175	24,639	7,430	779	5,644	671	3,057	126
2021	43,342	898,473,519	23,706	24,668	7,855	820	5,196	627	3,385	131
2022	42,340	871,621,677	23,969	20,584	7,223	722	5,874	616	3,414	120
2023	44,892	941,519,970	24,802	23,088	8,151	714	6,292	625	3,386	114
2024	45,849	958,384,821	23,683	25,559	8,012	695	6,315	635	3,500	105

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

Graph 32. The Statistics Summary of Vessels Passed Çanakkale Strait Number of Vessel



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

3.3. Dangerous Passing Through the Turkish Straits

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).

Table 44. Dangerous Passing Through The Turkish Straits (Metric Tons)

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)
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
2024	9,669	182,277,332	10,450	206,984,173

Source: Ministry of Transport and Infrastructure, Republic of Türkiye

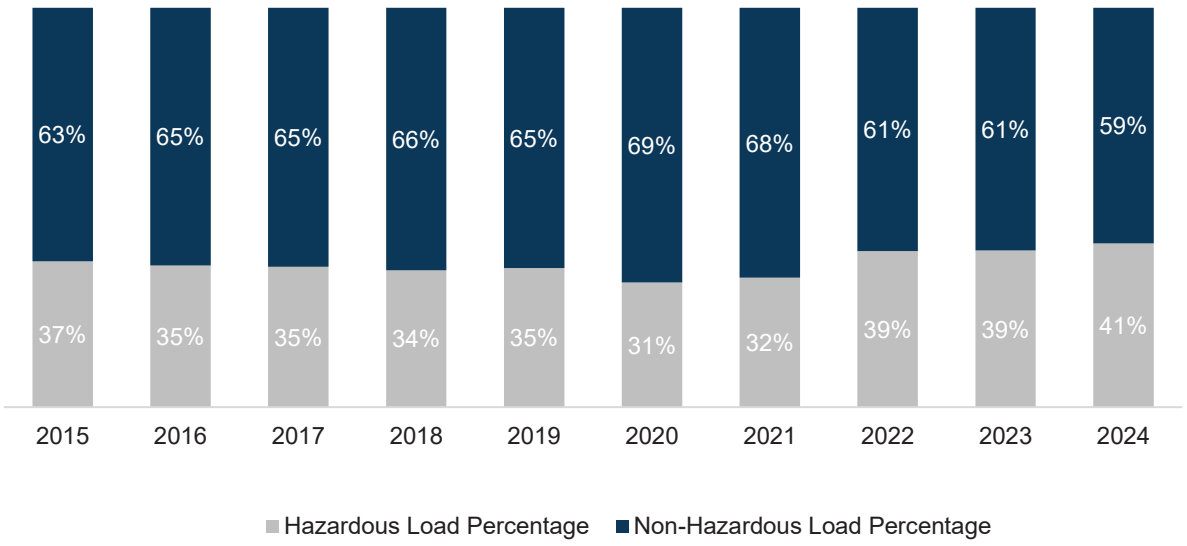
The statistics of ships passing through Istanbul and Çanakkale Straits, according to length, piloting and on country basis are shown in the following tables.

Table 45. Dangerous Passing Through The Istanbul Straits (Thousand Tons)

Years	Hazardous Cargo Quantity			Non-Hazardous Load Quantity	Total	Hazardous Load Percentage	Non-Hazardous Load Percentage
	Transported by Tankers	Carried by Other Vessels	Total				
2015	135,951	5,574	141,525	246,090	387,615	37%	63%
2016	136,099	4,519	140,618	255,544	396,162	35%	65%
2017	146,944	4,698	151,642	280,265	431,907	35%	65%
2018	147,375	3,135	150,510	288,374	438,884	34%	66%
2019	159,499	4,013	163,512	306,160	469,672	35%	65%
2020	139,245	3,265	142,510	314,050	456,560	31%	69%
2021	147,222	3,588	150,810	314,548	465,358	32%	68%
2022	146,904	2,874	149,778	233,523	383,300	39%	61%
2023	161,888	2,582	164,470	254,825	419,295	39%	61%
2024	167,276	15,001	182,277	265,300	447,577	41%	59%

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

Graph 33. Dangerous Passing Through The Istanbul Straits



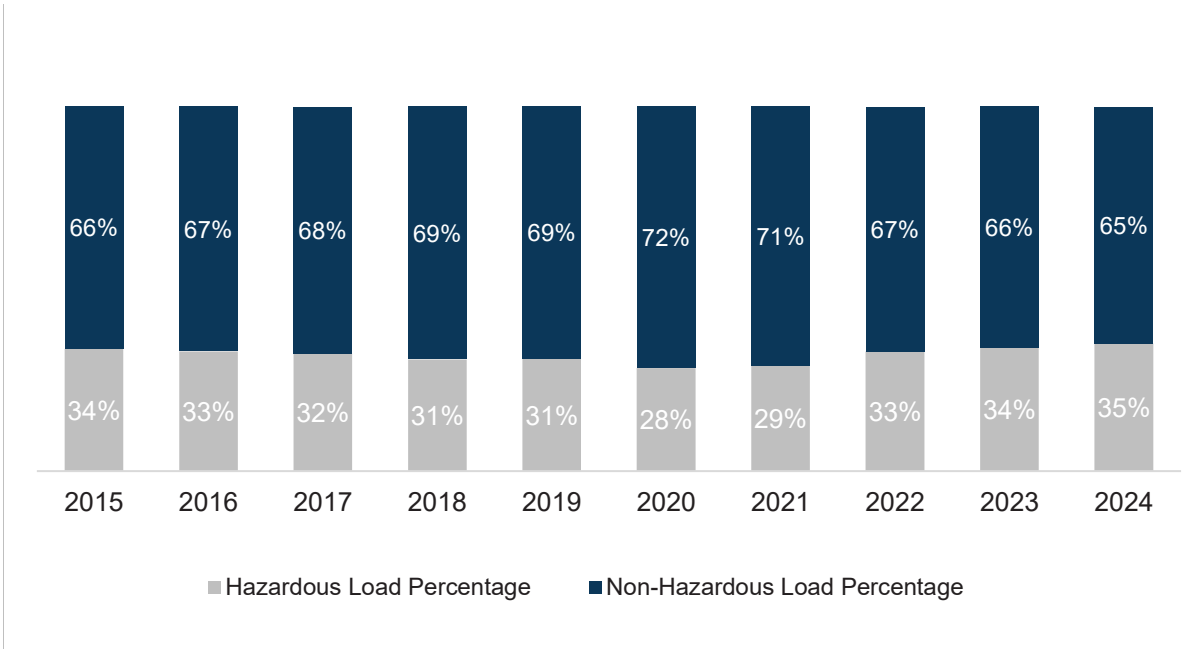
Source: General Directorate for Maritime Affairs -Department of Merchant Trade Development

Table 46. Dangerous Passing Through The Çanakkale Straits (Thousand tons)

Years	Hazardous Cargo Quantity			Non-Hazardous Load Quantity	Total	Hazardous Load Percentage	Non-Hazardous Load Percentage
	Transported by Tankers	Carried by Other Ships	Total				
2015	155,531	6,693	162,224	321,166	483,390	34%	66%
2016	154,302	6,281	160,583	328,596	489,179	33%	67%
2017	166,730	6,375	173,105	363,636	536,741	32%	68%
2018	164,583	6,256	170,839	386,448	557,287	31%	69%
2019	171,685	5,504	177,189	397,412	574,601	31%	69%
2020	157,193	4,605	161,798	410,284	572,082	28%	72%
2021	167,994	6,395	174,389	429,663	604,053	29%	71%
2022	166,775	5,352	172,127	352,350	524,478	33%	67%
2023	180,894	4,970	185,864	363,271	549,135	34%	66%
2024	188,424	18,560	206,984	384,886	591,870	35%	65%

Source: Ministry of Transport and Infrastructure, Republic of Türkiye

Graph 34. Dangerous Passing Through The Çanakkale Straits



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

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 connects the 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 connects the 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 this information 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 ships log that they have submitted SP 2 Report, and all information received regarding strait traffic.

The SP 2 report shall be submitted to the sector concerned 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

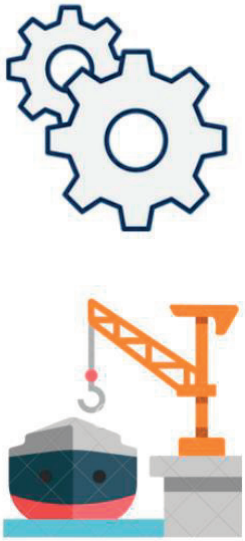
Vessels of 20 meters or more in a length passing through the Turkish Straits shall submit the “Call Point Report" (Annex-4) to the relevant TSVTS sector via VHF at designated locations. These positions are entry and exit points to the TSVTS system. In addition, the vessels shall submit this report to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

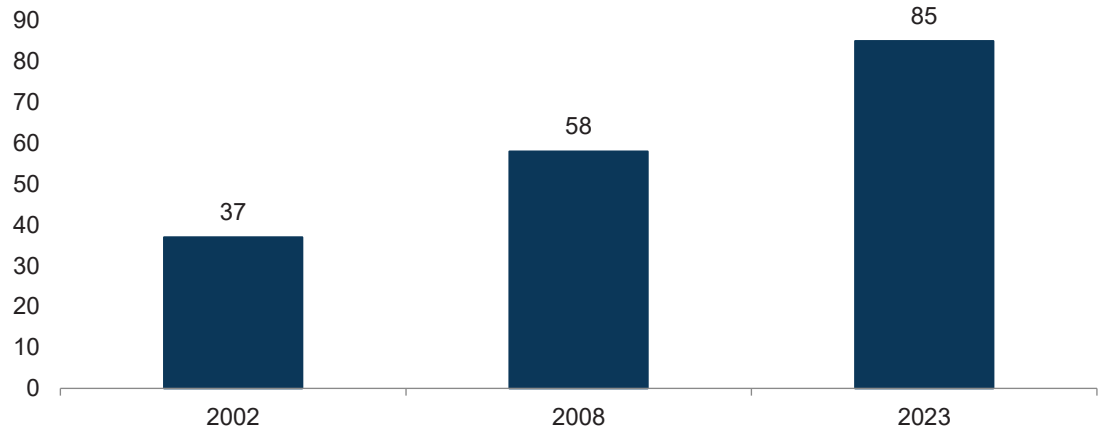


4. SHIPBUILDING INDUSTRY

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 2025 while it was only 37 in 2002. The quantity of shipyards under construction are 4 and 13 areas that are defined as shipyard investment areas of the same date mentioned above. The Covid-19 pandemic, within 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 35. 2002 / 2024 Shipyards Under Operation



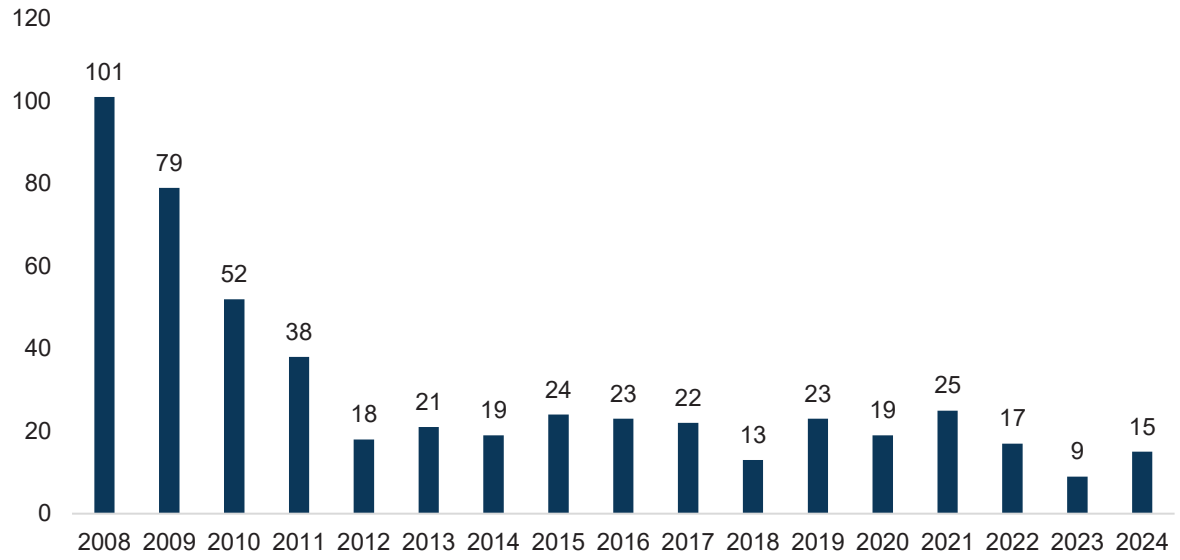
Source: Ministry of Transport and Infrastrucure 03/2025

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.

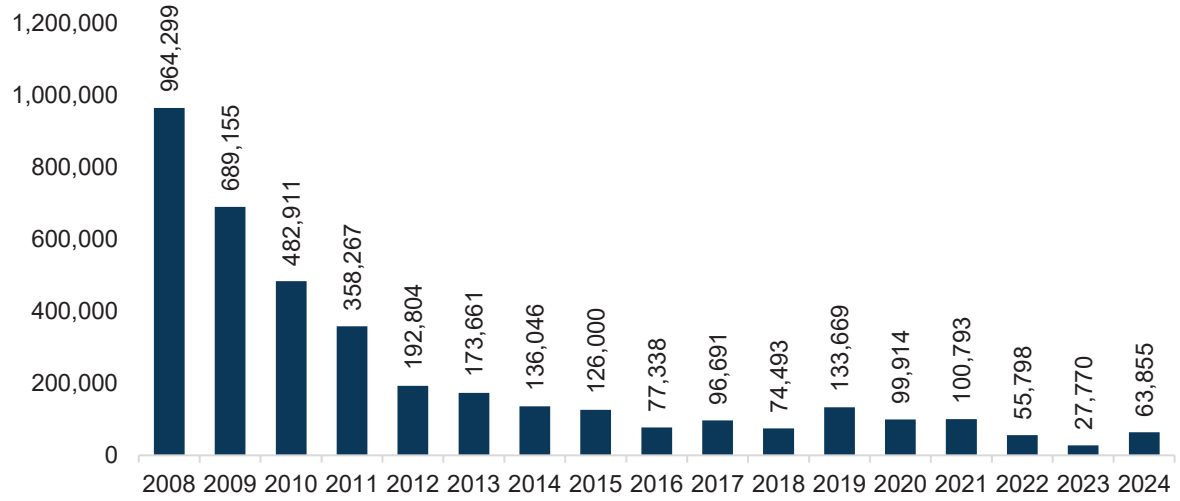
Some of the operative shipyards in Türkiye continue the modernization and extension operations but on the other hand, due to the global economic crisis, some of them suspend or cancel their modernization or extension projects because of the sanctions applied by the banks on the shipyards. In 2024, 15 ships DWT of 63,855 DWT have been delivered in the Turkish Shipyard.

Graph 36. Number of Ships Delivered Between 2008-2024



Source: Clarkson Research Services 03/2025

Graph 37. DWT of Ships Delivered Between 2008-2024



Source: Clarkson Research Services 03/2025

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 that will arise in the near future due to the Border Carbon Adjustment Mechanism

The developments in information technologies and the new era called Industry 4.0 have also shown their effect in the sector. Research continues on "autonomous ships", which is at the forefront of the world's agenda today, and studies are carried out on unmanned naval vehicles for defense purposes.

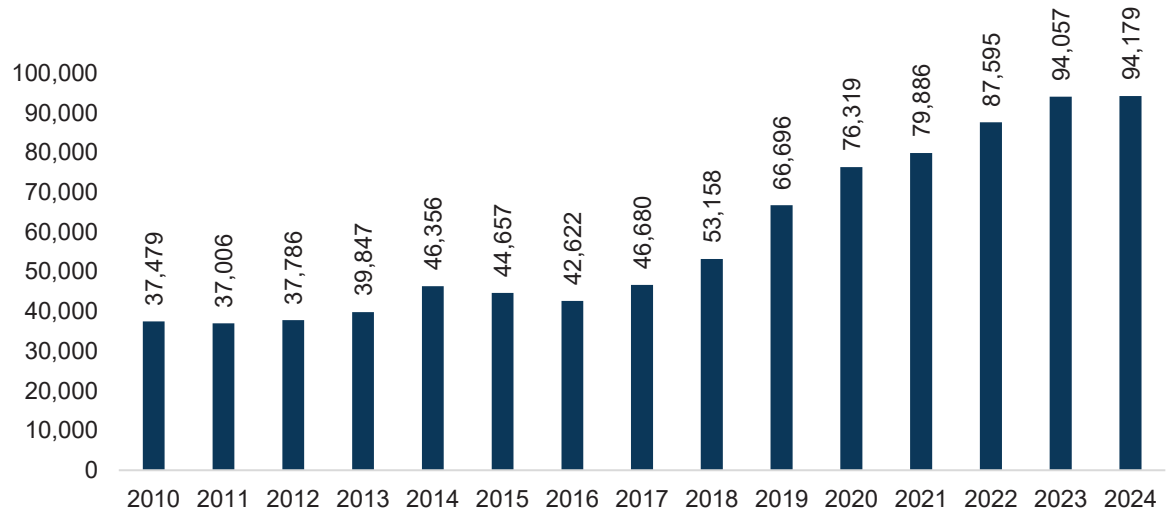
The shipbuilding market, which stagnated due to the effects of Covid-19 dominating most of 2020, showed a significant improvement in 2021. A strong start was made in the first eight months of 2021 with a total of 1060 ship orders with a volume of 85.6 million DWT and 63.7 million GT, which means the 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 2024 is 1,648 ships of 89.0 million DWT and 40.4 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 38. Employee Numbers in Turkish Shipyards and Sub Industry by 2024



Source: Ministry of Transport and Infrastrucure 03/2025

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, 94,057 in 2023, and reached 94,179 in 2024.

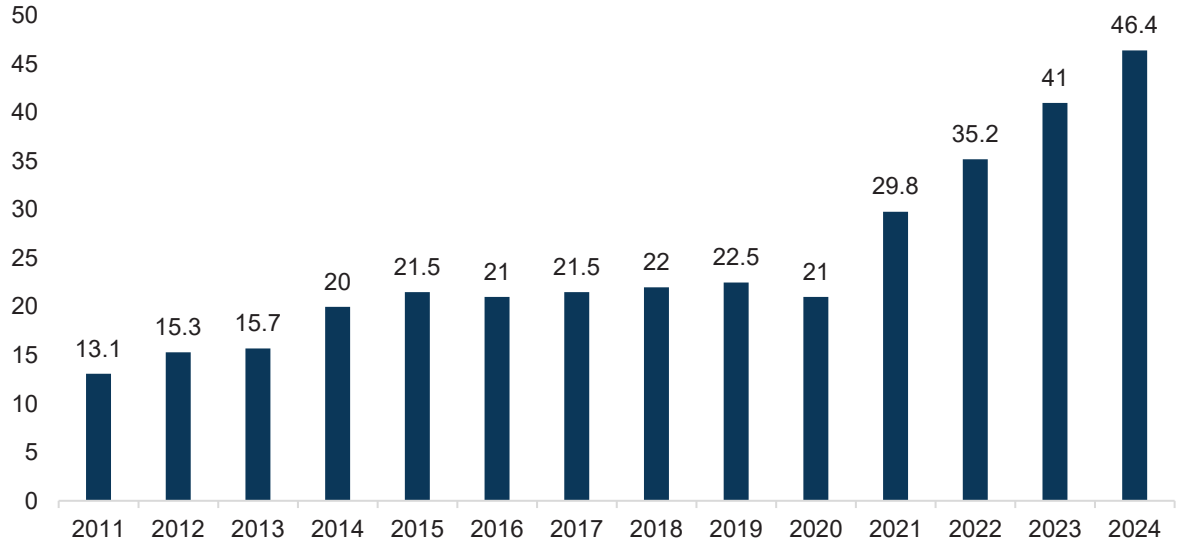
Most of the ships constructed in Turkish shipyards are built for export. Especially between 2002-2009, almost the total amount of these ships were exported to the EU member countries.

By the end of 2012, orders in our yards were decreased to 0.5 million DWT. Due to the lack of new orders, the shipyards are now mostly concerned, with repair and maintenance facilities. In 2013, in Turkish shipyards 15,755,206 DWT of repair and maintenance had been done. As of 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 41,000,000 DWT, in 2024 it raised up to 46,400 DWT.

Turkish Shipyard,

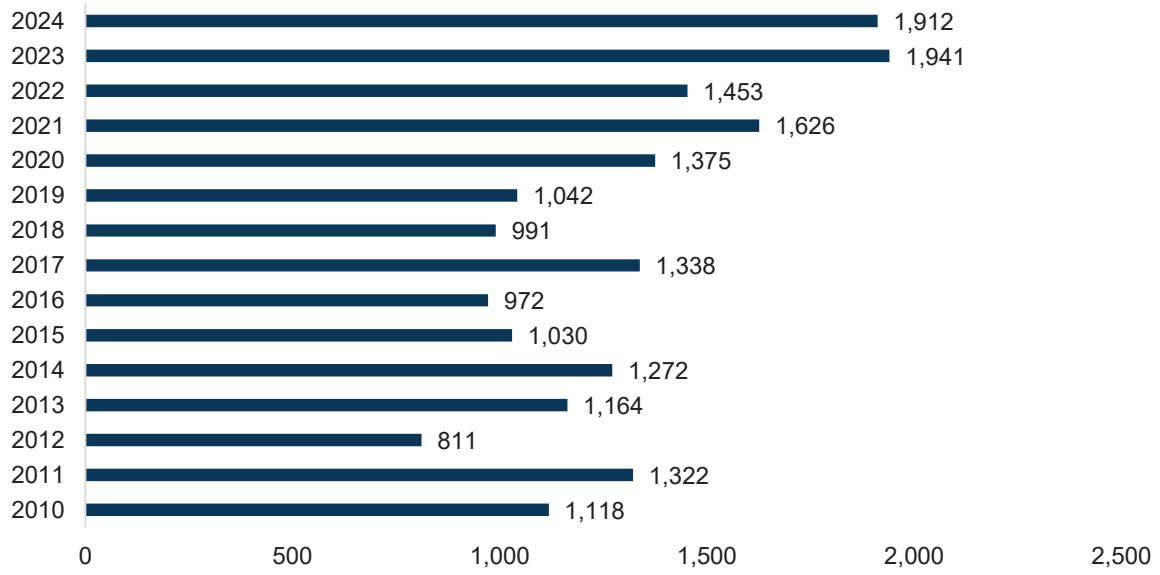
- 700,000 tons/year steel processing,
- 2 million DWT/year new ship construction,
- Construction of new ships up to 180,000 DWT in one piece,
- Building 60–70 meter mega yachts and pleasure boats,
- It has a maintenance and repair capacity of 46.4 million DWT/year.

Graph 39. Repair and Maintenance Facilities According to Years 2011-2024



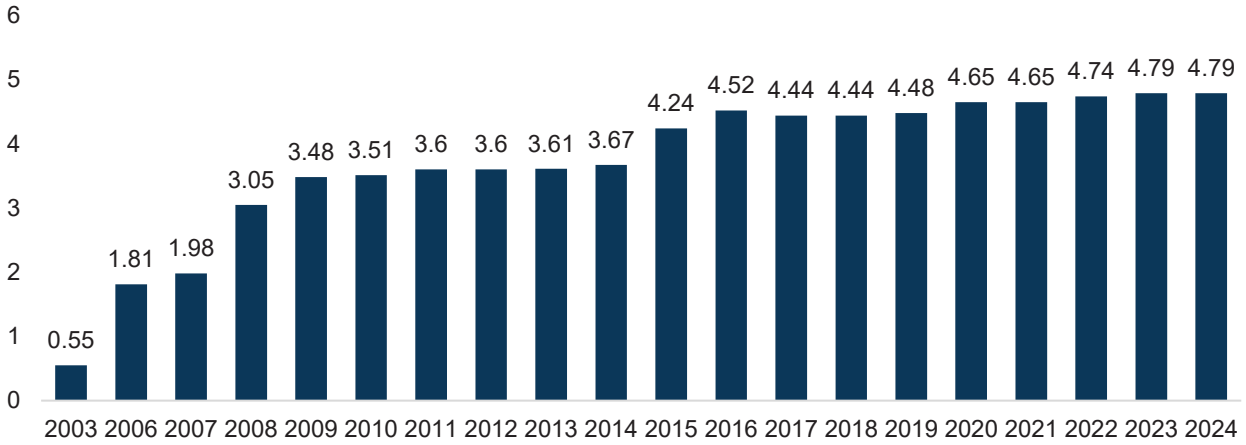
Source: GİSBİR Turkish Shipbuilders Association 03/2025

Graph 40. Export Figures of Turkish Shipbuilding Industry (2010-2024)



Source: Ship and Yacht Exporters Association (e-birlik.net) 03/2025

Graph 41. Shipyards Project Capacities Between 2003-2024 (Million DWT)



Source: Ministry of Transport and Infrastrucure 03/2025

In 2002, our shipyard's capacity was 550,000 DWT. In 2024 it has reached up to 4.79 million DWT which means a growth more over 8 times than 2002.

As of March 2025, 36 floating docks and 11 dry docks are operative in Türkiye.

Table 47. 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 03/2025

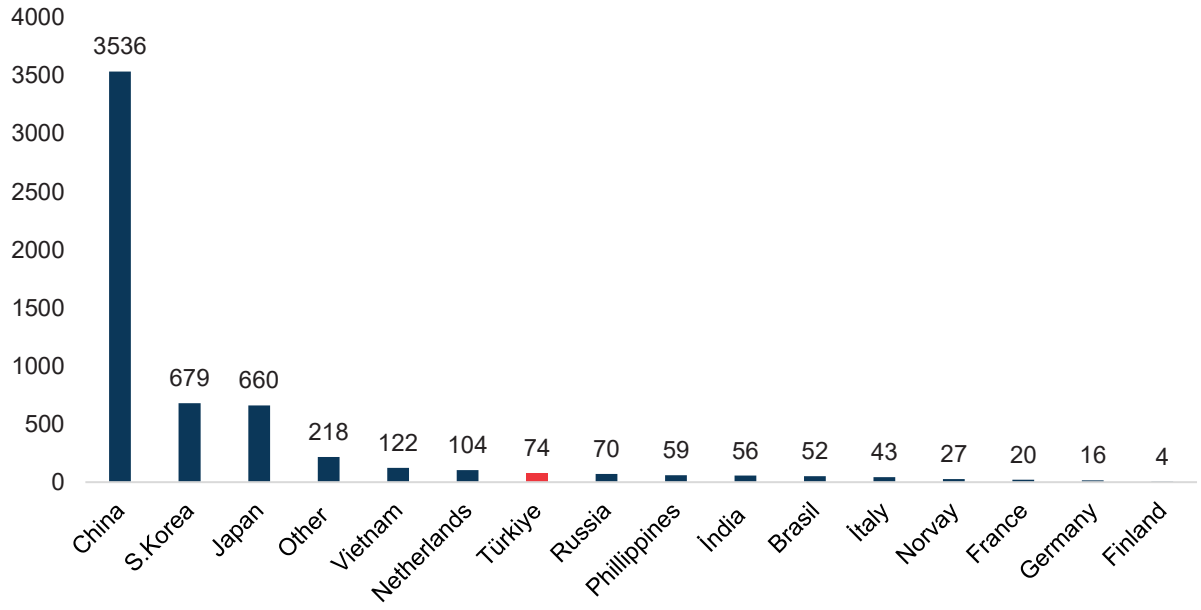
Table 48. Floating Docks in Türkiye

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	Düzgit Yalova Gemi İnşa San. 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 03/2025

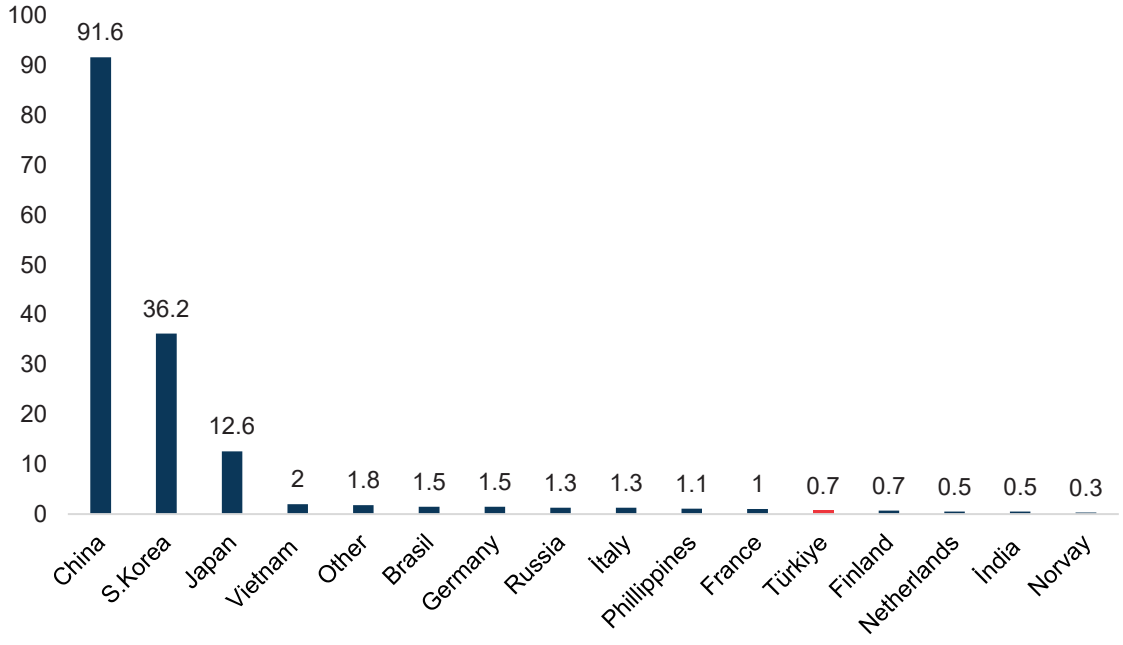
According to quantity, Turkish shipyards are in the 7th place in the world ranking according to quantity.

Graph 42. Orderbook by Builder Country (Quantity)



Source: Clarkson Research Services 03/2025

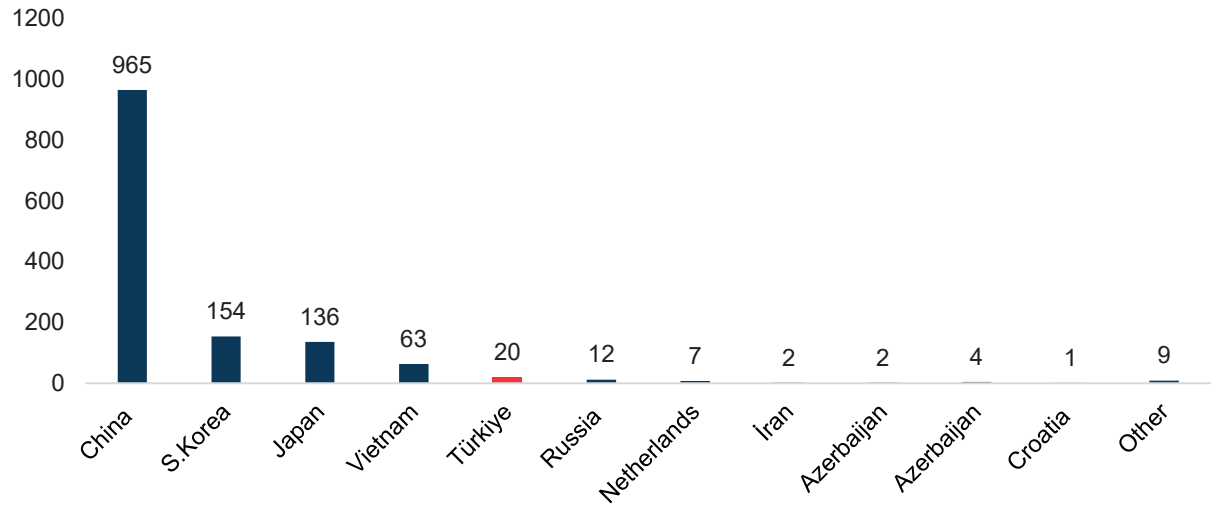
Graph 43. Orderbook by Builder Country (Tonnage- Million CGT)



Kaynak: Clarkson Research Services 03/2025

Our shipyards have a good reputation in building small and medium tonnage chemical tankers. As of the end of 2024, Türkiye was in the 5th place in terms of quantity among the countries which take tanker orders. It ranks 12th in the world ranking of shipbuilding.

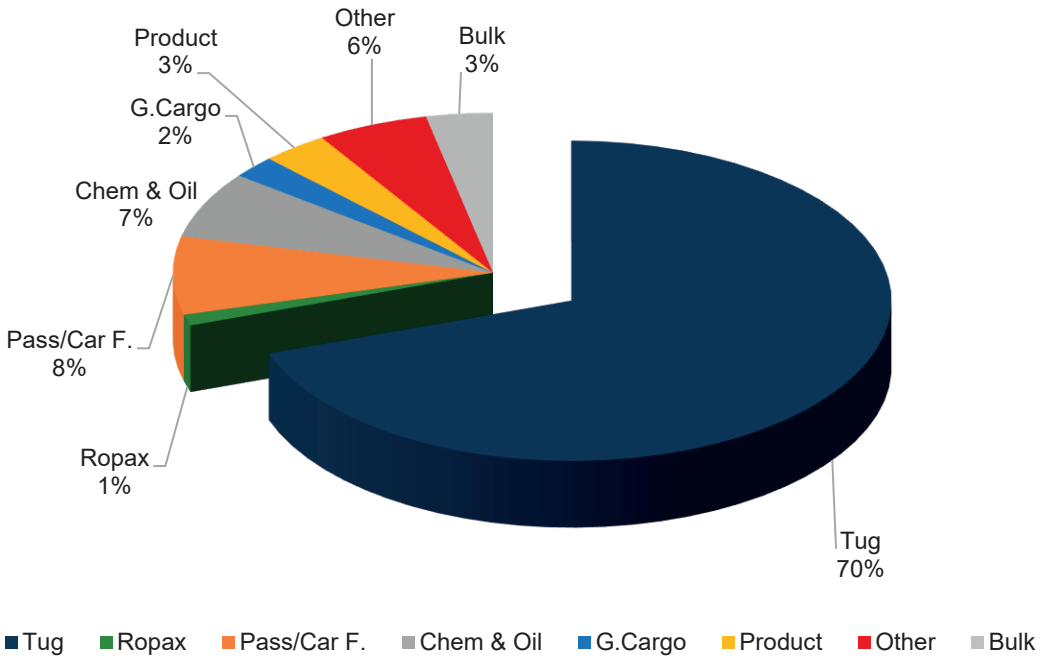
Graph 44. Tanker Orders by Builder Country (Quantity)



Source: Clarkson Research Services 03/2025

Turkish shipowners worldwide orders consist of 71 ships about 1,032,483 million CGT as of March 2025.

Graph 45. Distribution of Orders According to Shiptype in Turkish Shipyards



Source: Clarkson Research Services 03/2025

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. TCG Anadaolu The Multipurpose Amphibious Ship (Anadolu) Project
2. Fleet Replenishmen Tanker (Dimdeg) Project
3. Milgem Fifth Ship ('ISTIF' Class Frigate) Project
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
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.

[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)

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;

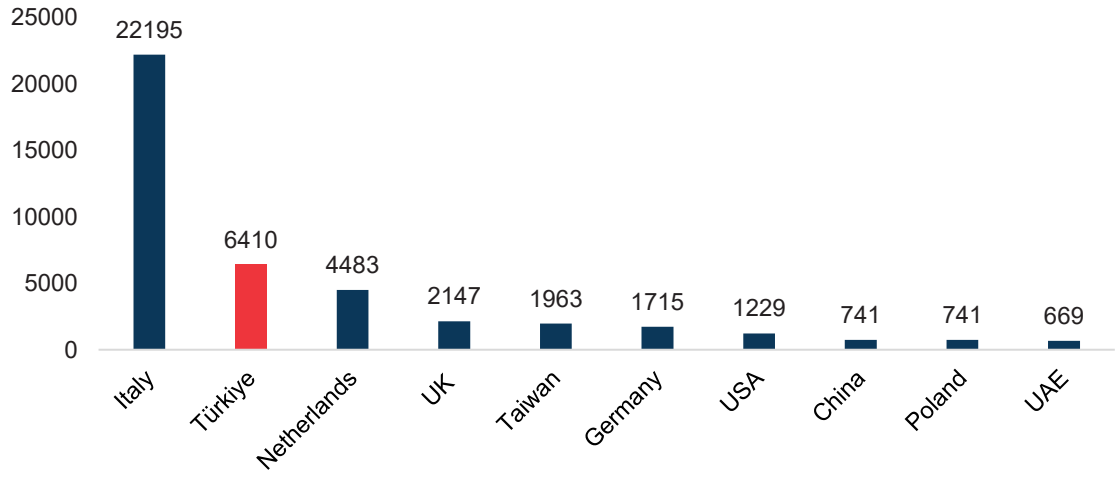
- Educated and competent labour
- Production quality in accordance with international standards
- Reasonable costs
- Adequate sub industry with quality
- Technology basis production
- Closeness to theinternational markets
- Appropriate climate
- Our country's potential in boat&yacht building

Main disadvantages are;

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

Türkiye has shown a steady increase in yacht construction, especially in yachts of 24 m and above, since 2007 and became the third in the world in terms of the number and length of superyachts delivered in 2010. The sector, which rose to second place in 2023 with 5,838 m, leaving the Netherlands behind, maintained its position with 146 projects and a total of 6,410 m in 2024; In terms of Gross Ton, it ranked fourth with approximately 55,000 GT (54,494) in 2022, 73,000 GT (73,011) in 2023 and 79,000 GT (78,986) in 2024.

Graph 46. Top Builder of Superyacht Projects on Order in 2024



Source: Boat International (2025 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.

CHAPTER V

SHIP RECYCLING INDUSTRY

5. SHIP RECYCLING INDUSTRY

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,

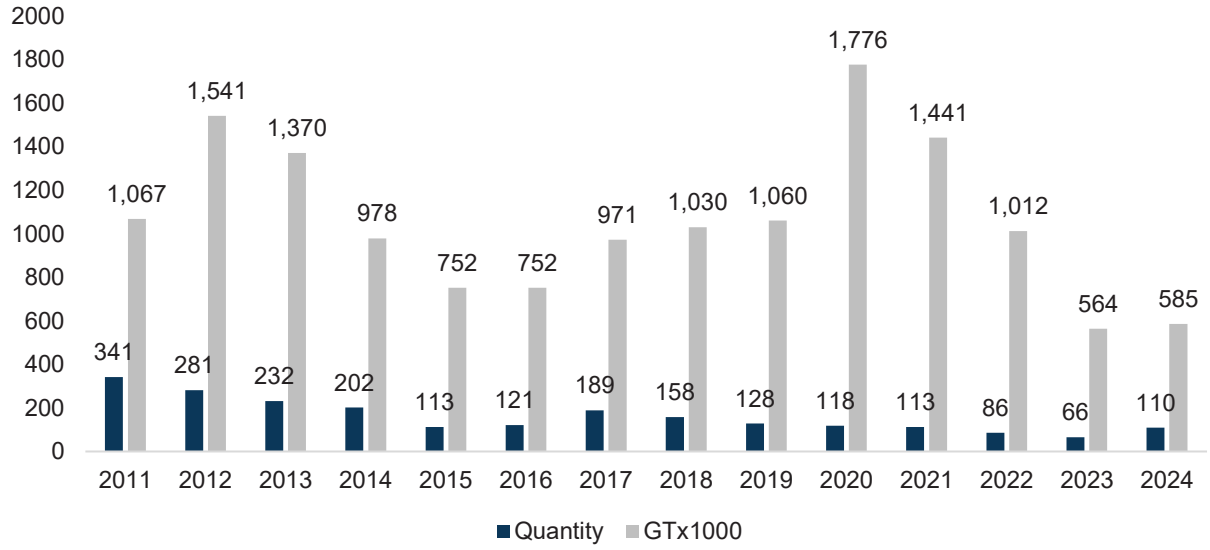
- Energy saving ratio is 74%, raw material resources preserved by 90%
- 40% less water consumption
- 76% less sewage pollution
- 86% less air pollution
- 97% less mine residue

observed.

The center of our country's ship recycling industry is İzmir-Aliağa, and currently 22 facilities are actively operating. 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 47. Türkiye's Ship Recycling Values by the Year



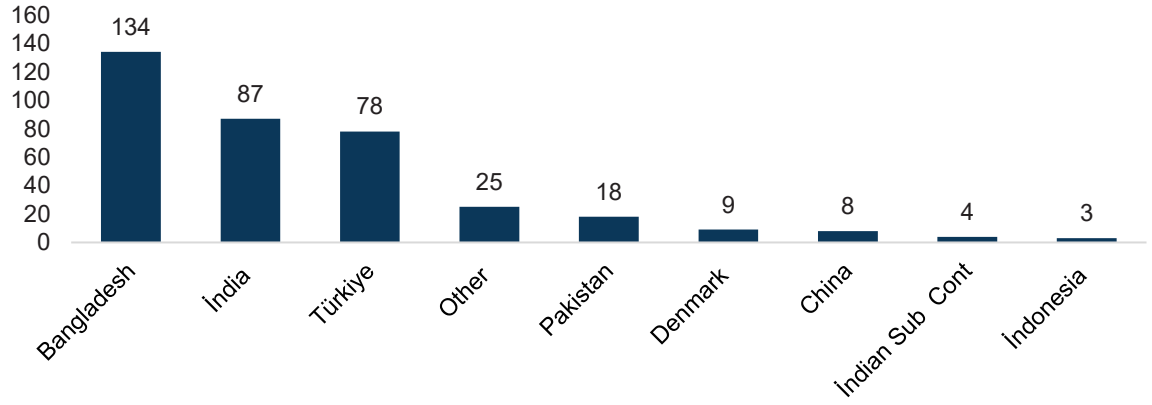
Source: Ministry of Transport and Infrastrucure 03/2025

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 emplyoment 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 11 in 2024.

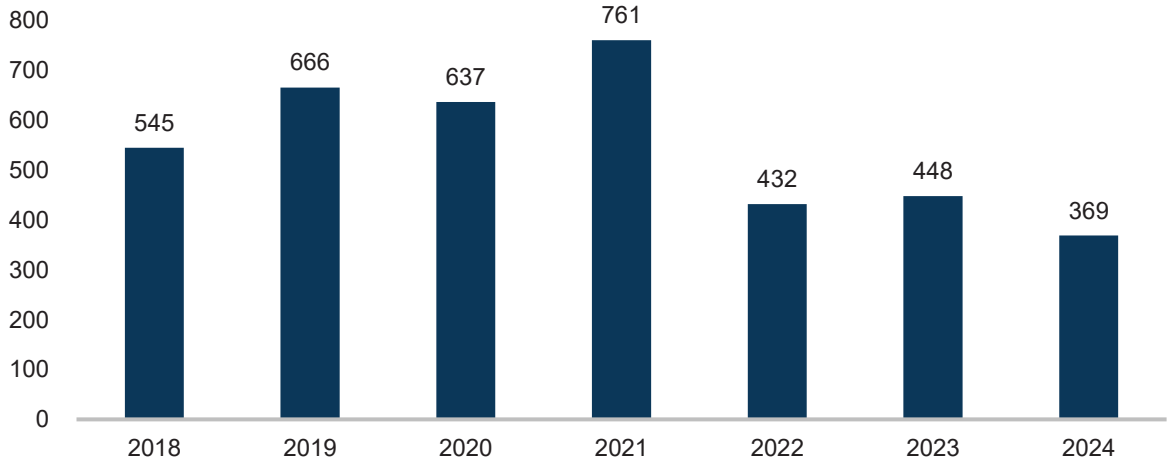
Accoardind to global data, Türkiye is in the 3th place in ranking according to quantity by the end of 2024.

Graph 48. Global Ship Recycling According to Quantity (Quantity)



Source: Clarksons Research Services Limited 03/2025

Graph 49. Recycled Ship Numbers by Years

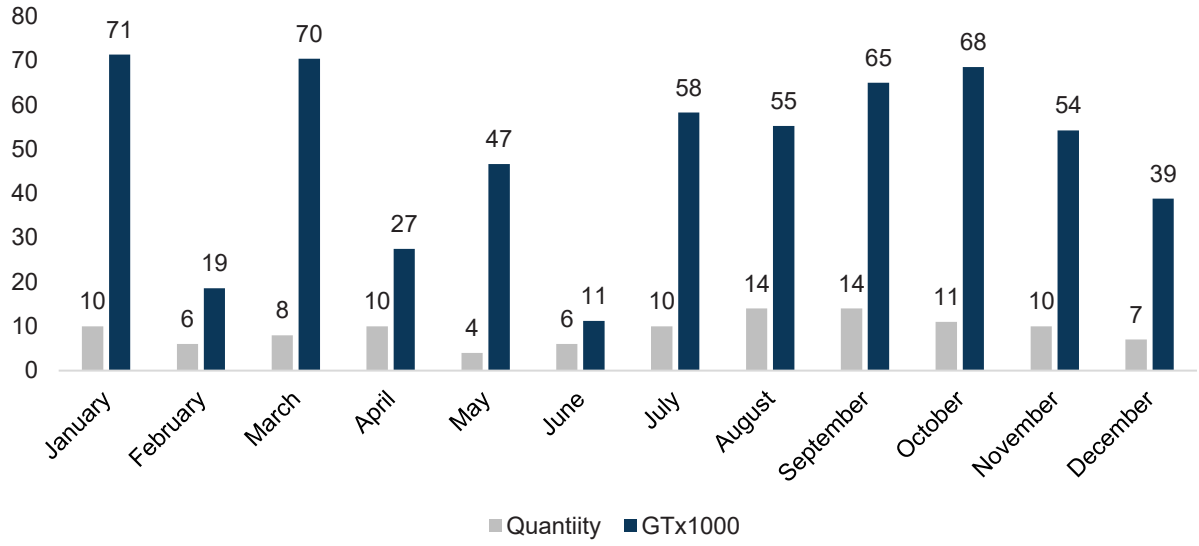


Source: Clarksons Research Services Limited 03/2025

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 2024, Türkiye's ship recycling facilities achieved to recycle 110 ships with the tonnage of 585,000 GT.

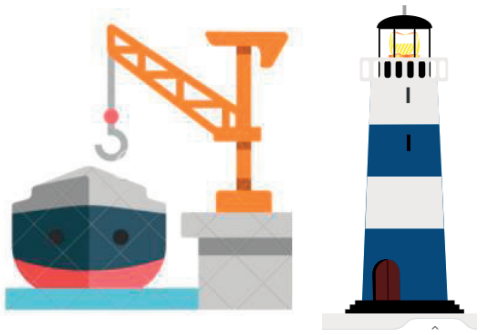
Graph 50. Ship Recycling by Months in Türkiye During 2024

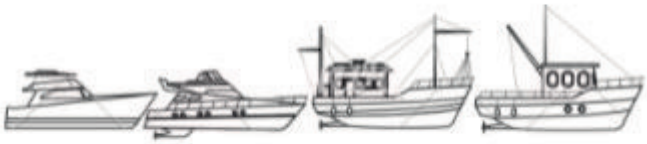


Source: Ministry of Transport and Infrastrucure 04/2025

CHAPTER VI

COASTAL STRUCTURES





6. COASTAL STRUCTURES

6.1. General Situation of Coastal Structures in Our Country

The seas and coasts of our country have a great potential to serve different industrial areas thanks to the advantages provided by its geographical structure, climatic features and geopolitical location. This geographical advantage has diversified coastal structures with different functions in our country. As of December 2024, there are a total of 957 coastal structures, including port and pier facility, marina/marina/berthing, shipyard, boat manufacturing site, boatyard, fishing coastal structure and shipbreaking facility, and the total length of the coastal areas of our country, which is surrounded by seas on three sides, is 8,592 km, excluding the islands. The protected coastal length is 3,216 km, which corresponds to 37%.

In the 2024-2028 Strategic Plan published by the Ministry of Environment, Urbanization and Climate Change, a new approach has been brought to coastal planning and implementation studies in our country. This approach aims to make holistic and strategic decisions and emphasizes that the work on Integrated Coastal Zone Plans, which aims to strike a balance between the protection and use of the coasts, is ongoing. In line with the 2030 Sustainable Development Goals, it has been stated that these plans should be created in coastal areas that have not yet been planned.

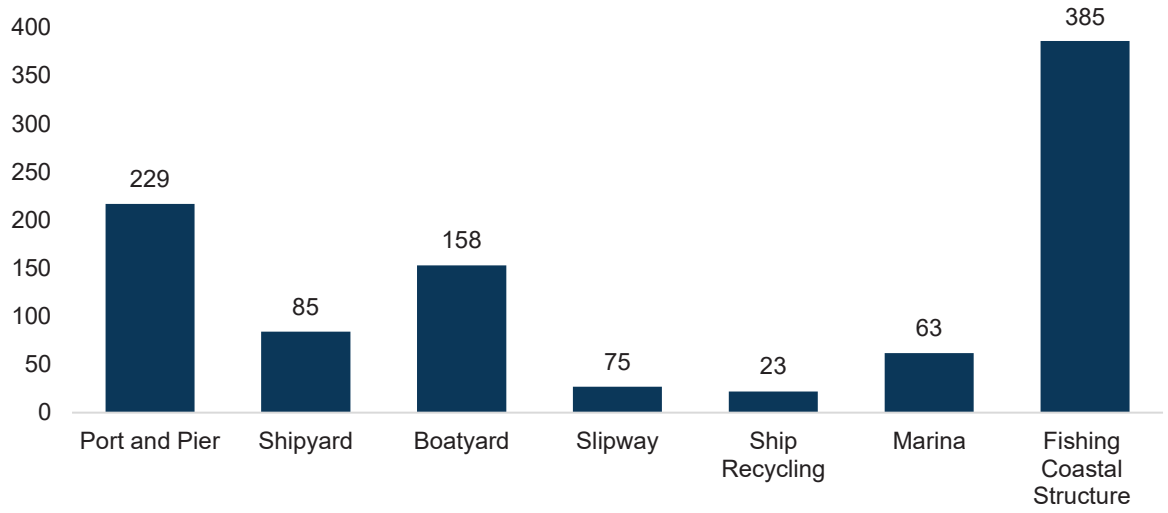
The lack of boat parking spaces due to the increasing use of boats, especially on the Aegean and Mediterranean coasts, prevents the effective use of coastal structures. In order to solve these problems, it is planned to create new boat parking spaces and protect coastal structures in the 2024-2028 Strategic Plan of the Ministry of Transport and Infrastructure of the Republic of Türkiye.

However, the lack of rail connections of the ports hinders multimodal transport and complicates the efficient use of the coasts. Strategies include accelerating port investment permits, providing berths for private boats and yachts, and completing railway projects. It is aimed to eliminate the deficiencies in global competition by implementing innovative projects for expansion in existing ports and large-scale container ports.

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.

Türkiye's natural and cultural values offer a significant competitive advantage in terms of tourism, and this advantage needs to be maintained in a sustainable manner. Within the framework of the Ministry of Industry and Technology Regional Development National Strategy 2024-2028, cruise tourism is also among the strategies, and it has been stated that Türkiye's competitiveness in this field will be increased by meeting the infrastructure needs of ports such as Istanbul, Kuşadası and Izmir and integrating cruise tourism with other transportation networks. It is seen that the main requirement in the development of cruise tourism is the developed port infrastructure and the main port of Galataport, which was opened in Istanbul in 2021, is a very important opportunity for the country to make a breakthrough in cruise tourism.

Graph 51. Existing Coastal Structures in Our Country



Source: Ministry of Transport and Infrastructure

In addition, it is planned to promote the development of blue growth sectors, areas such as aquaculture, maritime transport and coastal tourism in order to support the sustainable growth of the maritime sector. In places where coastal ports cannot be expanded, the construction of dry ports will be put on the agend and capacity problems in busy port areas will be solved.

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.

When we look at the 2024-2028 Strategic Plan published by the Ministry of Transport and Infrastructure; In line with the goal of developing maritime and disseminating marine culture, the development of coastal structures has also been determined as an important goal. This strategic plan aims to improve the sustainability and efficiency of transportation and infrastructure projects.

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 meet the need for shelter and mooring places in our country, legislative studies on the installation and operation of vault systems have gained momentum in 2024. In this context, in cooperation with the Ministry of Environment and Urbanization and the Ministry of Transport and Infrastructure, studies are carried out to determine the procedures and principles regarding the implementation of vault systems. Especially in coastal areas and bays where boat traffic is intense, a legislative infrastructure is established for the establishment and operation of vault systems that are open to public use and meet the criteria of maritime safety and navigation safety. These regulations aim to provide solutions suitable for navigation, life, property and environmental safety without preventing the use of the coast for the public benefit.

6.1.1. Ports

6.1.1.1. Port Investment Projects in Türkiye

According to the "Top 100 Ports 2024 Report" prepared by the UK-based news portal Lloyd's List, our ports included in the list showed a significant increase compared to 2022. The rankings of these ports are as follows: Ambarlı Port is 64th, Kocaeli Port is 85th, Mersin Port is 91st and Tekirdağ Port is 100th. These developments reinforce the influence and competitiveness of Turkish ports in global trade.

Ambarlı Port, as one of the most important ports in Türkiye, plays a major role, especially in container transportation. In the light of the latest data, as of 2024, the amount of container handling at Ambarlı Port has reached the highest level in the last 9 years. This situation reflects that a significant breakthrough has been made in Türkiye's logistics sector and its increasing capacity with the modernization of the port. This increase can be considered as an indicator of the growth of both global trade and Türkiye's foreign trade activities.

Kocaeli ports have an important place among European ports. According to the evaluations, Kocaeli ports rank sixth among the busiest ports in Europe. This situation once again reveals the strategic importance of Kocaeli in the field of logistics and trade.

Kocaeli's ports in the Gulf of Izmit, especially large ports such as Derince Port, Izmit Port and Yarımca Port, play an important role in transportation to Europe and world markets. These ports support the production capacity and foreign trade volume of Kocaeli, one of Türkiye's industrial centers, allowing for an increase in trade with Europe.

Filyos Port Project;

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),

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 2024 increased by 0.7% increased to 2023 and reached 60,594. The number of foreign flagged ships calling at our ports decreased by 3.2% compared to the previous year, and the number of Turkish flagged ships increased by 8.9%.

Table 49. Total Number of Calling Vessel, 2022-2024

Months	2022			2023			2024		
	Turkish Flag	Foreign Flag	Total	Turkish Flag	Foreign Flag	Total	Turkish Flag	Foreign Flag	Total
January	1,158	2,808	3,966	1,272	3,076	4,348	1,398	2,954	4,352
February	1,145	2,758	3,903	1,135	2,691	3,826	1,435	3,097	4,532
March	1,198	2,882	4,080	1,294	3,330	4,624	1,510	3,327	4,837
April	1,355	3,118	4,473	1,471	3,350	4,821	1,429	3,331	4,760
May	1,736	3,363	5,099	1,679	3,882	5,561	1,722	3,570	5,292
June	1,794	3,464	5,258	1,867	3,793	5,660	2,025	3,519	5,544
July	1,835	3,479	5,314	1,975	3,636	5,611	2,151	3,513	5,664
August	1,799	3,752	5,551	1,976	3,696	5,672	2,332	3,535	5,867
September	1,661	3,859	5,520	1,883	3,599	5,482	2,175	3,294	5,469
October	1,589	3,843	5,432	1,817	3,766	5,583	1,944	3,453	5,397
November	1,292	3,466	4,758	1,401	2,909	4,310	1,410	2,965	4,375
December	1,359	3,339	4,698	1,507	3,190	4,697	1,463	3,042	4,505
Total	**17,921**	**40,131**	**58,052**	**19,277**	**40,918**	**60,195**	**20,994**	**39,600**	**60,594**

Source: Ministry of Transport and Infrastructure

Table 50. Calling Vessel Statistics at Turkish Ports According to the Harbour Masters Area of Jurisdiction

Harbour Master	2022 Total		2023 Total		2024 Total	
	NO. of Ship	Gross Tonnage	NO. of Ship	Gross Tonnage	NO. of Ship	Gross Tonnage
Alanya	29	1,021,163	43	1,607,915	49	1,806,624
Aliağa	6,067	115,127,698	6,329	121,843,279	6,086	116,793,047
Amasra	10	310,441	22	773,125	26	1,002,482
Ambarlı	3,895	77,363,575	4,256	82,479,123	3,960	82,202,463
Anamur	0	0	0	0	66	44,095
Antalya	690	8,700,424	668	8,905,864	487	6,749,782
Ayvalık	477	168,959	650	245,150	1,114	452,913
Bandıma	1,061	5,648,654	899	5,168,277	1,048	6,661,683
Bartın	364	1,284,167	334	1,208,980	353	1,179,493
Bodrum	2,071	5,978,174	2,790	6,015,895	2,867	6,272,518
Bozcaada	11	409,360	20	471,827	19	562,254
Ceyhan	1,293	47,912,867	1,207	37,887,528	1,053	32,952,722
Cide	0	0	10	7,812	0	0
Çanakkale	522	3,998,991	593	4,079,733	533	4,054,539
Çeşme	1,458	7,083,367	2,040	7,415,477	2,410	7,756,509
Datça	1	43,188	5	4,723	0	0
Dikili	185	1,083,514	134	857,870	189	1,032,856
Enez	0	0	15	1,532,817	13	1,157,423
Erdek	0	0	1	1,462	29	31,039

	2022 Total		2023 Total		2024 Total	
	NO. of Ship	Gross Tonnage	NO. of Ship	Gross Tonnage	NO. of Ship	Gross Tonnage
Fatsa	40	89,319	29	72,638	18	47,490
Fethiye	413	660,115	462	475,124	314	223,018
Finike	2	998	1	2,643	1	4,362
Gemlik	3,485	57,398,019	3,405	57,110,096	3,571	55,899,523
Giresun	90	768,032	122	754,980	141	1,055,056
Göcek	23	47,454	26	53,448	31	62,538
Güllük	557	5,619,840	389	3,822,886	402	4,224,892
Hopa	140	509,520	162	529,137	106	347,299
İğneada	0	0	0	0	0	0
İnebolu	79	261,533	81	281,430	81	286,328
İskenderun	4,694	76,916,598	3,927	72,769,296	3,976	80,041,968
İstanbul	1,375	28,571,617	1,585	34,598,738	1,032	25,594,429
İzmir	1,586	22,482,893	1,607	21,827,035	1,529	24,671,429
Karabiga	996	8,984,559	864	8,421,771	786	9,125,249
Karadeniz Ereğli	818	7,869,189	612	7,410,125	614	7,428,783
Karasu	388	2,946,298	428	2,810,453	541	4,139,245
Karataş	0	0	1	6,881	0	0
Kaş	31	76,850	6	133,973	249	37,584
Kefken	0	0	1	834	0	0
Kocaeli	9,321	156,056,459	9,560	170,788,848	9,001	169,037,809
Kuşadası	967	26,003,369	1,236	31,481,494	1,559	32,381,898
Marmara Adası	734	1,031,163	1,199	1,463,291	1,276	1,715,192
Marmaris	367	932,833	563	1,831,430	909	3,782,189
Mersin	4,257	74,375,125	3,933	67,592,320	4,151	78,209,859
Mudanya	1	1,998	130	116,534	0	0
Rize	117	430,269	128	426,352	171	468,445
Samsun	2,789	17,644,182	2,814	17,932,941	2,567	17,796,682
Silivri	10	5,152	77	56,215	0	0
Sinop	17	551,629	13	471,412	10	249,269
Sürmene	10	4,153	1	420	3	2,823
Taşucu	989	7,665,864	1,157	7,875,563	1,271	8,760,347
Tekirdağ	2,845	60,305,866	2,918	63,515,954	2,890	65,127,016
Tirebolu	60	521,090	73	561,691	86	682,965
Trabzon	414	2,995,025	490	4,096,016	495	4,149,402
Tuzla	796	15,770,190	856	15,681,973	992	15,848,315
Ünye	253	865,167	290	1,451,262	315	1,018,688
Yalova	549	10,122,512	475	9,724,655	506	11,289,474
Zonguldak	705	8,710,208	558	7,403,227	697	8,023,095
Total	**58,052**	**873,329,628**	**60,195**	**894,059,943**	**60,594**	**902,445,227**

Source: Ministry of Transport and Infrastructure

According to the data of the Ministry of Transport and Infrastructure, Maritime Affairs and Communications, 531,737,358 tons of cargo were handled in our country's ports and piers in 2024.

Of the total cargo handled in 2024;

- 26,7% (142.278.137 tons) of export,
- 48,4% (257.136.420 tons) of import,
- 11,9% (63.258.440 tons) of cabotage,
- 13% (69.064.361 tons) of it was realized as transit.

Table 51. Cargo Handling Figures at Turkish Port, 2021-2024

			2021	2022	2023	2024
Loading	Export	Turkish Flag	14,742,145	13,808,674	13,423,790	14,191,547
		Foreign Flag	139,021,513	136,364,228	122,086,891	128,086,590
		Total	153,763,658	150,172,902	135,510,681	142,278,137
	Cabotage Loading		31,184,349	34,027,952	31,635,352	31,721,345
	Transit Loading		62,603,531	65,949,720	50,808,302	50,356,382
	Total Loading		**247,551,538**	**250,150,574**	**217,954,335**	**224,355,864**
Unloading	Import	Turkish Flag	15,257,051	14,634,461	15,875,560	15,868,396
		Foreign Flag	217,376,009	229,282,658	240,331,067	241,268,024
		Total	232,633,060	243,917,119	256,206,627	257,136,420
	Cabotage Unloading		30,716,773	33,473,324	30,991,741	31,537,095
	Transit Unloading		15,405,413	15,069,266	15,927,101	18,707,979
	Total Unloading		**278,755,246**	**292,459,709**	**303,125,469**	**307,381,494**

Source: Ministry of Transport and Infrastructure

Table 52. Cargo Handling Statistics at Turkish Ports According to the Harbour Masters Area of Jurisdiction

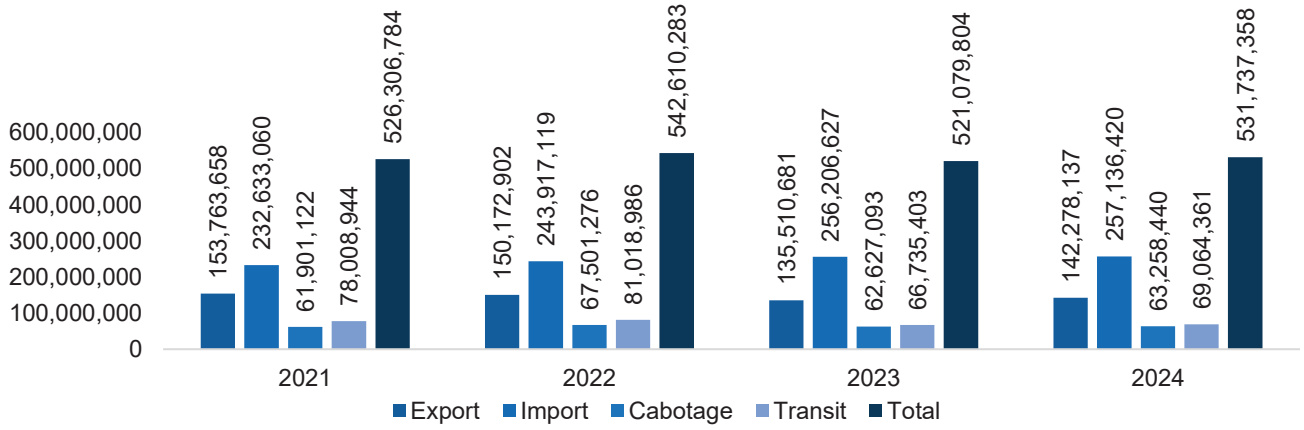
Harbour Master	2023			2024		
	Total Loading	Total Unloading	Cargo Handling	Total Loading	Total Unloading	Cargo Handling
Alanya	0	313,386	313,386	0	500,918	500,918
Aliağa	32,169,319	49,186,296	81,355,615	34,215,843	51,239,021	85,454,864
Amasra	1,850	0	1,850	0	0	0
Ambarlı	14,175,833	18,421,916	32,597,749	13,683,257	17,464,448	31,147,705
Antalya	2,699,643	3,621,645	6,321,288	1,757,375	3,355,416	5,112,791
Ayvalık	1,982	3	1,985	1,305	0	1,305
Bandıma	1,218,198	3,798,326	5,016,524	1,353,012	4,176,114	5,529,126
Bartın	705,402	681,550	1,386,952	807,347	616,611	1,423,958
Bodrum	0	0	0	0	0	0
Ceyhan	38,554,155	13,514,098	52,068,253	32,711,343	13,011,693	45,723,036
Çanakkale	3,869,467	348,668	4,218,135	4,138,640	184,773	4,323,413
Çeşme	864,259	808,981	1,673,240	829,219	831,438	1,660,657
Datça	4,335	0	4,335	0	0	0
Dikili	521,710	10,312	532,022	839,396	0	839,396
Enez	0	930,915	930,915	0	652,391	652,391
Erdek	0	1	1	2,734	7,940	10,674
Fatsa	80,580	16,285	96,865	66,521	0	66,521
Gemlik	6,899,650	7,659,267	14,558,917	8,883,885	7,931,055	16,814,940

	2023			2024		
	Total Loading	Total Unloading	Cargo Handling	Total Loading	Total Unloading	Cargo Handling
Giresun	317,378	429,363	746,741	480,005	486,990	966,995
Göcek	0	51,361	51,361	2,590	69,174	71,764
Güllük	5,261,158	63,307	5,324,465	6,027,986	65,861	6,093,847
Hopa	549,641	147,790	697,431	418,055	39,110	457,165
İnebolu	184,445	115,572	300,017	191,696	80,976	272,672
İskenderun	23,647,419	40,098,651	63,746,070	24,622,171	43,941,759	68,563,930
İstanbul	141,405	3,505,453	3,646,858	154,056	4,207,439	4,361,495
İzmir	3,014,478	4,429,414	7,443,892	3,338,916	4,124,789	7,463,705
Karabiga	1,818,996	10,695,921	12,514,917	2,004,932	10,970,723	12,975,655
Karadeniz Ereğli	1,049,938	8,283,211	9,333,149	1,235,214	8,597,327	9,832,541
Karasu	188,426	1,191,024	1,379,450	455,692	1,135,446	1,591,138
Kocaeli	28,509,480	52,782,064	81,291,544	31,030,342	52,757,397	83,787,739
Marmara Adası	2,253,798	2,326	2,256,124	2,670,090	0	2,670,090
Marmaris	0	8,591	8,591	0	11,638	11,638
Mersin	18,063,061	24,652,196	42,715,257	18,172,714	22,353,993	40,526,707
Mudanya	0	0	0	0	0	0
Rize	70,700	427,834	498,534	77,555	531,058	608,613
Samsun	4,180,790	9,995,778	14,176,568	3,480,023	9,267,766	12,747,789
Silivri	350	47,320	47,670	0	0	0
Sürmene	0	0	0	0	2,364	2,364
Taşucu	3,544,515	754,084	4,298,599	4,793,218	905,151	5,698,369
Tekirdağ	16,934,019	28,141,084	45,075,103	18,851,858	29,332,186	48,184,044
Tirebolu	0	512,071	512,071	0	591,067	591,067
Trabzon	478,736	2,253,205	2,731,941	693,581	1,861,706	2,555,287
Tuzla	2,793,764	2,859,565	5,653,329	2,420,210	3,151,622	5,571,832
Ünye	890,614	223,195	1,113,809	1,115,953	217,750	1,333,703
Yalova	1,141,919	2,177,272	3,319,191	1,246,247	2,322,961	3,569,208
Zonguldak	1,152,922	9,966,168	11,119,090	1,582,883	10,383,423	11,966,306
Total	**217,954,335**	**303,125,469**	**521,079,804**	**224,355,864**	**307,381,494**	**531,737,358**

Source: Ministry of Transport and Infrastructure

In 2024, compared to 2023, the amount of cargo handled at our ports increased by 2.0% (10,657,554 tons).

Graph 52. Cargo Handling by Years, 2021-2024



Source: Ministry of Transport and Infrastructure

In 2024, the amount of containers screened at the ports and piers of our country was 13,529,729 TEU.

Container handling;

- 36.9% (4,987,903 TEU) export,
- 36% (4,875,265 TEU) import,
- 6.7% (903,194 TEU) of cabotage,
- 20.4% (2,763,368 TEU) was realized as transit.

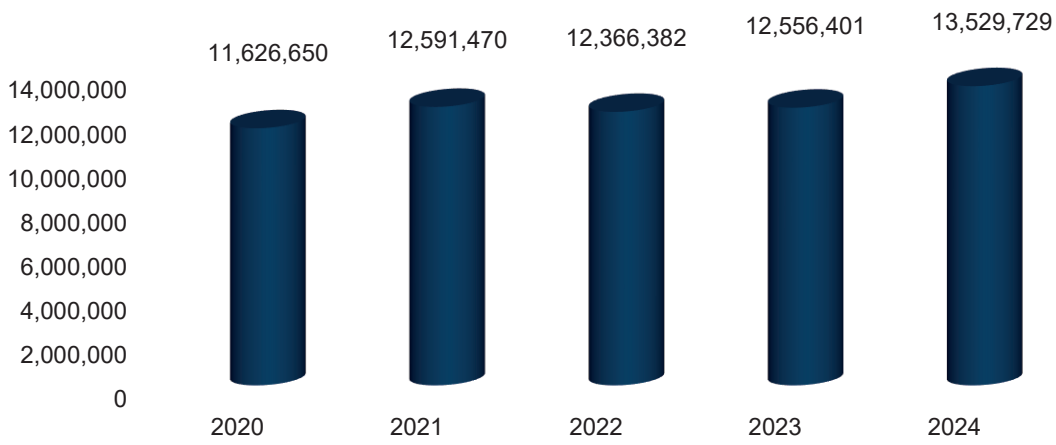
Table 53. Container Handling Figures at Turkish Ports (TEU), 2020-2024

Mode of Transport	2020	2021	2022	2023	2024
Export	4,618,225	4,677,414	4,694,918	4,910,525	4,987,903
Import	4,480,472	4,744,227	4,814,757	4,830,826	4,875,265
Cabotage	731,352	831,986	820,949	759,611	903,194
Transit	1,796,601	2,337,843	2,035,758	2,055,439	2,763,368
Grand Total	**11,626,650**	**12,591,470**	**12,366,382**	**12,556,401**	**13,529,729**

Source: Ministry of Transport and Infrastructure

In 2024, compared to 2023, the amount of containers handled at our ports increased by 7.8% (973,328 TEU).

Graph 53. Container Handling Figures at Turkish Ports (TEU), 2020-2024



Source: Ministry of Transport and Infrastructure, Republic of Türkiye

6.1.1.3. General Developments in World Ports

In 2023, Shangai port is still the port that handles the most containers with 49.2 million TEU. Among the ports that handle the most containers in the world, Shanghai Port is followed by Singapore port with 39 million TEU and Ningbo port with 35.3 million TEU.

Table 54. Most Container Handling Ports in the World (mteu)

Region/Port	2018	2019	2020	2021	2022	2023	2024
Busan	21.6	22.0	21.8	22.5	21.8	23.0	
Colombo	7.0	7.2	6.9	7.2	6.9	6.9	
Guangzhou	21.6	22.8	23.2	24.2	24.9	25.4	
Hong Kong	19.6	18.4	18.0	17.9	16.7	14.3	
Kaohsiung	10.4	10.4	9.6	9.9	9.5	8.8	
Keelung	1.5	1.5	1.5	1.6	1.6	1.5	
Kobe	2.9	2.9	2.6	2.8	2.9	2.8	
Manila	5.1	5.3	4.4	5.0	5.5	5.2	
Nagoya	2.9	2.8	2.5	2.7	2.7	2.6	
Ningbo	26.4	27.5	28.7	31.1	30.8	35.3	
Osaka	2.4	2.5	2.4	2.4	2.4	2.2	
Port Klang	12.3	13.6	13.2	13.8	13.2	13.5	
Qingdao	19.3	21.0	22.0	23.7	25.7	28.7	
Shanghai	42.0	43.3	43.5	47.0	47.3	49.2	
Shenzhen	25.7	25.8	26.6	28.8	30.0	29.9	
Singapore	36.6	37.2	36.9	37.5	37.3	39.0	41.1
Tanjung Priok	7.8	7.7	6.9	6.8	7.2	7.3	
Tianjin	16.0	17.3	18.4	20.3	21.0	22.2	
Tokyo	5.1	5.0	4.7	4.9	4.9	4.6	
Yokohama	3.0	3.0	2.7	2.9	2.6	2.7	
Asia	**444.9**	**458.9**	**457.6**	**484.3**	**493.6**	**512.3**	**545.5**
% y-o-y	*5%*	*3%*	*0%*	*6%*	*2%*	*4%*	*6%*
Antwerp	11.1	11.9	12.0	12.0	13.5	12.5	
Bremen/Bremerhaven	5.5	4.9	4.8	5.0	4.6	4.2	
Felixstowe	3.9	3.6	3.5	3.7	3.3	3.2	
Hamburg	8.7	9.3	8.5	8.7	8.3	7.7	
Le Havre	2.9	2.8	2.4	2.8	3.1	2.6	
Rotterdam	14.5	14.8	14.3	15.3	14.5	13.4	
Southampton	2.0	1.9	1.8	1.9	1.8	1.8	
Algeciras	4.8	5.1	5.1	4.8	4.8	4.7	4.7
Barcelona	3.4	3.3	3.0	3.5	3.5	3.3	
Genoa	2.7	2.7	2.5	2.6	2.5	2.4	
La Spezia	1.5	1.4	1.1	1.3	1.3	1.1	
Marseilles/Fos	1.4	1.5	1.3	1.5	1.5	1.3	
NW and Med Europe	**140.6**	**146.1**	**142.5**	**152.2**	**142.5**	**134.0**	**142.2**
% y-o-y	*5%*	*4%*	*-2%*	*7%*	*-6%*	*-6%*	*6%*
Charleston	2.3	2.4	2.3	2.8	2.8	2.5	2.5
Hampton Roads	2.9	2.9	2.8	3.5	3.7	3.3	
Long Beach	8.1	7.6	8.1	9.4	9.1	8.0	9.6
Los Angeles	9.5	9.3	9.2	10.7	9.9	8.6	
Montreal	1.7	1.7	1.6	1.7	1.7	1.5	
New York/New Jersey	7.2	7.5	7.6	9.0	9.5	7.8	
Oakland	2.5	2.5	2.5	2.4	2.3	2.1	
Seattle-Tacoma	3.8	3.8	3.3	3.7	3.4	3.0	
Vancouver	3.4	3.4	3.5	3.7	3.6	3.1	3.5
N America	**68.2**	**69.8**	**67.3**	**77.2**	**77.5**	**70.2**	**80.1**
% y-o-y	*8%*	*2%*	*-4%*	*15%*	*0%*	*-9%*	*14%*

Region/Port	2018	2019	2020	2021	2022	2023	2024
Dubai	15.0	14.1	13.5	13.7	14.0	14.5	
Jawaharlal Nehru	5.1	5.1	4.5	5.6	6.0	6.4	
Mundra	4.4	4.8	5.7	6.7	6.5	7.4	
Mittle East and ISC	**72.5**	**73.7**	**73.1**	**78.1**	**77.8**	**81.5**	**85.4**
% y-o-y	*3%*	*2%*	*-1%*	*7%*	*0%*	*5%*	*5%*
Buenos Aires	1.8	1.5	1.4	1.4	1.5	1.3	
San Juan	1.4	1.5	1.5	1.4	1.4	1.5	
Santos	4.1	4.2	4.2	4.4	5.0	4.6	
C and S America	**46.9**	**47.2**	**47.3**	**52.3**	**51.6**	**49.4**	**56.8**
% yıllık değişim	*7%*	*1%*	*0%*	*10%*	*-1%*	*-4%*	*15%*
Sydney	2.6	2.6	2.5	2.8	2.8	2.6	
Melbourne	3.0	3.0	2.9	2.9	2.9	2.7	
Oceania	**12.9**	**13.1**	**12.6**	**12.1**	**12.6**	**12.0**	**13.2**
% y-o-y	*7%*	*2%*	*-4%*	*-4%*	*4%*	*-4%*	*10%*
Durban	3.0	2.8	2.6	2.7	2.6	2.5	
Mombasa	1.3	1.4	1.4	1.4	1.5	1.6	
Cape Town	0.9	0.9	0.8	0.8	0.9	0.8	
Africa	**18.1**	**18.3**	**18.2**	**19.2**	**18.6**	**18.1**	**19.2**
% y-o-y	*8%*	*1%*	*-1%*	*6%*	*-3%*	*-3%*	*6%*

Source: Clarksons Research

6.1.2. Shipyard

The maritime sector consists of shipyards, ports, and ship components and plays an important role in ensuring global trade. Geographical discoveries made by French and Genoese sailors in the early 14th century, expeditions to regions such as the Atlantic Ocean and the African coasts revealed the durability of ships and the importance of the construction of these ships. Türkiye is rapidly approaching its goals with the policies it implements in the maritime field and increasing its competitiveness in the global market with a strong shipbuilding industry. Modern shipyards, high-capacity ports, and innovative shipbuilding techniques will make Türkiye one of the leading maritime countries worldwide.

When a comparison is made between 2002 and 2024 regarding the active shipyards and shipbreaking facilities in our country, the number of shipyards, which was 37 in 2002, increased by 130% to 85 in 2024;

- In 2002, there were 37 shipyards and a project capacity of 550,000 DWT.
- In 2024, it is seen that 85 shipyards and a project capacity of 4.79 million DWT have been reached.

The basis of this success is the correct planning and periodic inspection of the shipyard areas. In order for shipyards to work effectively and efficiently, the infrastructure and organization are well structured and regularly inspected is one of the critical factors that support the development of the sector. In this way, shipbuilding, maintenance and repair processes become higher quality and efficient, and competitiveness in the international market increases.

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 Industry is one of the important recycling sectors in Türkiye and is located in the Aliaga region. It was established in 1976 in Aliağa District, Arapçiftliği District, between Taşlı Burun and Ilıca Burun. This industry provides the recycling of ships in order to produce raw materials for iron and steel factories and makes a significant economic contribution. The ship recycling process is carried out in an environmentally friendly manner and at the same time helps to bring precious metals and other materials back into the economy.

There are various methods for evaluating ships that have completed their economic life. These methods include applications such as dismantling and recycling of ships, sinking them into artificial reefs, and using them for different purposes by fixing them on land or at sea. However, among these options, subjecting ships to the recycling process stands out as the most suitable solution in terms of environmental sustainability and economic efficiency. The recycling process both contributes to the protection of natural resources and creates economic benefits by reintroducing the recovered materials into the economy.

The ship recycling industry in Türkiye is of great importance not only for the local economy but also for world trade. Aliağa, as one of the largest ship recycling centers in Türkiye and even in the world, both contributes economically and draws attention with its environmentally friendly production processes. Developments in this area will help Türkiye achieve its leadership goals in the global maritime and recycling sectors.

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 recycling ship tonnage, which was 557 GT in 2009, is 585 GT in 2024.

6.1.4. Marina, Boat Manufacturing and Boatyard

According to the data of the Ministry of Transport and Infrastructure, there are 63 marinas and yacht berths throughout Türkiye, with a total of 25,038 yacht mooring and sheltering capacity. With the new investments to be made, it is aimed to increase this capacity significantly. As a result of the ongoing project studies for the construction of new marinas in the Aegean Region, it is planned to achieve a mooring capacity of 5,000 boats. In addition, it has been stated that project studies are continuing to build a new port for cruise ships in Fethiye.

In line with the demands for mooring and accommodation for private boats, apart from the marina concept, studies are carried out to shorten the permit approval processes and reduce investment costs, and various projects are included to increase the boat mooring capacity.

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. While the number of marinas in our country was 41 in 2002, it increased to 63 by 2024, and the boat mooring capacity, which was 8,500, increased by 194% to 25,038.

The number of Boat Manufacturing and Boatyards (including both in-scope and out-of-scope) increased from 724 in 2017 to 1,038 in 2024 with an increase of 43.4%.

Table 55. Number of Boat Manufacturing and Boatyard Facilities by Years

Year	Number of Boat Manufacturing and Boatyard Facilities
2017	724
2018	744
2019	780
2020	815
2021	819
2022	917
2023	984
2024	1,038

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

The EIA process has been initiated for the Environmental Impact Assessment Application File prepared within the framework of the EIA General Format in Annex-3 of the EIA Regulation for the İzmir Çaltılıdere Boat Manufacturing and Boatyard Project, which is expected to become the largest boat manufacturing site in Europe.

Within the scope of the Fethiye-Karaot Project, which is one of the boat manufacturing and boatyard projects in the Aegean and Mediterranean, the project area has been taken out of the boundaries previously determined as a Natural Site-Qualified Natural Conservation Area. The project is carried out with the aim of rehabilitating the situation, especially in the Fethiye-

Karagözler region. With the prerequisite of relocating Karagöz, it is aimed to implement the project as soon as possible.

Among the marinas under construction are Dalaman and Datça in Muğla, Gazipaşa and Demre in Antalya, Golden Horn in Istanbul and Tekirdağ Marina in Tekirdağ, and the total capacity of these ports has been determined as 2,291 boats.

In addition, the projects of Şifne, Çeşmealtı and Şakran marinas in Izmir, Aydıncık in Mersin and Lâpseki in Çanakkale are in the planning stage. With the construction of these new ports, it is aimed to increase the capacity of the marina by an additional 1,700 boats.

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.

The construction and repair work of a total of 9 fishermen's shelters such as Tarlaağzı Fisherman's Shelter, Pebble Fisherman's Shelter, Çayeli Fisherman's Shelter, Faroz Fisherman's Shelter and Giresun Fisherman's Shelter are continuing. In addition, it is planned to make repair tenders and start the construction of Dörtyol, Işıklı Konacık, Samandağ Çevlik and Abana fishermen's shelters, as well as the Sürmene Yeniay Shelter and Alanya Fishermen's Shelter Western Dock Construction projects. In addition, it is aimed to start repair and repair works regarding the Rumeli Lighthouse.

The "R&D Project for Fishermen's Shelters Needs Analysis-Creation of Development Roadmap and Governance Model with Fisheries Coastal Structures Data Architecture", which was launched in December 2022 in cooperation with The Scientific and Technological Research Council of Türkiye Turkish Management Sciences Institute and the Ministry of Agriculture and Forestry, General Directorate of Fisheries and Aquaculture, has been completed.

Within the scope of the project, the classification of coastal structures, the determination of product disembarkation points and capacity analysis were carried out, and evaluations and suggestions were presented for the coastal structure needs. In addition, data inventory and architecture for coastal structures were created, operational and governance model proposals were developed, and models were created to prioritize needs. Finally, a development roadmap and action plan for fishery coastal structures have been prepared.

<u>Fishermen's Shelters Under Construction</u>

- Giresun Fisherman's Shelter (DOKAP)
- Gravel Fisherman's Shelter Repair Construction
- Çayeli Fisherman's Shelter Supply Construction
- Iskenderun Fisherman's Shelter Repair Construction
- Tarlaağzı Fisherman's Shelter Repair Construction

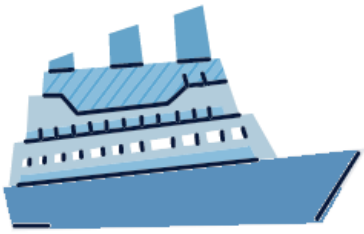
Ongoing Fishermen's Shelters Survey Project Works

- 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
- Kartal Fisherman's Shelter Survey Project Works-Istanbul
- Selimpaşa Fisherman's Shelter Survey Project Works-Istanbul
- Rumeli Kavağı Fisherman's Bar. Survey Project Works-Istanbul
- Poyrazköy Fisherman's Shelter Survey Project Works-Istanbul
- Karaburun Fisherman's Shelter Survey Project Works-Istanbul
- Igneada Fisherman's Shelter Survey Project Works-Kırklareli
- Keşan Yayla Fisherman's Shelter Survey Project Works-Edirne
- Kumbağ Fisherman's Shelter Survey Project Works-Tekirdağ
- 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
- Sığacık (Girlen) Fisherman's Shelter Survey Project Works-İzmir
- New Port Fishermen's Shelter Zoning Plan and EIA-İzmir
- Ören (Türkevleri) Fisherman's Shelter Survey Project Works-Muğla
- Bosphorus Fisherman's Shelter Survey Project Works-Muğla
- Erdek İlhanlar Bal.Bar. Beach Arrangement Sand Trap Spur EIA and Zoning Plan Study-Balıkesir
- Kilitbahir Fisherman's Shelter Survey Project Works-Çanakkale
- Koruköy Fisherman's Shelter Survey Project Works-Yalova
- Çardak Fisherman's Shelter Survey Project Works-Çanakkale
- Karabiga Port and Fisherman's Shelter Survey Project Works-Çanakkale
- 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
- Eğirdir Fisherman's Shelter Zoning Plan Preparation-Isparta
- Iskenderun Fisherman's Shelter Survey Project Works-Hatay
- Saridris Bal.Bar. Preparation of Zoning Plan-Isparta
- Kumluca Mavikent-Karaöz Fisherman's Shelter Survey Project Works-Antalya
- Gerze Fishermen's Shelter Capacity Increase and Breakwater Extension Survey Project Works-Sinop
- Catalçam Beach Sand Feeding 1. Section Construction EIA Report and Zoning Plan Procurement Works-Samsun
- Ordu Yalıköy Fisherman's Shelter Breakwater Extension and Extension Construction EIA Research-Ordu
- Akçaabat Darıca Fishermen's Shelter Survey Project Works-Trabzon
- Trabzon Akyazı Fisherman's Shelter Survey Project Works-Trabzon

- Araklı Fishermen's Shelter Survey Project Works-Trabzon
- Giresun Sailors and Üçkayalar Boatyard Supply Construction Survey Project Works-Giresun
- İnebolu Fishermen's Shelter Survey-Project Works-Kastamonu
- Alaplı Fisherman's Shelter Spur Addition Survey Project Works-Zonguldak
- Evrenye Fisherman's Shelter Dock Addition Survey Project Works-Kastamonu
- Amasra Castle Walls Protection Structure Survey Project Works-Bartın
- Akkonak Fisherman's Shelter Hydrographic and Oceanographic Report Preparation-Bartın

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 56. 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	19,77
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	2,218	-	2,218	2,742	-	2,742	23,047	-	23,047
2024	2,224	-	2,224	2,790	-	2,790	23,437	-	23,437

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 57. Marine Tourism Vessels With Tourism Administration Certificate (2024)

Marine Tourism Vessels	Number of Yacht	Number of Beds
Business Tourism Documentation of Turkish Flag Yacht	2,790	23,437

Marine Tourism Vessels	Number of Vessels	Passenger Capacity
Business Tourism Documentation of One a Day Trip	2,749	128,509

Marine Tourism Vessels	Number of Vessels	Passenger Capacity (Summer/Winter)
Business Tourism Documentation of Restaurant Ship	32	14,462

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 story teller 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.

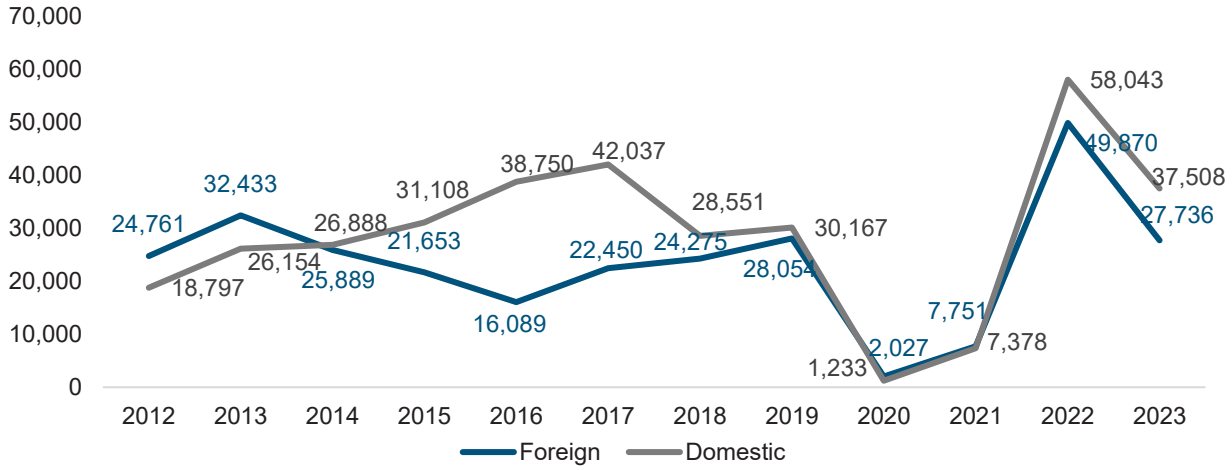
Blue Voyage Routes on the Aegean Routes

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 54. 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 58. Distribution of the Yachtsmen and the Crew Members of the Flag Q Yachts Arrived in Turkish Ports by their Nationalities and Years 2023

Nationality	Yachtsmen		Crew Member		Total		TOTAL
	Commercial	Private	Commercial	Private	Commercial	Private	
Germany	7,595	1,565	909	831	8,504	2,396	**10,900**
Austria	1,246	340	166	128	1,412	468	**1,880**
Belgium	740	259	58	88	798	347	**1,145**
Denmark	270	68	23	52	293	120	**413**
Finland	87	11	10	17	97	28	**125**
France	2,642	835	152	400	2,794	1,235	**4,029**
Netherlands	2,333	355	210	213	2,543	568	**3,111**
U. Kingdom	10,452	1,814	1,104	2,283	11,556	4,097	**15,653**
Ireland	530	140	83	123	613	263	**876**
Spain	3,347	678	75	198	3,422	876	**4,298**
Sweden	242	154	48	147	290	301	**591**
Italy	4,949	950	181	647	5,130	1,597	**6,727**
Luxembourg	39	25	6	9	45	34	**79**
Portugal	625	354	16	92	641	446	**1,087**
Greece	369	550	439	541	808	1,091	**1,899**
Czech Rep.	242	82	33	27	275	109	**384**
Switzerland	1,795	424	156	187	1,951	611	**2,562**
Iceland	43	16	1	8	44	24	**68**
Hungary	235	121	26	16	261	137	**398**
Norway	165	82	6	48	171	130	**301**
U.S.A	7,558	1,969	163	402	7,721	2,371	**10,092**
Australia	3,306	359	102	369	3,408	728	**4,136**
Japan	39	10	2	5	41	15	**56**
Canada	1,117	434	47	175	1,164	609	**1,773**
Mexico	431	262	8	106	439	368	**807**
New Zealand	869	121	60	206	929	327	**1,256**
Serbia	64	51	12	83	76	134	**210**
Malta	129	56	4	21	133	77	**210**
Israel	2,550	1,484	232	367	2,782	1,851	**4,633**
Others	31,631	7,177	5,916	7,186	37,547	14,363	**51,910**
T. Foreign	85,640	20,746	10,248	14,975	95,888	35,721	**131,609**
Türkiye	**61,475**	**35,280**	**43,374**	**24,267**	**104,849**	**59,547**	**164,396**
Grand Total	**147,115**	**56,026**	**53,622**	**39,242**	**200,737**	**95,268**	**296,005**

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

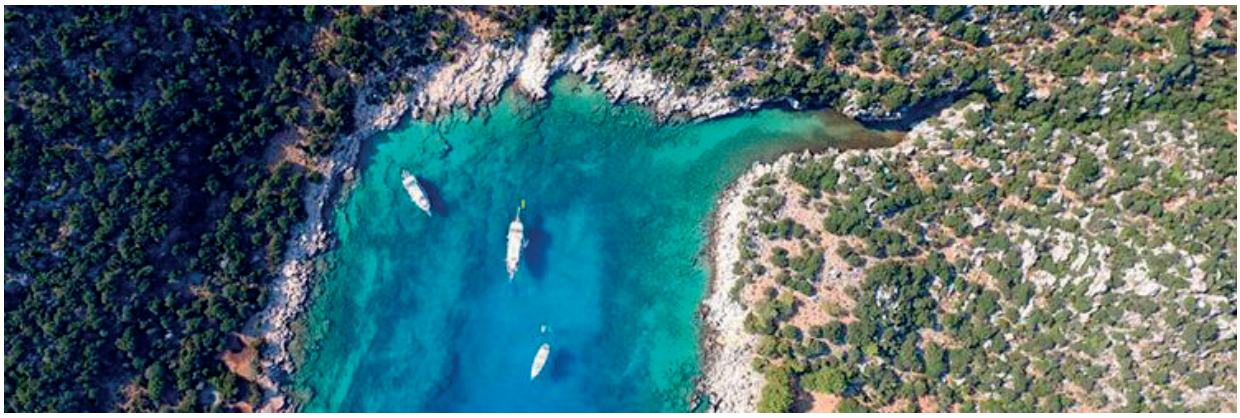
The Kaunus Rock Tombs, with their marvelous panorama, are among the places worth seeing in the area. Dişibilmez Point and Manastır Point are two important stops before Göcek. It is known that ships were built on Tersane (“Shipyard”) Island, located off the shores of Göcek, during the Byzantine era. Scattered 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 59. Marine Tourism Facility (2024)

Marine Tourism Facility				
Mooring Capacity Number Of Facility	Number of Facility	Yacht Capacity		
		Sea	Land	Total
Business Tourism Documantation of Yacht Harbour	34	10,388	3,205	13,593
Business Tourism DocumAntation of Yacht Slipway	5	-	827	827
Investment Tourism Documantation of Yacht Harbour	6	2,148	556	2,704
Grand Total	**45**	**12,536**	**4,588**	**17,124**

Source: Ministery of Culture &Tourism

Table 60. Marine Tourism Facility with Tourism Administration Certificate (2024)

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	220	-
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
29	Kumkuyu Marinas	Erdemli / MERSİN	200	200
30	Marintürk Göcek Exclusive Marinas	Göcek / MUĞLA	112	-
31	Mandalya Yacht Marinas	Milas / MUĞLA	50	-
32	Albatros Marinas	Marmaris / MUĞLA	152	48
33	İstinye Yacht Park	Sarıyer/İSTANBUL	180	
34	Tarabya Yacht Park	Sarıyer/İSTANBUL	208	
Total			**10,388**	**3,205**
General Total			**13,441**	

Source: Ministery of Culture &Tourism

Table 61. 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 62. 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.

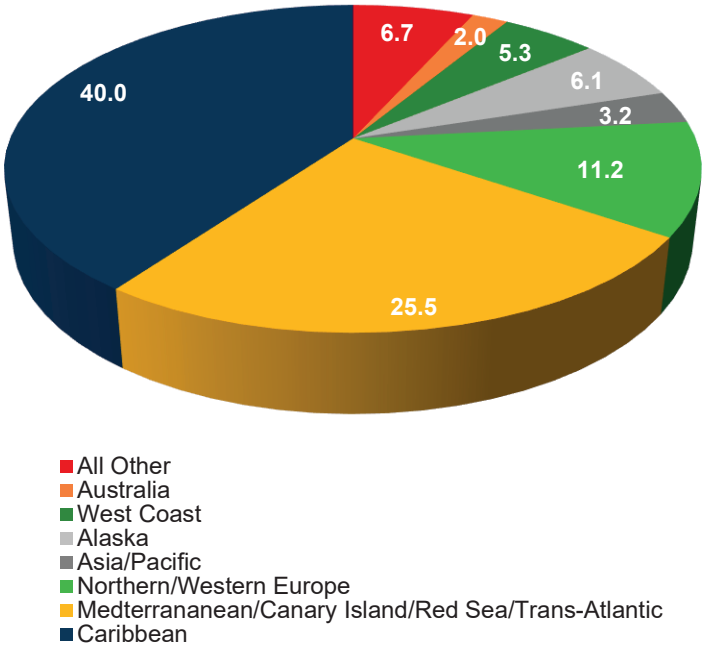
A vacation trip for multiple days, arranged on the cruise ship in the large inland waters or sea while visiting various destinations for tourism, following a particular route is known as a cruise. The focus in this sort of voyage is basically on staying aboard the ship along with eye-catching destinations 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.

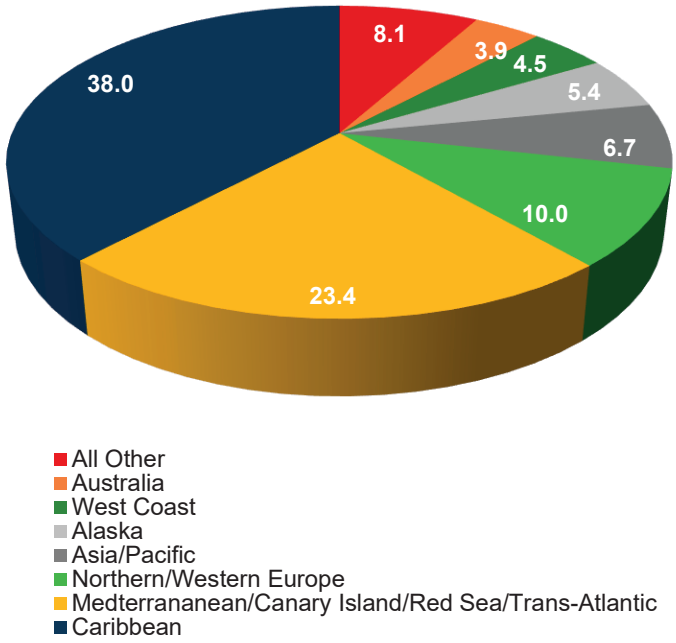
Graph 55. Global Deployment Shares, % (2022)



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 56. Global Deployment Shares, % (2023)



Source: Cruise Industry News, 2024 Annual Report

The total number of cruise passenger movements at MedCruise Ports during 2024 reached 35.98 million, once again surpassing pre-pandemic levels and marking a continued growth of the cruise industry in the MedCruise region, with a growth of 9.23% from 2023. This represents a solid increase from the previous year, reinforcing the sector's resilience and its significant role in global cruise tourism.

Four cruise ports in the Med and its adjoining seas hosted more than 2.2 million passenger movements in 2024 and top the list of the ports with the most significant traffic. These are Barcelona, Spain (3,655,981), Balearic Islands, Spain (2,503,087), Marseille, France (2,433,862) and Genoa/Savona, Italy (2,283,693).

Table 63. Top 10 MedCruise Ports (2024)

NO	Port	Total Passenger
1	Barcelona	3,655,981
2	Balearic Islands	2,503,087
3	Marseille	2,433,862
4	Genova, Savona	2,283,693
5	Las Palmas Ports	1,871,654
6	Naples, Salerno, Castellammare di Stabia	1,826,137
7	Piraeus	1,698,877
8	Tenerife Ports	1,318,760
9	Palermo	984,913
10	Valletta	940,915

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.

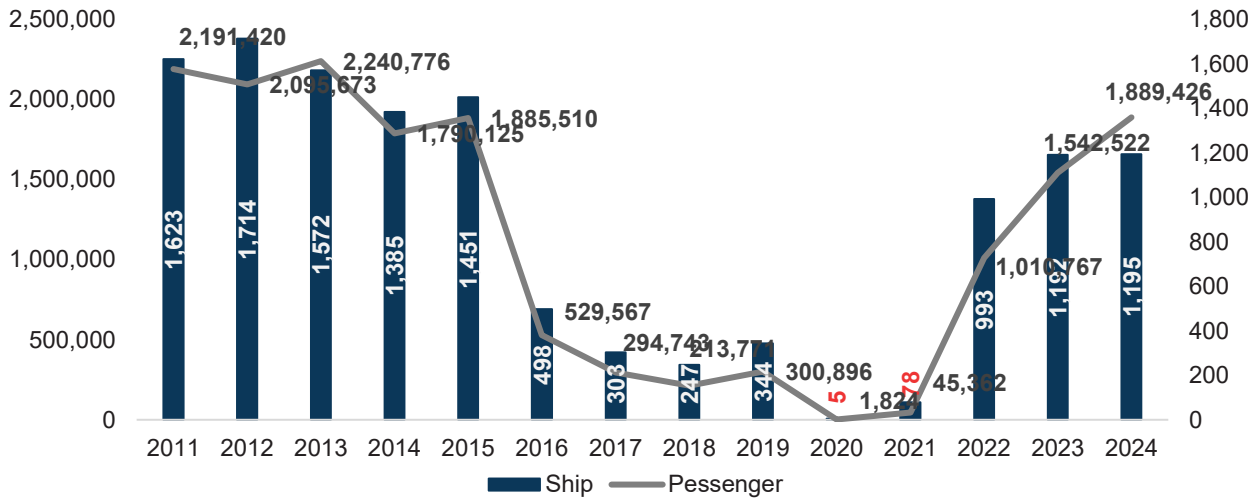
Luckily for cruise passengers, the choice and range of ships on which to so travel are getting wider each year

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 AI Development Program.

Graph 57. Statistics of Cruises and Passengers Arrived at Turkish Ports Between 2011-2024



Source: Ministery of Culture &Tourism

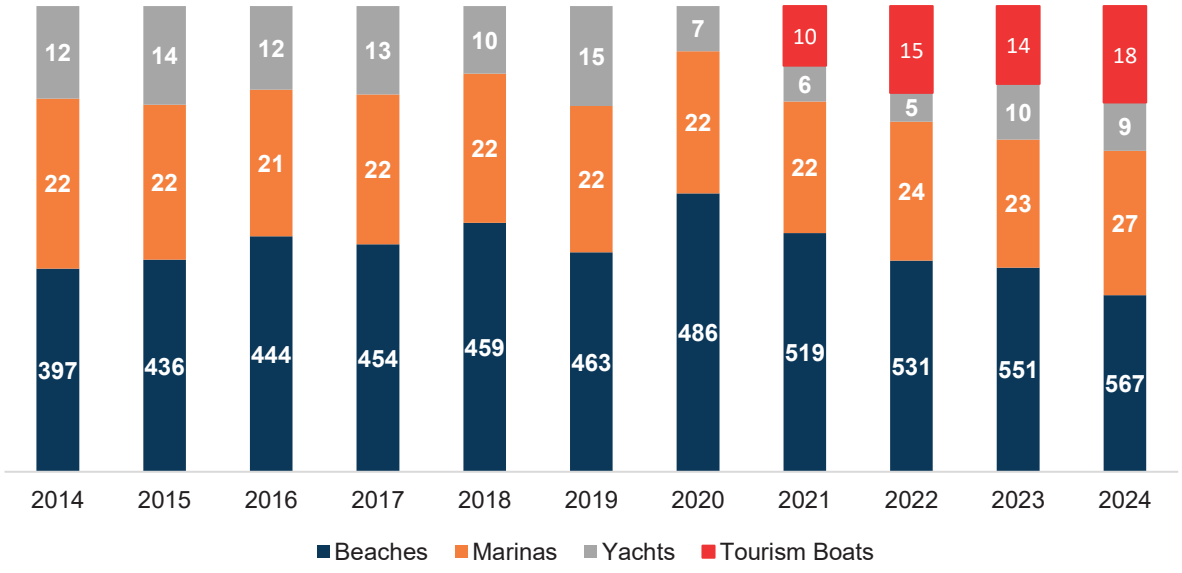
As of 2024, cruise ships made regular calls and overnight stays at Turkish ports throughout all twelve months of the year. As a result, a total of 1,889,426 cruise passengers visited our country's ports. This development clearly reflects a strong trend of sustainable growth in cruise tourism.

Projections for 2025 indicate that this momentum will continue to increase. By the end of the year, the number of cruise passengers visiting Türkiye is expected to reach 2,300,000.

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 58. Blue Flag Data (2024)



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.

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 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 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.

[3] Source: Ministry of Culture and Tourism

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 to 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 2023 was 420,527 tons at sea and 33,532 tons in inland waters, totaling 454,059 tons. Aquaculture production is 399,529 tons at sea, 156,758 tons in inland waters and 556,287 tons in total. Türkiye's total aquaculture production was 1,010,346 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 2023 were 454,059 tons and 11,346,939,912 TL for fishing, and 556,287 tons and 67,244,532,930 TL for aquaculture, respectively. The total quantity and value were 1,010,346 tons and 78,591,472,842 TL (Turkstat; DGFA).

According to provisional data from TIS, Türkiye's aquatic product imports and exports in 2023 were 272,192 tons and 40,603,307,361 TL in value for exports, and 105,252 tons and 6,613,363,257 TL in value for imports (Turkstat; DGFA).

Aquaculture production increased by 18.6% in 2023 compared to the previous year and became 1 million 7 thousand 921 tons. 38.4% of the production was marine fish obtained through hunting, 3.3% was other seafood obtained through hunting, 3.3% was inland fisheries obtained by hunting and 55.0% was aquaculture products (TurkStat). Aquaculture fishing increased by 35.5% in 2023, and total production through hunting was 454 thousand 59 tons, while aquaculture production

was 553 thousand 862 tons. Seafood catch increased by 39.4% and inland fisheries increased by 0.8% compared to the previous year (Turkstat).

Table 64. Aquaculture Production in Türkiye (Tonnes)

Years	Capture Production (tonnes)			Aquaculture Production (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
2023	420,527	33,532	454,059	399,529	156,758	556,287	1,010,346

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 2023 with a total production of 1,010,346 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 454,059 tons in 2023. It is observed that the values of fisheries in seas and inland waters varied from year to year between 2015 and 2023 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 387,115 tons. The least caught sea fish in the last seven years was 222,024 tons in 2018.

Table 65. 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
2023	387,115	33,412	420,527	31,695	1,837	33,532	454,059

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 273,915 tons. Anchovy fish was followed by brisling with 45 thousand 764 tons and sardine with 17 thousand 311 tons (Table 66).

According to data obtained from Turkstat, Türkiye has the largest share in Black Sea fishery. Of the 273,915 tons of anchovy caught in 2023, only 185,586 tons were caught in the Eastern Black Sea. The amount of anchovy caught in the Western Black Sea was 37,192 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 66. 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
2023	273,915	17,311	14,374	2,083	2,138	45,764

Source: Directorate General of Fisheries and Aquaculture, 2024.

According to the data obtained from the General Directorate of Fisheries and Aquaculture, as of the end of 2023, the number of licensed fishing vessels for fishing of aquatic products is 18,479 in total, with 15,219 in seas and 3,260 in inland waters. Among the vessels in our seas, 968 are between 10-12 meters and 15,842 are small-scale fishing vessels under 10 meters (Table 67).

Table 67. Size Distribution of Fishing Boats (2023) (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	679	8,495	3,488	947	856	460	294	15,219
Freshwater	416	2,408	356	21	59	0	0	3,260
Total	**1,095**	**10,903**	**3,844**	**968**	**915**	**460**	**294**	**18,479**

Source: Directorate General of Fisheries and Aquaculture, 2024.

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 6.8 to 13.1 thousand tons between 2015 and 2023. 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 68), according to the data from the General Directorate of Fisheries and Aquaculture.

Table 68. 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
2023	9,074	1,108	1,557	1,204	490

Source: Turkish Statistical Institute, Directorate General of Fisheries and Aquaculture, 2024.

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 69. 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
2024	13,821	9,869	4,715	2,527	697

Source: Turkish Statistical Institute, Directorate General of Fisheries and Aquaculture, 2024.

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).

Aquaculture is one of the areas where Türkiye has made a great leap forward in recent years. In 2023, aquaculture production constitutes 55% of aquaculture production in Türkiye. 72% of aquaculture production took place in seas and 28% in inland waters (TEPGE, 2024).

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 399,529 tons, accounting for 71.8% of the total, while inland waters accounted for 156,758 tons, or 28.2% of the total, resulting in a total of 556,287 tons, with a share of 8% in the change compared to the previous year (Table 7) (Turkstat).

Table 70. 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
2023	399,529	71.8	156,758	28.2	556,287	8.1

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

In recent years, total production in our sea and inland waters has been the fastest growing sector of all food production. According to TurkStat data in the last fishing season, the amount of aquaculture production in 2023 was 420,527 tons in the sea and 33,532 tons in our inland waters, 454,059 tons in total. Aquaculture production is 399,529 tons in the sea, 156,758 tons in inland waters, 556,287 tons in total. Türkiye's aquaculture production was 1,010,346 tons in total.

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 160,802 tons, followed by sea bream with 154,011 tons in 2023. It is observed that the share of sea-based trout farming in production has been increasing over the years (Table 71).

Table 71. Production Quantities of the Most Cultivated Species in Türkiye (Tons)

Years	Trout			Bream	Perch
	Freshwater	Sea	Total		
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
2023	156,431	66,055	222,486	154,011	160,802

Source: Turkish Statistical Institute, Directorate General of Fisheries and Aquaculture, 2024.

Türkiye 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 2023, there are a total of 2,385 aquaculture facilities, including 554 in the seas and 1,831 in inland waters. The number of facilities with a capacity between 0-50 tons/year is 121 in the seas (Table 72).

Table 72. Distribution of Aquaculture Facilities by Capacities (2023)

Group	Capacity Group (Tonne)	Number of Facilities (Piece)	Total Project Capacity (Tonne/Year)
SEA	Hatchery*	-	-
	0-50	121	3,391
	51-100	16	1,315
	101-250	17	2,935
	251-500	60	21,856
	501-1000	157	143,334
	1001>	153	363,490
	Total	**554**	**536,321**
FRESHWATER	Hatchery*	-	-
	0-50	1,066	18,492
	51-100	112	10,876
	101-250	248	49,672
	251-500	165	72,554
	501-1000	140	121,817
	1001>	2	3,900
	Total	**1,831**	**277,311**

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

8.3. 2023 Aquaculture Economic Data

8.3.1. Production Quantity and Value of Aquatic Products

The production quantity and value of aquatic products in 2023 are 454,059 tons and 11,346,939,912 TL for fishing, and 556,287 tons and 67,244,532,930 TL for aquaculture, with a total quantity of 1,010,346 tons and a total value of 78,591,472,842 TL (Table 73) (Turkstat; DGFA).

Table 73. 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
2023	454,059	11,346,939,912	556,287	67,244,532,930	1,010,346	78,591,472,842

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

8.3.2. Türkiye's Import and Export of Aquatic Products

According to the 2023 TSI data, which are temporary, Türkiye's seafood export and import figures are as follows: exports amount to 272,192 tons with a value of 40,603,307,361 TL, while imports amount to 105,252 tons with a value of 6,613,363,257TL (Table 74) (Turkstat; DGFA).

Table 74. 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
2023	272,192	1,709,398,874	40,603,307,361	105,252	279,068,891	6,613,363,257

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 2023, the production was 1.010.346 tons, exports were 272.192 tons, and imports were 105.252 tons. According to the data of the Turkish Statistical Institute Turkstat (TSI), the consumption of fish and seafood was evaluated as 614.449 tons in terms of tonnage, and fishmeal/oil production was 228.607 tons (Table 75).

Table 75. 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
2023	1,010,346	272,192	105,252	614,449	228,607	350.3	7.2

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 7,2 kg in 2023. 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 75).

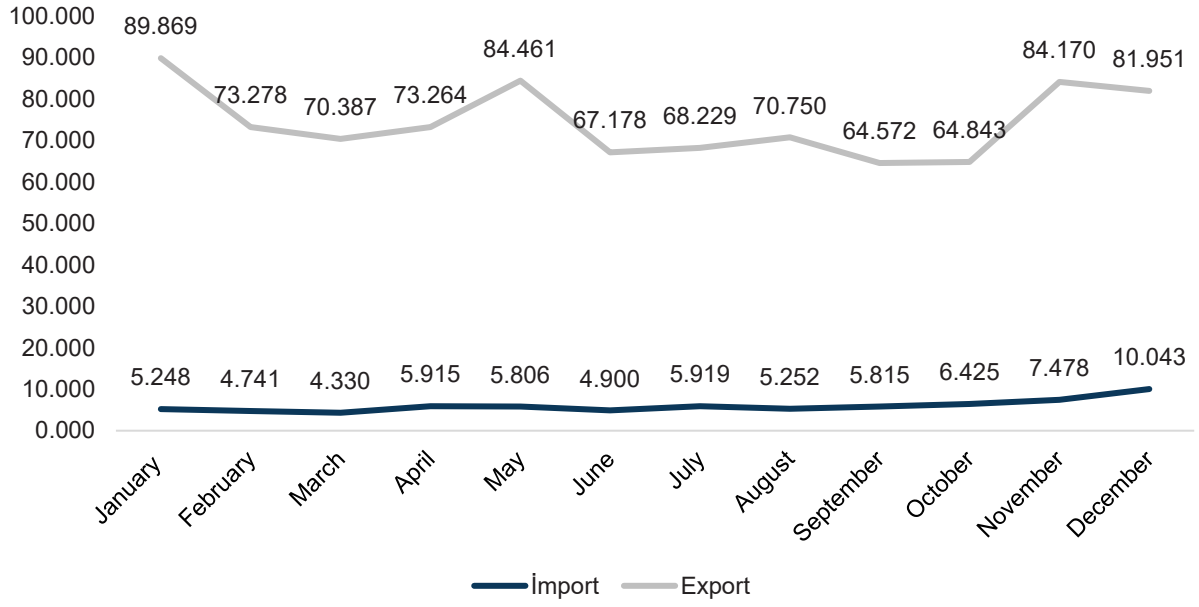
In 2019, 72% of the 157 million tons of seafood consumed was in Asia. China, Indonesia, India, the United States, and Japan were the top five countries in seafood consumption. It is reported that 17% of the global animal protein requirement was met by fish in 2019, and this figure corresponds to 7% of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

8.3.4. Foreign Trade

As of 2023, aquaculture production increased by 18.6% compared to the previous year and reached 1 million 7 thousand 921 tons. 38.4% of this production consisted of marine fish, 3.3% of other seafood, 3.3% of inland fisheries and 55.0% of aquaculture. While the total production by hunting was 454 thousand 59 tons, the production obtained through aquaculture was 553 thousand 862 tons. Seafood catch increased by 39.4% compared to the previous year, while inland fisheries increased by 0.8%. The amount of marine fish caught was recorded as 387 thousand 115 tons. Looking at the species of these fish, anchovy fish was the most caught species with 273 thousand 915 tons, followed by sprat with 45 thousand 764 tons and sardines with 17 thousand 311 tons, respectively. Aquaculture production was 399 thousand 529 tons of seafood and 154 thousand 333 tons of inland aquaculture in 2023. The most commonly grown fish species in inland waters was trout with 154 thousand 6 tons, sea bass with 160 thousand 802 tons and sea bream with 154 thousand 11 tons in the seas.

Foreign trade developments in the fisheries and aquaculture sector in 2024, January-December change rates; When we look at the economic activities, the total export amount of fisheries and aquaculture was 882 million 970 thousand dollars in January-December, and the total amount of imports was 71 million 872 thousand dollars. In the fisheries and aquaculture sector, the amount of exports in December 2024 was 81 million 951 thousand dollars and the amount of imports was 10 million 43 thousand dollars. In December, according to economic activities, the share of agriculture, forestry and fishing sector in exports was 4.1%, while in January-December period, the share of agriculture, forestry and fishing sector in exports according to economic activities was 3.6% (Graph 59).

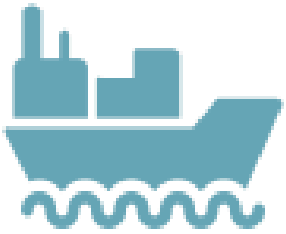
Graph 59. Export and Import Values (Thousand US$) of Fisheries and Aquaculture Sector, January-December 2024



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 76. 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	1,293	269	1,562	**-1.5**
2024	1,314	269	1,583	**2.8**

Source: Ministry of Transport and Infrastructure (31.12.2024)

Table 77. Distrubion of Ship Agencies By 6 Provinces

Number	Name of Province	Head Office	Branch Office	Total Number of Company	%
1	İstanbul	558	32	590	37.0
2	İzmir	118	62	180	12.0
3	Muğla	171	19	190	12.0
4	Mersin	108	47	155	10.0
5	Hatay	83	31	114	7.0
6	Kocaeli	61	27	88	6.0

Source: Ministry of Transport and Infrastructure (31.12.2024)

Table 78. Distrubion of Ship Agencies By 4 Regions

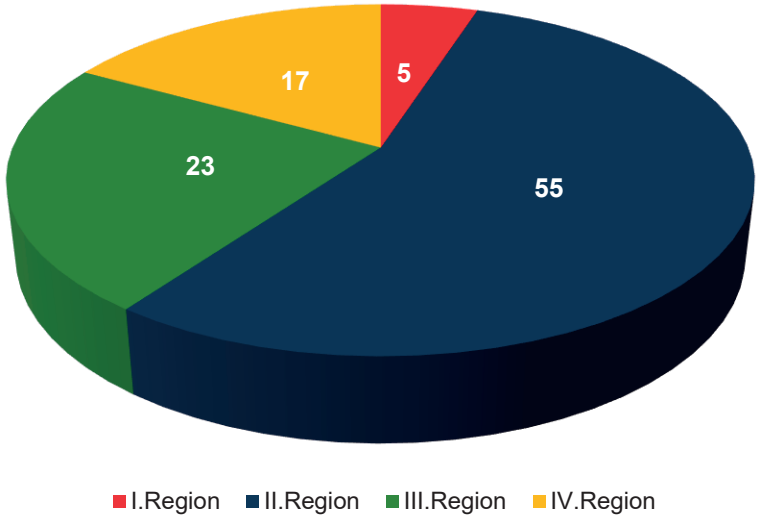
Regions	Head Office	Branch Office	Total Number of Company	%
I.Region (Black Sea)	**56**	**17**	**73**	5.0
II.Region (Marmara Sea)	**729**	**80**	**809**	55.0
III.Region (Agea)	**308**	**85**	**393**	23.0
IV.Region (Mediterranean)	**221**	**87**	**308**	17.0
Total	**1,314**	**269**	**1,583**	

Source: Ministry of Transport and Infrastructure (31.12.2024)

More than half of a total of 1,314 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 60. Distrubion of Ship Agencies By 4 Regions (%)



Source: Ministry of Transport and Infrastructure (31.12.2024)

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 965,246 TL for 2024.

Currently, there are 9,530 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.

C 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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Meclis-i Mebusan Cad. No: 22 Fındıklı - Beyoğlu İstanbul

Tel: +90 212 252 01 30 (pbx) Faks: +90 212 293 79 35

www.denizticaretodasi.org.tr

iletisim@denizticaretodasi.org.tr