İSTANBUL & MARMARA, AEGEAN, MEDITERRANEAN, BLACK SEA REGIONS

CHAMBER OF SHIPPING

MARITIME SECTOR REPORT

İstanbul 2026

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

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ISTANBUL - 2026

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

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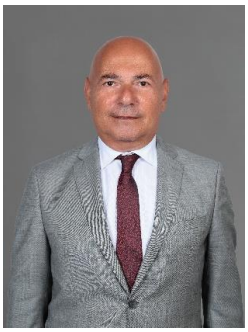

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FOREWORD

The year 2025 was recorded as a period in which uncertainties, geopolitical tensions, and protectionist policies became increasingly prominent in the global economy and international trade. In particular, the new tariffs and trade policies that came to the forefront following President Donald Trump's return to office for a second term in the United States heightened volatility in the global economy and gave rise to uncertainties regarding the future of global trade. The tariff-centered negotiations and reciprocal actions between the United States and several countries, most notably China and the European Union, emerged as key factors influencing the course of international trade.

While the effects of the tight monetary policies implemented worldwide to combat persistent inflation continued throughout the year, slower economic growth, rising financing costs, and ongoing geopolitical risks contributed to the continued fragility of the global economy. Meanwhile, energy security, the reshaping of supply chains, and green transition policies will remain key agenda items for the global economy in the period ahead.

From the perspective of the Turkish economy, 2025 was a year in which the macroeconomic rebalancing process continued. While the effects of the tight monetary and fiscal policies implemented to combat inflation became more pronounced, significant progress was made toward strengthening stability in financial markets.

The year 2025 also stood out as a period in which political and geopolitical risks played a decisive role in global maritime transportation. In addition to security issues in the Red Sea, trade tensions between the United States and China, U.S tariff measures targeting various countries, and port fee policies related to Chinese-built vessels were among the key agenda items shaping global maritime transportation.

Although a weaker outlook and expectations of contraction in global maritime transportation prevailed in the first half of the year, a stronger trend was observed in the markets from the third quarter onward. Ultimately, global maritime transport reached approximately 12.9 billion tons in 2025, representing a 1.5% increase in tonnage terms, while recording 2% growth in ton-miles.

Initial expectations for 2026 pointed to a more positive growth outlook for global maritime trade. However, following the attacks carried out by the United States and Israel against Iran on 28 February, the global trade and energy transportation sectors have entered a new and more fragile period. While growth expectations in ton-mile terms are expected to remain supported by changes in oil and natural gas trade flows, increased exports from the Atlantic basin to Asia, and the impact of longer-haul transportation, it is anticipated that the growth momentum of global seaborne trade in 2026 will weaken due to continuing uncertainties surrounding critical chokepoints, particularly the Strait of Hormuz, as well as the effects of the subsequent normalization process.

Despite all the uncertainties experienced around the globe, Türkiye continues to maintain its position as an important regional and global trade hub thanks to its strategic geographical location, strong port infrastructure and developing logistics capacity. Located at a critical transit point between Asia and Europe, Türkiye’s influence in maritime trade continues to grow steadily each year.

Our Maritime Sector Report 2025 presents, in light of comprehensive data, the developments, economic indicators and sectoral transformation processes taking place in both global and Turkish maritime sectors.

As we present our report, which is prepared every year with great care and intensive effort, for the benefit of our sector and maritime community, I would like to thank all our colleagues who contributed to its preparation and express my hope that the report will prove beneficial to our maritime sector and our country.

Tamer KIRAN

Turkish Chamber of Shipping

Chairman of the Board of Directors

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ABBREVIATIONS

AIP	: Air-Independent Propulsion
ASW	: Anti-Submarine Warfare
BKAP	: Integrated Coastal Area Plans
BSEC	: Black Sea Economic Cooperation
CGT	: Compensated Gross Ton
CLIA	: Cruise Lines International Association
DGFA	: Directorate General of Fisheries and Aquaculture
DMP	: Marine Spatial Planning
DWT	: Deadweight Tonnage
EIA	: Environmental Impact Assessment
EU	: European Union
EW	: Electronic Warfare
FAC	: Fast Attack Craft
FAO	: United Nations Food and Agriculture Organization
FEE	: Foundation for Environmental Education
GT	: Gross Tonnage
GTİP	: Customs Tariff Statistical Position
ICWP	: Integrated Coastal Zone Management and Planning
IMO	: International Maritime Organization
ISL	: Institute of Shipping Economics and Logistics
ISR	: Intelligence, Surveillance, and Reconnaissance
LNG	: Liquefied Natural Gas
LOA	: Length Overall
LPG	: Liquefied Petroleum Gas
MARRAP	: Marmara Report
MCM	: Mine Countermeasure
OECD	: Organisation for Economic Co-operation and Development
SOFIA	: State of World Fisheries and Aquaculture
SRR	: Ship Recycling Regulation
SuW	: Surface Warfare
TEPGE	: Agricultural Economic and Policy Development Institute
TEU	: Twenty-Foot Equivalent Unit
TL	: Turkish lira
TRY	: 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
USA	: United States of America
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 2025.

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 496 ships of which 298 (5.4 million DWT) have been imported and 198 (1.2 million DWT) have been built in Türkiye.

496 ships are distributed by type as follows: 16.9% dry cargo ships, 13.3% chemical tankers, 11.1% marine vehicles, 10.9% container ships, 6.3% bulk carrier ships and 41.5% other types.

By DWT the fleet consists of; 22.7% bulk carriers, 19.4% oil tankers, 18.3% container ships, 14.4% chemical tankers, 8.6% dry cargo ships, and 16.6% other types.

By DWT, 6.1% of our fleet is registered in the National Ship Registry, 93.9% of the fleet is registered in the International Ship Registry. By GT, 7.2% of our fleet is registered in the National Ship Registry, 92.8% of the fleet is registered in the International Ship Registry. (Table 2)

The fleet registered in the International Ship Registry (6.2 million DWT) is composed of; bulk carriers (22.5%), oil tankers (20.4%), container ships (18.3%), chemical tankers (15.2%), dry cargo vessels (8.5%) and other types (15%). (Table 2)

Table 2 shows Turkish merchant fleet which consists of 496 ships. 13.1% of the total fleet (65 ships) is registered in the National Ship Registry and 86.9% of the total fleet (496 ships) is registered in the International Ship Registry.

The majority of the fleet registered in the National Ship Registry (400.518 DWT) is composed of bulk carriers (25.3%), LNG tankers (23.4%), container ships (18.4%), dry cargo ships (9.6%), marine vehicles ships (6.4%) and other types (16.9%). (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	38	46	84	16.9	309,282	255,454	564,736	8.6	215,128	165,122	380,250	6.2
Bulk Carrier	30	1	31	6.3	1,445,939	50,316	1,496,255	22.7	827,309	27,989	855,298	14.0
Container	42	12	54	10.9	984,577	222,435	1,207,012	18.3	777,342	176,906	954,248	15.6
Dry Cargo/Container	8	8	16	3.2	58,905	57,418	116,323	1.8	42,150	38,858	81,008	1.3
Chemical Tankers	42	24	66	13.3	730,996	221,925	952,921	14.4	473,955	147,448	621,403	10.1
LPG Tankers	6	1	7	1.4	37,156	3,442	40,598	0.6	34,294	3,932	38,226	0.6
LNG Tankers	2	0	2	0.4	187,228	0	187,228	2.8	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	18	1	19	3.8	224,085	17,183	241,268	3.7	552,538	60,465	613,003	10.0
Ro-Ro Ferry/Passenger	2	14	16	3.2	457	3,453	3,910	0.1	5,027	30,601	35,628	0.6
Ferry Boats	1	27	28	5.7	0	22,894	22,894	0.4	1,815	35,685	37,500	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
Refrigerated	1	0	1	0.2	975	0	975	0.0	1,267	0	1,267	0.0
Fishing Boats	2	5	7	1.4	3,876	0	3,876	0.1	3,591	33,924	37,515	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	3	3	0.6	0	1,264	1,264	0.0	0	3,232	3,232	0.1
Tugs	1	0	1	0.2	0	0	0	0.0	1,565	0	1,565	0.0
Service Ships	22	9	31	6.3	53,166	0	53,166	0.8	173,742	24,553	198,295	3.2
Oil Tankers	14	12	26	5.2	1,091,845	190,478	1,282,323	19.4	594,231	101,446	695,677	11.3
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	19	4	23	4.7	156,756	42,336	199,092	3.0	268,065	57,840	325,905	5.3
Marine Vehicles	36	19	55	11.1	88,501	41,998	130,499	2.0	688,866	206,802	895,668	14.6
Grand Total	**298**	**198**	**496**	**100**	**5,407,057**	**1,190,351**	**6,597,408**	**100**	**4,947,718**	**1,184,537**	**6,132,255**	**100**

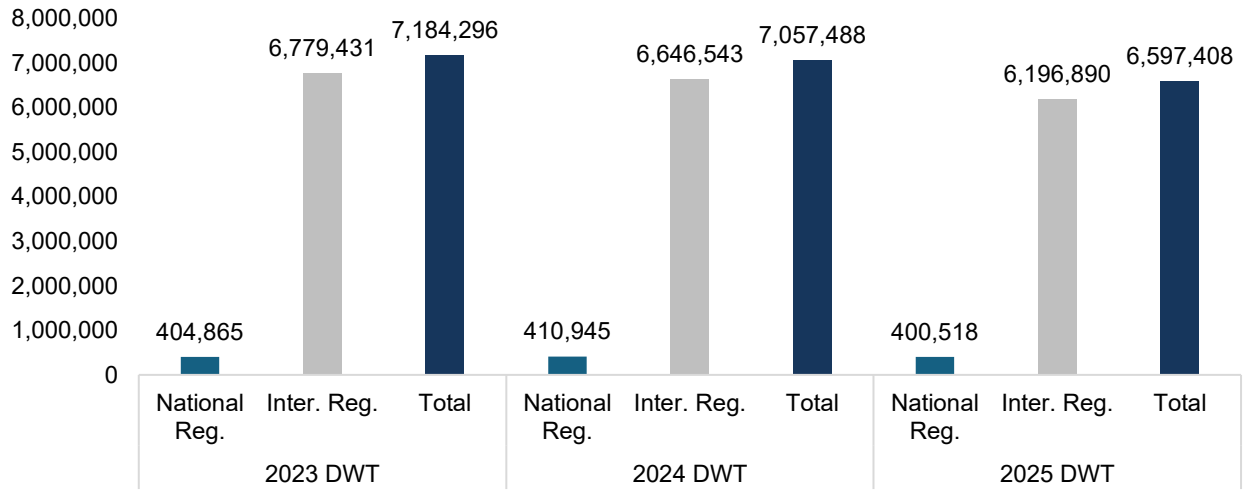
Source: Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping Statistics

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	6	78	84	16.9	38,469	526,267	564,736	8.6	24,649	355,601	380,250	6.2
Bulk Carrier	2	29	31	6.3	101,257	1,394,998	1,496,255	22.7	57,361	797,937	855,298	14.0
Container	2	52	54	10.9	73,726	1,133,286	1,207,012	18.3	55,122	899,126	954,248	15.6
Dry Cargo/Container	0	16	16	3.2	0	116,323	116,323	1.8	0	81,008	81,008	1.3
Chemical Tankers	2	64	66	13.3	9,497	943,424	952,921	14.4	6,441	614,962	621,403	10.1
LPG Tankers	0	7	7	1.4	0	40,598	40,598	0.6	0	38,226	38,226	0.6
LNG Tankers	1	1	2	0.4	93,715	93,513	187,228	2.8	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	18	19	3.8	1,500	239,768	241,268	3.7	19,638	593,365	613,003	10.0
Ro-Ro Ferry/Passenger	2	14	16	3.2	0	3,910	3,910	0.1	10,681	24,947	35,628	0.6
Ferry Boats	1	27	28	5.7	2,314	20,580	22,894	0.4	1,596	35,905	37,500	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
Refrigerated	0	1	1	0.2	0	975	975	0.0	0	1,267	1,267	0.0
Fishing Boats	3	4	7	1.4	0	3,876	3,876	0.1	16,007	21,508	37,515	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	3	3	0.6	0	1,264	1,264	0.0	0	3,232	3,232	0.1
Tugs	1	0	1	0.2	0	0	0	0.0	1,565	0	1,565	0.0
Service Ships	14	17	31	6.3	19,774	33,392	53,166	0.8	59,495	138,799	198,295	3.2
Oil Tankers	5	21	26	5.2	15,429	1,266,894	1,282,323	19.4	8,840	686,837	695,677	11.3
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	23	23	4.7	0	199,092	199,092	3.0	0	325,905	325,905	5.3
Marine Vehicles	17	38	55	11.1	25,578	104,921	130,499	2.0	37,562	858,106	895,668	14.6
Grand Total	**65**	**431**	**496**	**100**	**400,518**	**6,196,890**	**6,597,408**	**100**	**441,925**	**5,690,330**	**6,132,255**	**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) 2023-2024-2025 (1000 GT and Over)

Ship Types	2023 DWT			2024 DWT			2025 DWT			2024-2025 DWT % Change
	National Reg.	Inter. Reg.	Total	National Reg.	Inter. Reg.	Total	National Reg.	Inter. Reg.	Total	
Dry Cargo	27,756	624,953	652,709	24,576	644,164	668,740	38,469	526,267	564,736	-15.6%
Bulk Carrier	18,640	1,833,216	1,851,856	101,257	1,718,738	1,819,995	101,257	1,394,998	1,496,255	-17.8%
Container	134,264	987,982	1,122,246	112,274	1,117,783	1,230,057	73,726	1,133,286	1,207,012	-1.9%
Dry Cargo/Container	0	67,815	67,815	0	97,764	97,764	0	116,323	116,323	19.0%
Chemical Tankers	69,444	972,537	1,041,981	9,497	825,843	835,340	9,497	943,424	952,921	14.1%
LPG Tankers	0	37,156	37,156	0	37,156	37,156	0	40,598	40,598	9.3%
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	239,768	241,268	-3.9%
Ro-Ro Ferry/Passenger	0	10,235	10,235	0	11,951	11,951	0	3,910	3,910	-67.3%
Ferry Boats	2,314	20,700	23,014	2,314	21,804	24,118	2,314	20,580	22,894	-5.1%
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	2,783	6,023	3,240	2,783	6,023	0.0%
Refrigerated	0	0	0	0	0	0	0	975	975	-
Fishing Boats	0	3,876	3,876	0	7,705	7,705	0	3,876	3,876	-49.7%
Scientific Research Vessel	0	2,690	2,690	0	2,690	2,690	0	2,690	2,690	0.0%
Harbour Car Ferries	0	1,264	1,264	0	1,264	1,264	0	1,264	1,264	0.0%
Service Ships	19,774	37,676	57,450	19,774	40,009	59,783	19,774	33,392	53,166	-11.1%
Oil Tankers	10,868	1,490,352	1,501,220	10,868	1,479,662	1,490,530	15,429	1,266,894	1,282,323	-14.0%
Container/Ro-Ro	13,059	0	13,059	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	620	620	0	620	620	0.0%
Vessels of Offshore Activity	0	140,971	140,971	0	139,191	139,191	0	199,092	199,092	43.0%
Special Purpose Ships	0	5,552	5,552	0	5,552	5,552	0	0	0	-100.0%
Marine Vehicles	7,331	129,056	136,387	15,911	81,002	96,913	25,578	104,921	130,499	34.7%
Grand Total	**404,865**	**6,779,431**	**7,184,296**	**410,945**	**6,646,543**	**7,057,488**	**400,518**	**6,196,890**	**6,597,408**	**-6.5%**

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 1000 GT and above consists of 496 ships. The average age of these ships is 27 as of 31.12.2025.

The average age of dry cargo ships is 30, which makes 16.9% of the fleet. The average age of bulk carriers is 24 and makes up 6.3% of the total fleet. The average age of containers is 23, which is 10.9% of the fleet. The average age of chemical tankers is 21, which is 13.3% of the fleet. The average age of oil tankers is 19, which is 5.2% of the fleet.

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

Ship Types	Number	Tonnage (DWT)	Tonnage (GT)	Average Age
Dry Cargo	84	564,736	380,250	30
Bulk Carrier	31	1,496,255	855,298	24
Container	54	1,207,012	954,248	23
Dry Cargo/Container	16	116,323	81,008	20
Chemical Tankers	66	952,921	621,403	21
LPG Tankers	7	40,598	38,226	28
LNG Tankers	2	187,228	218696	6
Asphalt Tankers	4	61,450	48,941	10
Ro-Ro Ships	19	241,268	613,003	20
Ro-Ro Ferry/Passenger	16	3,910	35,628	14
Ferry Boats	28	22,894	37,500	30
Train Ferries	5	2,960	7,916	52
Passenger and Cargo Ships	10	6,023	40,677	27
Refrigerated	1	975	1,267	22
Fishing Boats	7	3,876	37,515	15
Scientific Research Vessel	3	2,690	12,827	21
Harbour Ferries	1	0	1,043	74
Harbour Car Ferries	3	1,264	3,232	39
Tugs	1	0	1,565	42
Service Ships	31	53,166	198,295	45
Oil Tankers	26	1,282,323	695,677	19
Container/Ro-Ro	1	13,059	9,991	29
Train Ferries/Ro-Ro	1	6,266	15,195	40
Dry Cargo/Ro-Ro	1	620	1,281	22
Vessels of Offshore Activity	23	199,092	325905	18
Marine Vehicles	55	130,499	895,668	37
Grand Total	**496**	**6,597,408**	**6,132,255**	**27**

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 496 ships with a total of 6,597,408 DWT.

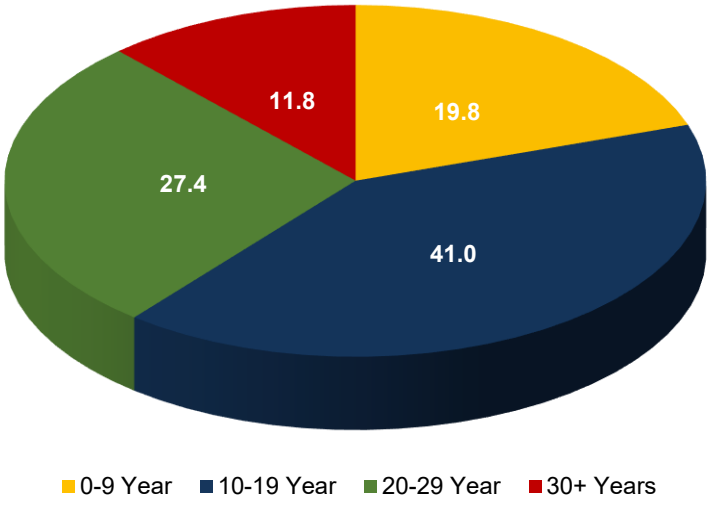
- 60 ships with total size 1,309,425 DWT are in the 0-9 age range,
- 148 ships with total size 2,704,818 DWT are in the 10-19 age range,
- 117 ships with total size 1,804,855 DWT are in the 20-29 age range,
- 171 ships with total size 778,310 DWT are of age 30 or older.

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

Divisions Of Tonnage	0-9 Years			10-19 Years			20-29 Years			30+ Years			Total	
	NO	DWT	%	NO	DWT	%	NO	DWT	%	NO	DWT	%	NO	DWT
0-149	22	0	0.0	26	0	0.0	6	0	0.0	49	0	0.0	103	0
150-1499	1	244	0.0	7	5,348	0.2	8	5,040	0.3	17	11,897	1.5	33	22,529
1500-5999	10	37,855	2.9	30	106,220	3.9	30	111,115	6.2	70	229,301	29.5	140	484,491
6000-9999	6	42,880	3.3	17	134,175	5.0	16	134,053	7.4	15	115,692	14.9	54	426,800
10000-34999	8	131,559	10.0	45	812,629	30.0	38	687,155	38.1	17	262,115	33.7	108	1,893,458
35000-52999	6	235,577	18.0	9	396,462	14.7	16	683,601	37.9	2	76,688	9.9	33	1,392,328
53000-79999	1	59,178	4.5	7	446,706	16.5	3	183,891	10.1	0	0	0.0	11	689,775
80000-119999	2	187,228	14.3	4	352,735	13.0	0	0	0.0	1	82,617	10.5	7	622,580
120000+	4	614,904	47.0	3	450,543	16.7	0	0	0.0	0	0	0.0	7	1,065,447
Grand Total	**60**	**1,309,425**	**100**	**148**	**2,704,818**	**100**	**117**	**1,804,855**	**100**	**171**	**778,310**	**100**	**496**	**6,597,408**

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. 19.8% of the fleet is in the 0-9 age range, 41.0% of the fleet is in the 10-19 age range, 27.4% of the fleet is in the 20-29 age range and 11.8% 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 (84 ships) which has a total size of 564,736 DWT.

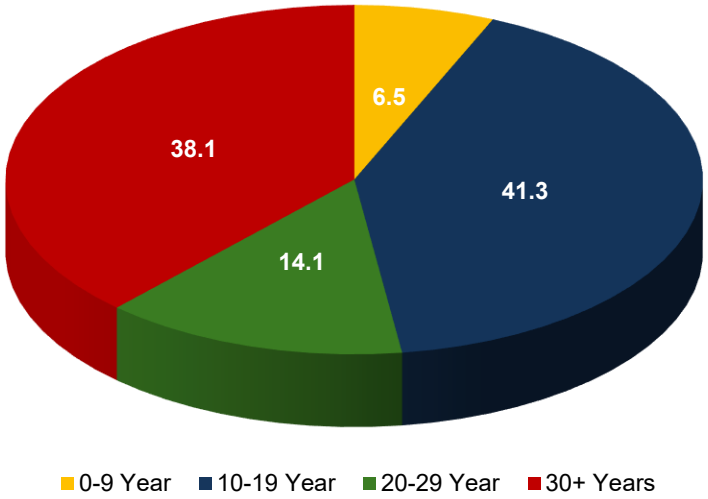
- 7 ships of size 36,781 DWT are in the 0-9 age range,
- 17 ships of size 233,446 DWT are in the 10-19 age range,
- 15 ships of size 79,191 DWT are in the 20-29 age range,
- 45 ships of size 215,318 DWT are 30 years or older.

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	5	21,580	0.6	5	18,808	0.1	10	40,497	0.5	37	130,826	0.6	57	211,711
6000-9999	2	15,201	0.4	7	51,319	0.2	5	38,694	0.5	4	27,868	0.1	18	133,082
10000-34999	0	0	0.0	3	64,037	0.3	0	0	0.0	4	56,624	0.3	7	120,661
35000-52999	0	0	0.0	2	99,282	0.4	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**	**36,781**	**100**	**17**	**233,446**	**100**	**15**	**79,191**	**100**	**45**	**215,318**	**100**	**84**	**564,736**

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

6.5% of Dry Cargo Ships are in the 0-9 age range; 41.3% are in the 10-19 age range; 14.1% are in the 20-29 age range and 38.1% are 30 years or older.

Table 7 shows the Bulk Carrier Segment (31 ships) with a total size of 1,496,255 DWT.

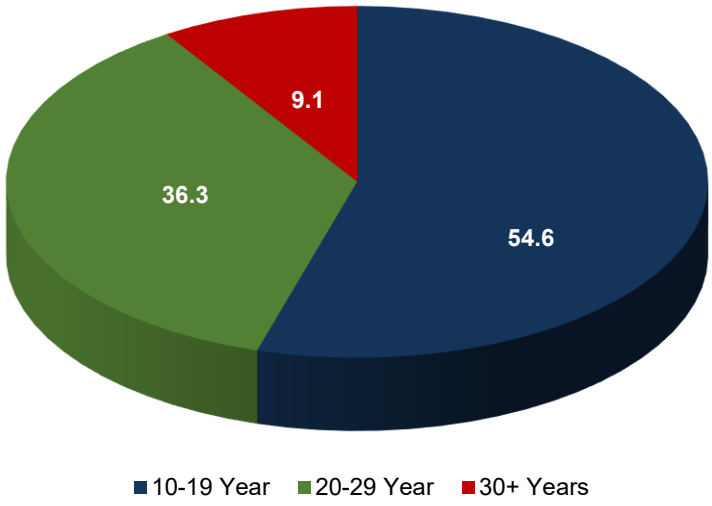
- 15 ships of size 816,803 DWT are in the 10-19 age range,
- 11 ships of size 542,791 DWT are in the 20-29 age range,
- 5 ships of size 136,661 DWT are 30 years or older.

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

Divisions Of Tonnage	0-9 Years			10-19 Years			20-29 Years			30+ Years			Total	
	NO	DWT	%	NO	DWT	%	NO	DWT	%	NO	DWT	%	NO	DWT
0-9999	0	0	0.0	0	0	0.0	0	0	0.0	2	7,487	0.1	2	7,487
10000-39999 (Handysize)	0	0	0.0	5	135,522	0.2	2	61,134	0.1	2	46,557	0.3	9	243,213
40000-49999 (Handymax)	0	0	0.0	1	48,549	0.1	2	91,402	0.2	0	0	0.0	3	139,951
50000-59999 (Supramax)	0	0	0.0	4	226,330	0.3	6	313,653	0.6	0	0	0.0	10	539,983
60000-84999 (Panamax)	0	0	0.0	5	406,402	0.5	1	76,602	0.1	1	82,617	0.6	7	565,621
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	**0**	**0**	**0**	**15**	**816,803**	**100**	**11**	**542,791**	**100**	**5**	**136,661**	**100**	**31**	**1,496,255**

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

54.6% are in the 10-19 age range; 36.3% are in the 20-29 age range and 9.1% are 30 years or older.

Table 8 shows Oil Tankers Segment (26 ships) with a total size of 1,282,323 DWT.

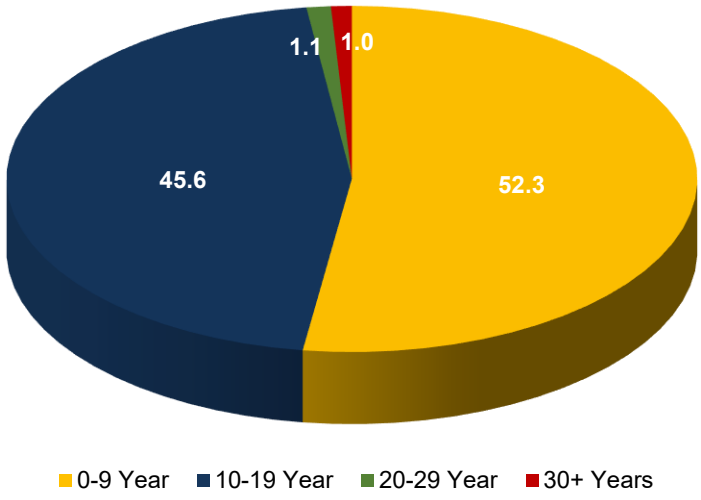
- 7 ships of size 670,260 DWT are in the 0-9 age range,
- 11 ships of size 585,047 DWT are in the 10-19 age range,
- 4 ships of size 14,598 DWT are in the 20-29 age range,
- 4 ships of size 12,418 DWT are 30 years or older.

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	2	5,357	0.0	6	16,331	0.0	4	14,598	1.0	4	12,418	1.0	16	48,704
5000-7499	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
10000-39999 (Handysize)	0	0	0.0	1	13,002	0.0	0	0	0.0	0	0	0.0	1	13,002
40000-59999 (Handymax)	1	49,999	0.1	0	0	0.0	0	0	0.0	0	0	0.0	1	49,999
60000-79999 (Panamax)	0	0	0	0	0	0	0	0	0	0	0	0	0	0
80000-119999 (Aframax)	0	0	0.0	1	105,171	0.2	0	0	0.0	0	0	0.0	1	105,171
120000-199999 (Suezmax)	4	614,904	0.9	3	450,543	0.8	0	0	0.0	0	0	0.0	7	1,065,447
200000-324999 (VLCC)	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
Grand Total	**7**	**670,260**	**100**	**11**	**585,047**	**100**	**4**	**14,598**	**100**	**4**	**12,418**	**100**	**26**	**1,282,323**

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

52.3% of the oil tankers are in the 0-9 age range; 45.6% are in the 10-19 age range; 1.1% are in the 20-29 age range and 1.0% are 30 years old or older.

Table 9 shows the average age of the chemical tankers (66 ships) with a total size of 952,921 DWT.

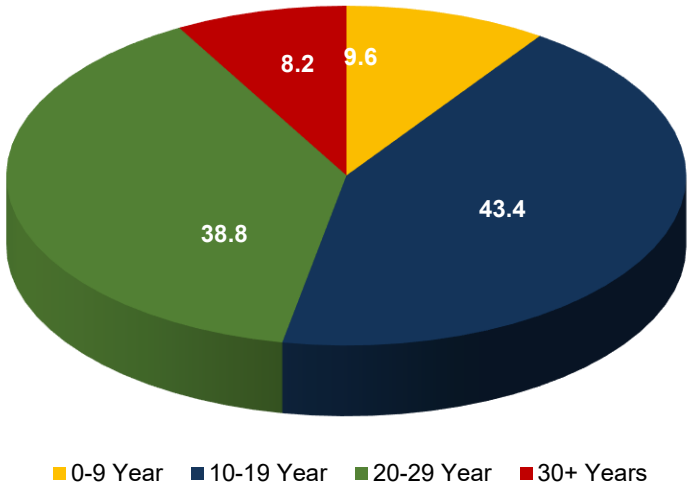
- 7 ships of size 91,874 DWT are in the 0-9 age range,
- 26 ships of size 413,640 DWT are in the 10-19 age range,
- 21 ships of size 369,807 DWT are in the 20-29 age range,
- 12 ships of size 77,600 DWT are 30 years or older.

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	0.0	2	8,407	0.0	6	23,001	0.1	4	14,010	0.2	13	48,756
5000-7499	2	13,541	0.1	2	12,579	0.0	3	20,311	0.1	3	18,028	0.2	10	64,459
7500-9999	1	7,538	0.1	4	35,330	0.1	2	16,242	0.0	4	35,456	0.5	11	94,566
10000-39999 (Handysize)	3	67,457	0.7	16	255,802	0.6	9	263,997	0.7	1	10,106	0.1	29	597,362
40000-59999 (Handymax)	0	0	0.0	2	101,522	0.2	1	46,256	0.1	0	0	0.0	3	147,778
60000-79999 (Panamax)	0	0	0	0	0	0	0	0	0	0	0	0	0	0
80000-119999 (Aframax)	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
200000-324999 (VLCC)	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
Grand Total	**7**	**91,874**	**100**	**26**	**413,640**	**100**	**21**	**369,807**	**100**	**12**	**77,600**	**100**	**66**	**952,921**

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

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



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

9.6% of chemical tankers are in the 0-9 age range; 43.4% are in the 10-19 age range; 38.8% are in the 20-29 age range and 8.2% are 30 years or older.

Table 10 shows the average age of the Container Ships (54 ships) with a total size of 1,207,012 DWT.

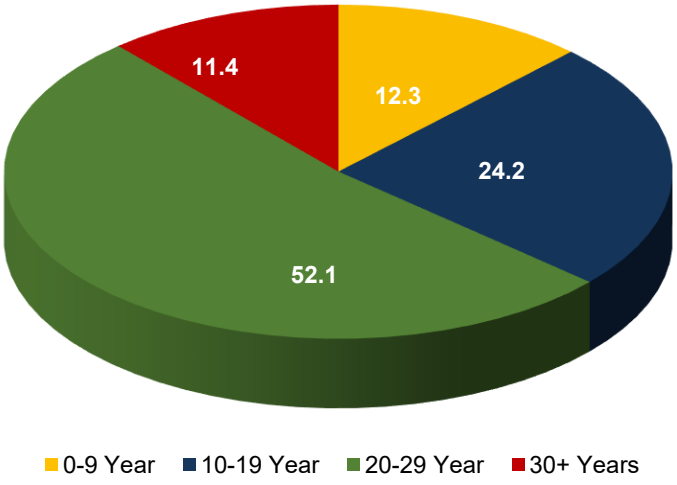
- 4 ships of size 147,996 DWT are in the 0-9 age range,
- 12 ships of size 292,383 DWT are in the 10-19 age range,
- 31 ships of size 628,533 DWT are in the 20-29 age range,
- 7 ships of size 138,100 DWT are 30 years or older.

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
1500-5999	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6000-9999	0	0	0.0			0.0	1	9,950	0.0	1	9,766	0.1	2	19,716
10000-34999	0	0	0.0	11	253,774	0.9	27	505,427	0.8	4	51,646	0.4	42	810,847
35000-52999	4	147,996	1.0	1	38,609	0.1	3	113,156	0.2	2	76,688	0.6	10	376,449
53000-79999	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
120000+	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Grand Total	**4**	**147,996**	**100**	**12**	**292,383**	**100**	**31**	**628,533**	**100**	**7**	**138,100**	**100**	**54**	**1,207,012**

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

12.3% of Container ships are in the 0-9 age range; 24.2% are in the 10-19 age range; 52.1% are in the 20-29 age range and 11.4% are 30 years or older.

Table 11 shows the average age of the Ro-Ro Ships, (19 ships) with a total size of 241,268 DWT.

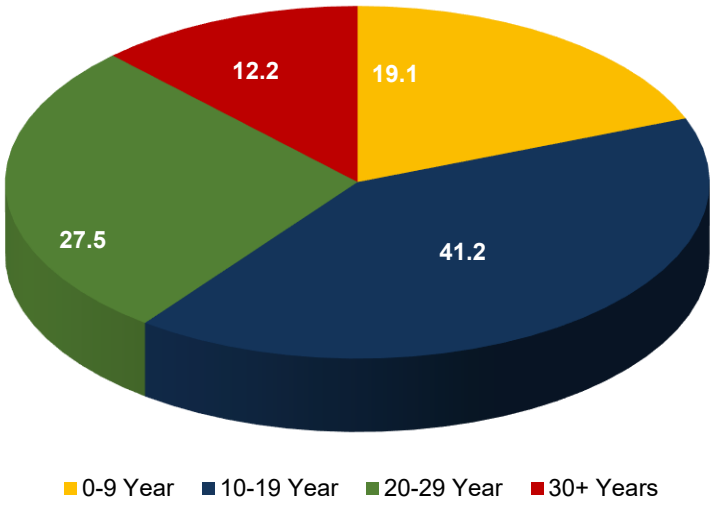
- 3 ships of size 46,110 DWT are in the 0-9 age range,
- 7 ships of size 99,352 DWT are in the 10-19 age range,
- 6 ship of size 66,274 DWT are in the 20-29 age range,
- 3 ships of size 29,532 DWT are 30 years or older.

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
1500-5999	0	0	0.0	0	0	0.0	0	0	0.0	1	1,500	0.1	1	1,500
6000-9999	0	0	0.0	0	0	0.0	2	19,730	0.3	0	0	0.0	2	19,730
10000-34999	3	46,110	1.0	7	99,352	1.0	4	46,544	0.7	2	28,032	0.9	16	220,038
35000-52999	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
80000-119999	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
Grand Total	**3**	**46,110**	**1**	**7**	**99,352**	**1**	**6**	**66,274**	**1**	**3**	**29,532**	**1**	**19**	**241,268**

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

19.1% of Ro-Ro Ships are in the 0-9 age range; 41.2% are in the 10-19 age range; 27.5% are in the 20-29 age range and 12.2% 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 453 ships. 13.5% of the total fleet (61 ships) is registered in National Ship Registry and 86.5% of the total fleet (392 ships) in the International Ship Registry. The total DWT and GT values of the ships over 1000 DWT are 6,741,418 DWT and 4,978,800 GT respectively. 6 classes make up the majority of this capacity. Bulk carriers lead with 22.2%, oil tankers follow with 19.6%, containers with 17.9%, chemical tankers with 14.1%, dry cargo with 9.1% and ro-ro ships with 3.6%. These 6 classes make up 86.5% of the total fleet based on DWT.

6.8% of the bulk carrier ships are registered in the National Ship Registry, and the rest 93.2% are registered in the International Ship Registry with a total weight of 1,496,255 DWT for the bulk carrier segment.

1.9% of the oil tankers are registered in the National Ship Registry, and the rest 98.1% are registered in the International Ship Registry with a total weight of 1,323,541 DWT for the oil tankers segment.

6.1% of the container ships are registered in the National Ship Registry, and the rest 93.9% are registered in the International Ship Registry with a total weight of 1,207,013 DWT for the container ship segment.

1.0% of the chemical tankers are registered in the National Ship Registry, and the rest 99.9% are registered in the International Ship Registry with a total weight of 952,921 DWT for the chemical tankers segment.

8.7% of the dry cargo ships are registered in the National Ship Registry, and the rest 91.3% are registered in the International Ship Registry with a total weight of 610,397 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 241,268 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	41	74	115	25.4	313,358	297,039	610,397	9.1	217,552	188,007	405,559	8.1
Bulk Carrier	30	1	31	6.8	1,445,939	50,316	1,496,255	22.2	827,309	27,989	855,298	17.2
Container	42	12	54	11.9	984,577	222,436	1,207,013	17.9	777,342	176,906	954,248	19.2
Dry Cargo/Container	8	8	16	3.5	58,905	57,418	116,323	1.7	42,150	38,858	81,008	1.6
Chemical Tankers	42	24	66	14.6	730,996	221,925	952,921	14.1	473,955	147,448	621,403	12.5
LPG Tankers	6	1	7	1.6	37,156	3,442	40,598	0.6	34,294	3,932	38,226	0.8
LNG Tankers	2	0	2	0.4	187,228	0	187,228	2.8	218,696	0	218,696	4.4
Asphalt Tankers	1	3	4	0.9	6,600	54,850	61,450	0.9	5,311	43,630	48,941	1.0
Water Barges	0	1	1	0.2	0	1,027	1,027	0.0	0	488	488	0.0
Ro-Ro Ships	18	1	19	4.2	224,085	17,183	241,268	3.6	552,538	60,465	613,003	12.3
Ro-Ro Ferry/Passenger	0	2	2	0.4	0	2,752	2,752	0.0	0	3,538	3,538	0.1
Ferry Boats	0	10	10	2.2	0	18,824	18,824	0.3	0	14,527	14,527	0.3
Train Ferries	0	2	2	0.4	0	2,600	2,600	0.0	0	2,466	2,466	0.0
Passenger and Cargo Ships	2	1	3	0.7	31,182	1,700	32,882	0.5	5,132	10,583	15,715	0.3
Fishing Boats	1	0	1	0.2	3,307	0	3,307	0.1	2,184	0	2,184	0.0
Scientific Research Vessel	1	0	1	0.2	2,690	0	2,690	0.0	3,327	0	3,327	0.1
Service Ships	17	14	31	6.8	63,369	20,247	83,616	1.2	45,242	8,206	53,448	1.1
Oil Tankers	19	33	52	11.5	1,099,512	224,029	1,323,541	19.6	598,809	121,124	719,933	14.5
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	13	4	17	3.9	156,034	42,336	198,370	3.0	148,886	57,840	206,726	4.1
Marine Vehicles	7	8	15	3.4	88,501	47,268	135,769	2.0	60,316	32,591	92,907	1.9
Grand Total	**252**	**201**	**453**	**100**	**5,452,764**	**1,288,654**	**6,741,418**	**100**	**4,038,229**	**940,571**	**4,978,800**	**100**

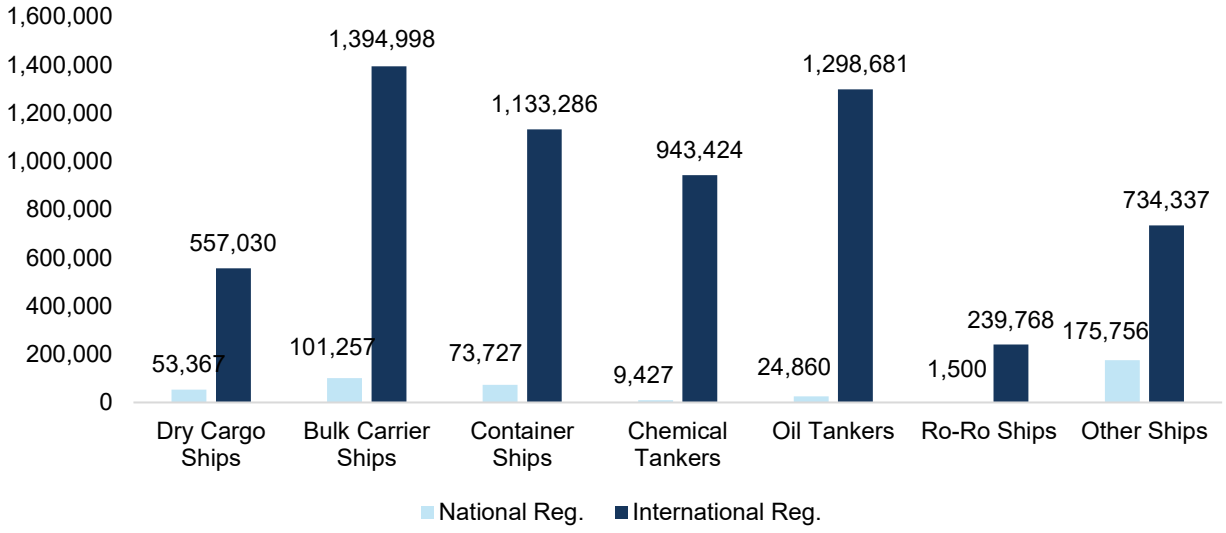
Source: Istanbul and Marmara, Aegean, Mediterranean and Black Sea Regions Chamber of Shipping Statistics

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	97	115	25.4	53,367	557,030	610,397	9.1	33,054	372,505	405,559	8.1
Bulk Carrier	2	29	31	6.8	101,257	1,394,998	1,496,255	22.2	57,361	797,937	855,298	17.2
Container	2	52	54	11.9	73,727	1,133,286	1,207,013	17.9	55,122	899,126	954,248	19.2
Dry Cargo/Container	0	16	16	3.5	0	116,323	116,323	1.7	0	81,008	81,008	1.6
Chemical Tankers	2	64	66	14.6	9,497	943,424	952,921	14.1	6,441	614,962	621,403	12.5
LPG Tankers	0	7	7	1.6	0	40,598	40,598	0.6	0	38,226	38,226	0.8
LNG Tankers	1	1	2	0.4	93,715	93,513	187,228	2.8	109,777	108,919	218,696	4.4
Asphalt Tankers	0	4	4	0.9	0	61,450	61,450	0.9	0	48,941	48,941	1.0
Water Barges	0	1	1	0.2	0	1,027	1,027	0.0	0	488	488	0.0
Ro-Ro Ships	1	18	19	4.2	1,500	239,768	241,268	3.6	19,638	593,365	613,003	12.3
Ro-Ro Ferry/Passenger	0	2	2	0.4	0	2,752	2,752	0.0	0	3,538	3,538	0.1
Ferry Boats	1	9	10	2.2	2,314	16,510	18,824	0.3	1,596	12,931	14,527	0.3
Train Ferries	2	0	2	0.4	2,600	0	2,600	0.0	2,466	0	2,466	0.0
Passenger and Cargo Ships	2	1	3	0.7	3,240	29,642	32,882	0.5	15,284	431	15,715	0.3
Fishing Boats	0	1	1	0.2	0	3,307	3,307	0.1	0	2,184	2,184	0.0
Scientific Research Vessel	0	1	1	0.2	0	2,690	2,690	0.0	0	3,327	3,327	0.1
Service Ships	11	20	31	6.8	31,965	51,651	83,616	1.2	24,025	29,423	53,448	1.1
Oil Tankers	11	41	52	11.5	24,860	1,298,681	1,323,541	19.6	14,407	705,526	719,933	14.5
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	17	17	3.9	0	198,370	198,370	3.0	0	206,726	206,726	4.1
Marine Vehicles	7	8	15	3.4	28,793	106,976	135,769	2.0	13,407	79,500	92,907	1.9
Grand Total	**61**	**392**	**453**	**100**	**439,894**	**6,301,524**	**6,741,418**	**100**	**362,569**	**4,616,231**	**4,978,800**	**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 453 ships. The average age of these ships is 27 as of 31.12.2025.

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

Ship Types	Number	DWT	GT	Average Age
Dry Cargo	115	610,397	405,559	36
Bulk Carrier	31	1,496,255	855,298	24
Container	54	1,207,013	954,248	23
Dry Cargo/Container	16	116,323	81,008	20
Chemical Tankers	66	952,921	621,403	21
LPG Tankers	7	40,598	38,226	28
LNG Tankers	2	187,228	218,696	6
Asphalt Tankers	4	61,450	48,941	10
Water Barges	1	1,027	488	57
Ro-Ro Ships	19	241,268	613,003	20
Ro-Ro Ferry/Passenger	2	2,752	3,538	17
Ferry Boats	10	18,824	14,527	34
Train Ferries	2	2,600	2,466	53
Passenger and Cargo Ships	3	32,882	15,715	56
Fishing Boats	1	3,307	2,184	38
Scientific Research Vessel	1	2,690	3,327	40
Service Ships	31	83,616	53,448	40
Oil Tankers	52	1,323,541	719,933	18
Container/Ro-Ro	1	13,059	9,991	29
Train Ferries/Ro-Ro	1	6,266	15,195	40
Dry Cargo/Ro-Ro	2	3,262	1,973	32
Vessels of Offshore Activity	17	198,370	206,726	18
Marine Vehicles	15	135,769	92,907	31
Grand Total	**453**	**6,741,418**	**4,978,800**	**27**

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 453 ships with a total of 6,741,418 DWT.

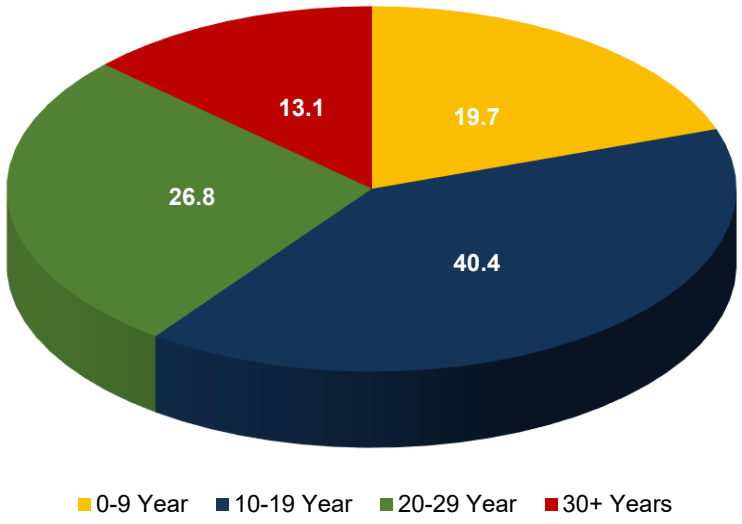
- 48 ships with total size 1.328.180 DWT are in the 0-9 age range,
- 129 ships with total size 2,721,870 DWT are in the 10-19 age range,
- 110 ships with total size 1,809,745 DWT are in the 20-29 age range,
- 166 ships with total size 881,623 DWT are of age 30 or older.

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	3	3,238	0.1	6	7,874	0.4	40	50,653	5.7	50	62,996
1500-5999	20	55,623	4.2	41	125,382	4.6	31	113,170	6.3	90	264,216	30.0	182	558,391
35000-52999	6	235,577	17.7	9	396,462	14.6	16	683,601	37.7	2	76,688	8.7	33	1,392,328
53000-79999	1	59,178	4.5	7	446,706	16.4	3	183,891	10.2	0	0	0.0	11	689,775
6000-9999	6	42,880	3.2	17	134,175	4.9	16	134,053	7.4	15	115,692	13.1	54	426,800
80000-119999	2	187,228	14.1	4	352,735	13.0	0	0	0.0	1	82,617	9.4	7	622,580
10000-34999	8	131,559	9.9	45	812,629	29.8	38	687,156	38.0	18	291,757	33.1	109	1,923,101
120000+	4	614,904	46.3	3	450,543	16.6	0	0	0.0	0	0	0.0	7	1,065,447
Grand Total	**48**	**1,328,180**	**100**	**129**	**2,721,870**	**100**	**110**	**1,809,745**	**100**	**166**	**881,623**	**100**	**453**	**6,741,418**

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. 19.7% of the fleet is in the 0-9 age range, 40.4% of the fleet is in the 10-19 age range, 26.8% of the fleet is in the 20-29 age range and 13.1% is 30 years old or over.

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

As of January 1st 2026, accounting only for ships with size 1000 GT and above, Turkish fleet under foreign flag is 45.4 million DWT, whereas the total fleet under both Turkish and foreign flag amounts to 50.7 million DWT.

On the other hand, the ratio distribution of the fleet regarding the flags of registration is as follows: 10.4% percent of these ships are registered under the Turkish flag and 89.6% are registered under the foreign flags.

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

Years	National Flag			Foreign Flag			Total Fleet Controlled		Years DWT Change %
	No	1000 DWT	%	No	1000 DWT	%	No	1000 DWT	
1999	448	8,697	90,5	69	915	9,5	517	9,612	
2000	456	8,269	90,6	96	855	9,4	552	9,124	-5.1
2001	445	7,321	82,0	107	1,607	18,0	552	8,928	-2.1
2002	451	7,815	83,8	117	1,514	16,2	568	9,329	4.5
2003	432	7,045	79,9	147	1,772	20,1	579	8,817	-5.5
2004	408	6,556	75,2	163	2,159	24,8	571	8,715	-1.2
2005	420	6,427	70,2	237	2,725	29,8	657	9,152	5.0
2006	432	6,844	65,5	353	3,609	34,5	785	10,453	14.2
2007	446	6,464	58,2	424	4,650	41,8	870	11,114	6.3
2008	490	6,592	50,0	513	6,591	50,0	1,003	13,183	18.6
2009	520	6,736	43,9	636	8,592	56,1	1,156	15,328	16.3
2010	560	7,246	42,1	665	9,954	57,9	1,225	17,201	12.2
2011	547	7,797	39,7	672	11,863	60,3	1,219	19,660	14.3
2012	523	8,479	37,6	642	14,093	62,4	1,165	22,572	14.8
2013	627	9,488	31,3	842	20,838	68,7	1,469	30,326	34.4
2014	599	8,580	28,2	890	21,846	71,8	1,489	30,427	0.3
2015	564	8,297	30,2	834	19,209	69,8	1,398	27,507	-9.6
2016	551	8,272	28,4	984	20,879	71,6	1,535	29,151	6.0
2017	525	7,800	26,7	1,022	21,465	73,3	1,547	29,265	0.4
2018	483	7,288	25,5	1,028	21,323	74,5	1,511	28,611	-2.2
2019	457	6,831	23,9	1,027	21,758	76,1	1,484	28,589	-0.1
2020	410	6,194	21,1	1,074	23,157	78,9	1,484	29,352	2.7
2021	384	5,432	18,8	1,108	23,497	81,2	1,492	28,929	-1.4
2022	353	5,157	16,8	1,164	25,523	83,2	1,517	30,680	6.1
2023	345	5,447	14,3	1,352	32,649	85,7	1,697	38,096	24.2
2024	348	6,026	12,6	1,614	41,950	87,4	1,962	47,976	25.9
2025	343	5,564	10,7	1,749	46,380	89,3	2,092	51,943	8.3
2026	337	5,262	10,4	1,836	45,435	89,6	2,173	50,697	-2.4

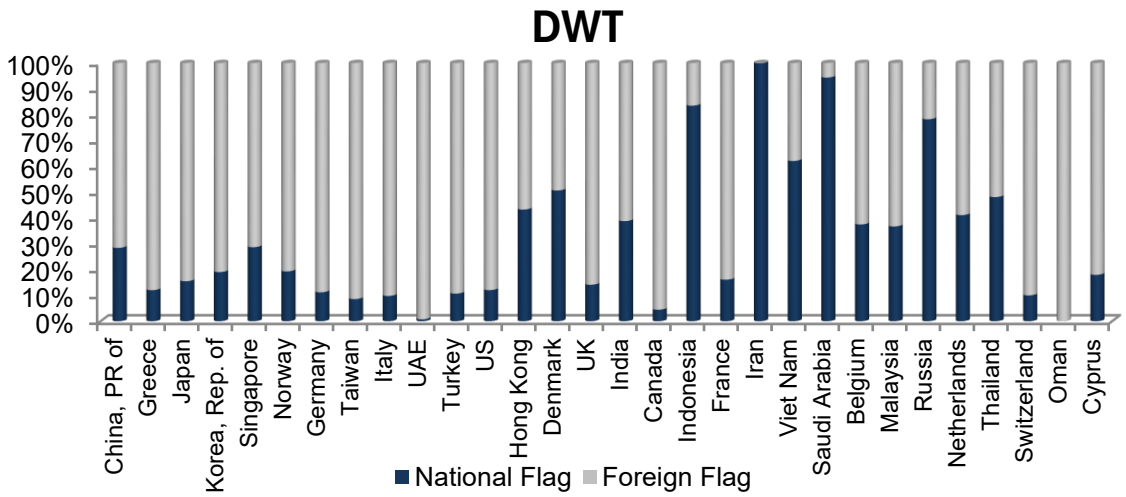
Source: Institute of Shipping Economics and Logistics (ISL) January-February 2026

Table 17. Total Fleet of the 30 Countries by National and Foreign Flags (01 January 2026)
(1000 GT and Over)

Country of Control (DWT-Rank 2026)		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	6,292	130,048	1.400	13.2	5,094	351,406	4.765	13.9	11,386	481.454	6.165	13.6	73.0
2	Greece	560	49,840	39	17.8	4,811	377,408	1.973	14.0	5,371	427.248	2.012	14.4	88.3
3	Japan	944	43,531	384	13.6	3,526	220,260	2.465	9.0	4,470	263.792	2.848	9.9	83.5
4	Korea, Rep. of	756	21,328	799	18.6	915	81,051	590	11.9	1,671	102.379	1.388	14.9	79.2
5	Singapore	721	25,787	535	11.6	911	59,047	754	15.0	1,632	84.834	1.290	13.5	69.6
6	Norway	638	14,529	80	18.2	954	58,333	447	16.7	1,592	72.862	527	17.3	80.1
7	Germany	133	8,354	753	19.9	1,827	61,152	2.522	15.3	1,960	69.507	3.275	15.6	88.0
8	Taiwan	121	5,630	227	16.3	919	61,523	2.152	12.2	1,040	67.152	2.379	12.7	91.6
9	Italy	349	5,915	88	21.7	1,050	63,123	3.929	16.6	1,399	69.038	4.017	17.9	91.4
10	UAE	62	406	6	13.0	1,133	54,638	303	19.4	1,195	55.044	309	19.1	99.3
11	Türkiye	**337**	**5,262**	**70**	**24.3**	**1,836**	**45,435**	**248**	**22.4**	**2,173**	**50.697**	**319**	**22.7**	**89.6**
12	US	230	6,224	92	24.9	804	37,588	117	16.8	1,034	43.812	209	18.6	85.8
13	Hong Kong (SAR)	275	17,509	13	14.4	392	20,606	63	18.9	667	38.115	76	17	54.1
14	Denmark	336	21,883	1.369	15.6	403	22,324	1.322	16.7	739	44.207	2.691	16.2	50.1
15	UK	147	5,787	181	16.5	675	39,929	1.152	14.0	822	45.716	1.333	14.4	87.3
16	India	695	15,815	15	17.8	256	14,162	9	17.4	951	29.977	25	17.7	47.2
17	Canada	131	1,306	6	24.8	395	31,990	1.950	12.8	526	33.296	1.955	15.8	96.1
18	Indonesia	2,452	27,705	171	25.6	183	6,730	80	16.9	2,635	34.435	252	25	19.5
19	France	124	4,621	347	13.6	395	25,863	2.143	12.9	519	30.485	2.490	13.1	84.8
20	Iran	220	18,966	154	24.7	9	175	-	29.9	229	19.141	154	24.9	0.9
21	Viet Nam	776	8,175	52	18.0	357	11,599	16	18.9	1,133	19.774	68	18.3	58.7
22	Saudi Arabia	143	19,330	14	13.6	22	776	1	18.3	165	20.106	15	14.2	3.9
23	Belgium	95	11,037	9	8.3	146	16,835	14	11.6	241	27.872	22	10.3	60.4
24	Malaysia	202	4,702	42	19.3	165	9,717	4	16.7	367	14.419	46	18.2	67.4
25	Russia	1,273	12,361	141	31.0	112	1,131	13	31.6	1,385	13.492	154	31.1	8.4
26	Netherlands	533	4,610	180	16.0	336	7,157	52	17.0	869	11.767	232	16.4	60.8
27	Thailand	313	4,183	50	28.3	84	3,843	98	16.6	397	8.026	148	25.8	47.9
28	Switzerland	11	731	-	11.0	125	7,279	6	14.8	136	8.011	6	14.5	90.9
29	Oman	3	1	-	12.9	68	8,342	10	15.1	71	8.342	10	15	100.0
30	S.Cyprus	67	1,707	17	16.2	202	6,724	175	16.9	269	8.431	192	16.7	79.8
Total 30 Countries		**18.939**	**497,284**	**7,235**	**18.1**	**28.105**	**1,706,145**	**27,372**	**14.7**	**47.044**	**2,203,429**	**34.607**	**16.1**	**77.4**
Other		**2.532**	**35,750**	**198**	**24.9**	**2.654**	**76,623**	**444**	**23.2**	**5.186**	**112,373**	**642**	**24.0**	**68.2**
Subtotal		**21.471**	**533,034**	**7,433**	**18.9**	**30.759**	**1,782,768**	**27,816**	**15.4**	**52.230**	**2,315,802**	**35.249**	**16.9**	**77.0**
Unknown										**1.702**	**78.587**	**281**	**23.8**	
World Total										**53.932**	**2.394.389**	**35.531**	**17.1**	

Source: ISL January-February 2026

Graph 11. By Country of Domicile as of 1 January 2026 (1000 GT and Over)

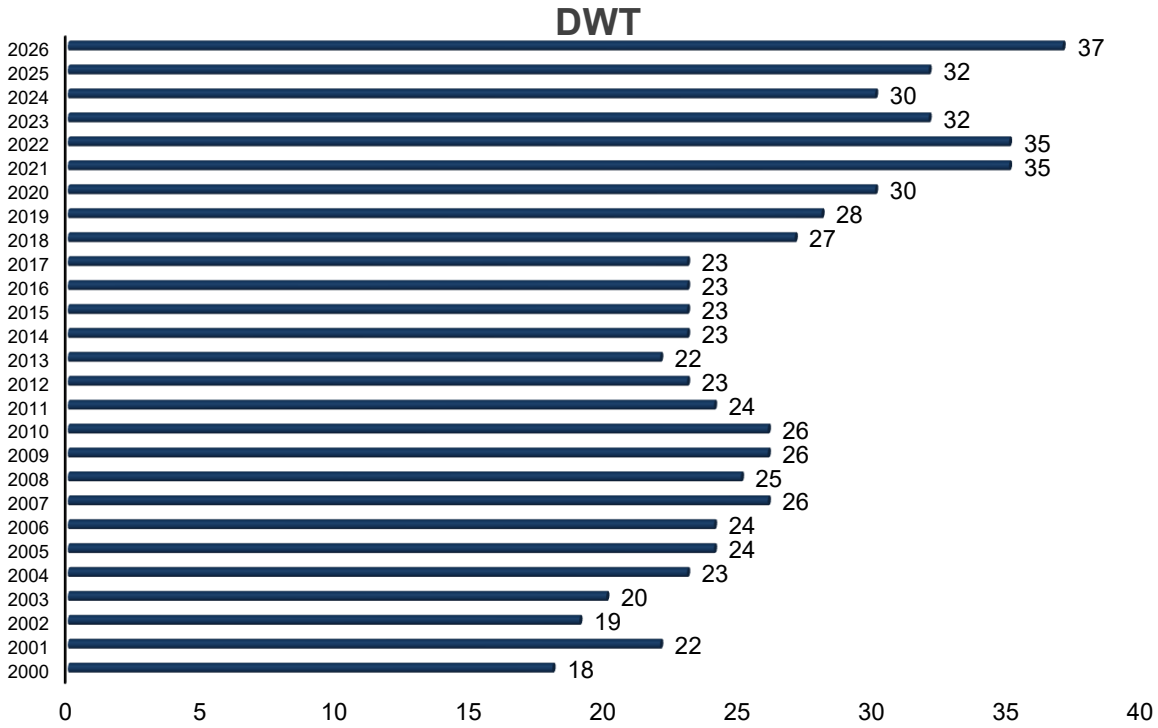


Source: ISL January-February 2026

The World fleet (300 GT and over) consists of 63,020 ships with a total size of 2,404,793.000 DWT based in 158 countries as of 01.01.2026. Turkish merchant fleet is positioned 37th in the world as shown in the Table.

Liberya leads with a share of 18.2%, Panama is second with 14.3% and Marshall Island is third with share of 12.9% of the total registry.

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



Source: ISL January-February 2026

Table 18. World Merchant Fleet Ranking by Flag as of 1 January 2026 (300 GT and Over)

DWT Rank 2026	Flag	1 January 2025				1 January 2026				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	5,263	266,335	415,947	7,491	5,494	285,447	437,780	8,276	18.2	5.2
2	Panama	7,257	239,311	367,125	3,648	7,179	226,230	343,652	3,691	14.3	-6.4
3	Marshall Islands	3,911	181,540	297,511	1,034	4,012	188,817	309,296	962	12.9	4.0
4	Singapore	2,420	102,521	149,398	3,520	2,816	131,205	182,683	5,635	7.6	22.3
5	Hong Kong (SAR)	2,346	131,260	202,143	4,460	2,088	112,231	175,543	3,205	7.3	-13.2
6	China, PR of	7,218	81,243	127,137	1,353	7,769	84,805	132,725	1,409	5.5	4.4
7	Malta	1,830	85,639	111,846	2,795	1,846	87,499	112,987	2,968	4.7	1.0
8	Bahamas	1,022	51,681	55,070	232	1,059	53,636	56,410	276	2.3	2.4
9	Greece	794	32,715	53,329	41	781	31,776	51,577	40	2.1	-3.3
10	Japan	2,785	31,427	42,886	328	2,841	34,031	46,159	388	1.9	7.6
11	Portugal/Madeira	980	25,984	35,627	1,407	1,133	28,180	38,942	1,440	1.6	9.3
12	S.Cyprus	833	22,617	33,518	428	834	23,376	34,253	491	1.4	2.2
13	Indonesia	3,877	20,374	29,305	182	4,211	21,917	31,330	181	1.3	6.9
14	Portugal	465	19,994	28,796	400	453	18,807	28,456	407	1.2	-1.2
15	Denmark	522	22,831	25,735	1,473	512	22,644	25,389	1,469	1.1	-1.3
16	Korea, Rep. of	1,084	17,184	20,929	660	1,092	18,951	23,066	812	1.0	10.2
17	Iran	514	11,794	20,819	156	539	11,406	20,049	158	0.8	-3.7
18	Saudi Arabia	145	9,228	16,972	11	157	10,540	19,387	14	0.8	14.2
19	India	953	10,149	17,058	58	988	10,935	18,282	74	0.8	7.2
20	Norway	961	16,491	18,723	89	925	16,402	18,065	84	0.8	-3.5
21	Russia	1,642	9,418	12,741	152	1,659	12,320	16,760	152	0.7	31.5
22	Barbados	468	10,687	18,375	40	427	8,386	14,466	43	0.6	-21.3
23	Netherlands	736	7,539	8,932	204	786	10,266	14,122	208	0.6	58.1
24	Sierra Leone	516	3,330	5,363	54	566	7,436	12,789	53	0.5	138.4
25	Cameroon	172	2,834	4,895	10	252	7,119	12,680	11	0.5	159.0
26	Belgium	75	3,992	6,411	15	110	6,732	11,657	15	0.5	81.8
27	France	245	10,104	9,982	409	260	11,076	10,544	430	0.4	5.6
28	US	408	8,507	9,281	275	417	8,712	9,510	282	0.4	2.5
29	Gambia	31	679	1,103	1	119	5,113	9,165	2	0.4	731.1
30	Viet Nam	1,385	6,707	11,147	53	1,348	5,546	9,012	53	0.4	-19.1
31	Antigua & Barbuda	641	6,488	9,421	318	693	6,545	8,962	328	0.4	-4.9
32	Comoro Islands	322	2,512	4,099	20	426	5,269	8,912	48	0.4	117.4
33	Germany	205	8,443	8,567	758	194	8,457	8,540	768	0.4	-0.3
34	Palau	440	4,905	7,555	36	429	4,542	7,127	32	0.3	-5.7
35	Bermuda	106	9,942	6,377	48	118	11,202	7,104	48	0.3	11.4
36	Italy	550	11,974	6,693	95	532	12,336	6,598	117	0.3	-1.4
37	Türkiye	659	4,798	6,379	98	676	4,661	6,139	97	0.3	-3.8
38	Bangladesh	489	3,477	5,979	12	492	3,541	6,098	12	0.3	2.0
39	Philippines	1,271	3,809	5,300	53	1,310	4,099	5,838	53	0.2	10.1
40	Guinea Republic	86	2,013	3,530	2	130	3,343	5,836	8	0.2	65.3
158	**Total**	**63,914**	**1,577,233**	**2,329,534**	**33,220**	**66,020**	**1,639,945**	**2,404,793**	**35,543**	**100.0**	**3.2**

Source: ISL January-February 2026

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 50,7 million DWT, Greece to 427,3 million DWT, Russia to 13,5 million DWT and Iran to 19,1 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	781	51,577	2.1	-3.3
12	S. Cyprus	834	34,253	1.4	2.2
17	Iran	539	20,049	0.8	-3.7
21	Russia	1,659	16,760	0.7	31.5
37	Türkiye	676	6,139	0.3	-3.8
60	Egypt	104	1,685	0.1	-2.8
93	Ukraine	78	216	0.0	-9.2
123	Bulgaria	22	68	0.0	-48.1
133	Georgia	6	16	0.0	-
145	Syria	5	6	0.0	-

Source: ISL January-February 2026

CHAPTER II

DEVELOPMENTS IN SEABORNE TRADE

2. DEVELOPMENTS IN SEABORNE TRADE

2.1. Developments in the Transportation of Foreign Trade Cargoes

Global seaborne trade growth is projected to pick up slightly to 1.4% in our base case outlook for 2026, reaching 13.1bn tonnes, with tonne-mile trade growth of 1.5% initially expected. This follows a resilient year for global seaborne trade in 2025, with trade in tonnes growing by an estimated 1.5%, though heavily weighted towards the back half of the year.

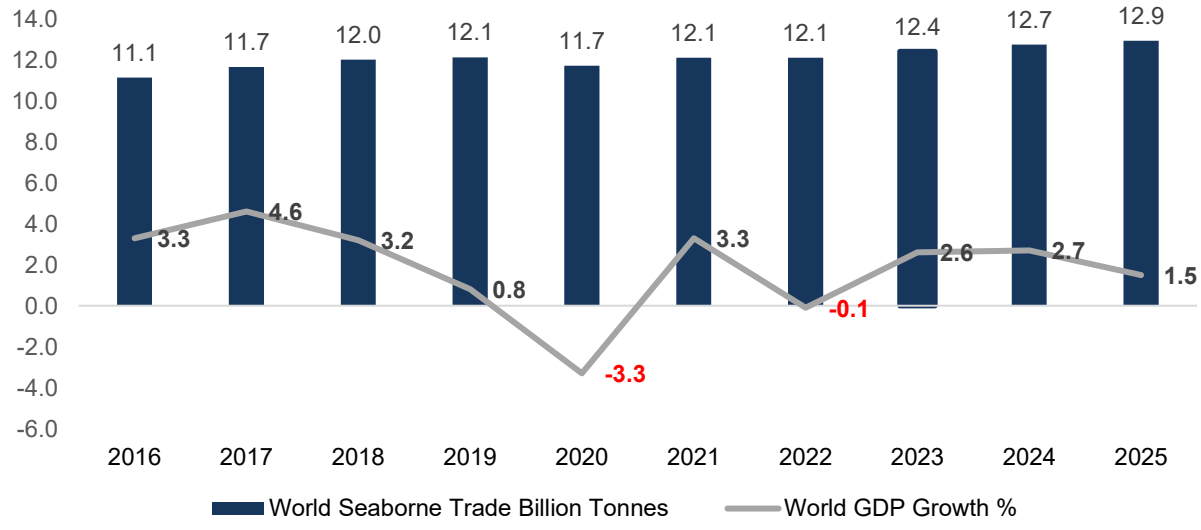
The global macroeconomic backdrop currently appears broadly steady but uncertain in the near-term, with a range of risks in focus (e.g. geopolitical tensions, tariffs), while Red Sea rerouting is also in focus; tonne-mile trade growth is currently projected at 1.5% basis 'unwinding' through 2H 2026. Looking further ahead, seaborne trade volumes are initially projected to grow by 1.7% to 13.3bn tonnes in 2027, with tonne-mile trade growth expected to slow to 1.0%.

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
2016	12.9	11.1	86
2017	13.5	11.7	86
2018	14.0	12.0	86
2019	14.3	12.1	85
2020	13.6	11.7	87
2021	14.2	12.1	86
2022	14.1	12.1	86
2023	14.3	12.4	87
2024	14.7	12.7	87
2025	14.9	12.9	87

Source: World Seaborn Trade February 2026

Graph 13. Global Seaborn Trade Growth



Source: World Seaborn Trade February 2026

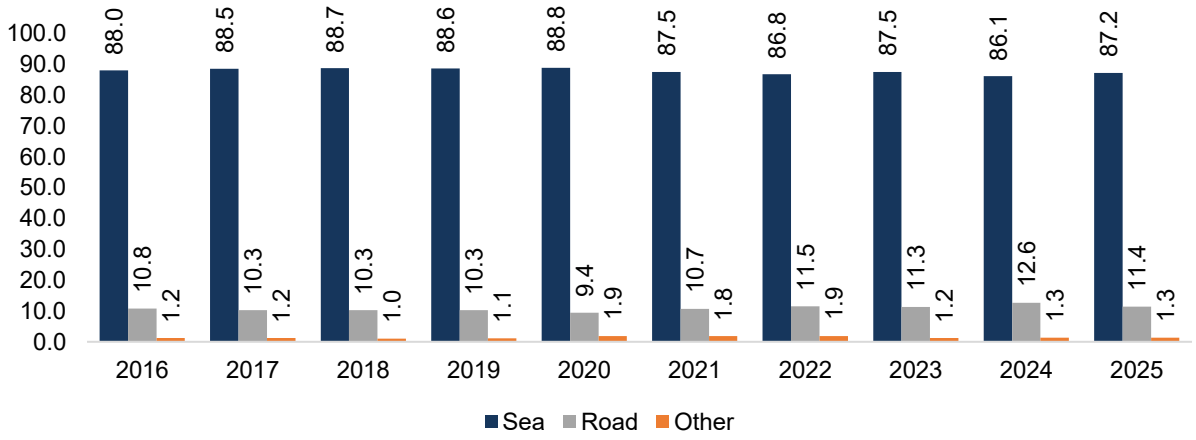
Table 21. Turkish Foreign Trade Transportation by Modes (Tons %)

Year	Sea	Road	Pipeline / Other	Rail	Air
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
2025	87.2	11.4	0.4	0.5	0.4

Source: Turkish Statistical Institute

87.2% of Türkiye's foreign trade is being realised by maritime transportation. The progress between the years of 2016-2025 is shown in the Table below by the modes of transportation.

Graph 14. Foreign Trade Transportation by Modes (Tons %)



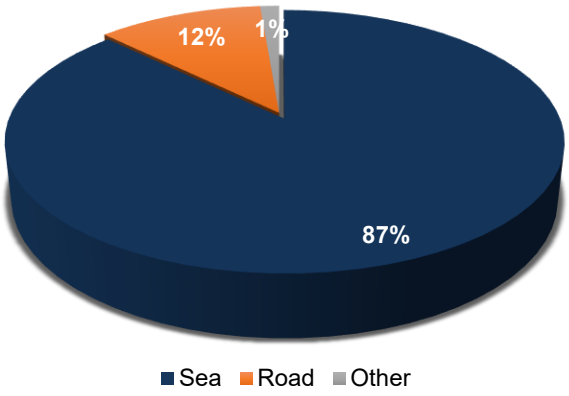
Source: Turkish Statistical Institute

Table 22. Foreign Trade Transportation by Modes Quantity and Value

Modes	Export Quantity %	Import Quantity %	Seaborn Trade Quantity %	Export Value US $ %	Import Value US $ %	Seaborn Trade Value US $ %
Sea	79.7	92.2	87.2	56.3	59.7	58.2
Road	18.4	6.7	11.4	31.9	21.2	26.1
Air	0.9	0.1	0.4	10.3	16.3	13.6
Rail	0.8	0.3	0.5	0.7	1.0	0.9
Pipeline/Other	0.1	0.7	0.4	0.8	1.8	1.3
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

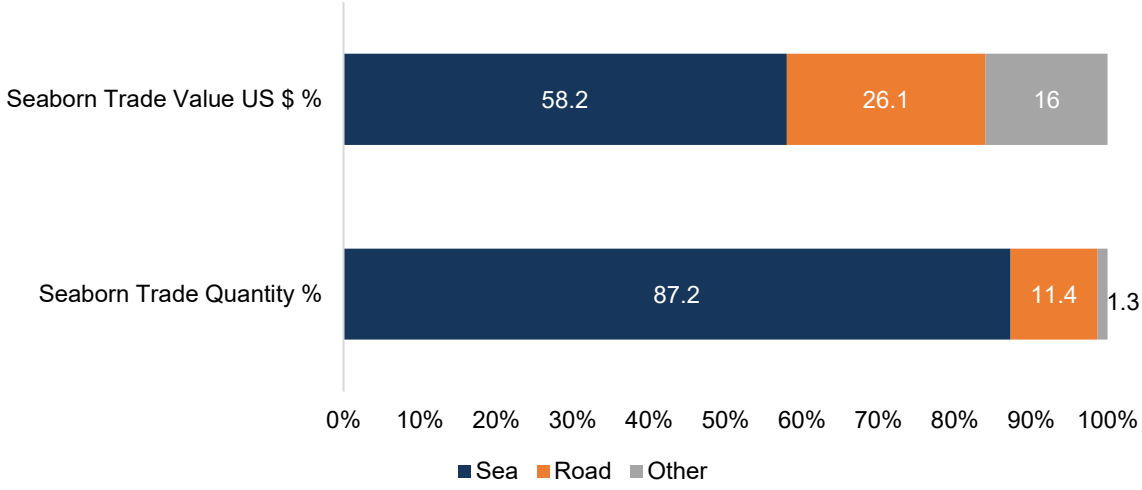
Source: Turkish Statistical Institute

Graph 15. Seaborn Trade Quantity (%)



Source: Turkish Statistical Institute

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



Source: Turkish Statistical Institute

58.2% of the volume of Türkiye's foreign trade transportation has been carried by sea; 26.1% has been carried by road; 0,9% has been carried by rail; 13.6% has been carried by air and 1.3% 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

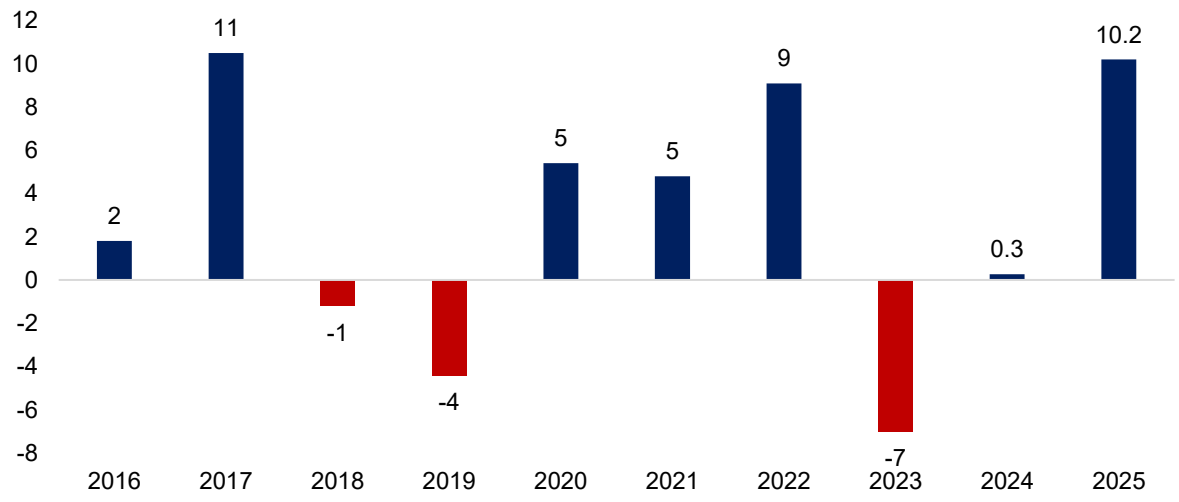
According to the Turkish Maritime Cabotage Law No. 815. the maritime transportation carried out by Turkish ships, being loaded at the harbors and seaports of Türkiye and discharged at the harbors and seaports of Türkiye, is defined as maritime cabotage. The number of cargoes carried bulk and partially between 2016-2025 in Turkish ports and wharves on ton basis is presented in Table 23.

Table 23. 2016-2025 Cabotage Transportation

Years	Cabotage Loading (Ton)	Change %
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	31,721,345	0,3
2025	34,961,329	10,2

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

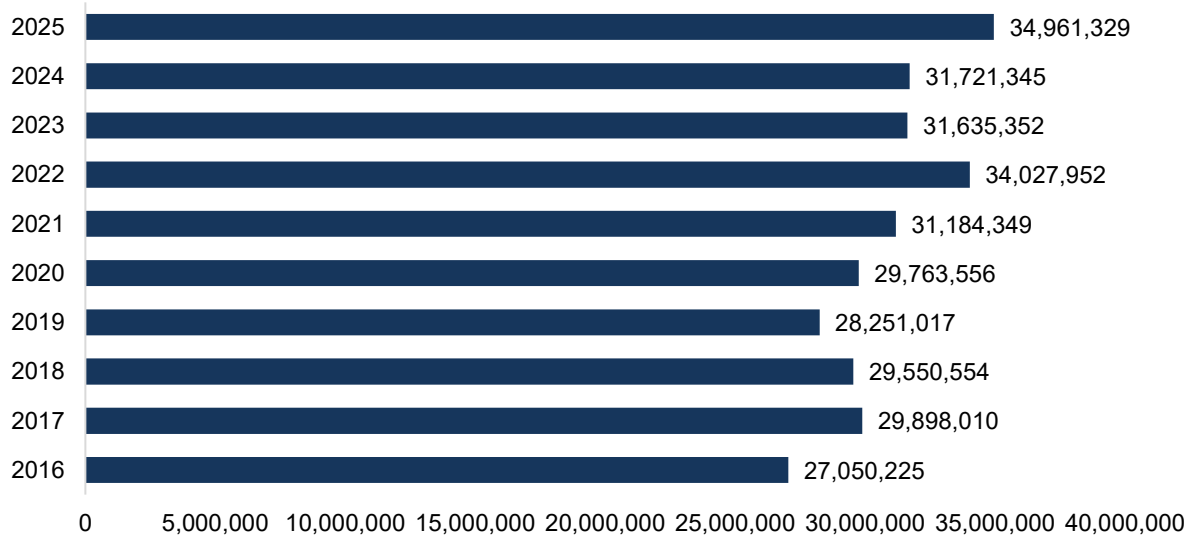
Graph 17. Rate of Change in Cabotage Transportation Between 2016-2025 (%)



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

Total cabotage transportation in 2025 is 34.961.329 tons, and the average of cabotage transportation between 2015 and 2024 is 30,1 million tons.

Graph 18. 2016-2025 Cabotage Transportation (Ton)



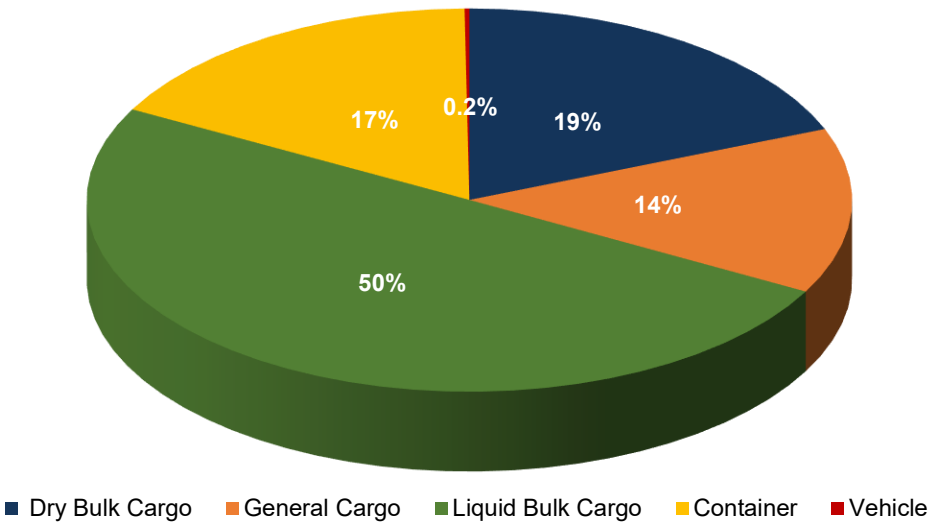
Source: General Directorate for Maritime Affairs - Department of Merchant Trade Development

Table 24. Cabotage Transportation by the Types of Cargoes in 2025 (Tons)

Cargo Type	Cabotage Loading	Cabotage Unloading	Cabotage Handling	%
Dry Bulk Cargo	6,556,231	6,640,853	13,197,084	19
General Cargo	4,812,983	4,720,645	9,533,628	14
Liquid Bulk Cargo	17,522,591	17,279,378	34,801,969	50
Container	6,016,491	6,025,033	12,041,524	17
Vehicle	53,033	51,744	104,777	0,2
Total	34,961,329	34,717,653	69,678,982	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 50%, dry bulk cargo 19%, general cargo 14% and container 17%.

The ports with the largest shares in cabotage handling in 2025 are Aliağa Port 21.2%, Kocaeli Port 16.9% and Tekirdağ Port 11.1%.

Table 25. 2025 Cabotage Transportation in Ports

Harbour Master	Cabotage Loading	Cabotage Unloading	Cabotage Handling
Aliağa	10,654,904	4,141,157	14,796,061
Kocaeli	5,439,387	6,313,190	11,752,577
Tekirdağ	3,128,686	4,576,034	7,704,720
İskenderun	3,135,131	1,884,671	5,019,802
Antalya	805,474	2,723,915	3,529,389
İstanbul	45,481	3,338,818	3,384,299
Ambarlı	703,282	2,156,914	2,860,196
Marmara Adası	2,732,061	2,052	2,734,113
Ceyhan	2,476,167	217,285	2,693,452
Gemlik	1,057,203	1,108,373	2,165,576
Mersin	209,939	1,833,549	2,043,488
Karadeniz Ereğli	156,727	1,541,402	1,698,129
Samsun	490,104	1,022,336	1,512,440
İzmir	482,812	608,299	1,091,111
Karabiga	474,934	585,729	1,060,663
Tuzla	334,321	707,795	1,042,116
Çanakkale	913,776	50,281	964,057
Ünye	577,223	22,308	599,531
Tirebolu	0	555,834	555,834
Rize	0	485,841	485,841
Trabzon	285,327	158,577	443,904
Hopa	338,141	0	338,141
Bandıma	30,912	198,878	229,790
İnebolu	186,224	1,868	188,092
Zonguldak	73,709	112,063	185,772
Giresun	173,445	11,623	185,068
Yalova	4,203	171,894	176,097
Göcek	0	64,667	64,667
Karasu	0	45,036	45,036
Çeşme	408	34,734	35,142
Güllük	29,163	0	29,163
Bartın	19,000	3,999	22,999
Erdek	3,180	17,597	20,777
Marmaris	0	7,471	7,471
Mudanya	0	4,181	4,181
Sürmene	0	3,512	3,512
Enez	0	3,256	3,256
Taşucu	0	2,514	2,514
Dikili	5	0	5
Total	**34,961,329**	**34,717,653**	**69,678,982**

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

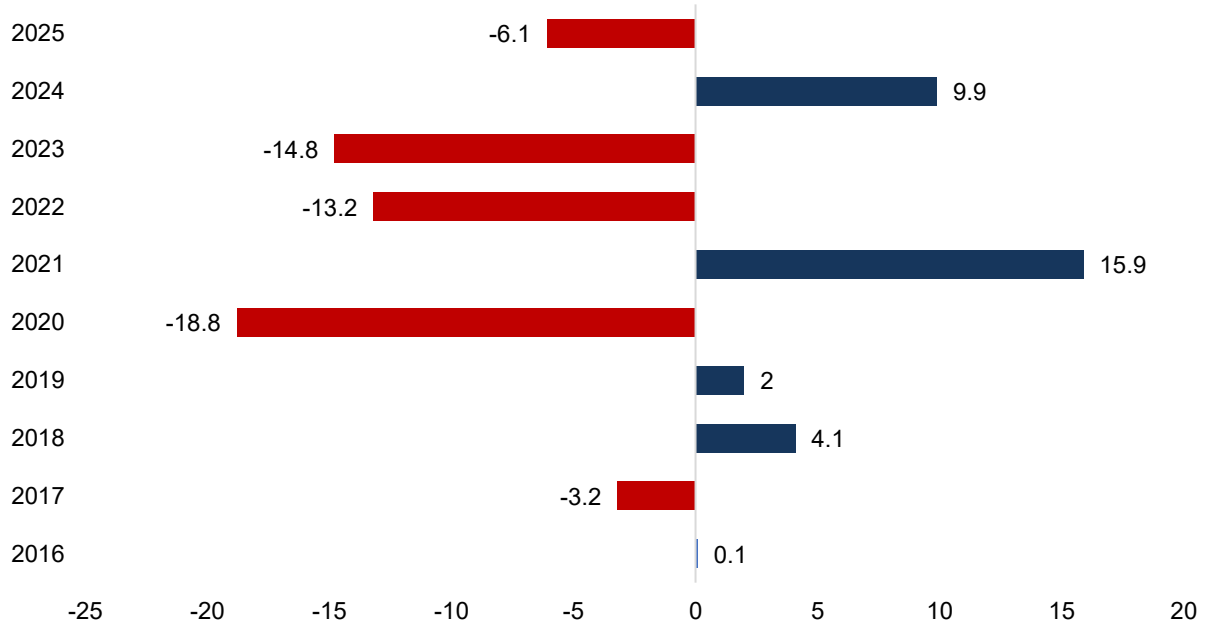
Table 26. Vehicle Transportation in Cabotage Lines, 2016-2025

Year	Vehicle Number	Vehicle Number Change %	Vehicle (NumberxMile)	Vehicle (NumberxMile) Change %
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
2025	9,636,762	-6.1	60,616,990	-16.4

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

In Table 26 the changes in cabotage transportation of vehicles between the years 2016 and 2025 are being shown. Between 2016 and 2025, an average of 11.5 million vehicles were transported in cabotage.

Graph 20. Vehicle Transportation in Cabotage Lines, Annual Change (%), 2014-2025



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

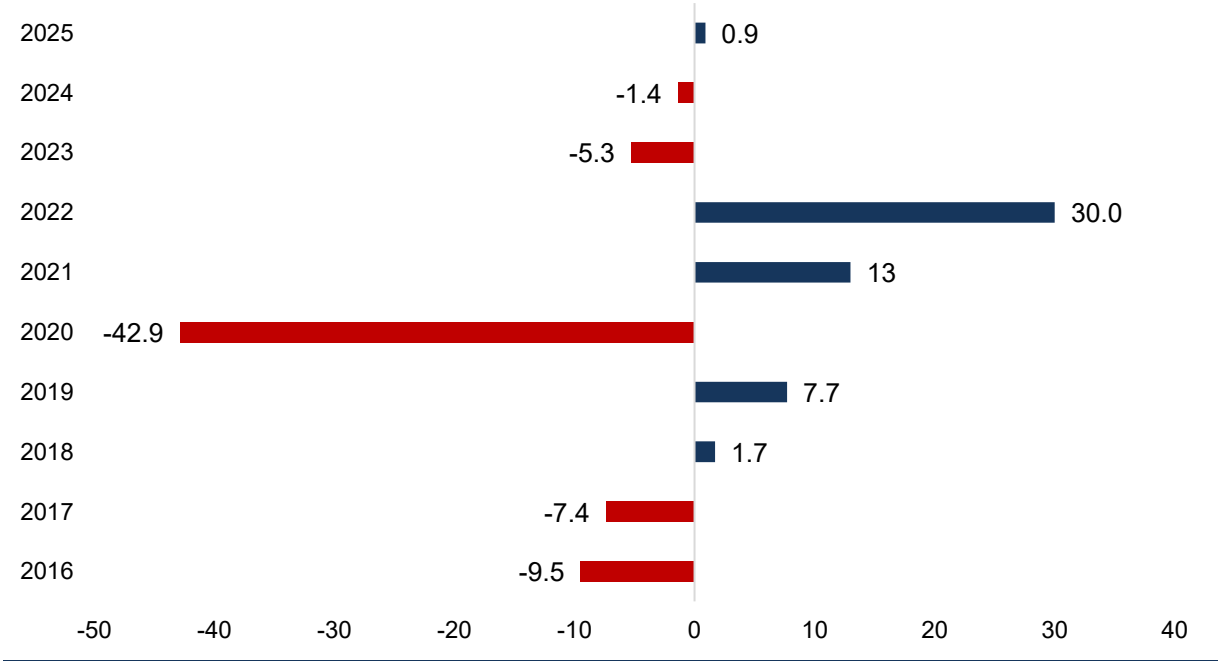
In Table 27 the changes in cabotage transportation of passengers between the years 2016 and 2025 are being shown. Between 2016 and 2025, an average of 124 million passengers were transported by cabotage.

Table 27. Passenger Transportation in Cabotage Lines, 2016-2025

Year	Passenger Number	Annual Change	Passenger (Number x Mile)	Annual Change
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
2025	118,891,577	0.9	934,698,298	-1.2

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

Graph 21. Passenger Transportation in Cabotage Lines, Annual Change (%), 2016-2025



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)

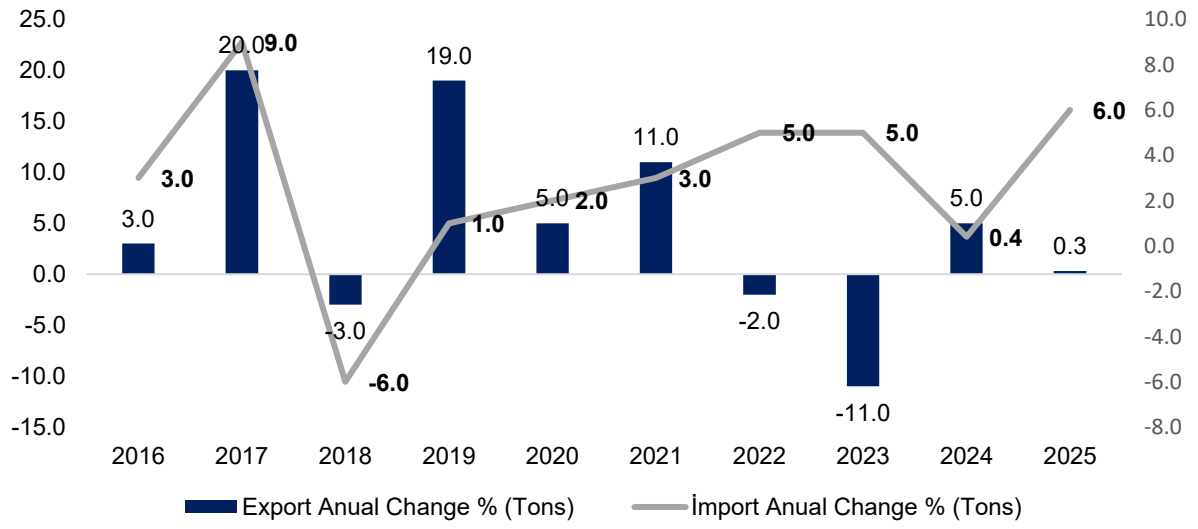
Year	Export	Import	Seaborn Trade Total	Turkish Flag Annual Change (%)	Turkish Flag (%)	Foreign Flag (%)
2016	94,805,120	215,132,519	309,937,639	38,623,279	12	88
2017	113,692,068	233,656,024	347,348,092	36,815,820	11	89
2018	110,424,635	218,544,820	328,969,455	35,510,231	11	89
2019	131,676,578	221,404,812	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
2025	142,769,980	271,659,580	414,429,560	28,831,352	7	93

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 271 million tons in 2025. The share of Turkish flag vessels transporting foreign trade cargoes has been realized as 7% on average.

A comparison between 2016 and 2025 of the transportation of foreign trade cargoes reveals that the total amount increased from 309 million tons in 2016 to 414 million tonnes in 2025. Import goods increased from 215 million tons to 271 million tons, whereas export goods increased from 94 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 2016-2025 has been realized as 9% on the average.

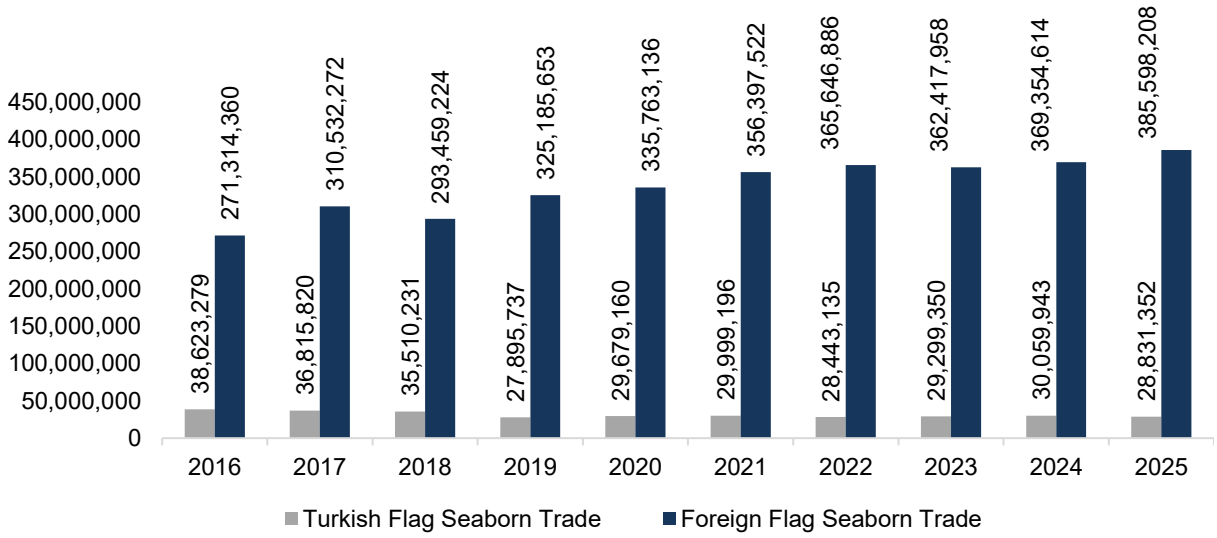
The transportation of foreign trade cargoes by Turkish flag vessels includes 6% of the total of 271 million tonnes imports and 9% of the total of 142 million tonnes exports.

Table 29. Foreign Trade Transportation by Flags (Tons)

Year	Turkish Flag					Foreign Flag				
	Import	%	Export	%	Seaborn Trade	Import	%	Export	%	Seaborn Trade
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
2025	15,450,667	6	13,380,685	9	28,831,352	256,208,913	0,94	129,389,295	91	385,598,208

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 decreased to 13 million tons for exports and decreased to 15 million tons for imports in 2025 when compared to 15 and 23 million tons respectively in 2016.

The share of foreign flag vessels in total foreign trade transportation, increased to 129 million tons for exports and increased to 256 million tons for imports in 2025 when compared with the 79 and 191 million tons in 2016.

2.5. Developments in Foreign Trade Transportation by Types of Cargoes

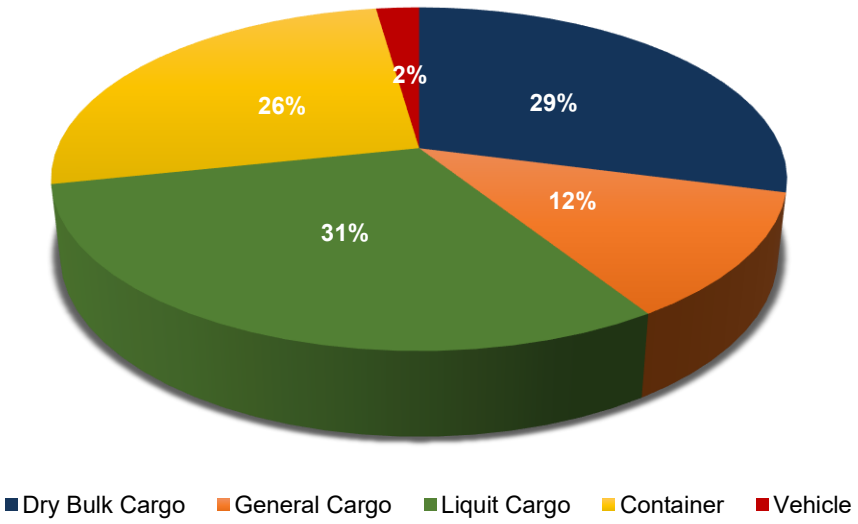
The major shipping segments of the 414 million tons seaborn trade and 69 million tons transit handling goods in 2025, are 29% Dry Bulk Cargo, 31% Liquid Bulk Cargo, 26% Container, 12% General Cargo and 2% Vehicles.

Table 30. Cargo Handling Statistics İn Turkish Ports By Cargo Types, 2025

Cargo Types	Export	Import	Seaborn Trade	Cabotage Handling	Transit Handling	Cargo Handling
Dry Bulk Cargo	44,199,987	103,300,974	147,500,961	13,197,084	240,530	160,938,575
General Cargo	16,849,128	39,344,214	56,193,342	9,533,628	120,617	65,847,587
Liquit Cargo	21,787,818	79,909,828	101,697,646	34,801,969	33,215,094	169,714,709
Container	53,150,669	43,566,354	96,717,023	12,041,524	35,580,980	144,339,527
Vehicle	6,782,378	5,538,210	12,320,588	104,777	135	12,425,500
Total	142,769,980	271,659,580	414,429,560	69,678,982	69,157,356	553,265,898

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

Graph 24. Cargo Handling Export and Import in Turkish Ports By Cargo Types, 2025



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

2.6. The Progress in Seaborne Trade by Country Groups

In 2025, 62 million tons of exports and 73 million tons of imports, totally transit (loading-unloading) 35 million tons of transportation have been realized to the OECD countries. Table 31 shows the export and import values to the OECD countries.

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

OECD Country	Export	Import	Foreign Trade	Transit Handling	Cargo Handling
Italy	17,276,832	8,341,684	25,618,516	21,817,246	47,435,762
U.S.	13,518,965	21,729,680	35,248,645	1,872,173	37,120,818
Greece	7,228,329	8,085,781	15,314,110	6,028,286	21,342,396
Belgium	5,495,496	4,916,737	10,412,233	950,953	11,363,186
Netherlands	3,538,934	4,709,011	8,247,945	546,474	8,794,419
United Kingdom	4,130,354	3,021,427	7,151,781	732,636	7,884,417
France	3,320,005	2,795,371	6,115,376	575,334	6,690,710
Korea, South	355,176	4,449,888	4,805,064	969,484	5,774,548
Colombia	174,638	4,161,993	4,336,631	44	4,336,675
Portugal	2,017,561	552,420	2,569,981	991,232	3,561,213
Germany	832,128	1,819,025	2,651,153	271,034	2,922,187
Australia	46,337	1,957,494	2,003,831	9,382	2,013,213
Norway	204,626	1,551,198	1,755,824	3,683	1,759,507
Canada	761,764	605,736	1,367,500	64,911	1,432,411
Denmark	154,377	993,578	1,147,955	90,736	1,238,691
Lithuania	150,945	910,044	1,060,989	19,748	1,080,737
Poland	463,841	586,155	1,049,996	17,879	1,067,875
Israel	633,132	316,815	949,947	71,256	1,021,203
Slovenya	811,294	124,390	935,684	53,001	988,685
Ireland	257,608	50,878	308,486	630,136	938,622
Sweden	153,916	594,519	748,435	0	748,435
Finland	64,397	617,432	681,829	1,966	683,795
Latvia	84,674	421,982	506,656	13,772	520,428
Japan	242,031	233,844	475,875	246	476,121
Estonia	117,644	337,480	455,124	632	455,756
Mexico	91,138	82,231	173,369	22	173,391
Chile	155,324	472	155,796	31	155,827
Iceland	119,580	0	119,580	0	119,580
Austria	88,500	0	88,500	0	88,500
Costa Rica	22,288	636	22,924	0	22,924
New Zealand	2,845	0	2,845	139	2,984
Total	**62,514,679**	**73,967,901**	**136,482,580**	**35,732,436**	**172,215,016**

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

In 2025, the seaborne trade volume between Türkiye and the OECD countries was 172 million metric tons of which 136 million metric tons were import-exports while 35 million metric tons were transit cargoes.

In the year 2025, 62 million tons of exports and 47 million tons of imports or totally 109 million tons of seaborne transportation have been realized to the EU countries.

Table 32. Seaborne Export/Import and Transit Handling of Türkiye and EU Countries (Tons)

EU Country	Export	Import	Foreign Trade	Transit Handling	Cargo Handling
Italy	17,276,832	8,341,684	25,618,516	21,817,246	47,435,762
Greece	7,228,329	8,085,781	15,314,110	6,028,286	21,342,396
Spain	9,097,050	4,178,068	13,275,118	1,464,941	14,740,059
Romania	5,866,104	3,384,874	9,250,978	3,537,426	12,788,404
Belgium	5,495,496	4,916,737	10,412,233	950,953	11,363,186
Netherlands	3,538,934	4,709,011	8,247,945	546,474	8,794,419
Bulgaria	2,071,688	2,053,743	4,125,431	2,926,878	7,052,309
France	3,320,005	2,795,371	6,115,376	575,334	6,690,710
Malta	2,584,392	1,755,498	4,339,890	274,333	4,614,223
Portugal	2,017,561	552,420	2,569,981	991,232	3,561,213
Germany	832,128	1,819,025	2,651,153	271,034	2,922,187
Croatia	429,212	357,076	786,288	1,058,699	1,844,987
Denmark	154,377	993,578	1,147,955	90,736	1,238,691
Lithuania	150,945	910,044	1,060,989	19,748	1,080,737
Poland	463,841	586,155	1,049,996	17,879	1,067,875
Slovenia	811,294	124,390	935,684	53,001	988,685
Ireland	257,608	50,878	308,486	630,136	938,622
Sweden	153,916	594,519	748,435	0	748,435
Finland	64,397	617,432	681,829	1,966	683,795
Latvia	84,674	421,982	506,656	13,772	520,428
Estonia	117,644	337,480	455,124	632	455,756
Austria	88,500	0	88,500	0	88,500
Total	**62,104,927**	**47,585,746**	**109,690,673**	**41,270,706**	**150,961,379**

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

In 2025, 24 million tons of exports and 124 million tons of imports, totally 149 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	3,660,168	101,562,166	105,222,334	2,678,562	107,900,896
Greece	7,228,329	8,085,781	15,314,110	6,028,286	21,342,396
Romania	5,866,104	3,384,874	9,250,978	3,537,426	12,788,404
Ukraine	2,618,672	7,224,524	9,843,196	1,203,018	11,046,214
Bulgaria	2,071,688	2,053,743	4,125,431	2,926,878	7,052,309
Georgia	1,206,956	1,616,345	2,823,301	3,387,137	6,210,438
Albania	1,864,291	68,708	1,932,999	10,967	1,943,966
Moldova	225,518	490,480	715,998	0	715,998
Azerbaijan	135,500	0	135,500	142,182	277,682
Serbia	51,000	0	51,000	0	51,000
Total	**24,928,226**	**124,486,621**	**149,414,847**	**19,914,456**	**169,329,303**

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 2025, 30.838.000 TEU of the container capacity was not registered in the country of domicile of the owner but flagged out.

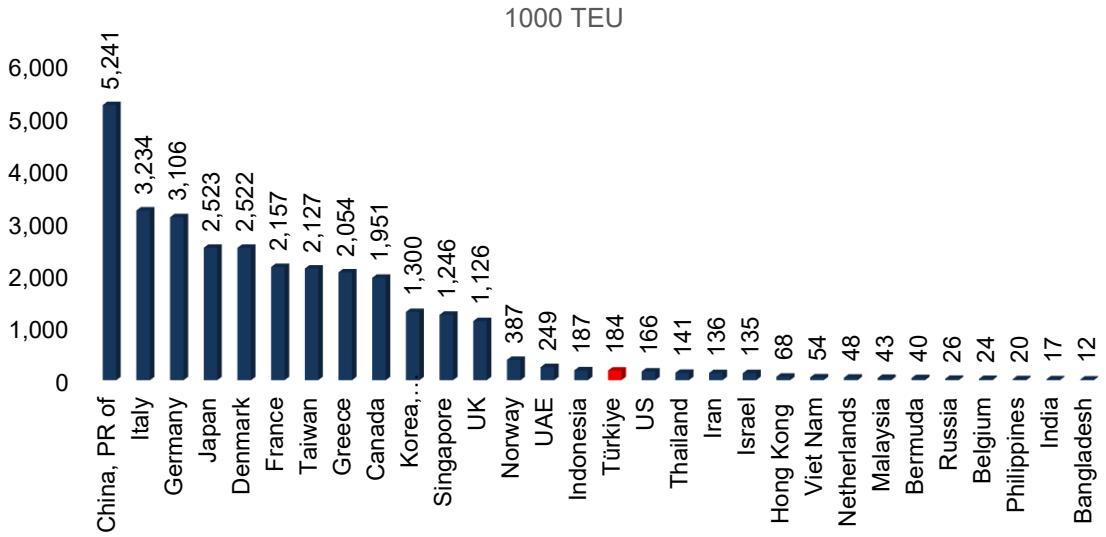
Table 34. World Full Container Fleet by Country of Domicile (1000 GT and over) 2025

TEU-rank	Country	No	1000 DWT	1000 TEU	Av. Age	Foreign Flag %	TEU Annual Change %
1	China, PR of	1,410	62,342	5.241	10.6	78.8	14.0
2	Italy	560	39,148	3.234	18.3	99.5	17.9
3	Germany	760	36,998	3.106	15.1	77.3	-0.6
4	Japan	398	28,338	2.523	8.6	87.5	5.3
5	Denmark	343	29,253	2.522	15.0	46.5	2.8
6	France	299	24,896	2.157	11.7	85.0	21.2
7	Taiwan	393	24,488	2.127	9.6	89.4	16.8
8	Greece	461	24,782	2.054	14.9	98.2	13.2
9	Canada	196	21,822	1.951	8.7	99.9	27.7
10	Korea, Rep. of	252	14,458	1.300	10.6	50.6	25.7
11	Singapore	271	14,447	1.246	12.0	64.3	8.9
12	UK	173	13,445	1.126	15.3	84.6	0.2
13	Norway	62	4,591	387	13.3	100.0	9.4
14	UAE	123	3,266	249	19.4	97.6	12.1
15	Indonesia	235	2,709	187	10.1	37.4	3.2
16	**Türkiye**	**121**	**2,436**	**184**	**20.5**	**70.1**	**5.0**
17	US	81	2,319	166	17.7	62.7	-4.5
18	Thailand	51	1,723	141	15.1	67.5	45.1
19	Iran	27	1,616	136	15.5	-	-
20	Israel	36	1,688	135	12.3	96.4	3.7
21	Hong Kong	25	814	68	19.8	86.3	-13.5
22	Viet Nam	54	740	54	19.3	21.3	19,2
23	Netherlands	46	606	48	17.4	53.7	-
24	Malaysia	46	614	43	17.6	6.2	37.3
25	Bermuda	4	467	40	8.6	100.0	-
26	Russia	29	335	26	20.6	30.9	-16.6
27	Belgium	8	309	24	11.3	69.4	-24.2
28	Philippines	41	267	20	27.5	2.7	8.9
29	India	9	229	17	21.0	23.3	-
30	Bangladesh	11	190	12	23.0	-	-
Total 30 Countries		6.525	359,337	30,525	13,5	80.5	11.5
Other		219	4,064	314	23,6	60.3	-53.7
WORLD TOTAL		**6.744**	**363,401**	**30,838**	**13,8**		**10.8**

Source: ISL 2025

With respect to the owner countries. Chine shipowners’ control by far the largest part of the world container fleet, namely 5,2 million TEU (1.410 container vessels) followed by Italy 3,2 million TEU (560 container vessels) and Germany 3,1 million TEU (760 container vessels).

Graph 25. World Full Container Fleet by Country of Domicile (1000 GT and over) 2025



Source: ISL 2025

TEU based container transportations in 2025 realized as follows in their respective subgroups; exports became 5.1 million TEU, imports 5.2 million TEU, cabotage handling 949,360 TEU and transit handling 2.7 million TEU.

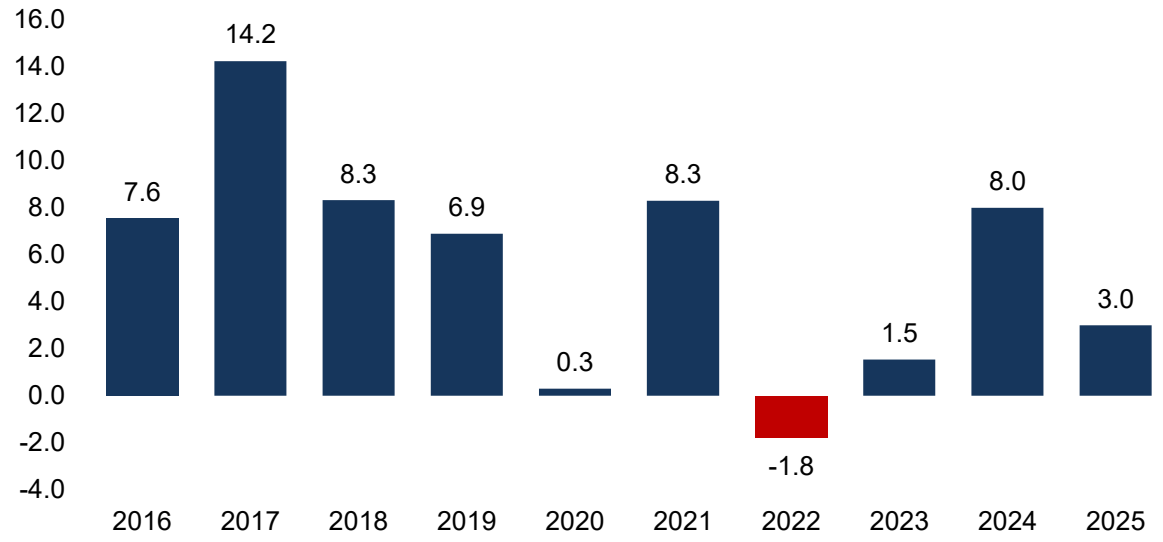
Transportation volume of Türkiye's container transports by seaway was 8.7 million TEU in 2016; in 2025 it became 13.9 million TEU, at the same period imports cargoes increased to 3.6 million TEU from 5.2 million TEU and the exports cargoes increased to 3.5 million TEU when compared with 5.1 million TEU in 2016.

Table 35. Container Handling Statistics At Turkish Ports 2016-2025 (TEU)

Years	Export	Import	Seaborn Trade	Cabotage Handling	Transit Handling	Total Handling	Change %
2016	3,543,804	3,607,086	7,150,890	738,312	872,772	8,761,974	8
2017	3,866,874	3,975,205	7,842,079	935,521	1,232,937	10,010,537	14
2018	4,160,124	4,259,029	8,419,153	935,661	1,489,184	10,843,998	8
2019	4,594,647	4,540,201	9,134,849	753,267	1,703,722	11,591,838	7
2020	4,618,225	4,480,472	9,098,697	731,352	1,796,601	11,626,650	0
2021	4,677,414	4,744,227	9,421,640	831,987	2,337,843	12,591,470	8
2022	4,694,918	4,814,757	9,509,675	820,949	2,035,758	12,366,382	-2
2023	4,910,525	4,830,826	9,741,352	759,611	2,055,439	12,556,402	2
2024	4,987,903	4,875,265	9,863,168	903,194	2,763,368	13,529,729	8
2025	5,136,656	5,192,863	10,329,519	949,360	2,717,699	13,996,578	3

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

Graph 26. Yearly Change of Container Handling 2016-2025 (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	1,099,361	1,208,803	2,308,164	117,814	1,002,071	3,428,048
Kocaeli	1,123,112	1,077,707	2,200,819	84,854	220,005	2,505,678
Tekirdağ	307,008	327,407	634,415	304,912	1,199,000	2,138,327
Mersin	952,323	972,515	1,924,837	31,495	14,358	1,970,690
Aliağa	792,620	669,035	1,461,655	83,452	156,167	1,701,274
Gemlik	352,089	336,410	688,499	116,237	104,788	909,524
İskenderun	409,881	410,241	820,122	29,821	19,584	869,527
İzmir	57,233	123,470	180,703	53,132	424	234,259
Antalya	5,414	12,022	17,436	67,415	0	84,851
Samsun	25,622	32,020	57,642	19,147	0	76,789
Trabzon	864	3,258	4,122	20,445	0	24,567
Giresun	0	9,445	9,445	13,497	0	22,942
Ceyhan	9,276	8,170	17,446	796	96	18,338
İstanbul	1,717	1,353	3,070	2,142	1,207	6,419
Zonguldak	0	448	448	2,386	0	2,834
Karabiga	0	0	0	1,673	0	1,673
Taşucu	0	559	559	0	0	559
Marmara Adası	0	0	0	132	0	132
Tuzla	130	0	130	0	0	130
Karasu	6	0	6	0	0	6
Bandırma	0	0	0	5	0	5
Mudanya	0	0	0	5	0	5
Marmaris	1	0	1	0	0	1
Total	**5,136,656**	**5,192,863**	**10,329,519**	**949,360**	**2,717,699**	**13,996,578**

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

Table 37. Container Handling in Turkish Ports by Country Basis, 2025

Country	Export	Import	Seaborn Trade	Transit Handling	Total Handling
Egypt	880,019	810,861	1,690,880	142,846	1,833,725
China	520,789	437,552	958,341	345,374	1,303,715
Greece	336,547	638,766	975,312	168,338	1,143,650
Italy	360,415	229,107	589,522	89,193	678,715
America	211,123	318,044	529,167	117,064	646,231
Georgia	39,339	271,612	310,951	304,837	615,787
Belgium	320,944	228,969	549,913	61,194	611,107
Spain	280,275	221,762	502,037	86,725	588,762
Russian Federation	182,716	203,960	386,676	189,281	575,957
Singapore	231,392	140,552	371,944	106,710	478,654
Morocco	303,451	103,057	406,508	56,120	462,628
Romania	26,006	146,788	172,794	203,191	375,985
United Kingdom	272,382	61,719	334,100	24,023	358,123
Saudi Arabia	165,370	82,699	248,069	86,454	334,523
Libya	122,821	175,175	297,996	30,999	328,994
Malta	117,002	150,811	267,813	8,272	276,085
Bulgaria	31,560	55,646	87,205	176,479	263,684
Korea, South	43,339	116,720	160,059	68,653	228,712
India	41,954	46,187	88,141	120,199	208,340
Algeria	40,049	116,156	156,205	51,922	208,127
Other	609,166	636,721	1,245,887	279,828	1,525,715
Total	**5,136,656**	**5,192,863**	**10,329,519**	**2,717,699**	**13,047,218**

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

As of 2025, the countries which Türkiye performed foreign trade with / conducted transit container transportation are as follows: China, Georgia and Romania. The data of the foreign trade/transit container transportation of top 19 countries are shown in the Table 37.

2.8. Vehicle Transportation Through Ro-Ro Lines

Table 38 shows below the amounts of vehicles transported (export and import) in the years 2025.

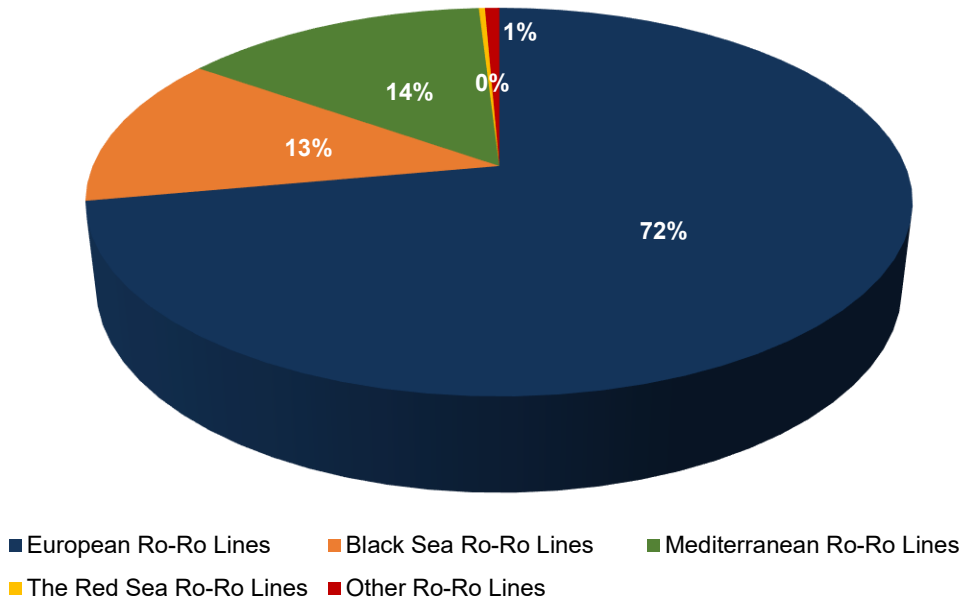
- In the 24 European lines 522.717 vehicles have been transported in 2025.
- In the 7 Black Sea lines 91.588 vehicles have been transported in 2025.
- In the 6 Mediterranean lines 103.494 vehicles have been transported in 2025.
- In the 3 The Red Sea lines 2.074 vehicles have been transported in 2025.
- Other lines 4.853 vehicles have been transported in 2025.

Table 38. Vehicle Transportation Through Regular İnternational Ro-Ro Lines, 2025

Region	Lines	Incoming Vehicle	Outbond Vehicle	Total Transported Vehicle
Europe	Tuzla (Pendik) - Trieste	90,505	76,845	167.350
	Yalova - Sete	68,411	57,264	125.675
	Çeşme - Trieste	33,088	33,603	66.691
	Mersin - Trieste	26,599	24,639	51.238
	Gemlik - Trieste	20,706	28,310	49.016
	Ambarlı - Trieste	10,497	15,812	26.309
	Tuzla (Pendik) - Bari	3,584	6,334	9.918
	Tekirdağ - Sete	0	5,204	5.204
	Tuzla (Pendik) - Patras	2,846	1,937	4.783
	İzmir - Sete	11	3,195	3.206
	Tekirdağ - Trieste	0	3,182	3.182
	Gemlik - Patras	1,726	600	2.326
	Kocaeli - Koper	25	1,472	1.497
	Çeşme - Chios	229	1,111	1.340
	Ambarlı - Patras	1,168	113	1.281
	Kocaeli - Valencia	1,111	0	1.111
	Gemlik - Marseille	0	912	912
	İstanbul - Marseille	0	484	484
	Kocaeli - Barcelona	3	307	310
	Gemlik - Vasto	230	0	230
	Kocaeli - Antwerpen	207	21	228
	Gemlik - Valencia	0	204	204
	Kocaeli - Piraeus	9	107	116
	Gemlik - Molfalcone	0	106	106
	Total European Ro-Ro Lines	**260,955**	**261,762**	**522.717**
Black Sea	Samsun - Tuapse	19,228	18,516	37.744
	Karasu-Tuapse	9,835	10,637	20.472
	Samsun - Novorossiysk	6,759	7,241	14.000
	İstanbul - Tuapse	3,778	5,192	8.970
	Karasu - Constanta	4,065	4,242	8.307
	Karasu - Chornomorsk	803	998	1.801
	İstanbul - Novorossiysk	246	48	294
	Total Black Sea Ro-Ro Lines	**44,714**	**46,874**	**91.588**
Mediterranean	Mersin - Gazimağusa	27,201	28,667	55.868
	Taşucu - Kyrenia	15,128	17,809	32.937
	Taşucu - Tripoli	5,089	5,025	10.114
	Mersin - Kyrenia	1,981	885	2.866
	Taşucu - Gazimağusa	1,482	36	1.518
	İskenderun- El Arish	66	125	191
	Total Mediterranean Ro-Ro Lines	**50,947**	**52,547**	**103.494**
The Red Sea	İskenderun - Aqaba	123	1,324	1.447
	Mersin - Aqaba	0	355	355
	İstanbul - Jeddah	3	269	272
	Total The Red Sea Ro-Ro Lines	**126**	**1,948**	**2.074**
Other Ro-Ro Lines		**3.181**	**1,672**	**4,853**
Total		**359.923**	**364,803**	**724,726**

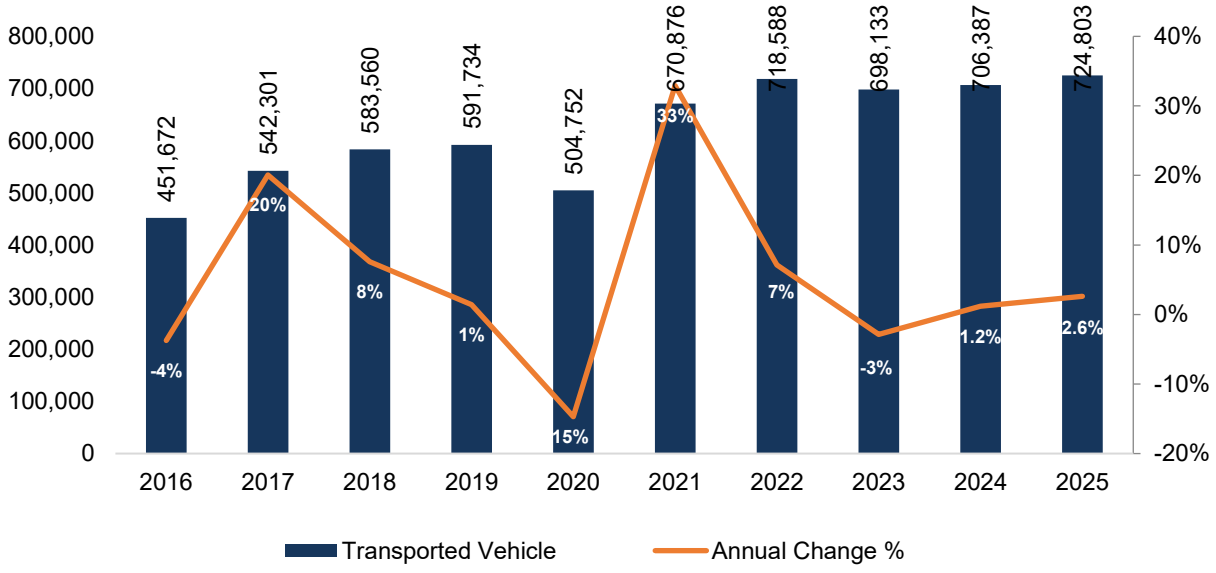
Source: General Directorate for Maritime Affairs - Department of Merchant Trade Development

Graph 27. Ro-Ro Lines Transported Vehicles (2025)



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

Graph 28. Ro-Ro Lines Transported Vehicles Number and Annual Change 2016-2025



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. Characteristics of The Straits / Navigational Risks

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 2016-2025 are shown in Table below.

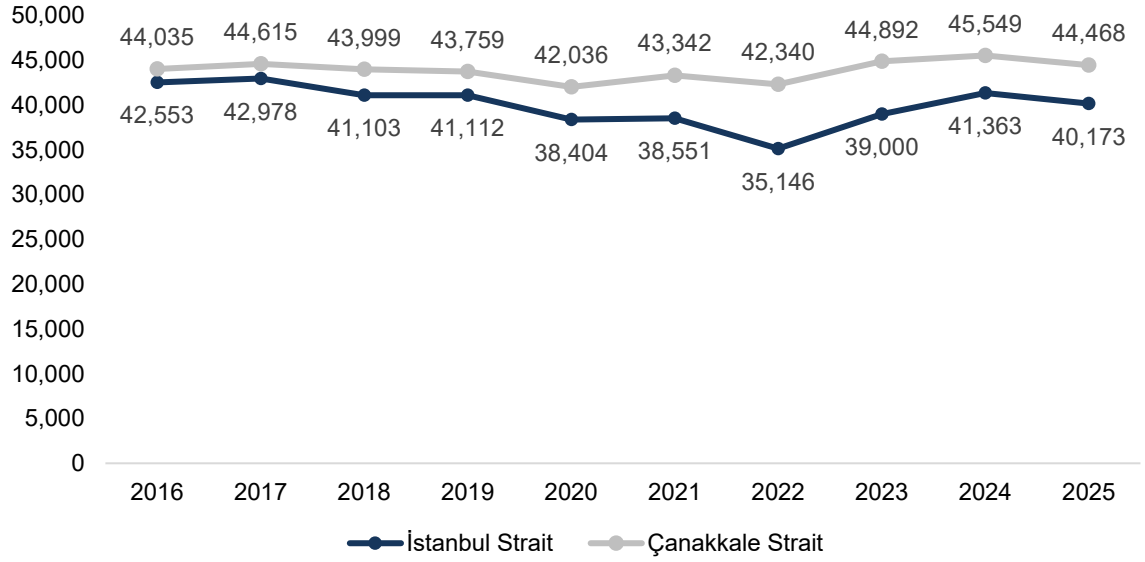
Table 39. Vessels Passing Through the Turkish Straits (2016-2025)

Years	Istanbul			Canakkale		
	Number Of Vessels	GT	Number Of Vessels Change	Number Of Vessels	GT	Number Of Vessels Change
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%
2025	40,173	619,298,004	-2.9%	44,468	966,023,610	-2.4%

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

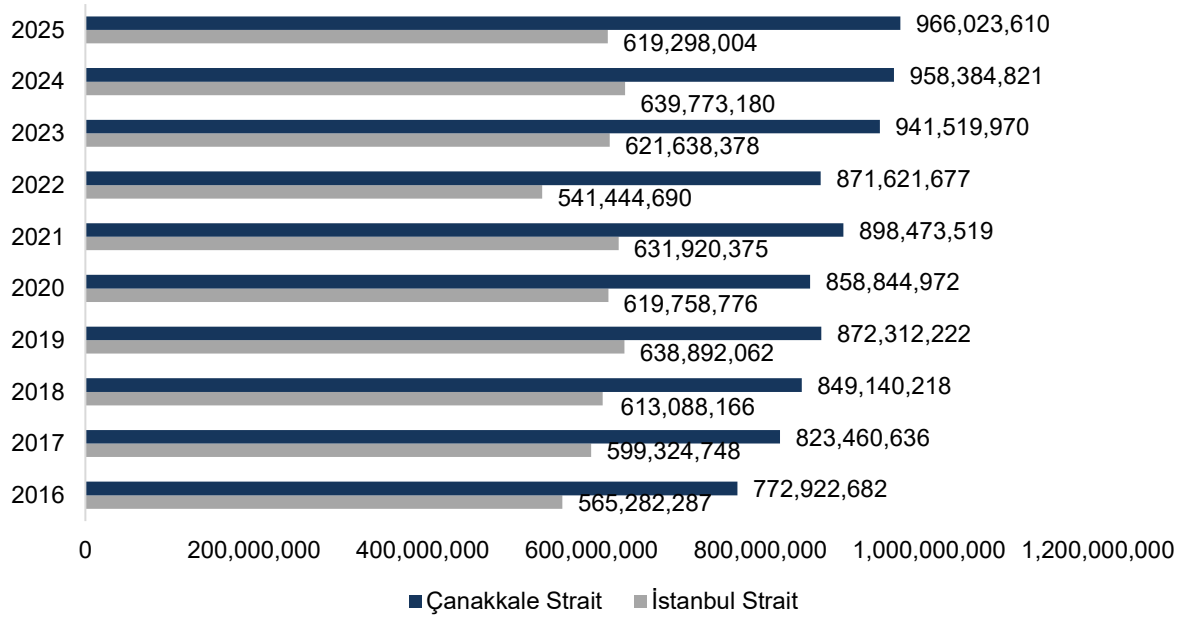
In the year 2025, 40,173 ships in total have passed through the İstanbul Strait with a monthly average of 3,347 ships; 44,468 ships in total have passed through the Çanakkale Strait with a monthly average of 3,705 ships.

Graph 29. Number of Vessels Passing Through The Turkish Straits (2016-2025) (Tons)



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

Graph 30. 2016-2025 Vessels Passing Through The Turkish Straits GT



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

Table 40. 2020-2025 Statistics of Vessels Passed Istanbul Strait According To Their Ship Type

Ship Types	2020	2021	2022	2023	2024	2025	Annual Share
General Cargo Ship	16,864	16,891	15,371	15,421	15,490	14,724	36.7%
Bulk Carrier	8,592	8,684	7,076	8,285	8,777	7,493	18.7%
Other Tanker, TTA	5,252	5,085	5,447	6,174	6,233	6,314	15.7%
Container Ship	2,633	2,735	2,426	3,376	3,533	3,991	9.9%
Chemical Tanker, TCH	2,653	2,701	2,782	2,671	2,910	2,504	6.2%
Passenger Ship	74	217	85	407	756	751	1.9%
Barge / Barge Carrier	15	13	34	278	731	1,187	3.0%
Roll on Roll of Vessel	222	268	274	462	526	361	0.9%
LPG	530	462	424	442	526	736	1.8%
Livestock Carrier	555	566	491	476	468	486	1.2%
Tug	175	214	234	314	300	273	0.7%
Vehicle Carrier	87	18	67	28	87	98	0.2%
Cement Carrier	18	46	38	49	45	39	0.1%
Ferry	1	2	1	0	44	0	0.0%
Naval	205	190	30	33	32	27	0.1%
Refrigerated Cargo Carrier	52	48	15	41	7	2	0.0%
Other	476	411	351	543	898	1,186	3.0%
Total	**38,404**	**38,551**	**35,146**	**39,000**	**41,363**	**40,172**	**100.0%**

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

Table 41. 2020-2025 Statistics of Vessels Passed Çanakkale Strait According To Their Ship Type

Ship Types	2020	2021	2022	2023	2024	2025	Annual Share
General Cargo Ship	14,197	14,713	13,880	14,073	14,337	13,870	31.2%
Bulk Carrier	9,170	9,349	8,049	8,833	9,619	8,066	18.1%
Container Ship	5,219	5,502	5,767	6,604	6,497	6,668	15.0%
Other Tanker, TTA	5,644	5,196	5,874	6,292	6,315	6,555	14.7%
Chemical Tanker, TCH	3,057	3,385	3,414	3,386	3,500	3,181	7.2%
Roll on Roll of Vessel	1,649	1,974	2,140	2,501	2,423	2,582	5.8%
LPG	542	498	477	512	531	665	1.5%
Livestock Carrier	593	607	521	519	515	518	1.2%
Vehicle Carrier	498	448	443	369	461	493	1.1%
Passenger Ship	26	43	489	546	432	559	1.3%
Tug	306	341	337	338	323	363	0.8%
Cement Carrier	17	45	47	49	109	118	0.3%
LNG	129	129	139	113	104	144	0.3%
Barge / Barge Carrier	109	179	60	50	66	63	0.1%
Naval	211	206	34	46	42	54	0.1%
Ferry	26	29	9	14	14	15	0.0%
Refrigerated Cargo Carrier	76	71	32	42	14	11	0.0%
Other	567	627	628	605	547	543	1.2%
Total	**42,036**	**43,342**	**42,340**	**44,892**	**45,849**	**44,468**	**100.0%**

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

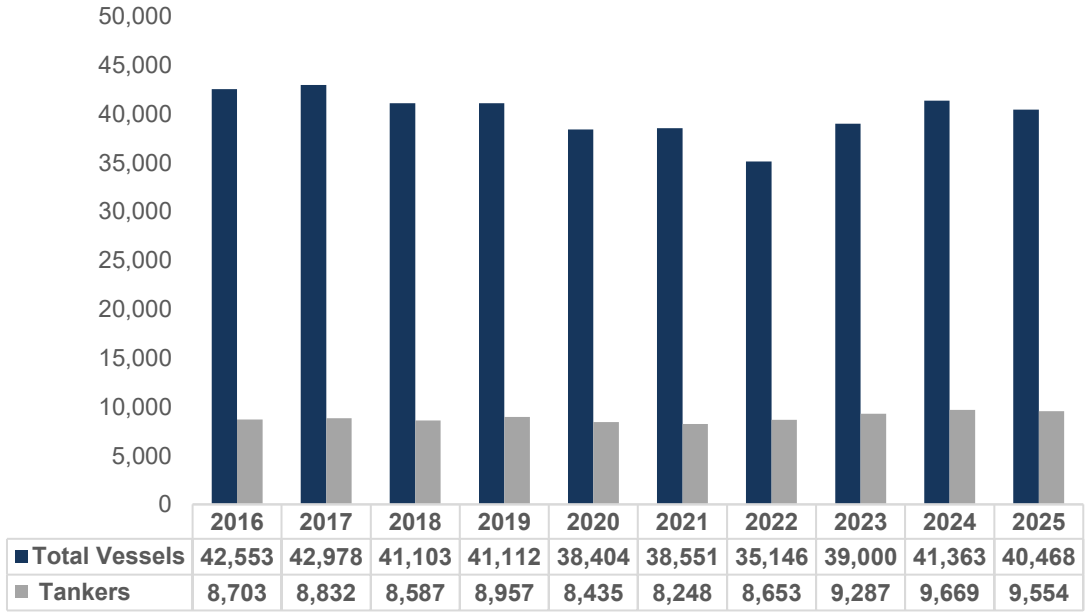
The statistics of ships passing through Istanbul and Çanakkale Straits, according to length, piloting and on country basis are shown in the following tables.

Table 42. 2016-2025 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	
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
2025	44,468	966,023,610	23,971	23,661	8,038	708	6,555	809	3,181	102

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

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



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

Table 43. 2016-2025 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	
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
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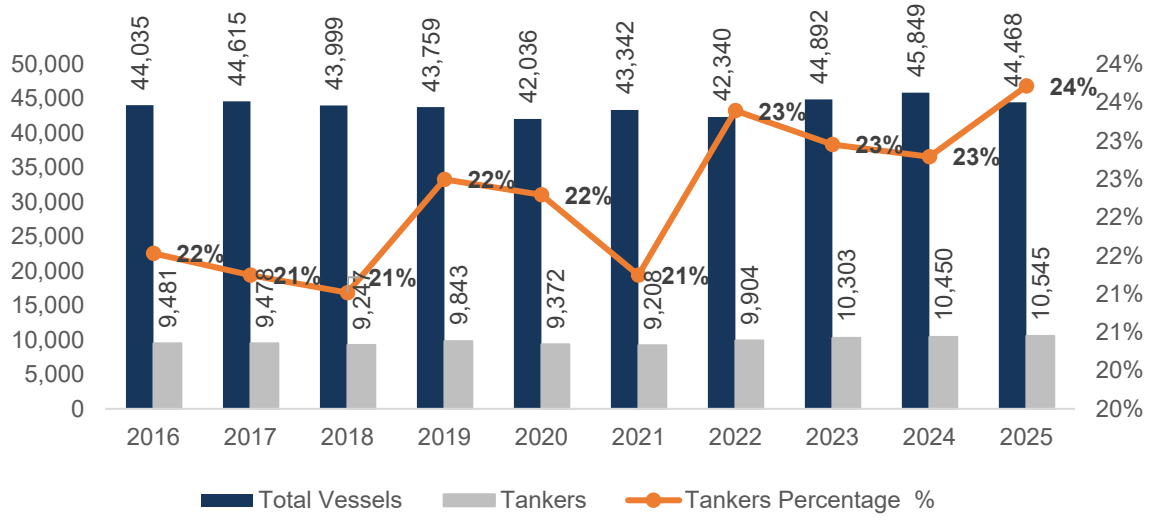
2025	44,468	966,023,610	23,971	23,661	8,038	708	6,555	809	3,181	102

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).

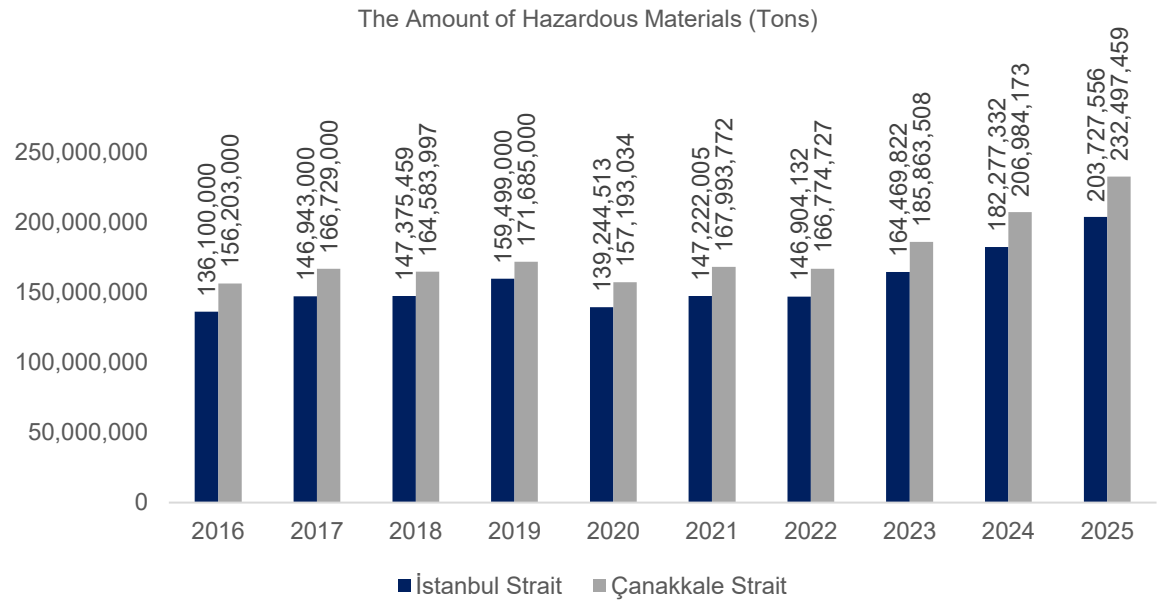
Table 44. Dangerous Passing Through The Turkish Straits (Metric Tons)

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)
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
2025	9,554	203,727,556	10,545	232,497,459

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.

Graph 33. Dangerous Passing Through The Turkish Straits (Metric Tons)



Source: Ministry of Transport and Infrastructure, Republic of Türkiye

3.2. Turkish Straits Reporting System (TUBRAP)

Traffic Separation Scheme

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

On the North, the line 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
d) 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
d) 39° 43'.940 N, 25° 54'.970 E
e) 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

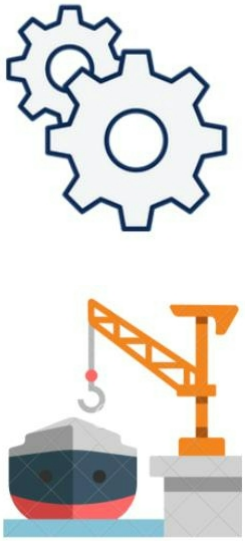
Vessels of 20 meters or more in a length passing through the Turkish Straits shall submit the “Call Point Report" (Annex-4) to the relevant TSVTS sector via VHF at designated locations. These positions are entry and exit points to the TSVTS system. In addition, the vessels shall submit this report to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

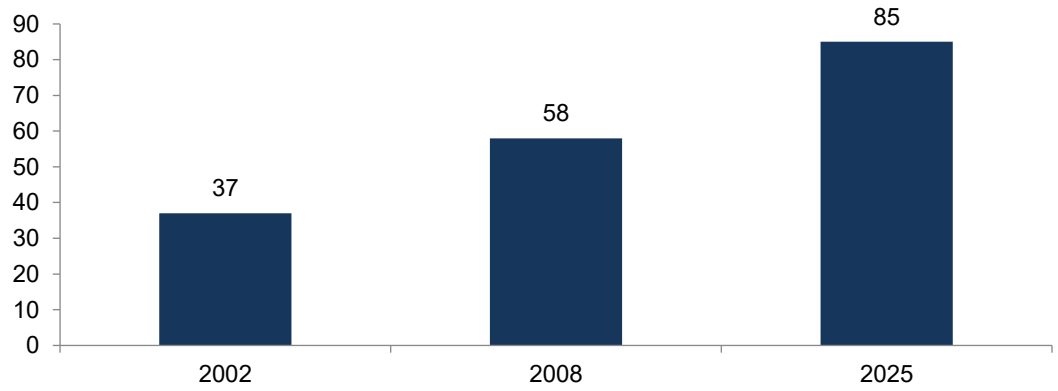


4. SHIPBUILDING INDUSTRY

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 2026 while it was only 37 in 2002. The quantity of shipyards under construction are 7 and 13 areas that are defined as shipyard investment areas of the same date mentioned above. The Covid-19 pandemic, within the 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 34. 2002 / 2025 Shipyards Under Operation



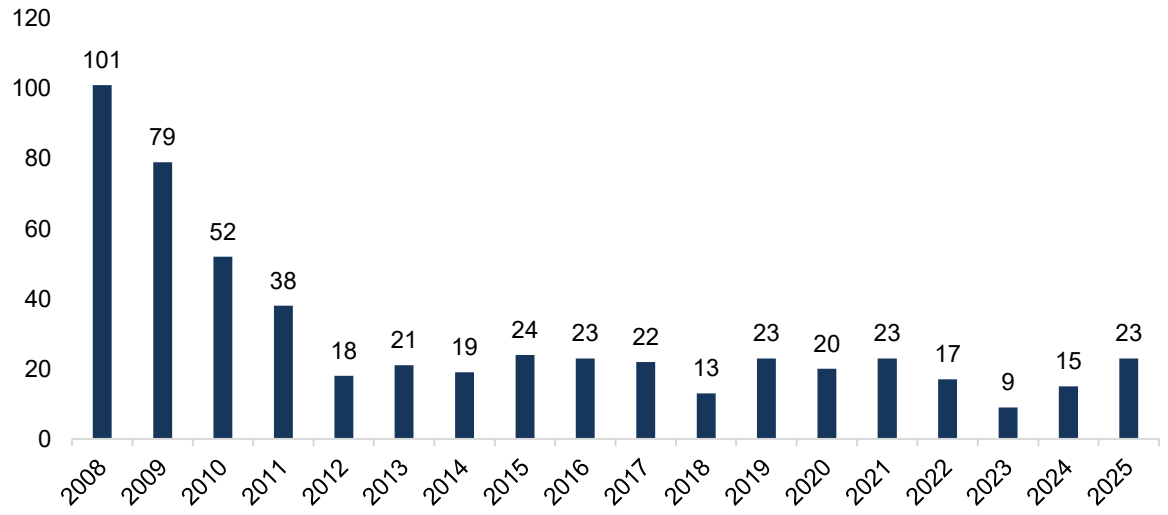
Source: Ministry of Transport and Infrastrucure 03/2026

The shipbuilding industry is a strategic heavy industry that, in all countries where it is supported and developed,

- Creates rapid development in its related ancillary industries,
- Provides foreign exchange earnings
- Increases the skilled workforce in its region
- Helps the development, growth and strengthening of regional trade
- Raises the welfare and cultural level of the people living in the region
- Creates significant employment potential together with its ancillary industries.

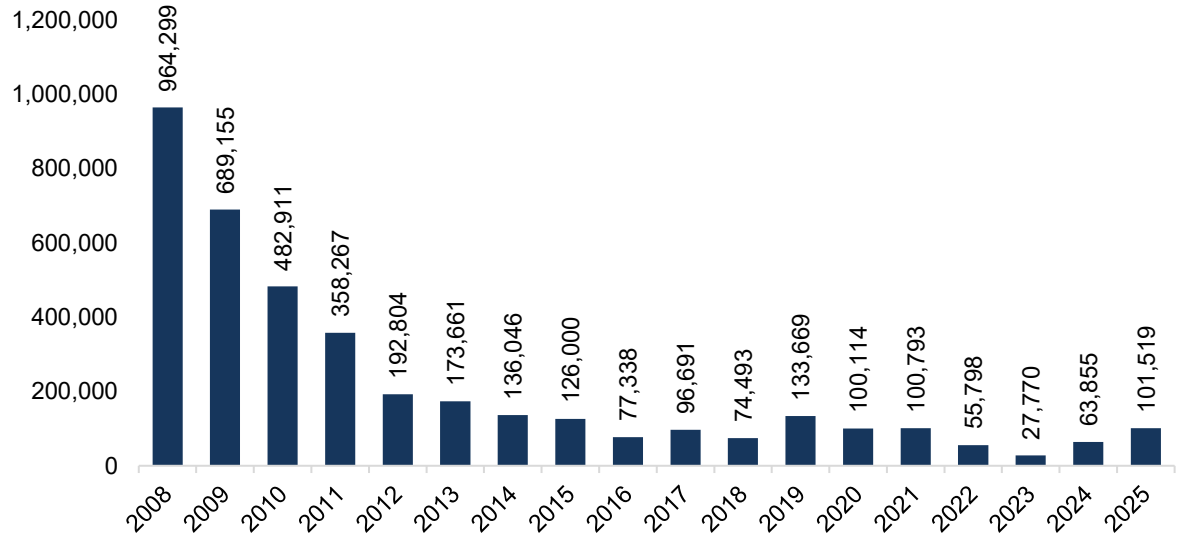
Some of the operative shipyards in Türkiye continue the modernization and extension operations but on the other hand, due to the global economic crisis, some of them suspend or cancel their modernization or extension projects because of the sanctions applied by the banks on the shipyards. In 2025, 23 ships DWT of 101.519 DWT have been delivered in the Turkish Shipyard.

Graph 35. Number of Ships Delivered Between 2008-2025



Source: Clarkson Research Services 04/2026

Graph 36. DWT of Ships Delivered Between 2008-2024



Source: Clarkson Research Services 04/2026

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, the most exported product group in 2025 was cargo ships with $628.9 million, followed by yachts with $545 million, and fishing vessels with $347 million. On a cumulative basis, the total exports of

the Ship, Yacht and Services Exporters Association in 2025 increased by 15.49% compared to 2024, reaching $1,952 billion.

As a result, Türkiye has become one of the pioneering countries in projects such as the first floating power ship (powership), the first remote-controlled ship, the first autonomous ship, the first electric and LNG-powered tugboats, electric-hybrid passenger ships and ferries, and fishing vessels capable of operating in polar regions.

Such achievements and orders received from developed countries such as the Netherlands, Norway, and Finland have significantly increased the global competitiveness of our shipbuilding industry, enabling it to become a world-renowned brand. Our shipyards now rank fourth in the world in megayacht production, second in tugboat construction, sixth in ferry and excursion boat production, and first in fishing vessel exports.

Today, 45–65% of our country's shipbuilding industry production consists of green ships, and approximately 55–60% of these vessels are exported to European countries. To sustain this positive momentum, our shipyards need continued support in R&D, innovation, and clean production technologies to address potential competitive disadvantages and strengthen their position in global markets.

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.

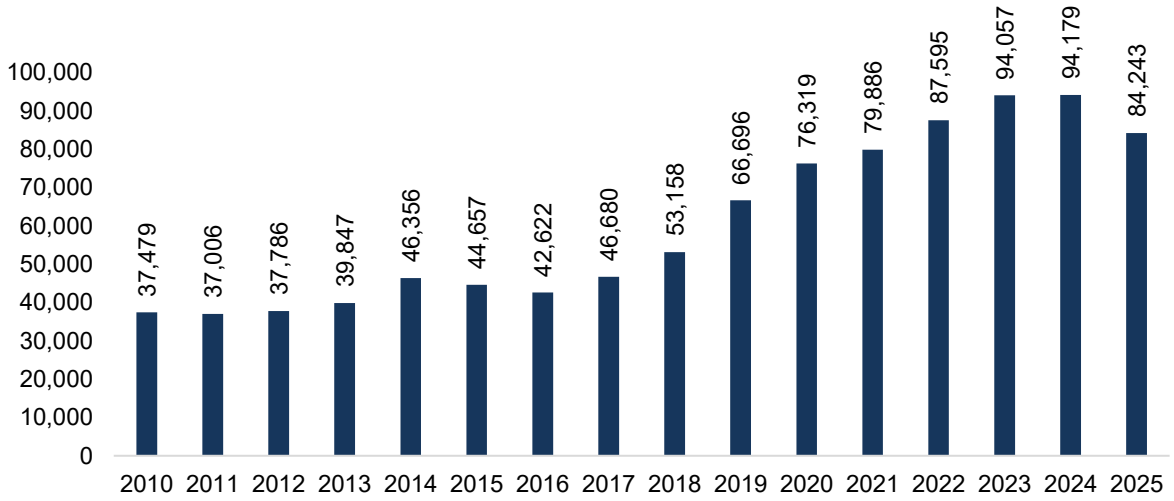
The shipbuilding market, which stagnated due to the effects of Covid-19 dominating most of 2020, showed a significant improvement in 2021. A strong start was made in the first eight months of 2021 with a total of 1060 ship orders with a volume of 85.6 million DWT and 63.7 million GT, which means the 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 1648 ships of 89.0 million DWT and 40.4 million CGT. The ship delivery size for 2025 is 1959 vessels with a total volume of 97.1 million DWT and 44 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 37. Employee Numbers in Turkish Shipyards and Sub Industry by 2025



Source: Ministry of Transport and Infrastrucure 03/2026

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, 94.179 in 2024, and 84.248 in 2025.

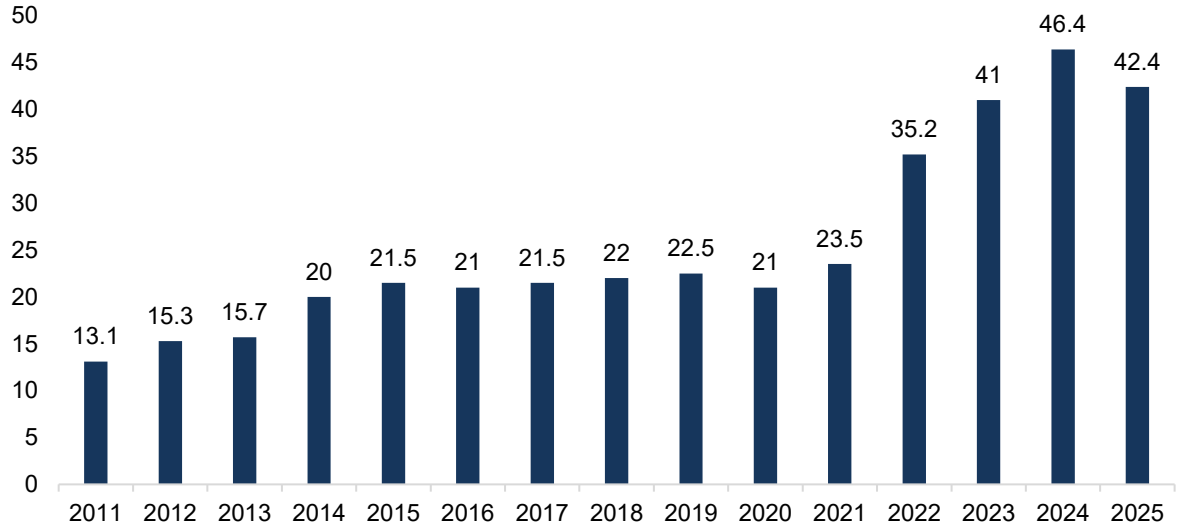
Most of the ships constructed in Turkish shipyards are built for export. Especially between 2002-2009, almost the total amount of these ships were exported to the EU member countries.

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 46.400.000 DWT, in 2025 42.400.000 DWT.

Turkish Shipyard,

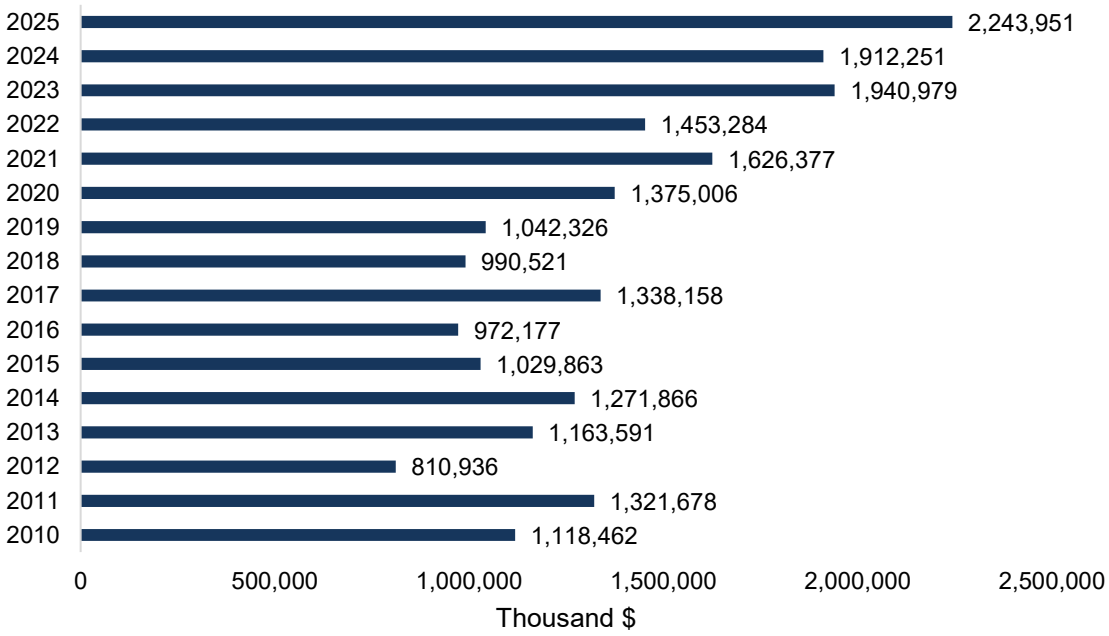
- 700,000 tons/year steel processing,
- 2 million DWT/year new ship construction,
- Construction of new ships up to 180,000 DWT in one piece,
- Building 60–70 meter mega yachts and pleasure boats,
- It has a maintenance and repair capacity of 42.6 million DWT/year.

Graph 38. Repair and Maintenance Facilities According to Years 2011-2025



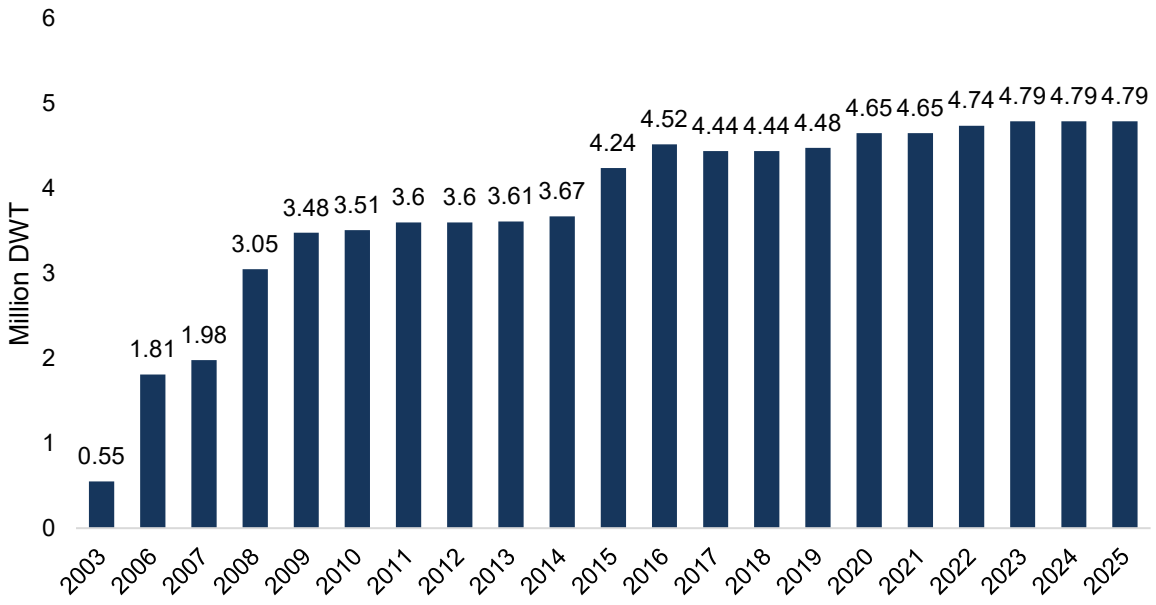
Source: GİSBİR Turkish Shipbuilders Association 03/2026

Graph 39. Export Figures of Turkish Shipbuilding Industry (2010-2025)



Source: Ship and Yacht Exporters Association (e-birlik.net) 03/2026)

Graph 40. Shipyards Project Capacities Between 2003-2025 (Million DWT)



Source: Ministry of Transport and Infrastrucure 03/2026

In 2002, our shipyard's capacity was 550.000 DWT. In 2025 it has reached up to 4,79 million DWT which means a growth more over 8 times than 2002.

As of March 2026, 38 floating docks and 11 dry docks are operative in Türkiye.

Table 45. Dry Docks in Türkiye

	City	Operator	Dimensions
1	İSTANBUL	İSTANBUL ŞEHİR HATLARI (HALİÇ)	109x22,5
2	İSTANBUL	İSTANBUL ŞEHİR HATLARI (HALİÇ)	81,5x17
3	İSTANBUL	İSTANBUL ŞEHİR HATLARI (HALİÇ)	151x16
4	İSTANBUL	URSA GEMİCİLİK BAKIM ONARIM TERSANECİLİK SAN. TİC. AŞ.	56x14 m
5	İSTANBUL	İSTANBUL TERSANE KOMUTANLIĞI (PENDİK TERSANESİ)	300X69
6	İSTANBUL	TUZLA GEMİ ENDÜSTRİSİ AŞ.	300x53 m
7	İSTANBUL	SEDEF GEMİ İNŞAATI AŞ.	315x50 m
8	İSTANBUL	DENİZ ENDÜSTRİSİ AŞ.	210x37 m
9	YALOVA	SEFİNE DENİZCİLİK TERSANECİLİK TURİZM SAN. ve TİC. AŞ.	240x40 m
10	YALOVA	BEŞİKTAŞ GEMİ (A-10)	235x40x6,5 m
11	ÇANAKKALE	İÇDAŞ ÇELİK ENERJİ TERSANE VE ULAŞIM SAN. AŞ.	370x70 m

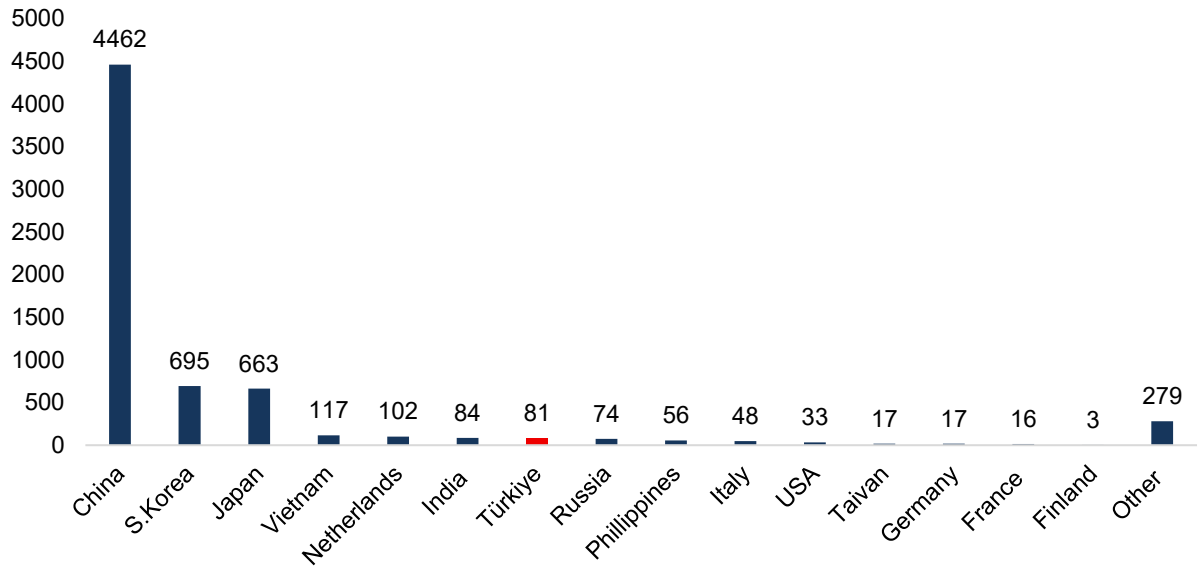
Source: Ministry of Transport and Infrastrucure 04/2026

Table 46. Floating Docks in Türkiye

NO	City	Operator	Dimensions	Lifting Capacity (Tons)
1	İSTANBUL	DENTAŞ İNŞA ve ONARIM SAN. A.Ş.	128x30 m	5
2	İSTANBUL	GİSAN GEMİ İNŞA SAN. ve A.Ş.	167x34 m	9
3	İSTANBUL	ÇEKSAN GEMİ İNŞA ÇELİK KONS. SAN. ve TİC. A.Ş.	130x29 m	7
4	İSTANBUL	ART GEMİ İNŞA VE TERSANECİLİK HİZMETLERİ A.Ş. (2. TESİS - Aydıntepe)	190x41,6 m	13,5
5	İSTANBUL	ART GEMİ VE TERSANECİLİK HİZMETLERİ A.Ş. (1. TESİS - Tuzla Şube)	219,5x45,14 m	20
6	İSTANBUL	KUZEYSTAR SHİPYARD	281x62 m	80
7	İSTANBUL	KUZEYSTAR SHİPYARD	217,5x43 m	45
8	İSTANBUL	İSTANBUL DENİZCİLİK GEMİ İNŞA SAN.VE TİC. A.Ş.	95x28,40 m	7,5
9	İSTANBUL	SNR GEMİ İNŞA SANAYİ A.Ş.	122,60x38,40 m	7
10	İSTANBUL	DESAN DENİZ İNŞAAT SANAYİ A.Ş.	139,5x36,51 m	8,5
11	İSTANBUL	DESAN DENİZ İNŞAAT SANAYİ A.Ş.	212,2x51,2	30
12	İSTANBUL	DESAN DENİZ İNŞAATI SANAYİ KÜÇÜK HAVUZ ŞUBESİ	170,11x36 m	13
13	İSTANBUL	GEMAK GEMİ İNŞAAT SANAYİ VE TİC.A.Ş.	192x37,38 m	14
14	İSTANBUL	GEMAK GEMİ İNŞAAT SANAYİ VE TİC.A.Ş.	223,91x45 m	28
15	İSTANBUL	HİDRODİNAMİK GEMİ SAN. VE TİC. A.Ş.	115,3x22 m	2,5
16	İSTANBUL	ÇİNDEMİR MAKİNE GEMİ ONARIM VE TERSANECİLİK A.Ş.	235x47,8 m	5
17	İSTANBUL	ERKAL ULUSLARARASI NAKLİYAT VE TİCARET A.Ş.	350x79,26 m	65
18	İSTANBUL	TURQUOISE YAT SAN. AŞ	66x27 m	2,5
19	İSTANBUL	TERSAN TERSANECİLİK ve TAŞIMACILIK SAN. ve TİC. A.Ş.	130x30,5 m	6,5
20	İSTANBUL	TORLAK DENİZCİLİK SAN. VE TİC. A.Ş	195x39,6 m	13
21	YALOVA	BEŞİKTAŞ GEMİ	353,28x66 m	72
22	YALOVA	BEŞİKTAŞ GEMİ	285x54,6 m	52,5
23	YALOVA	DOĞRUYOL TERSANECİLİK SAN. ve TİC.A.Ş.	128x30,2 m	5,5
24	YALOVA	DÜZGİT YALOVA GEMİ İNŞA SAN. A.Ş	227,5X43 m	22,5
25	YALOVA	HAT-SAN GEMİ İNŞAA BAKIM-ONARIM DEMİR NAK. SAN. VE TİC. A.Ş.	240,4x46 m	25
26	YALOVA	HAT-SAN GEMİ İNŞAA BAKIM-ONARIM DEMİR NAK. SAN. VE TİC. A.Ş.	227,5x43 m	22,5
27	YALOVA	HİCRİ ERCİLİ TERSANECİLİK SAN. VE TİC. A.Ş.	96x30.1 m	4,5
28	YALOVA	ÖZATA DENİZCİLİK SAN. VE TİC. A.Ş.	183.9x33.6 m	10
29	YALOVA	ÖZATA DENİZCİLİK SAN. VE TİC. A.Ş.	264x52 m	28
30	YALOIVA	PARK TERSANE A.Ş	285x54,6 m	52,5
31	YALOVA	SANMAR TERSANESİ	83,8x33,5m	3,5
32	YALOVA	SEFİNE DENİZCİLİK TERSANESİ SAN. VE TİC. A.Ş.	282,2x57 m	36,857
33	YALOVA	SEFİNE DENİZCİLİK TERSANESİ SAN. VE TİC. A.Ş.	282,2x57 m	36,857
34	YALOVA	SELTAŞ DENİZCİLİK SAN. VE TİC. A.Ş.	260x45 m	7,213
35	YALOVA	TERSAN TERSANECİLİK SAN VE TİC AŞ	178x35 m	9
36	YALOVA	TERSAN TERSANECİLİK SAN VE TİC AŞ	309.4x60.9 m	43.717
37	YALOVA	YALOVA GEMİ TERSANECİLİK SAN. VE TİC.AŞ	217x42.9m	16
38	KASTAMONU	UZMAR GEMİ İNŞ.SAN.ve TİC. A.Ş	68X38 m	2

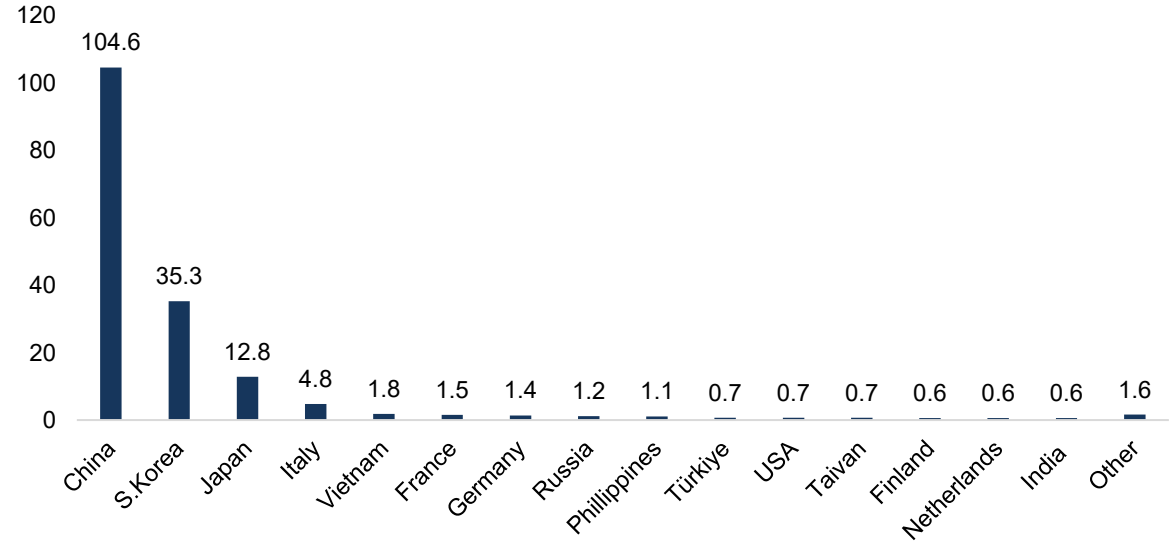
Source: Ministry of Transport and Infrastrucure 04/2026

Graph 41. Orderbook by Builder Country (Quantity)



Source: Clarkson Research Services 12/2025

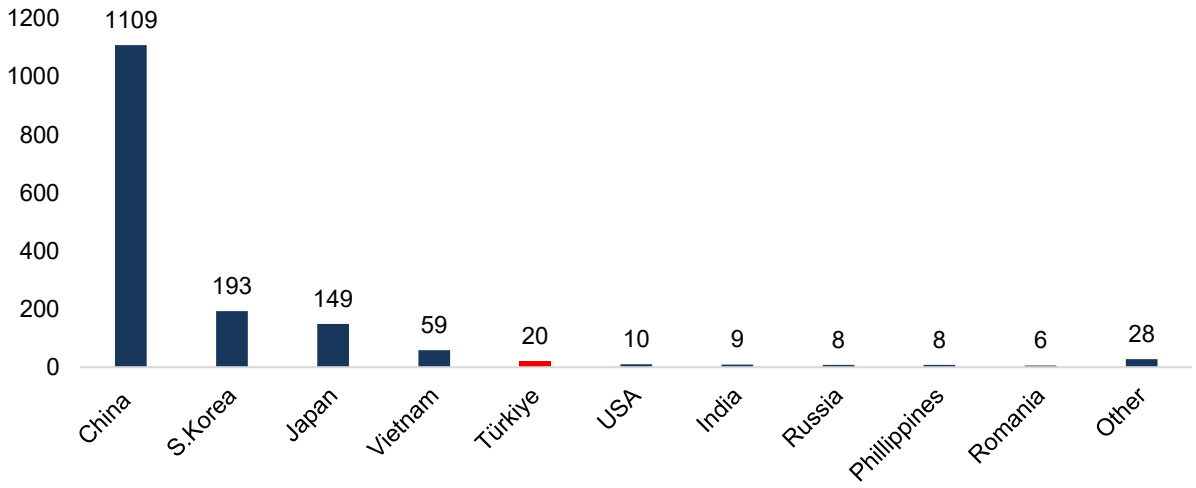
Graph 42. Orderbook by Builder Country (Tonnage- Million CGT)



Kaynak: Clarkson Research Services 12/2025

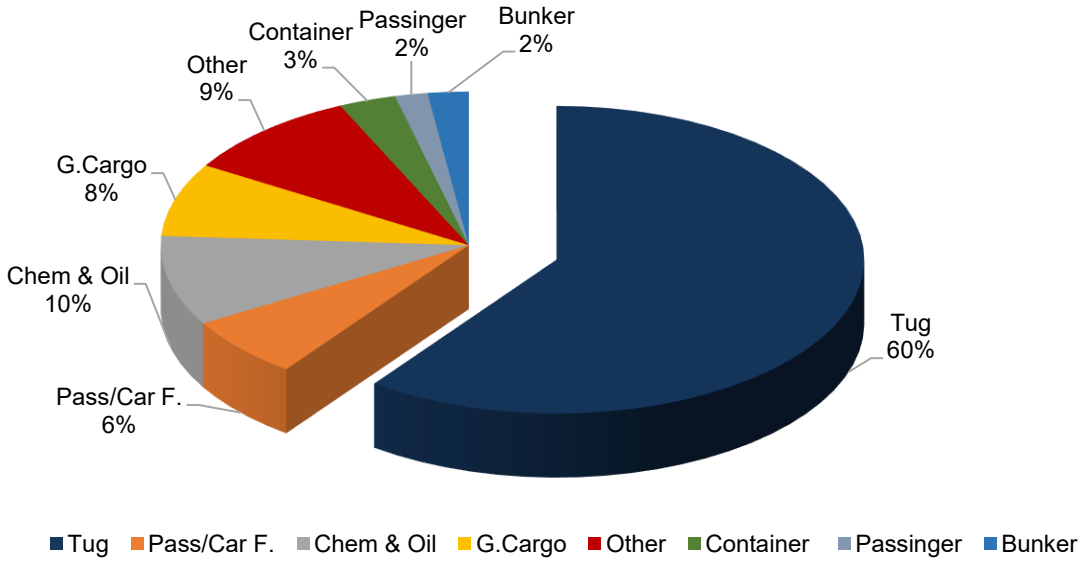
Our shipyards are a globally significant brand, particularly in the construction of small and medium-tonnage chemical tankers. Having consistently ranked among the top countries receiving tanker orders for many years, even reaching 5th place in this field, Türkiye currently ranks 7th in terms of the number of ships ordered 81 and 10th in terms of tonnage (million CGT), according to current global ship order data.

Graph 43. Tanker Orders by Builder Country (Quantity)



Source: Clarkson Research Services 03/2026

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



Source: Clarkson Research Services 03/2026

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. **Procurement Projects for MiLGEM 5th Ship and 6th–12th Ships**

   The frigate delivered to meet the requirements of the Turkish Naval Forces Command is the fifth ship of the MiLGEM Project and the first frigate of the İstif-class. Under this project, the platform is designed to conduct reconnaissance and surveillance, base and port defence, anti-submarine warfare (ASW), surface warfare, air defence warfare, amphibious operations, and patrol missions.In parallel, the project for the 6th–12th MiLGEM ships encompasses the construction of seven I-class frigates, which are being constructed simultaneously at three private Turkish shipyards. This unique project model, rarely seen worldwide, draws its strength from Türkiye's robust infrastructure, sustainable defence industry, and, above all, its skilled human capital**.**

2. **National Fast Attack Craft (FAC) Project**

   Under the National FAC Project, one fast attack craft will be delivered to the Turkish Naval Forces Command to serve in the mission of achieving and maintaining sea control. In surface warfare, the vessel will be capable of operating from concealed positions to complicate adversary detection and identification, launching attacks with long-range guided missiles, and, when required, conducting such strikes in coordination with frigates and helicopters. The National FAC will also be equipped with sufficient air defence systems to ensure survivability and will be designed for high speed and maneuverability.

3. **New Type Submarine Procurement Project**

   The New Type Submarine Project aims to construct six submarines at Gölcük Naval Shipyard with maximum Turkish industry participation. These platforms are designed to exploit stealth characteristics to conduct operations in maritime environments, launch guided missiles from submarines against surface targets, and operate with Air-Independent Propulsion (AIP) systems.

   The REIS-class submarines, internationally known as Type-24, feature Fuel Cell technology that provides AIP capability. This capability will make them the first submarines of their kind in service for the Turkish Naval Forces and will position Türkiye among the few nations worldwide employ this advanced technology.

4. **Multi-Purpose Amphibious Assault Ship (LHD) Project**

   The LHD TCG ANADOLU is capable of transporting a marine battalion together with required combat and support vehicles to crisis zones without reliance on a main base. With its well deck, it can participate in landing operations using embarked landing craft, and it has a flight deck that enables day and night operations with helicopters and unmanned aerial vehicles (UAVs).

[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)

In addition, TCG ANADOLU is equipped with a hospital complex of at least 30 beds, including operating rooms, X-ray equipment, dental treatment units, intensive care, and isolation wards, allowing the ship to perform as a hospital ship in humanitarian assistance operations.

5. Unmanned Surface Vehicle

The MARLIN ASV entered into service in 2024. It is capable of conducting Intelligence, Surveillance, and Reconnaissance (ISR), Surface Warfare (SuW), and Electronic Warfare (EW) missions. The platform is designed for interoperability with various manned and unmanned systems and can operate in remote-controlled, semi-autonomous, or fully autonomous modes.

The ULAQ AUSV is capable of performing Intelligence, Surveillance, and Reconnaissance (ISR), Surface Warfare, and Anti-Submarine Warfare (ASW) missions. It is interoperable with different manned and unmanned platforms and can operate in remote-controlled, semi-autonomous, or fully autonomous modes.

The SANCAR AUSV is designed for Intelligence, Surveillance, and Reconnaissance (ISR), Surface Warfare, and Mine Countermeasure (MCM) missions. Like other systems in this category, it is interoperable with manned and unmanned platforms and can operate in remote-controlled, semi-autonomous, or fully autonomous modes.

The SALVO AUSV is capable of Intelligence, Surveillance, and Reconnaissance (ISR), Surface Warfare, and drone-assisted missions. It offers interoperability with manned and unmanned platforms and can function in remote-controlled, semi-autonomous, or autonomous modes.

4.3. Yacht and Boat Building Industry

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

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

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

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

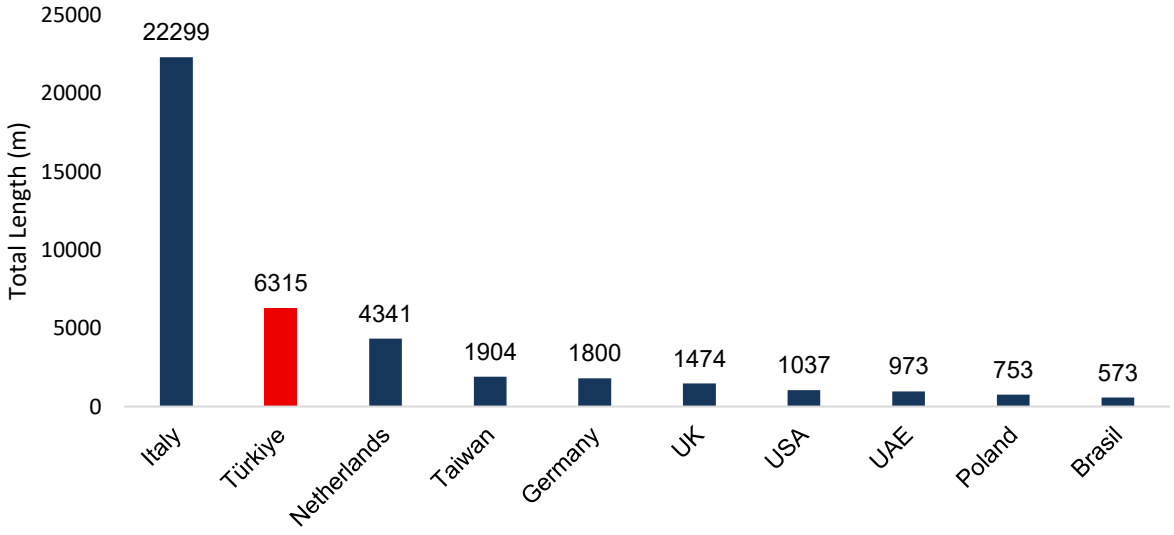
- Educated and competent labour
- Production quality in accordance with international standards
- Reasonable costs
- Adequate sub industry with quality
- Technology basis production
- Closeness to the international markets
- Appropriate climate
- Our country's potential in boat&yacht building

Main disadvantages are;

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

Türkiye has shown a steady increase in yacht construction, particularly in yachts of 24 meters and above, since 2007, and in 2010, it became the world's third largest producer of superyachts in terms of both number and length. In 2023, surpassing the Netherlands, the sector rose to second place with 5,838 meters, and maintained its position in 2025 with 141 projects and a total of 6,315 meters. In terms of Gross Tonnage, it secured third place with approximately 55,000 GT (54,494) in 2022, 73,000 GT (73,011) in 2023, 79,000 GT (78,986) in 2024, and 83,000 GT (83,283) in 2025.

Graph 45. Top Builder of Superyacht Projects on Order in 2025



Source: Boat International (2026 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:

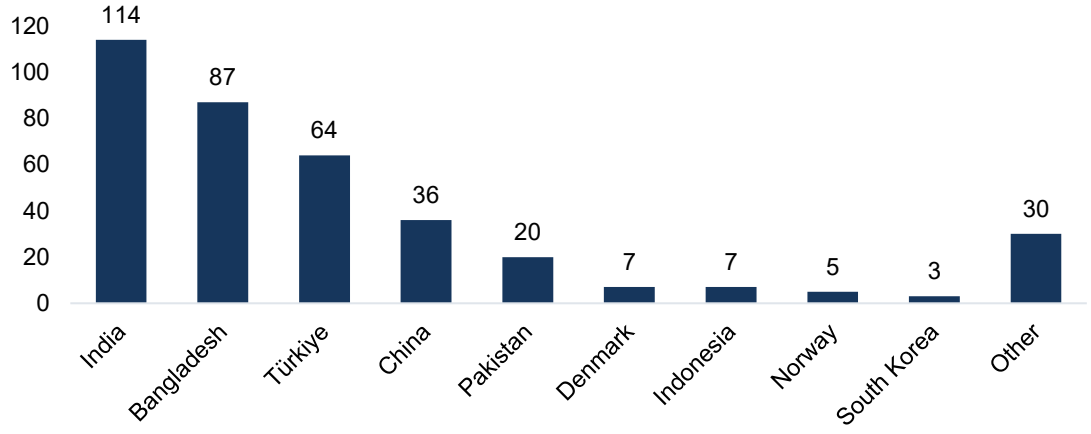
- Qualified labour force and closeness to the Europe Market
- Within the Mediterranean basin Türkiye is the only country with ship recycling industry
- Türkiye is the only OECD Member country which has ship recycling industry
- There is a demand in the country for the goods obtained by recycling
- Entrepreneur 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

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 10 in 2025.

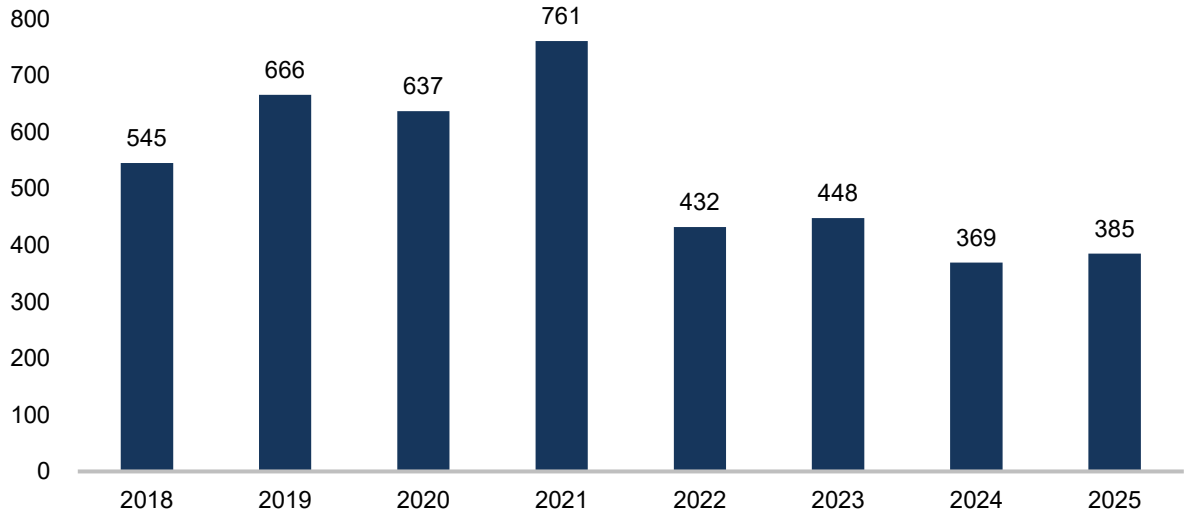
Accoardind to global data, Türkiye is in the 3th place in ranking according to quantity by the end of 2025.

Graph 46. Global Ship Recycling (Quantity), 2025



Source: Clarksons Research Services Limited 04/2026

Graph 47. Recycled Ship Numbers by Years

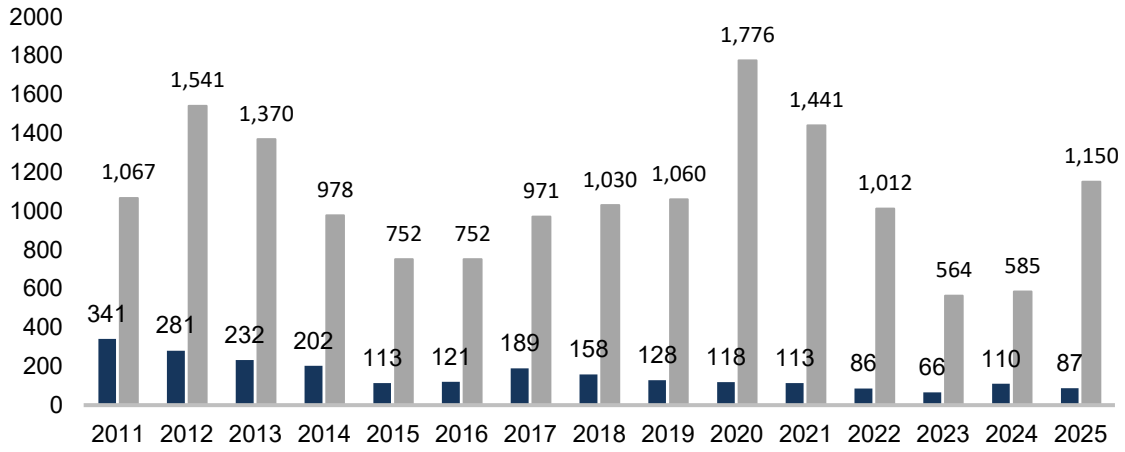


Source: Clarksons Research Services Limited 04/2026

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.

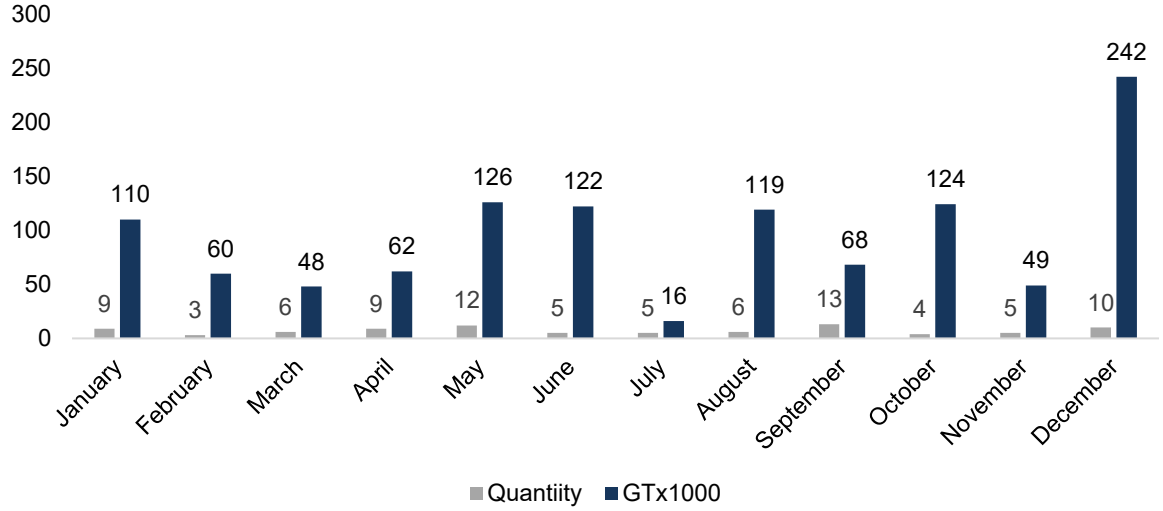
By the end of 2025, Türkiye's ship recycling facilities achieved to recycle 87 ships with the tonnage of 1,150,000 GT.

Graph 48. Ship Recycling in Türkiye Over The Years



Source: Ministry of Transport and Infrastrucure 04/2026

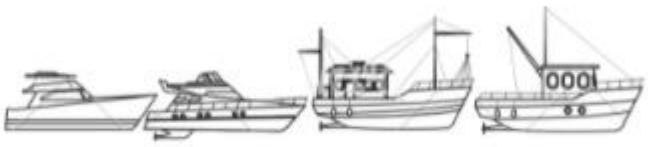
Graph 49. Ship Recycling by Months in Türkiye During 2025



Source: Ministry of Transport and Infrastrucure 04/2026

CHAPTER VI

COASTAL STRUCTURES



6. COASTAL STRUCTURES

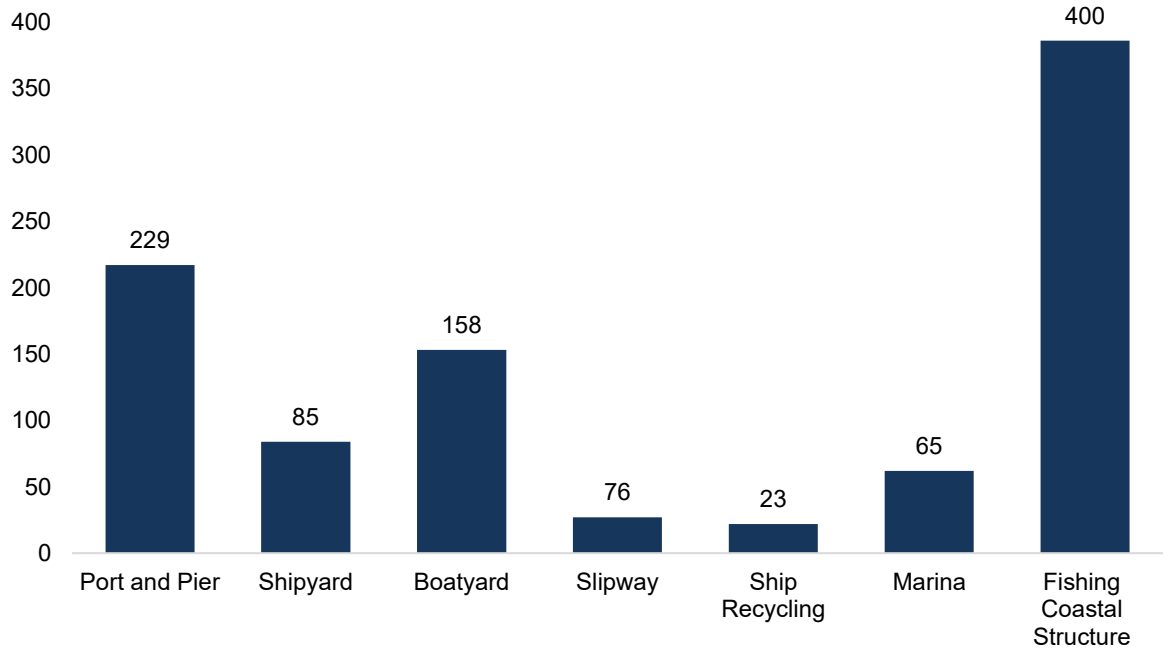
6.1. General Situation of Coastal Structures in Our Country

Türkiye's geographical location surrounded by seas ensures that its coastal regions have significant economic and industrial potential. The fact that the country is surrounded by seas on three sides allows the coastal areas to develop in a way that can serve many sectors such as transportation, trade, tourism, fishing and shipbuilding. In addition, the natural harbor characteristics of the coasts, suitable climatic conditions and strategic geopolitical location are among the main factors supporting the development of maritime activities. Thanks to these advantages, many coastal structures serving different purposes have been established in Türkiye and have diversified over time.

These investments in coastal areas contribute to the country's national economy and strengthen its integration with international trade networks. In particular, port and pier facilities form the basic infrastructure of maritime transportation, while marinas and yacht harbors make significant contributions to the development of the tourism sector. In addition, shipyards and boat manufacturing sites are important production areas where shipbuilding and maintenance activities are carried out. Boatyards, fishing coastal structures, and shipbreaking facilities also stand out as complementary coastal infrastructures that meet the diverse needs of the maritime industry.

As of December 2025, there are a total of 950 coastal structures with different functions and actively used on the coasts of Türkiye. These structures are; These structures consist of various categories such as port and pier facilities, marinas and marinas, berthing places, shipyards, boat manufacturing places, boatyards, coastal structures for fishing purposes and shipbreaking facilities. This diversity showcases the multifaceted nature of the maritime sector and the capacity of coastal areas to serve different economic activities.

Graph 50. Existing Coastal Structures in Our Country



Source: Ministry of Transport and Infrastructure

Türkiye's coastal length is approximately 8.592 kilometers, excluding the islands. While this long coastline offers significant opportunities for maritime activities, it also brings with it the necessity of protecting and sustainably using the coasts. According to the available data, the length of the protected coast is approximately 3.216 kilometers, which corresponds to approximately 37% of the total coastal length. This situation shows the importance of efforts to protect the natural and ecological characteristics of coastal areas and reveals that coastal management policies should be shaped in line with sustainability principles.

Coasts, which allow many types of use, are natural resources that can be increased with planned use and whose quality can deteriorate with bad and wrong 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.

The 2024-2028 Strategic Plan, published by the Ministry of Environment, Urbanization and Climate Change, sets out a more holistic and sustainable approach to the planning and management of coastal areas in Türkiye. In this context, it aims to disseminate the Integrated Coastal Area Plans (BKAP) studies in order to ensure the balance between protection and use in coastal areas. In line with the 2030 Sustainable Development Goals, it is stated that these plans should be created in coastal areas that have not yet been planned.

Figure 1. Integrated Coastal Areas Plans Throughout the Country

Source: Ministry of Environment, Urbanization and Climate Change

According to the evaluations in the 6th issue of the Journal of Environment, City and Climate, Integrated Coastal Zone Management and Planning (ICWP) is a holistic planning approach that considers coastal areas and land-sea interaction zones together. In Türkiye, this approach is implemented as a part of the spatial planning system within the framework of the Zoning Law No. 3194 and related legislation; it aimsto protect the environmental, social and economic balance with the sustainable use of coastal areas.

In the same issue of the journal, the relationship between ICWP and Marine Spatial Planning (DMP) is discussed. In the study, it is emphasized that integrating Türkiye's institutional and implementation experience in the field of ICWP with DMP processes will make significant

contributions to the sustainable management of marine resources, maritime trade and the protection of ecosystems. In addition, it is stated that a holistic and multidimensional planning approach in maritime areas is of strategic importance due to Türkiye's coastline on the Mediterranean, Aegean and Black Seas.

In this context, studies have been initiated to prepare the Izmir Province Integrated Coastal Areas Plan to include marine areas. In the 2025 Annual Report of the General Directorate of Spatial Planning of the Ministry of Environment, Urbanization and Climate Change, it is stated that it is aimed to complete the Integrated Coastal Areas Planning studies in Türkiye with the approval of other coastal plans that need to be revised by 2028.

Due to the increasing number of boats and yachts on the Aegean and Mediterranean coasts, the inadequacy of mooring and berthing areas emerges as an important infrastructure problem that limits the effective use of coastal structures. Within the scope of the 2024-2028 Strategic Plan prepared by the Ministry of Transport and Infrastructure to solve this problem, it is aimed to create new mooring areas, protect coastal structures and increase the capacity of existing ports.

In addition, it is aimed to support multimodal transportation and increase Türkiye's competitiveness in maritime trade by strengthening the railway connections of ports and developing large-scale container port projects.

With the Fishing Shelters Needs Analysis Study carried out to improve the fishery infrastructure, the technical deficiencies of the existing shelters were determined and a comprehensive inventory was created. In addition, it is aimed to develop cruise tourism within the scope of the National Strategy for Regional Development (2024-2028) prepared by the Ministry of Industry and Technology; it is planned to strengthen the infrastructures of Istanbul, Kuşadası and Izmir ports.

Additionally, there are plans to develop blue growth sectors such as aquaculture, maritime transportation, and coastal tourism to support sustainable growth in the maritime sector. In order to meet the increasing need for mooring, it is stated that legislative studies for the establishment of mooring buoy systems are carried out in cooperation with the Ministry of Environment, Urbanization and Climate Change and the Ministry of Transport and Infrastructure. These regulations aim to support maritime safety and environmental sustainability by providing safe and orderly mooring, especially in busy coastal areas.

6.1.1. Ports

6.1.1.1. Port Investment Projects in Türkiye

The 2053 Transport and Logistics Master Plan, published by the Ministry of Transport and Infrastructure, addresses the importance and role of ports in Türkiye from a strategic perspective. The plan emphasizes that ports play a critical function in the integration of transportation modes throughout the country and at the same time are of increasing importance in connecting regional and international transportation corridors from east to west and from north to south. For this reason, the port sector is in a vital position, especially in developing foreign trade and supporting economic growth.

While 4 ports from Türkiye were included in the "World's 100 Ports Handling the Most Containers" list prepared by the UK-based news portal Lloyd's List in 2024, this number increased to 5 in 2025. The rankings of the ports in question are as follows: Ambarlı Port ranks 72nd, Kocaeli Port 86th, Aliağa Port 91st, Tekirdağ Port 94th and Mersin Port 98th. Aliağa Port entered the list from the 91st place for the first time this year. These developments strengthen Türkiye's position in world maritime trade and increase its competitiveness.

Data for 2025 shows that the amount of cargo handled at ports is concentrated in the Marmara, Eastern Mediterranean, and Aegean regions. This situation reveals that port and maritime investments to be made in these regions should be directed primarily to these areas in order to prevent potential transportation bottlenecks that may occur in the future.

In this context, İyidere Logistics Port, which is under construction in Rize, is planned as a logistics base that will make significant contributions to the regional and national economy within the scope of İyidere Logistics Center. With the completion of the port, it is aimed to increase the trade and transportation capacity in the Black Sea region and strengthen Türkiye's logistics infrastructure.

Filyos Port and Filyos Industrial Zone Railway Connection Line (2020-2028);

The tender for the construction of the Filyos Port Railway Junction Line Project, which is planned to provide a railway connection between Filyos Port and Filyos Industrial Zone, has been completed. With the project, it is aimed to ensure the integration of the port into the national railway network and to transport the cargo coming to the port to the inner regions and industrial centers by rail in an uninterrupted and effective manner.

- 7.17 km line length,
- 387 m railway bridge length,
- 13 m bridge span,
- 11 m bridge height,
- 60 km/h design speed,

The bridge and station expansion works included in the project include the Filyos Stream crossing and increasing the capacity of the existing Gökçeler Station. The project is among the strategic transportation investments within the scope of the Twelfth Development Plan of the Republic of Türkiye (2024-2028) and the 2025 Presidential Annual Investment Program.

6.1.1.2. Current Status of Ports

The number of ships calling at our ports in 2025 increased by 3.4% increased to 2024 and reached 62,656. The number of foreign flagged ships calling at our ports decreased by 2.9% compared to the previous year, and the number of Turkish flagged ships increased by 4.3%.

Table 47. Total Number of Calling Vessel, 2023-2025

Months	2023			2024			2025		
	Turkish Flag	Foreign Flag	Total	Turkish Flag	Foreign Flag	Total	Turkish Flag	Foreign Flag	Total
January	1,272	3,076	4,348	1,398	2,954	4,352	1,464	3,120	4,584
February	1,135	2,691	3,826	1,435	3,097	4,532	1,226	2,651	3,877
March	1,294	3,330	4,624	1,510	3,327	4,837	1,512	3,304	4,816
April	1,471	3,350	4,821	1,429	3,331	4,760	1,612	3,152	4,764
May	1,679	3,882	5,561	1,722	3,570	5,292	2,002	3,626	5,628
June	1,867	3,793	5,660	2,025	3,519	5,544	2,060	3,722	5,782
July	1,975	3,636	5,611	2,151	3,513	5,664	2,450	3,907	6,357
August	1,976	3,696	5,672	2,332	3,535	5,867	2,303	3,716	6,019
September	1,883	3,599	5,482	2,175	3,294	5,469	2,146	3,656	5,802
October	1,817	3,766	5,583	1,944	3,453	5,397	1,972	3,607	5,579
November	1,401	2,909	4,310	1,410	2,965	4,375	1,634	3,180	4,814
December	1,507	3,190	4,697	1,463	3,042	4,505	1,526	3,108	4,634
Total	**19,277**	**40,918**	**60,195**	**20,994**	**39,600**	**60,594**	**21,907**	**40,749**	**62,656**

Source: Ministry of Transport and Infrastructure

Table 48. Calling Vessel Statistics at Turkish Ports According to the Harbour Masters Area of Jurisdiction

	2023		2024		2025	
	NO. of Ship	Gross Tonnage	NO. of Ship	Gross Tonnage	NO. of Ship	Gross Tonnage
Alanya	43	1,607,915	49	1,806,624	54	1,988,775
Aliağa	6,329	121,843,279	6,086	116,793,047	6,224	117,135,641
Amasra	22	773,125	26	1,002,482	31	1,195,267
Ambarlı	4,256	82,479,123	3,960	82,202,463	4,194	95,038,567
Anamur	0	0	66	44,095	48	20,352
Antalya	668	8,905,864	487	6,749,782	540	7,377,830
Ayvalık	650	245,150	1,114	452,913	1,294	511,919
Bandıma	899	5,168,277	1,048	6,661,683	914	7,114,273
Bartın	334	1,208,980	353	1,179,493	362	1,251,016
Bodrum	2,790	6,015,895	2,867	6,272,518	3,188	8,147,893
Bozcaada	20	471,827	19	562,254	23	532,643
Ceyhan	1,207	37,887,528	1,053	32,952,722	1,373	38,006,679
Cide	10	7,812	0	0	0	0
Çanakkale	593	4,079,733	533	4,054,539	566	4,436,208
Çeşme	2,040	7,415,477	2,410	7,756,509	2,356	8,351,089
Datça	5	4,723	0	0	1	12,255
Dikili	134	857,870	189	1,032,856	304	1,216,064
Enez	15	1,532,817	13	1,157,423	23	2,157,486
Erdek	1	1,462	29	31,039	44	46,458
Fatsa	29	72,638	18	47,490	12	29,008
Fethiye	462	475,124	314	223,018	543	272,457
Finike	1	2,643	1	4,362	1	1,210
Gemlik	3,405	57,110,096	3,571	55,899,523	3,467	66,494,878
Giresun	122	754,980	141	1,055,056	113	1,152,953
Göcek	26	53,448	31	62,538	33	77,991
Güllük	389	3,822,886	402	4,224,892	434	4,339,883

	2023		2024		2025	
	NO. of Ship	Gross Tonnage	NO. of Ship	Gross Tonnage	NO. of Ship	Gross Tonnage
Hopa	162	529,137	106	347,299	97	271,139
İnebolu	81	281,430	81	286,328	95	326,930
İskenderun	3,927	72,769,296	3,976	80,041,968	4,175	83,923,154
İstanbul	1,585	34,598,738	1,032	25,594,429	1,158	32,851,677
İzmir	1,607	21,827,035	1,529	24,671,429	1,337	20,208,766
Karabiga	864	8,421,771	786	9,125,249	788	8,376,659
Karadeniz Ereğli	612	7,410,125	614	7,428,783	613	6,562,532
Karasu	428	2,810,453	541	4,139,245	479	4,270,856
Karataş	1	6,881	0	0	0	0
Kaş	6	133,973	249	37,584	655	1,030,188
Kefken	1	834	0	0	0	0
Kocaeli	9,560	170,788,848	9,001	169,037,809	9,206	181,355,101
Kuşadası	1,236	31,481,494	1,559	32,381,898	1,641	39,152,480
Marmara Adası	1,199	1,463,291	1,276	1,715,192	1,707	2,153,709
Marmaris	563	1,831,430	909	3,782,189	820	3,599,094
Mersin	3,933	67,592,320	4,151	78,209,859	3,924	76,919,837
Mudanya	130	116,534	0	0	11	12,326
Rize	128	426,352	171	468,445	191	574,756
Samsun	2,814	17,932,941	2,567	17,796,682	2,163	15,575,184
Silivri	77	56,215	0	0	0	0
Sinop	13	471,412	10	249,269	6	70,303
Sürmene	1	420	3	2,823	3	4,134
Taşucu	1,157	7,875,563	1,271	8,760,347	1,313	8,632,935
Tekirdağ	2,918	63,515,954	2,890	65,127,016	3,049	72,794,269
Tirebolu	73	561,691	86	682,965	101	734,882
Trabzon	490	4,096,016	495	4,149,402	541	4,515,476
Tuzla	856	15,681,973	992	15,848,315	882	14,336,797
Ünye	290	1,451,262	315	1,018,688	343	1,124,683
Yalova	475	9,724,655	506	11,289,474	566	12,086,550
Zonguldak	558	7,403,227	697	8,023,095	650	8,136,149
Total	**60,195**	**894,059,943**	**60,594**	**902,445,227**	**62,656**	**966,509,361**

Source: Ministry of Transport and Infrastructure

According to the data of the Ministry of Transport and Infrastructure, Maritime Affairs and Communications, 553,265,898 tons of cargo were handled in our country's ports and piers in 2025.

Of the total cargo handled in 2025;

- 25.8% (142,769,980 tons) of export,
- 49.1% (271,659,580 tons) of import,
- 12.6% (69,678,982 tons) of cabotage,
- 12.5% (69,157,356 tons) of it was realized as transit.

Table 49. Cargo Handling Figures at Turkish Port, 2022-2025

			2022	2023	2024	2025
Loading	Export	Turkish Flag	13,808,674	13,423,790	14,191,547	13.380.685
		Foreign Flag	136,364,228	122,086,891	128,086,590	129.389.295
		Total	150,172,902	135,510,681	142,278,137	142.769.980
	Cabotage Loading		34.027.952	31,635,352	31,721,345	34,961,329
	Transit Loading		65.949.720	50,808,302	50,356,382	51,894,183
	Total Loading		250.150.574	217,954,335	224,355,864	229,625,492
Unloading	Import	Turkish Flag	14,634,461	15,875,560	15,868,396	15.450.667
		Foreign Flag	229,282,658	240,331,067	241,268,024	256.208.913
		Total	243,917,119	256,206,627	257,136,420	271.659.580
	Cabotage Unloading		33,473,324	30,991,741	31,537,095	34,717,653
	Transit Unloading		15.069.266	15,927,101	18,707,979	17,263,173
	Total Unloading		292,459,709	303,125,469	307,381,494	323,640,406

Source: Ministry of Transport and Infrastructure

Table 50. Cargo Handling Statistics at Turkish Ports According to the Harbour Masters Area of Jurisdiction

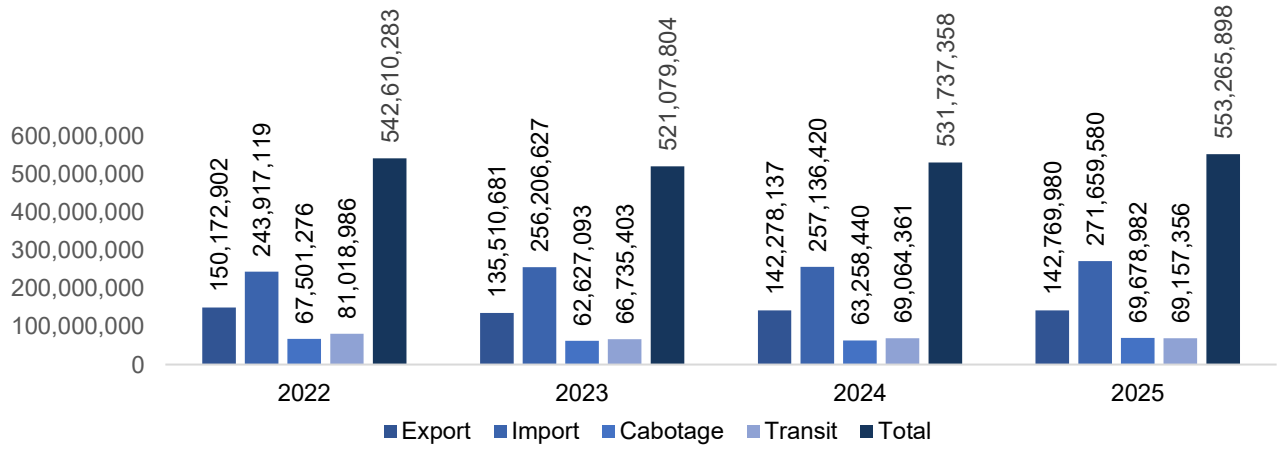
Harbour Master	2024			2025		
	Total Loading	Total Unloading	Cargo Handling	Total Loading	Total Unloading	Cargo Handling
Alanya	0	500,918	500,918	0	515,068	515,068
Aliağa	34,215,843	51,239,021	85,454,864	35,871,916	52,827,360	88,699,276
Ambarlı	13,683,257	17,464,448	31,147,705	14,866,665	19,230,141	34,096,806
Antalya	1,757,375	3,355,416	5,112,791	2,895,968	3,605,362	6,501,330
Ayvalık	1,305	0	1,305	1,699	0	1,699
Bandıma	1,353,012	4,176,114	5,529,126	1,342,929	4,340,462	5,683,391
Bartın	807,347	616,611	1,423,958	983,030	603,770	1,586,800
Ceyhan	32,711,343	13,011,693	45,723,036	35,530,673	15,837,274	51,367,947
Çanakkale	4,138,640	184,773	4,323,413	3,961,328	84,408	4,045,736
Çeşme	829,219	831,438	1,660,657	828,160	809,210	1,637,370
Dikili	839,396	0	839,396	806,175	0	806,175
Enez	0	652,391	652,391	0	1,255,209	1,255,209
Erdek	2,734	7,940	10,674	3,180	17,597	20,777
Fatsa	66,521	0	66,521	32,320	0	32,320
Gemlik	8,883,885	7,931,055	16,814,940	9,215,392	8,571,382	17,786,774
Giresun	480,005	486,990	966,995	654,810	617,802	1,272,612
Göcek	2,590	69,174	71,764	0	64,667	64,667
Güllük	6,027,986	65,861	6,093,847	6,081,097	68,616	6,149,713
Hopa	418,055	39,110	457,165	386,001	2,793	388,794
İnebolu	191,696	80,976	272,672	220,847	103,195	324,042
İskenderun	24,622,171	43,941,759	68,563,930	23,448,597	47,457,140	70,905,737
İstanbul	154,056	4,207,439	4,361,495	333,363	4,850,413	5,183,776
İzmir	3,338,916	4,124,789	7,463,705	2,995,439	4,190,245	7,185,684
Karabiga	2,004,932	10,970,723	12,975,655	2,019,414	10,529,358	12,548,772

	2024			2025		
	Total Loading	Total Unloading	Cargo Handling	Total Loading	Total Unloading	Cargo Handling
Karadeniz Ereğli	1,235,214	8,597,327	9,832,541	1,321,175	8,038,088	9,359,263
Karasu	455,692	1,135,446	1,591,138	400,731	1,318,033	1,718,764
Kocaeli	31,030,342	52,757,397	83,787,739	31,539,549	52,400,426	83,939,975
Marmara Adası	2,670,090	0	2,670,090	3,399,252	2,052	3,401,304
Marmaris	0	11,638	11,638	2	7,473	7,475
Mersin	18,172,714	22,353,993	40,526,707	16,493,574	24,476,275	40,969,849
Mudanya	0	0	0	0	4,181	4,181
Rize	77,555	531,058	608,613	62,050	667,620	729,670
Samsun	3,480,023	9,267,766	12,747,789	3,527,560	9,305,095	12,832,655
Sürmene	0	2,364	2,364	0	3,512	3,512
Taşucu	4,793,218	905,151	5,698,369	4,890,619	896,786	5,787,405
Tekirdağ	18,851,858	29,332,186	48,184,044	18,895,453	31,713,735	50,609,188
Tirebolu	0	591,067	591,067	0	629,991	629,991
Trabzon	693,581	1,861,706	2,555,287	742,745	2,406,896	3,149,641
Tuzla	2,420,210	3,151,622	5,571,832	2,221,561	2,757,057	4,978,618
Ünye	1,115,953	217,750	1,333,703	1,388,194	97,472	1,485,666
Yalova	1,246,247	2,322,961	3,569,208	1,173,716	2,372,621	3,546,337
Zonguldak	1,582,883	10,383,423	11,966,306	1,090,308	10,961,621	12,051,929
Genel Toplam	**224,355,864**	**307,381,494**	**531,737,358**	**229,625,492**	**323,640,406**	**553,265,898**

Source: Ministry of Transport and Infrastructure

In 2025, compared to 2024, the amount of cargo handled at our ports increased by 4.0% (21,528,540 tons).

Graph 51. Cargo Handling by Years, 2022-2025



Source: Ministry of Transport and Infrastructure

In 2025, the amount of containers screened at the ports and piers of our country was 13,996,578 TEU.

Container handling;

- 36.7% (5,136,656 TEU) export,
- 37.1% (5,192,863 TEU) import,
- 6.8% (949,360 TEU) of cabotage,
- 19.4% (2,717,699 TEU) was realized as transit.

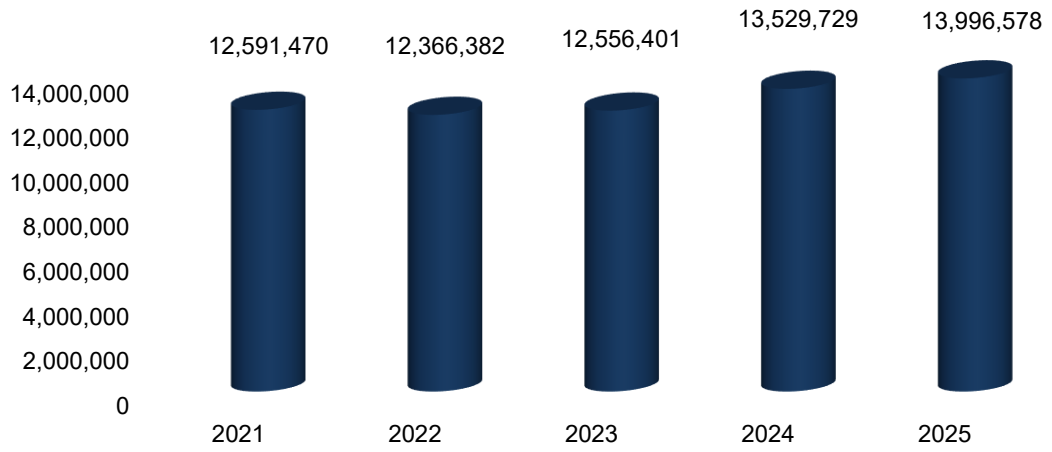
Table 51. Container Handling Figures at Turkish Ports (TEU), 2021-2025

Mode of Transport	2021	2022	2023	2024	2025
Export	4,677,414	4,694,918	4,910,525	4,987,903	5,136,656
Import	4,744,227	4,814,757	4,830,826	4,875,265	5,192,863
Cabotage	831,986	820,949	759,611	903,194	949,360
Transit	2,337,843	2,035,758	2,055,439	2,763,368	2,717,699
Grand Total	**12,591,470**	**12,366,382**	**12,556,401**	**13,529,729**	**13,996,578**

Source: Ministry of Transport and Infrastructure

In 2025, compared to 2024, the amount of containers handled at our ports increased by 3.5% (466,848 TEU).

Graph 52. Container Handling Figures at Turkish Ports (TEU), 2021-2025



Source: Ministry of Transport and Infrastructure, Republic of Türkiye

6.1.1.3. General Developments in World Ports

In 2025, Shangai port is still the port that handles the most containers with 55.06 million TEU. Among the ports that handle the most containers in the world, Shanghai Port is followed by Singapore port with 44.66 million TEU and Ningbo port with 43.87 million TEU.

Table 52. Most Container Handling Ports in the World (mteu)

Region/Port						
Europe	**2021**	**2022**	**2023**	**2024**	**2025**	**Year-on-Year (%)**
Algeciras	4.80	4.77	4.73	4.71	4.76	1%
Ambarli	2.94	2.87	3.31	3.01		
Antwerp	12.02	11.39	10.57	11.43		
Bremen/Bremerhaven	5.02	4.57	4.18	4.44		
Felixstowe	3.70	3.30	3.25	3.61		
Hamburg	8.72	8.26	7.70	7.80		
London Gateway	1.80	2.05	2.00	2.20		
Piraeus	5.31	5.00	5.10	4.70		
Rotterdam	15.30	14.46	13.45	13.80		
Valancia	5.56	5.05	4.80	5.48	5.68	4%
Americas						
Colon	4.92	5.10	4.80	5.56		
Long Beach	9.40	9.13	8.02	9.65	9.88	2%
Los Angeles	10.68	9.91	8.63	10.29		
NY/NJ	8.99	9.49	7.81	8.70		
Santos	4.44	4.99	4.55	5.48	5.91	8%
Savannah	5.61	5.89	4.93	5.55		
Seattle-Tacoma	3.74	3.38	2.97	2.26		
Vancouver	3.68	3.56	3.13	3.48		
Mittle East/ISC/Africa						
Colombo	7.25	6.86	6.90	7.78		
Dubai	13.70	13.97	14.47	15.54		
Durban	2.66	2.57	2.54	2.65		
Jawaharlal Nehru	5.63	5.96	6.35	7.12		
Jeddah	4.72	4.96	5.59	3.72		
Mundra	6.67	6.50	7.40	8.22		
Port Said	4.14	4.25	4.17	3.91		
Salalah	4.51	4.50	3.79	3.28		
Tangier	7.17	7.60	8.62	10.24		

Asia Pacific						
Busan	22.50	21.82	22.99	24.46	24.87	2%
Dalian	3.67	4.46	5.00	5.40	5.48	1%
Guangzhou	24.18	24.86	25.41	25.97	27.68	7%
Haiphong	5.82	5.63	5.57	7.15		
Ho Chi Minh	7.95	7.91	7.67	9.16		
Hong Kong	17.85	16.69	14.34	13.69	12.91	-6%
Kaohsiung	9.86	9.49	8.83	9.23	8.89	-4%
Laem Chabang	8.49	8.74	8.87	9.55	10.45	9%
Lianyungang	5.04	5.57	6.14	6.69	7.16	7%
Manila	4.98	5.47	5.21	5.47		
Nanjing	3.10	3.20	3.45	3.71	4.01	8%
Ningbo	31.08	30.78	35.30	39.30	43.87	12%
Port Klang	13.83	13.22	13.50	14.64		
Qingdao	23.70	25.67	28.72	30.87	32.89	
Rizhao	5.18	5.80	6.26	6.71	7.37	10%
Shanghai	47.03	47.30	49.16	51.56	55.06	7%
Shenzhen	28.76	30.04	29.88	33.40	35.41	6%
Singapore	37.55	37.29	39.01	41.12	44.66	9%
Tanjung Pelepas	11.20	10.51	10.48	12.25		
Tanjung Perak	3.90	3.97	4.10	4.30		
Tanjung Priok	6.75	7.23	7.29	7.60		
Tianjin	20.26	21.02	22.17	23.28	24.03	3%
Tokyo	4.86	4.94	4.57	4.65		
Xiamen	12.03	12.43	12.55	12.25	12.51	
Yingkou	5.22	5.00	5.34	5.56	5.95	7%

Source: Clarksons Research

6.1.2. Shipyard

The maritime sector is an important part of global trade with its structure consisting of shipyards, ports and ships. The expeditions of French and Genoese sailors in the direction of the Atlantic Ocean and the African coasts at the beginning of the 14th century clearly demonstrated the importance of shipbuilding activities with the durability of ships. Today, the maritime industry continues to grow with technological developments.

When comparing the years 2003 and 2025 regarding active shipyards and shipbreaking facilities in our country, the number of shipyards, which was 37 in 2003, increased by 130% to 85 in 2025.

Approximately 70% of the shipyards are concentrated in the Marmara Region, especially on the coasts of the Sea of Marmara; This situation has enabled the shipbuilding industry to form a strong center in the region. Modern shipyards, especially in Tuzla Shipyards Region and Altınova Shipyards Region, increase Türkiye's competitiveness in the global maritime sector with large-tonnage ship production and innovative shipbuilding techniques.

- While there were 37 shipyards and a project capacity of 0.55 million DWT in 2003,
- In 2025, it is seen that 85 shipyards and 4.79 million DWT project capacity have been reached.

The basis of this success lies in the correct planning of shipyard areas and periodic inspections. In order for shipyards to operate effectively and efficiently, well-structured and regular inspection of the infrastructure and organization is one of the critical factors supporting the development of the sector. In this way, shipbuilding, maintenance and repair processes become higher quality and efficient, as well as increasing competitiveness in the international market.

Figure 2. Distribution of Active Shipyard and Ship Dismantling Facilities by Province

Source: Ministry of Transport and Infrastructure

In addition, the Turkish shipbuilding industry has gained significant momentum in the field of green transformation as of 2025. In line with the environmentally friendly production approach, the construction of green ships with low emissions, energy efficiency and sustainable technologies has become one of the priority agendas of the sector. This transformation is not only within the scope of environmental responsibility; it is also considered as a strategic investment area in terms of increasing exports, increasing productivity and strengthening global competitiveness.

Thanks to Türkiye's advanced shipyard infrastructure and engineering capacity, its goal of becoming an important center in environmentally friendly ship production is strengthening. In this direction, the Turkish shipbuilding industry aims to gain a more effective position in the

international market through sustainable maritime practices. To date, 54 green ships have been built, and 39 of them are under construction.

6.1.3. Ship Recycling Industry

Ship recycling is a process that refers to the decommissioning of marine vessels that have completed their useful life and allowing their materials to be reused, safe and environmentally friendly ships. This area is one of the first stages of reintroducing waste materials into the economy and is seen as an important environmentally oriented branch of the maritime industry on a global scale.

The history of shipbreaking activities in Türkiye is quite old and dates back to before the Republic. The first activities in this field started in the Golden Horn, and in 1925, various ships such as the Bandırma Ferry and the Ertuğrul Yacht were dismantled here. In the same years, dismantling of foreign flagged ships was carried out in Hasköy.

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 data from the Ministry of Transport and Infrastructure, while the total tonnage of recycled ships was 557 thousand GT in 2009, it increased to 1,150 thousand GT in 2025 with a growth of 106%.

The ship recycling sector not only contributes to the Turkish economy but also plays an important function in terms of global trade. In this field, Aliağa creates economic value as one of the leading centers of both Türkiye and the world and stands out with its environmentally friendly practices. These developments strengthen Türkiye's position in the international maritime and recycling sectors.

Türkiye ranks fourth in the world in ship recycling. Of the 23 facilities operating in Aliağa, 11 are certified in accordance with the European Union legislation and 20 are certified according to the standards of the Hong Kong Convention. In these facilities, a model in which resources are constantly reused is applied and thus it is aimed to reduce foreign dependency on raw materials.

6.1.4. Marina, Boat Manufacturing and Boatyard

Türkiye, Thanks to its strategic geographical location, the seas surrounding it on three sides, its favorable climate and its rich cultural and natural heritage, it has a strong potential on a global scale in terms of yacht and cruise tourism.

The investments implemented in this context are considered as important steps that support sustainable growth in the sector while bringing a new dynamism to marine tourism.

According to the data of the Ministry of Transport and Infrastructure, there are 65 marinas and yacht berths throughout Türkiye. The marina capacity, which was 8,500 in 2002, increased to 25,962 in 2025.

As of 2025, Gazipaşa Marina and Demre Marina are among the prominent projects within the scope of strategic investments to strengthen Türkiye's marine tourism infrastructure. Gazipaşa Marina, with its modern and environmentally friendly infrastructure, offers yacht mooring capacity, dock and pier arrangements at international standards; Demre Marina also aims to increase the yacht tourism potential of the region with its protective breakwater systems, maintenance-repair and social reinforcement areas. Both marinas are considered as integrated investments that strengthen Antalya's marine tourism diversity, contribute to the spread of the tourism season throughout the year and support Türkiye's competitiveness in the Mediterranean basin.

Gazipaşa Marina

- 308 yacht mooring capacity,
- 600 meters main breakwater,
- 193 meters secondary breakwater,
- 676 meters of dock,
- 320 meters floating pier,
- 3.863 m² superstructure

Demre Marina

- 750 yacht mooring capacity,
- 958 meters main breakwater,
- 281 meters secondary breakwater,
- 287 meters of dock,
- 5 floating piers,

In Datça Marina, Tekirdağ Marina, Golden Horn Marina and Complex and Mersin Aydıncık Marina projects, marina infrastructure and superstructure constructions and preparation processes for operation continue.

The planning approach for yacht and cruise tourism in Türkiye is discussed in a holistic and sustainable framework within the scope of the Twelfth Development Plan (2024-2028) Tourism Report prepared by the Presidency of Strategy and Budget of the Republic of Türkiye. Accordingly, it is envisaged that the main plan of tourism coastal structures will be updated in a way to prevent the opening of natural bays suitable for yacht tourism to uncontrolled construction.

In addition, in order to increase the yacht mooring and berthing capacity, it is aimed to build new marinas, cruise ship terminals and mega yacht boatyards that will serve the maintenance and repair of marine vehicles in the coastal areas where they are needed, within the framework of sustainability principles.

It is important to observe the supply-demand balance by taking into account the occupancy rates of existing marinas, Mediterranean and Black Sea yacht traffic and new yacht construction rates, and in this context, to plan new investments in line with regional needs with the Public-Private Partnership (PPP) model. In addition, it is planned to support projects aimed at increasing the number of cruise terminals with the existing marina capacity and increasing the number of cruise passengers (e.g. Yenikapı Cruise Port Project). (Presidency of the

Republic of Türkiye Strategy and Budget Directorate, Twelfth Development Plan 2024-2028 Tourism Report).

While the number of Boat Manufacturing and Boatyards (both in-scope and out-of-scope) was 744 in 2018, it increased by 47.7% to 1,099 facilities in 2025.

Table 53. Number of Boat Manufacturing and Boatyard Facilities by Years

Year	Number of Boat Manufacturing and Boatyard Facilities
2018	744
2019	780
2020	815
2021	819
2022	917
2023	984
2024	1,038
2025	1,099

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

In addition, with the regulations that came into force in 2025, the permit, allocation and license processes for shipyards, boat manufacturing and boatyards have been made simpler and more predictable; This has been an important development that paves the way for private sector investments.

Within the scope of environmental sustainability, practices for waste management, energy efficiency and emission control have been made mandatory, and the compliance of facilities with international environmental standards has been strengthened.

As of 2025, work on boat manufacturing, boatyards and marina investments in Türkiye continues at both the planning and implementation levels. The Environmental Impact Assessment (EIA) process has been initiated for the İzmir Çaltılıdere Boat Manufacturing and Boatyard Project, which is aimed to be one of the largest boat manufacturing centers in Europe, and environmental, technical and economic feasibility studies continue within the scope of the project.

Within the scope of Fethiye Karaot Boat Manufacturing and Boatyard Project, which is one of the important projects planned in the Aegean and Mediterranean regions, the area usage decisions have been revised, and it is aimed to minimize the environmental impacts of the project and to make the scattered boat maintenance and repair activities in the region more organized. In this direction, it is planned to rehabilitate the existing construction, especially in the Karagözler region, and to move the activities to a more suitable area.

6.1.5. Fishermen's Shelters

Policies and practices for fishermen's shelters show a significant development process by 2025 in line with the goals of sustainability of the aquaculture sector, increasing logistics capacity and strengthening coastal infrastructure. In this context, the modernization of existing fishing

shelters across the country has accelerated; Basic infrastructure elements such as docks, breakwaters, boatyards and mooring capacity have been rearranged to serve fishing vessels of different sizes. At the same time, it was aimed to increase the total capacity with the construction of new fishing shelters, and investments that would meet regional needs, especially in the Black Sea, Mediterranean and Aegean coastlines, were prioritized.

In this context, the construction of approximately 10 fishing shelters on the line extending from Dörtyol to Trabzon continues, and it is considered that these investments will contribute to the more systematic and effective use of coastal areas.

The work on the fisheries coastal structures project, which was initiated in December 2022 in cooperation with TÜBİTAK TÜSSİDE and the General Directorate of Fisheries and Aquaculture of the Ministry of Agriculture and Forestry, was completed in 2025. Within the scope of the project, the current situation of approximately 400 coastal structures was analyzed; classification, determination of disembarkation points and capacity assessments were made. In addition, a data inventory and data architecture were created, and a governance model, prioritization approaches, development roadmap and action plan were put forward. These studies are aimed to contribute to the more planned and effective management of coastal use.

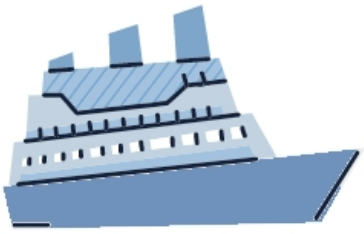
While there were 178 fishing shelters in our country in 2003, this number reached 400 in 2025. 222 fishing shelters have been completed in 22 years.

The Public Investment Program published by the Presidency of the Republic of Türkiye Strategy and Budget details the ongoing investments in fishing shelters. In this context, the projects under construction include Giresun Fisherman's Shelter, Çayeli Fisherman's Shelter Supply Construction, Armutlu Fisherman's Shelter Reinforcement Construction, Biga Aksaz Fisherman's Shelter repair and expansion construction, Faroz Fisherman's Shelter repair construction, construction maintenance and repair works carried out in Kastamonu, and Alanya Fisherman's Shelter west dock.

In addition, it is stated that the Kozlu Beach Coastal Structures and Fisherman's Shelter Breakwater Addition project is also included within the scope of the ongoing fishermen's shelters survey and project studies. These investments are aimed to strengthen coastal infrastructure and contribute to the safer and more effective conduct of fishing activities.

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 54. 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	9234
2004	83	8	91	699	294	993	6,377	2,110	8487
2005	76	10	86	723	345	1,068	6,394	2,486	8880
2006	60	11	71	666	395	1,061	5,398	2,764	8162
2007	58	11	69	845	381	1,226	6,764	2,748	9512
2008	61	15	76	990	431	1,421	8,051	3,116	11,167
2009	53	18	71	943	433	1,376	7,443	3,191	10,634
2010	59	17	76	521	438	959	4,851	3,240	8,091
2011	308	18	326	992	868	1,86	10,292	7,199	17,491
2012	944	10	954	1,246	829	2,075	13,203	6,567	19,770
2013	857	26	883	1,529	871	2,4	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	18,685
2018	1,156	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
2025	2.350	-	2.301	3.001	-	3.001	26.009	-	26.009

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

Marine Tourism Vessels	Number of Yacht	Number of Beds
Business Tourism Documantation of Turkish Flag Yacht	3,001	26,009

Marine Tourism Vessels	Number of Vessels	Passenger Capacity
Business Tourism Documantation of Daily Excursion Boat	2,651	127,052

Marine Tourism Vessels	Number of Vessels	Passenger Capacity
Business Tourism Documantation of Restaurant Ship	33	14,755

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.

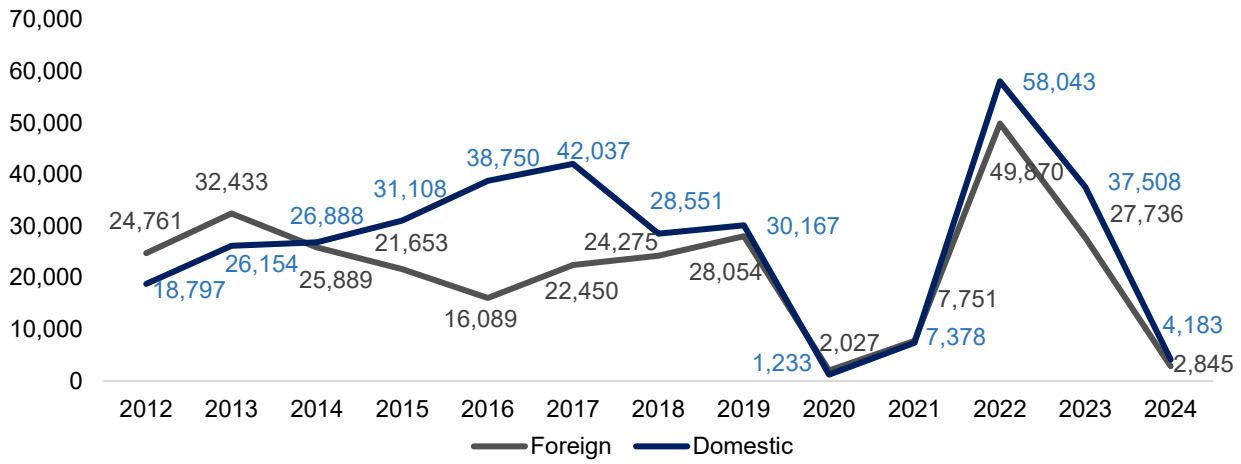
Blue Voyage Routes on the Aegean Routes

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 53. 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 56. Distribution of the Yachtsmen and the Crew Members of the Flag Q Yachts Arrived in Turkish Ports by their Nationalities and Years 2024

Nationality	Yachtsmen		Crew Member		Total		TOTAL
	Commercial	Private	Commercial	Private	Commercial	Private	
Germany	7,313	2,611	731	990	8,044	3,601	**11,645**
Austria	1,171	632	118	156	1,289	788	**2,077**
Belgium	944	418	34	114	978	532	**1,510**
Denmark	279	152	16	108	295	260	**555**
Finland	84	161	5	56	89	217	**306**
France	1,813	1,489	105	503	1,918	1,992	**3,910**
Netherlands	1,838	660	105	296	1,943	956	**2,899**
U.Kingdom	8,871	3,921	928	4,288	9,799	8,209	**18,008**
Ireland	464	269	79	323	543	592	**1,135**
Spain	2,731	1,037	41	299	2,772	1,336	**4,108**
Sweden	179	167	29	228	208	395	**603**
Italy	3,523	1,535	111	889	3,634	2,424	**6,058**
Luxembourg	29	32	2	14	31	46	**77**
Portugal	534	380	12	97	546	477	**1,023**
Greece	330	897	425	754	755	1,651	**2,406**
Czech Rep.	338	130	36	27	374	157	**531**
Switzerland	1,105	700	124	195	1,229	895	**2,124**
Iceland	17	28	2	12	19	40	**59**
Hungary	133	204	18	14	151	218	**369**
Norway	139	72	6	31	145	103	**248**
USA	6,754	2,436	89	396	6,843	2,832	**9,675**
Australia	3,333	565	50	489	3,383	1,054	**4,437**
Japan	13	25	1	8	14	33	**47**
Canada	849	610	27	179	876	789	**1,665**
Mexico	174	239	4	116	178	355	**533**
New Zealand	1,077	271	80	349	1,157	620	**1,777**
Serbia	92	132	2	146	94	278	**372**
Malta	148	129	0	27	148	156	**304**
Israel	82	313	6	88	88	401	**489**
Others	32,816	18,318	5,599	14,134	38,415	32,452	**70,867**
T. Foreign	**77,173**	**38,533**	**8,785**	**25,326**	**85,958**	**63,859**	**149,817**
Türkiye	**79,803**	**78,241**	**49,909**	**53,011**	**129,712**	**131,252**	**260,964**
Grand Total	**156,976**	**116,774**	**58,694**	**78,337**	**215,670**	**195,111**	**410,781**

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

AntalyaKaş 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 tripleharbored 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 57. Marine Tourism Facility (2025)

Mooring Capacity Number of Facility	Number of Facility	Yacht Capacity		
		Sea	Land	Total
Business Tourism Documantation of Yacht Harbour	37	11,804	3,465	15,269
Business Tourism DocumAntation of Yacht Slipway	5	-	821	821
Investment Tourism Documantation of Yacht Harbour	6	2,061	426	2,487
Grand Total	**48**	**13,865**	**4,712**	**18,577**

Source: Ministery of Culture &Tourism

Table 58. Marine Tourism Facility with Tourism Administration Certificate (2025)

NO	Port Name	Cıty of	Capacıty	
			At Sea	On Shore
1	Setur Kusadası Yacht Port	Kusadasi/AYDIN	310	-
2	Atakoy Yacht Port	Atakoy/ISTANBUL	1.040	60
3	G-Marina Kemer	Kemer/ANTALYA	150	150
4	Marmaris Yacht Port	Marmaris/MUGLA	676	122
5	Club Marinas	Gocek/MUGLA	195	-
6	Setur Antalya Marinas	ANTALYA	200	150
7	Kumlubuku Yacht Club	Marmaris/MUGLA	10	-
8	D-MarinTurgutreis Yacht Port	Bodrum/MUGLA	550	140
9	Ece Marina	Fethiye/MUGLA	230	-
10	Milta Bodrum Yacht Port	Bodrum/MUGLA	425	50
11	My Marina Ekincik	Marmaris/MUGLA	67	15
12	D-Marin Didim Marinas	Didim/AYDIN	576	600
13	D-Marin Port Gocek Marinas	Fethiye/MUGLA	379	-
14	Alacati Yacht Port	Cesme/IZMIR	260	100
15	Marinturk Gocek Village Port	Gocek/MUGLA	220	-
16	SETUR Yalova Yacht Port	YALOVA	240	80
17	Alanya Yacht Port	Alanya/ANTALYA	287	160
18	Teos Marinas	Seferihisar/IZMIR	480	80
19	Port Iasos	Milas/MUGLA	100	-
20	Skopea Marinas	Fethiye/MUGLA	80	-
21	Marmaris Adakoy Marinas	Marmaris/MUGLA	33	-
22	I&C Cesme Yacht Port	Cesme/IZMIR	377	100
23	West Istanbul Marinas	Beylikduzu/ISTANBUL	600	370
24	SETUR Ayvalik Marinas	Ayvalik/BALIKESIR	200	150
25	Mersin Yacht Port	MERSIN	500	500
26	Gulluk Yat Marin	Milas/MUGLA	270	-
27	Gokova Oren Marinas	Milas/MUGLA	416	130
28	Yalikavak Marinas	Bodrum/MUGLA	710	40
29	Kumkuyu Marinas	Erdemli/MERSIN	200	200
30	Marinturk Gocek Exclusive	Gocek/MUGLA	112	-
31	Mandalya Yacht Marinas	Milas/MUGLA	50	-
32	Istinye Yacht Park	Sariyer/ISTANBUL	180	-
33	Tarabya Yacht Park	Sariyer/ISTANBUL	208	-
34	Albatros Marinas Marmaris	MUGLA	152	48
35	Marti Marinas	Marmaris/MUGLA	306	70
36	Marinturk Istanbul City Port	Pendik/ISTANBUL	785	50
37	Oasis Marinas Yenifoca	Yenifoça / IZMIR	230	100
Total			**11,804**	**3,465**
General Total			**15,269**	

Source: Ministery of Culture &Tourism

Table 59. Business Tourism Documantaton of Yacht Slipway

NO	Port Name	City of	Capacity	
			At Sea	On Shore
1	Yacht Lift Yacht Slipway	Bodrum / MUGLA	-	400
2	Aganlar Yacht Slipway	Bodrum / MUGLA	-	200
3	Neta Marinas Yacht Slipway	Bodrum / MUGLA	-	21
4	Ege Yacht Slipway	Milas / MUGLA	-	50
5	Gocek Yacht Slipway	Gocek / MUGLA	-	150
Total			-	**821**
General Total			**821**	

Source: Ministery of Culture &Tourism

Table 60. Yacht Harbour Investment Tourism Documantation

NO	Port Name	City of	Capacity	
			At Sea	On Shore
1	Meersea Körmen Yacht Port	Datca/MUGLA	246	56
2	Ataport Yacht Port	Zeytinburnu/ISTANBUL	1,000	70
3	Tekirdag Yacht Port	Suleymanpasa/TEKIRDAG	175	
4	Gazipasa Marinas	Gazipasa/ANTALYA	208	-
5	Setur Demre Marinas	Demre/ANTALYA	400	300
6	Karagozler Dock	Fethiye/MUGLA	32	-
Total			**2,061**	**426**
General Total			**2,487**	

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

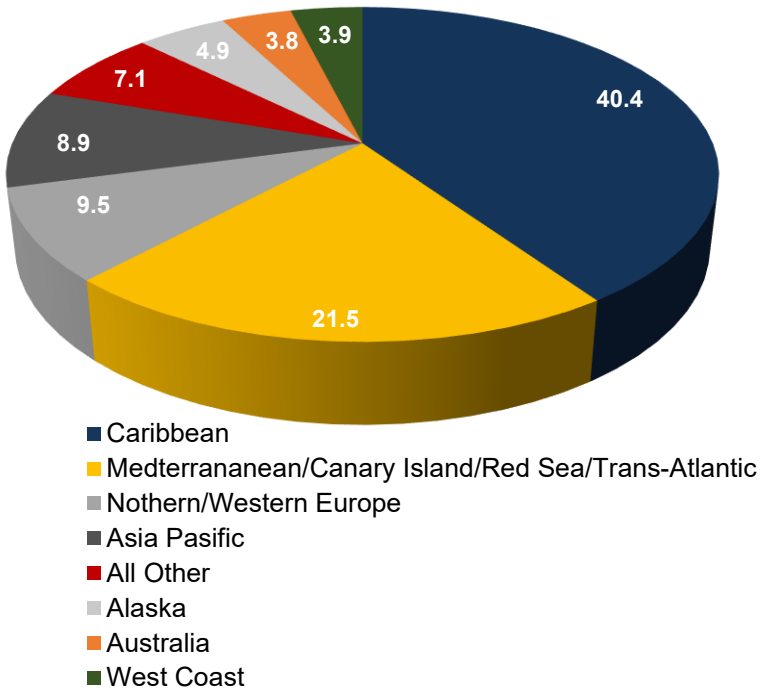
destinations for the tourists. The growing industry of hospitality & tourism is contributing to the market growth, thus driving the global cruises market.

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.

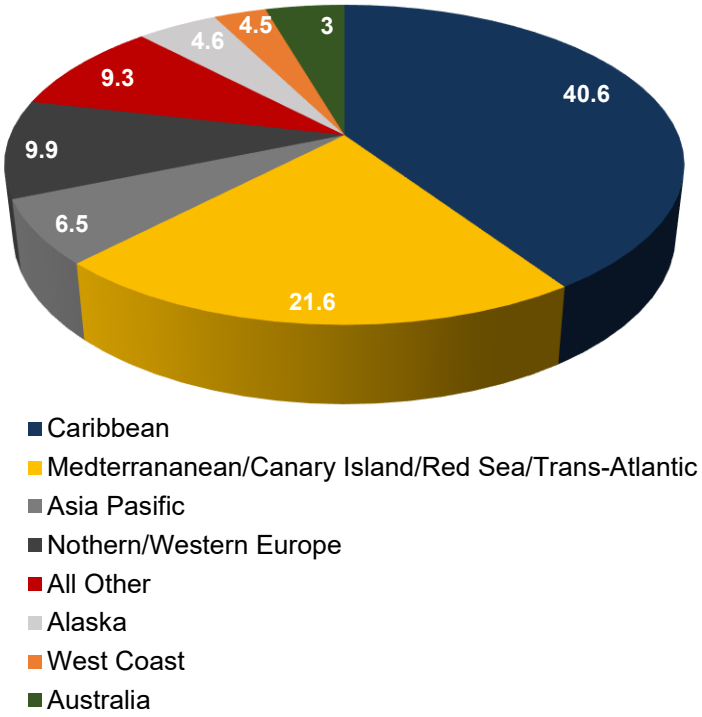
Graph 54. Global Deployment Shares, % (2024)



Source: Cruise Industry News, 2025 Annual Report

The Mediterranean remained the world's second-largest cruise market in 2024, representing roughly (20%) to (23%) of global cruise vessel deployment capacity, second only to the Caribbean. The region's ports hosted over 35.9 million passenger movements and logged 15,823 vessel calls during the year.

Graph 55. Global Deployment Shares, % (2025)



Source: Cruise Industry News, 2025 Annual Report

The total number of cruise passenger movements at MedCruise Ports during 2025 reached 39,75 million once again surpassing pre-pandemic levels and confirming the sustained recovery of the cruise industry in the MedCruise region, with growth of 10.50% compared to 2024. The total number of cruise ship calls was 17,783 in MedCruise Ports in 2025, representing the highest level ever recorded by MedCruise and reflecting a growth of 12.39% compared to 2024. This represents a solid increase from the previous year, reinforcing the sector's resilience and its significant role in global cruise tourism. (Source; Medcruise 2025 Report)

Five cruise ports in the Mediterranean and its adjoining seas hosted more than 2 million passenger movements in 2025 and top the list of the ports with the most significant traffic (Table 61). These are Barcelona (3,999,258), Marseille (2,634,780), Balearic Islands (2,577,959), Genoa and Savona (2,421,895) and Las Palmas Ports (2,089,027).

Table 61. Top 10 MedCruise Ports (2025)

No	Port	TP 2025
1	Barcelona	3,999,258
2	Marseille	2,634,780
3	Balearic Islands	2,577,959
4	Genova, Savona	2,421,896
5	Las Palmas Ports	2,089,027
6	Naples, Salerno, Castellammare di Stabia	1,955,867
7	Piraous	1,863,397
8	Tenerife Ports	1,643,686
9	Messina, Milazzo Roggio Calabri	1,438,146
10	Kusadasi, Bodrum	1,133,454

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.

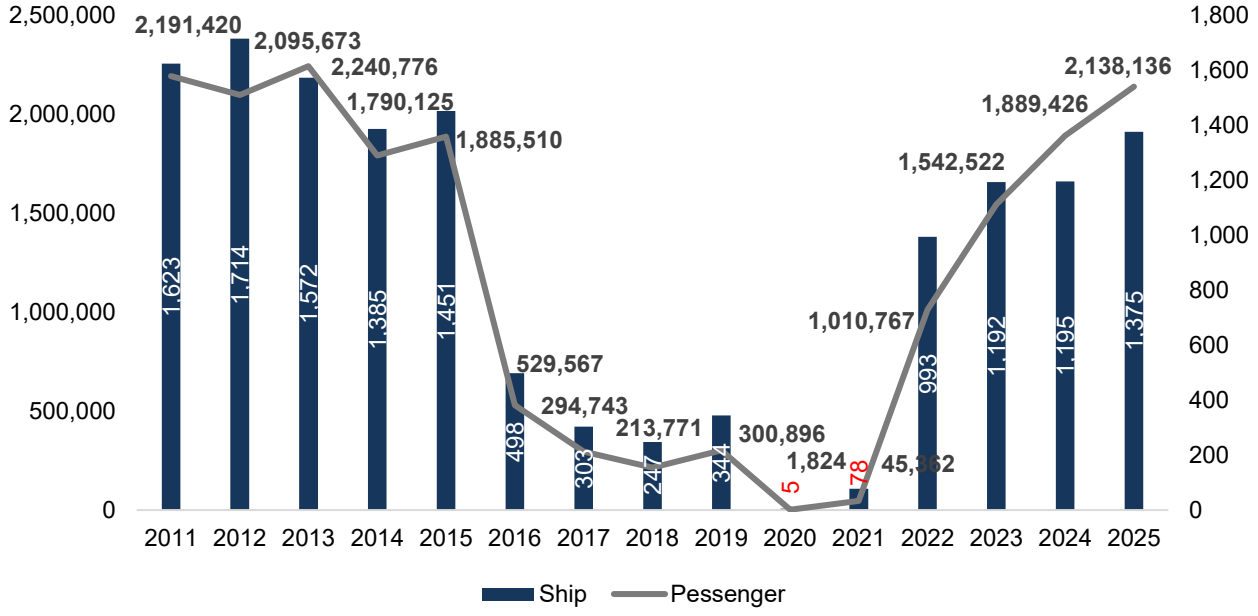
Luckily for cruise passengers, the choice and range of ships on which to so travel are getting wider each year.

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 56. Statistics of Cruises and Passengers Arrived at Turkish Ports Between 2011-2025



Source: Ministery of Culture &Tourism

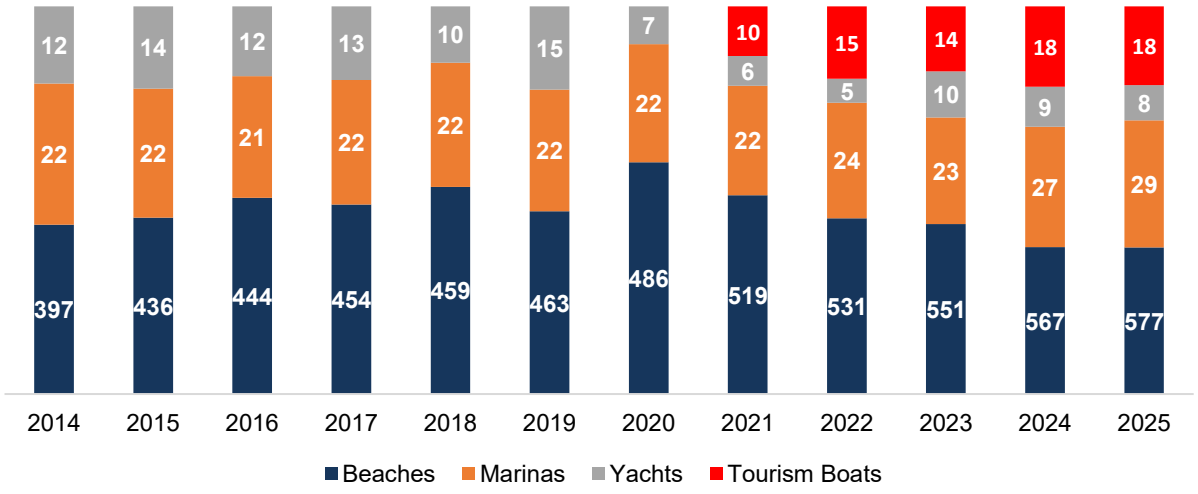
As of 2025, cruise ships made regular calls and overnight stays at Turkish ports throughout all twelve months of the year. As a result, a total of 2,138,136 cruise passengers visited our country's ports. This development clearly reflects a strong trend of sustainable growth in cruise tourism.

Projections for 2026 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 57. Blue Flag Data (2025)



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 world's population increases, the demand for animal protein sources, which play an important role in human nutrition, is also rising. Fish and other aquatic products are obtained through capture and aquaculture activities. Increasing industrialization and environmental pressures have led to the gradual pollution of seas and inland waters, resulting in a decrease in natural stocks. For this reason, the importance of aquaculture has increased significantly in recent years (Yonar, 2008; Akyıldız, 2013).

Türkiye has significant potential for aquatic production, as it is surrounded by seas on three sides and possesses abundant inland water resources. With a total coastline of 8,333 km and seas exhibiting diverse ecological characteristics, the country occupies a strategic position in terms of fisheries production and trade. These characteristics contribute to increased marine biodiversity and allow for the economic utilization of a wide range of species.

The fisheries and aquaculture sector holds a significant position in the Turkish economy in terms of both production and foreign trade. Advances in the technologies used in the sector, the diversification of production methods, and the increase in international trade volume are among the key factors supporting its growth. In this context, sustainable production and resource management policies have come to the forefront.

An examination of data from international organizations indicates that the fisheries and aquaculture sector is one of the fastest-growing segments within the agricultural sector. Reports published by the Organisation for Economic Co-operation and Development (OECD) and the Food and Agriculture Organization of the United Nations (FAO) emphasize that aquaculture, in particular, has experienced significant growth momentum in recent years (TEPGE, 2023). According to data from the Turkish Statistical Institute (Turkstat), aquaculture production reached 1,007,921 tons in 2023, representing an increase of 18.6% compared to the previous year. In 2024, total production decreased by 7.6% to 933,194 tons. Of this total, 356,070 tons were obtained through capture fisheries, while 577,124 tons were derived from aquaculture activities. Approximately 62% of total production in 2024 originated from aquaculture, whereas 38% was obtained through capture fisheries.

An analysis of foreign trade data for the fisheries and aquaculture sector reveals that the sector exhibits an export-oriented structure. In the January–December period of 2024, exports amounted to 882.97 million USD, while imports totaled 71.87 million USD. Leading indicators for the January–December period of 2025 suggest that, although export and import values fluctuated throughout the year, an upward trend in exports became more pronounced in the final quarter. This indicates that the sector has maintained its competitiveness in international markets (Turkstat, 2025).

Factors such as population growth, environmental pressures, overfishing, and climate change impose significant stress on aquatic resources. In this context, the conservation of aquatic resources, the implementation of sustainable fisheries policies, and the further development of aquaculture activities are of critical importance.

Aquatic production holds strategic importance both globally and specifically in Türkiye in terms of food security, economic development, and environmental sustainability. Rapid population growth significantly increases food demand, and due to the limited capacity of natural fisheries resources, aquaculture is emerging as one of the primary food production systems of the future (TEPGE, 2025).

In this report, the fisheries sub-sector within the broader maritime sector is examined, and global and national developments in fisheries production, capture fisheries, aquaculture activities, and foreign trade are evaluated through a holistic approach.

8.2. Current Status of Aquatic Products

8.2.1. Global Aquatic Production

Global aquatic production is carried out in both marine and inland waters through capture fisheries and aquaculture. While advancements in global standards, technological development, and the modernization of fishing vessels have propelled the fisheries sector forward, capture fisheries production has exhibited fluctuations and a declining trend. Between 2015 and 2022, global capture fisheries production remained relatively stable at over 90 million tons, whereas aquaculture production has shown continuous growth over the same period.

According to the Food and Agriculture Organization of the United Nations (FAO) 2024 report on Fisheries and Aquaculture, global fisheries and aquaculture production reached a record 182 million tons in 2021, representing an increase of 56 million tons compared to the year 2000. Although this represented a 2.7% increase over 2020, global aquatic production set a new record in 2022, reaching 185 million tons—a 1.5% increase compared to 2021. This growth was primarily driven by a 3.6% increase in aquaculture production, while capture fisheries experienced a 0.7% decline due to fluctuations in the harvesting of pelagic species.

These data indicate that the global fisheries and aquaculture sectors continue to grow; however, reductions in capture fisheries production, particularly due to fluctuations in pelagic species catches, pose a significant challenge for the sustainable management of marine ecosystems. This situation underscores the need for more comprehensive research and the implementation of sustainable fisheries practices to better understand and manage the impacts of overfishing, climate change, and alterations in marine ecosystems on the sector.

Excluding marine mammals and aquatic plants, global aquatic production reached 188 million tons in 2023, of which 90 million tons were derived from capture fisheries and 98 million tons from aquaculture (Table 62).

Table 62. World Aquaculture Production (Tonnes)

Years	Capture Production (Tonnes)			Aquaculture Production (Tonnes)			Total (Tons)
	Sea	Inland water	Total	Sea	Inland water	Total	
2015	80,438,718	11,134,146	91,572,864	27,068,357	45,861,641	72,929,997	164,502,862
2016	78,206,872	11,314,670	89,521,542	28,609,670	47,960,247	76,569,918	166,091,460
2017	81,491,055	11,877,368	93,368,423	30,083,077	49,545,170	79,628,248	172,996,671
2018	84,520,639	11,985,462	96,506,101	30,877,296	51,601,032	82,478,328	178,984,429
2019	80,105,137	12,090,295	92,195,432	31,862,628	53,349,551	85,212,180	177,407,612
2020	78,795,376	11,470,557	90,265,933	33,118,115	54,384,495	87,502,609	177,768,543
2021	79,838,687	11,363,695	91,202,382	34,640,923	56,222,784	90,863,706	182,066,088
2022	79,708,639	11,320,891	91,029,529	35,340,189	59,072,534	94,412,723	185,442,252
2023	78,351,970	12,031,616	90,383,586	36,774,049	61,742,926	98,516,975	188,900,561

Source: FAO (2025), Fisheries and Aquaculture Statistics

Between 2000 and 2021, aquaculture production exhibited an average annual growth rate of 5.0%, reaching approximately 90.9 million tons in 2021—one of the highest levels historically recorded (FAO, 2024). In contrast, global capture fisheries production has remained generally stable since the early 1990s, fluctuating over the years but maintaining a level of around 90 million tons (FAO, 2024).

Moreover, factors such as climate change, ecosystem transformations, overfishing, and the status of fish stocks constitute major influences on production levels. For instance, capture fisheries production reached a peak of approximately 96.4 million tons in 2018, but by 2021 it had declined to around 91 million tons, accounting for roughly 50% of total aquatic production (FAO, 2024).

According to the FAO State of World Fisheries and Aquaculture (SOFIA) report, global aquatic production reached a historical high of approximately 223 million tons. Of this total, around 185 million tons originated from aquatic animals, with aquaculture accounting for 51% of production and capture fisheries contributing 49% (FAO, 2024).

Regional distribution indicates that Asia maintains a leading position in global aquatic production, representing approximately 70% of the total. This is followed by Europe, the Americas, Africa, and Oceania. At the country level, China is the largest producer with a share of approximately 35–36%, followed by India (8%) and Indonesia (7%). Together, these three countries account for roughly half of global production (FAO, 2024).

FAO analyses by fisheries region reveal significant spatial differences in production. In particular, inland water production is concentrated in Asia and constitutes a substantial portion of global production. In 2022, approximately 34% of total aquatic production was derived from Asia's inland waters (FAO, 2024).

By 2022, aquaculture accounted for 51% of global aquatic production, surpassing capture fisheries. This demonstrates the increasing contribution of aquaculture to global production in recent years. Aquaculture production is predominantly concentrated in Asia, which plays a central role in global production growth. In other regions, production levels are lower, and the contribution of aquaculture varies by country (FAO, 2024).

Table 63. Hunting and Aquaculture Production in the World

Countries	Capture Production				Aquaculture Production			
	2000	2010	2015	2021	2000	2010	2015	2021
World	93.566.5	87.191.3	91.558.6	91 190.7	32.420.3	57.756.4	72.889.0	90 861.8
Africa	6.772.4	7.789.9	8.881.9	10 358.4	399.6	1.286.1	1.778.3	2 322.0
America	25.754.5	17.577.0	17.546.9	19 199.9	1.423.4	2.514.6	3.279.2	4 465.4
Asia	43.566.5	46.711.4	49.547.3	46 634.2	28.422.5	51.232.9	64.679.9	80 259.8
Europe	16.180.0	13.876.9	14.157.4	13 484.0	2.052.9	2.533.2	2.967.7	3 567.8
Oceania	1.088.6	1.217.2	1.366.0	1 477.7	121.8	189.7	184.0	246.8

Source: FAO, 2024, Fisheries and Aquaculture Production

As a result of licensing regulations, fleet reduction, and production restrictions implemented in China, capture fisheries-based production continues to decline. This loss is intended to be offset by fleets operating in offshore waters (TEPGE, 2023).

Table 64. World Aquaculture Production by Country (Tons)

Countries	2018	2019	2020	2021	2022
China	62,207,398	62,242,310	62,846,808	64,159,579	65,869,459
India	12,562,853	13,386,400	13,265,638	14,394,560	15,716,918
Indonesia	12,770,927	12,774,873	12,103,606	12,665,749	12,722,332
Vietnam	7,489,679	7,926,658	8,173,609	8,276,370	8,749,863
Peru	7,311,264	4,976,241	5,770,371	6,677,498	5,458,136
Russia	5,310,940	5,212,169	5,342,456	5,455,718	5,303,022
USA	5,253,977	5,314,752	4,708,885	4,723,804	4,758,731
Bangladesh	4,276,641	4,384,219	4,503,371	4,621,228	4,735,056
Norway	3,849,317	3,767,966	3,962,634	4,060,575	4,090,741
Japan	3,939,849	3,786,422	3,779,468	3,710,570	3,734,643
Other	124,765,195	123,772,011	124,456,846	128,745,650	55,596,928
World	**180,465,700**	**178,976,103**	**178,470,342**	**183,868,252**	**186,735,827**

Source: FAO, 2024, Statistical Data

At the country level, aquatic production is not evenly distributed, with countries in Asia clearly leading the sector. China is the largest producer, generating 64.2 million tons of aquatic products, accounting for 35% of total global production. It is followed by India, Indonesia, Vietnam, and Peru. According to FAO data, global aquatic production is projected to reach 202 million tons by 2030 (TEPGE, 2023).

As of 2023, according to the most recent FAO report, approximately 4.9 million fishing vessels are operating worldwide. The majority of these vessels are concentrated in Asia, while Oceania accounts for less than 1% of the global fleet (FAO, 2024).

Aquaculture continues to grow globally, although it is influenced by local policies, variations in management objectives, field conditions, and environmental factors. Asia maintains its leading position in production, with China remaining the top producer in both capture fisheries and aquaculture.

8.2.2. Aquaculture Production in Türkiye

Türkiye's geographic location and abundant natural resources provide favorable conditions for aquatic production through capture fisheries and aquaculture. The country is bordered on three sides by seas with distinct ecological characteristics and differing production potentials: the Black Sea, the Aegean Sea, and the Mediterranean Sea. Additionally, Türkiye possesses the entire Marmara Sea, an inland sea. Across 25 river basins, there are numerous rivers, 200 natural lakes, 318 reservoir lakes, and approximately 1,300 ponds (Eleventh Development Plan 2019–2023).

Türkiye functions as both an importer and exporter of aquatic products, maintaining a positive trade balance in this sector. In 2024, production quantities and values were as follows: capture fisheries—355,995 tons valued at 11,346,939,912 TRY; aquaculture—577,124 tons valued at 67,244,532,930 TRY; totaling 933,119 tons valued at 78,591,472,842 TRY (Turkstat, DGFA).

According to provisional Turkstat data for 2024, aquatic product exports amounted to 312,630 tons valued at 40,603,307,361 TRY, while imports totaled 120,237 tons valued at 6,613,363,257 TRY (Turkstat, DGFA).

Total aquatic production in 2024 decreased by 7.6% compared to the previous year, reaching 933,194 tons. Of this total, 31.1% consisted of marine fish obtained through capture fisheries, 3.5% of other marine products, and 3.6% of inland capture fisheries. The largest share, 61.8%, was derived from aquaculture activities (Turkstat, 2024).

Capture fisheries production totaled 356,070 tons, whereas aquaculture production amounted to 577,124 tons. Marine capture decreased by 23.3% compared to the previous year, while inland capture production increased slightly by 0.2% (Turkstat, 2024).

Table 65. 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
2024	322,388	33,607	355,995	405,742	171,382	577,124	933,119

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

In Türkiye, aquatic production is carried out through capture fisheries and aquaculture, with production derived from both marine and inland waters. Over the past seven years, the largest increase occurred in 2023, when total production reached 1,010,346 tons. While aquaculture production in both marine and inland waters has shown a year-on-year increase, capture fisheries production exhibits annual fluctuations (Table 65).

Regarding Türkiye's aquatic product trade, data for 2023 indicate that exports amounted to 272,192 tons valued at 40,603,307,361 TRY, while imports totaled 105,252 tons valued at 6,613,363,257 TRY. Evaluating the provisional data for 2024, aquatic product exports increased to approximately 312,630 tons, reaching a value of around 2 billion USD. This trend demonstrates that the growth in production, particularly from aquaculture activities, has positively impacted Türkiye trade performance and that the country continues to maintain a net exporter position in the aquatic products sector (Turkstat, 2023; 2024).

8.2.2. Fisheries

In Türkiye, aquatic production is carried out in both marine and inland waters through capture fisheries and aquaculture. The total capture fisheries production in 2015 was 431,907 tons across marine and inland waters, whereas in 2024 it was recorded as 355,994 tons. Year-on-year fluctuations in capture fisheries production in both marine and inland waters are observed between 2015 and 2024. The highest production in both marine and inland waters occurred in 2019. According to 2024 data, the catch of marine fish reached 289,993 tons. Over the past eight years, the lowest recorded marine fish catch was 222,024 tons in 2018 (Table 66).

Table 66. 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
2024	289,993	32,394	322,387	31,212	2,395	33,607	355,994

Source: Turkish Statistical Institute, Directorate General of Fisheries and Aquaculture (2025).

The most frequently captured pelagic marine fish in Türkiye include anchovy (Engraulis encrasicolus), sardine (Sardina pilchardus), horse mackerel (Trachurus spp.), bonito (Sarda sarda), bluefish (Pomatomus saltatrix), and chub mackerel (Scomber japonicus). According to species-specific distribution data, anchovy was the most abundant catch, totaling 153,175 tons, followed by bonito with 49,278 tons and horse mackerel with 19,649 tons (Table 67).

Based on Turkstat data, the Black Sea region accounts for the largest share of marine fisheries in Türkiye. In particular, anchovy fisheries are concentrated in the Black Sea, with the majority of the catch obtained from the Eastern Black Sea, while the Western Black Sea contributes a smaller share. Recent data indicate notable year-to-year fluctuations in anchovy catches, which are associated with climate conditions, sea surface temperature variations, and changes in fish stocks.

Table 67. 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
2024	153,175	17,818	19,649	49,278	3,610	16,067

Directorate General of Fisheries and Aquaculture, 2025.

According to Table 6, anchovy (*Engraulis encrasicolus*) holds a dominant and decisive position in pelagic fisheries production in Türkiye. Between 2015 and 2024, anchovy accounted for the largest share of total pelagic catches, although its production has exhibited significant interannual variability. Notably, while production peaked in 2019 and 2023, it declined substantially in 2024, indicating fluctuations in anchovy stock levels over the years.

Bonito (*Sarda sarda*) fisheries, in contrast, show episodic surges rather than a consistent trend, suggesting periodic concentrations in stock abundance. Sardine (*Sardina pilchardus*) and horse mackerel (*Trachurus spp.*) production, by comparison, exhibited relatively limited variation, reflecting a more stable production pattern. The production of chub mackerel (*Scomber japonicus*) displayed alternating increases and decreases over the years. Overall, the annual production levels of pelagic fish species vary, reflecting the influence of stock dynamics and environmental conditions on fisheries output.

According to data from the General Directorate of Fisheries and Aquaculture (DGFA), as of the end of 2024, the number of licensed fishing vessels in Türkiye was 15,212 for marine waters and 3,385 for inland waters, totaling 18,597 vessels. Of these, 986 vessels were medium-sized (10–12 m), while 15,931 were small-scale fishing vessels under 10 meters in length, forming the majority of the national fishing fleet (Table 68).

Table 68. 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	688	8,425	3,510	964	862	467	296	15,212
Freshwater	517	2,402	389	22	55	0	0	3,385
Total	**1,205**	**10,827**	**3,899**	**986**	**917**	**467**	**296**	**18,597**

Source: Directorate General of Fisheries and Aquaculture, 2025.

The most frequently caught demersal marine fish species in Türkiye include whiting (Merlangius merlangus), European hake (Merluccius merluccius), flathead mullet (Mugil cephalus), red mullet (Mullus barbatus), and turbot (Scophthalmus maximus). Compared to pelagic species, demersal fish catches exhibit less interannual variability. Between 2015 and 2024, whiting showed the

greatest fluctuation among demersal species, with annual catches ranging from 6,800 to 13,100 tons, and a slight upward trend observed in recent years. Red mullet catches fluctuated between 1,200 and 1,700 tons over the past seven years, while flathead mullet (2,000–3,400 tons) and European hake, with an average catch of approximately 1,000 tons, exhibited an increasing trend. Catches of turbot, another significant demersal species, ranged between 139 and 496 tons in recent years (Table 69).

Table 69. 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
2024	8,711	742	2,112	1,66	496

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

Other marine products with the highest capture rates in Türkiye include carpet shell clams (Ruditapes decussatus), sea snails, shrimps, black mussels (Mytilus galloprovincialis), and cuttlefish (Sepia officinalis). Among these, carpet shell clams are the most abundantly caught. In the production of non-fish marine products, the species contributing most to the catch is the white carpet shell clam, almost entirely harvested from the Western Black Sea region (Eleventh Development Plan 2019–2023).

Table 70. 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, 2025.

According to Table 10, marine fish capture production in Türkiye is largely dependent on the Black Sea. In particular, the Eastern Black Sea has been the main source of production throughout the period under review, while the contribution of the Western Black Sea remains relatively limited. Between 2000 and 2024, the total production from the Black Sea accounted for a significant portion of the national total in many years, highlighting the region's pivotal role in pelagic fisheries (DGFA, 2024).

An evaluation over the years indicates considerable variability in production originating from the Black Sea. High production levels were recorded in 2007 and 2019, whereas lower levels were observed in 2012, 2018, and 2022. The total production of 290,582 tons in the Black Sea in 2023 decreased to 214,760 tons in 2024, demonstrating the persistence of this variable pattern (DGFA, 2024).

For other seas, production in the Marmara and Aegean Seas has been relatively limited and stable. The Mediterranean Sea contributes the least to the overall production, providing only a minor share throughout the years (DGFA, 2024).

Overall, marine fish capture production in Türkiye is highly dependent on the Black Sea, with production levels in the Eastern Black Sea being particularly decisive for total output. This reliance constitutes a key factor underlying the interannual variability in production volumes (DGFA, 2024).

Table 71. Marine Fish Capture Production Quantity by Seas (tons)

Years	Black Sea			Marmara	Aegean	Mediterranean	Total
	East	West	Total				
2000	243,417	97,595	341,012	46,137	40,242	14,299	441,690
2001	221,690	121,073	342,763	68,327	42,996	11,094	465,180
2002	251,818	130,229	382,047	68,047	32,559	10,793	493,446
2003	204,754	107,132	311,886	60,925	31,483	11,832	416,126
2004	233,084	118,129	351,213	60,640	33,946	10,953	456,752
2005	170,841	63,132	233,973	44,768	38,774	16,733	334,248
2006	229,874	50,640	280,514	67,153	47,680	14,598	409,945
2007	341,188	71,441	412,629	44,447	44,386	16,739	518,201
2008	283,991	23,123	307,114	38,402	32,870	17,274	395,660
2009	239,703	38,000	277,703	31,709	44,801	26,423	380,636
2010	255,570	48,121	303,691	36,529	34,996	24,440	399,656
2011	293,263	40,608	333,871	36,433	31,330	30,613	432,247
2012	157,044	53,556	210,600	45,371	34,784	24,883	315,638
2013	166,205	43,105	209,310	38,284	30,143	17,431	295,168
2014	124,713	35,163	159,876	30,095	31,406	9,682	231,059
2015	235,312	39,430	274,742	29,338	33,086	8,600	345,766
2016	115,808	76,624	192,432	29,336	32,099	9,857	263,724
2017	152,429	39,453	191,882	22,062	43,833	11,900	269,677
2018	82,730	39,271	122,001	49,707	39,578	10,738	222,024
2019	26,749	35,356	298,105	27,157	37,591	11,873	374,726
2020	131,273	87,982	219,255	21,139	37,909	13,608	291,911
2021	143,262	60,514	203,776	11,365	33,767	13,382	262,290
2022	97,398	86,363	183,761	20,436	38,625	11,714	254,536
2023	23,265	53,317	290,582	48,303	36,032	12,198	387,115
2024	133,066	81,694	214,760	33,226	30,614	11,395	289,995

Source: Directorate General of Fisheries and Aquaculture, 2025

During the 2000–2024 period, inland fisheries capture production in Türkiye exhibited a generally fluctuating trend, with total production declining from 42,824 tons to 33,607 tons. On a regional basis, significant decreases were observed in the Black Sea and Eastern Anatolia regions, whereas the Marmara and Central Anatolia regions maintained relatively stable production levels. In the Southeastern Anatolia region, an increase from 1,541 tons to 2,000 tons was recorded. Although production levels in other regions fluctuated, the overall trend indicates a decline. These findings demonstrate that regional disparities are pronounced in Türkiye's inland fisheries capture production and that there is an overall downward trend in total output.

Table 72. Inland Fisheries Production by Regions (tons)

Years	Black Sea	Marmara Sea	Aegean	Mediterranean	Central Anatolia	Eastern Anatolia	Southeastern Anatolia Region	Total
2000	2,384	4,671	2,145	4,846	7,101	20,136	1,541	42,824
2001	2,422	4,913	2,148	5,184	7,001	20,339	1,316	43,323
2002	2,449	5,450	2,349	5,888	7,182	19,297	1,323	43,938
2003	4,278	5,546	2,592	6,236	5,801	18,851	1,394	44,698
2004	2,483	5,199	2,508	6,824	8,597	18,628	1,346	45,585
2005	2,278	6,849	2,186	6,253	9,209	18,099	1,241	46,115
2006	2,112	6,661	2,071	6,127	10,173	15,829	1,109	44,082
2007	2,168	6,397	2,019	6,108	10,136	15,234	1,259	43,321
2008	1,801	5,774	1,934	5,403	9,861	14,967	1,271	41,011
2009	2,301	5,507	1,707	5,713	8,856	13,715	1,388	39,187
2010	2,268	6,070	2,142	5,927	7,322	14,846	1,684	40,259
2011	2,034	7,319	1,906	5,505	6,141	12,519	1,674	37,098
2012	1,834	5,866	2,150	5,274	6,617	12,702	1,678	36,121
2013	1,323	7,953	2,142	4,749	5,859	11,576	1,472	35,074
2014	1,271	7,947	2,060	5,065	6,980	11,214	1,597	36,134
2015	1,192	6,338	1,853	4,298	7,670	11,354	1,471	34,176
2016	1,033	6,764	1,525	4,392	7,102	11,824	1,216	33,856
2017	829	6,485	1,767	3,833	6,626	11,553	1,052	32,145
2018	688	6,038	1,398	3,653	6,188	11,398	776	30,139
2019	844	6,209	1,519	3,989	6,809	11,419	807	31,596
2020	1,040	6,100	1,828	4,707	7,487	11,146	811	33,119
2021	917	6,387	1,774	4,097	7,834	11,324	807	33,140
2022	1,074	6,563	1,562	4,242	7,346	11,302	1,167	33,256
2023	1,061	6,789	1,667	4,347	7,342	11,321	1,005	33,532
2024	894	6,421	1,453	4,568	7,057	11,214	2,000	33,607

Source: Directorate General of Fisheries and Aquaculture, 2025

8.2.3. Aquaculture

Aquaculture production in Türkiye, first recorded in statistics in 1986 with 3,000 tons, showed a generally continuous increase between 1986 and 2016, except for the years 2001–2002. Aquaculture production has continued its steady growth since 2003 (Eleventh Development Plan, 2019–2023).

Aquaculture is one of the sectors in which Türkiye has made significant advances in recent years. In 2023, aquaculture accounted for 55% of total fisheries production in Türkiye. Of this production, 72% occurred in marine waters, while 28% took place in inland waters (TEPGE, 2024).

Table 73. 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	8.06
2024	405,742	70.3	171,382	29.7	577,124	3.75

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

In recent years, total production in Türkiye's marine and inland waters has become the fastest-growing sector within overall food production. According to Turkstat data, during the last fishing season, capture production in 2024 reached 322,387 tons in marine waters and 33,607 tons in inland waters, totaling 355,994 tons. Aquaculture production amounted to 405,742 tons in marine waters and 171,382 tons in inland waters, with a total of 577,124 tons. Consequently, total fisheries production in Türkiye reached 933,119 tons.

An analysis of production quantities for the most extensively cultured species in Türkiye between 2015 and 2024 indicates that trout production increased from 108,038 tons to 231,591 tons, largely supported by expansion in marine production. During the same period, gilt-head seabream (Sparus aurata) production rose from 51,844 tons to 155,279 tons, and European seabass (Dicentrarchus labrax) production increased from 75,164 tons to 165,055 tons, showing a consistent upward trend. Production levels for all species have risen over the years, particularly accelerating after 2020, reaching the highest levels by 2024 (Table 74).

Table 74. 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	9,920	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
2024	170,905	60,686	231,591	155,279	165,055

Source: Turkish Statistical Institute, Directorate General of Fisheries and Aquaculture, 2025.

Türkiye possesses aquaculture facilities, technology, and human resources suitable for further development in aquaculture production. In its geographical context, Türkiye is among the leading countries in aquaculture within the Middle East, the Caucasus, and European Union countries (Eleventh Development Plan, 2019–2023).

A large proportion of Türkiye's aquaculture facilities, particularly inland water facilities, are small-scale family enterprises (Eleventh Development Plan, 2019–2023). As of the end of 2024, the total number of facilities engaged in aquaculture activities was 2,471, comprising 557 marine and 1,914 inland water facilities. Examining the capacity distribution, 1,200 facilities operate within the 0–50 tons/year range, including 115 in marine waters and 1,085 in inland waters. In marine aquaculture, production capacity is largely concentrated in large-scale enterprises, particularly facilities with capacities of 1,001 tons/year or more, which dominate both in number and total production capacity. Conversely, in inland aquaculture, small-scale facilities are numerically dominant, although the majority of total production capacity is concentrated in medium- and large-scale enterprises.

Considering the total capacity distribution of both marine and inland aquaculture, the 51–100 tons/year capacity group includes 143 facilities with a total of 12,697 tons/year, the 101–250 tons/year group includes 283 facilities with 56,232 tons/year, the 251–500 tons/year group comprises 251 facilities with 107,342 tons/year, and the 501–1,000 tons/year group consists of 290 facilities with 258,395 tons/year. The highest capacity is in the 1,001 tons/year and above group, which includes 158 facilities with a total capacity of 403,040 tons/year. Overall, the total annual production capacity of the 2,471 facilities is 859,973 tons, indicating that production capacity is concentrated in large-scale enterprises and that a production structure based on economies of scale prevails in the sector (Table 75).

Table 75. Distribution of Aquaculture Facilities by Capacities (2024)

Group	Capacity Group (Tonne)	Number of Facilities (Piece)	Total Project Capacity (Tonne/Year)
Sea	Hatchery*	**151**	**0**
	0-50	115	3,221
	51-100	15	1,245
	101-250	18	3,115
	251-500	56	20,565
	501-1000	146	133,634
	1001>	156	398,140
	Total	**557**	**559,920**
Freshwater	Hatchery*	**95**	**-**
	0-50	1,085	19,046
	51-100	128	11,452
	101-250	265	53,117
	251-500	195	86,777
	501-1000	144	124,761
	1001>	2	4,900
	Total	**1,914**	**300,053**

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

8.2.3. Water Resources Management and Fisheries in Türkiye

Law No. 1380 on Fisheries regulates the production, conservation, and control of aquatic resources. Based on this law, the issued regulations and communiqués oversee fisheries activities from various perspectives, including fishing seasons, locations, methods, catch limits, regional fishing practices, and the types of fishing gear used. Additionally, certain restrictions are imposed on recreational fishing activities with regard to specific species, regions, and methods. Within this legislative framework, fishing vessels holding a fisheries license are entitled to conduct commercial fishing throughout Türkiye's seas. To ensure effective fisheries control nationwide, activities such as fish stocking, the transfer of aquatic plants, and the release of other aquatic organisms in marine and inland waters require the authorization of the Ministry of Agriculture and Forestry. Conducting such activities without the necessary permit is prohibited.

Table 76. Fishing (Carp) Quantities (DGFA)

Years	Fish Stocking		Fish Quantity (Pieces)
	Number of Provinces	Number of References	
2002	28	200	5,540,000
2003	48	274	5,920,000
2004	57	338	6,000,000
2005	48	315	6,485,000
2006	49	317	6,550,000
2007	55	326	4,450,000
2008	56	330	4,730,000
2009	58	401	4,100,000
2010	58	451	5,150,000
2011	62	449	4,550,000
2012	39	498	3,500,000
2013	49	554	4,250,000
2014	32	328	4,030,000
2015	52	378	3,500,000
2016	55	541	5,000,000
2017	60	591	6,085,000
2018	60	686	6,000,000
2019	66	787	6,168,000
2020	65	833	6,691,150
2021	73	1,011	54,018,450
2022	75	1,178	76,373,300
2023	75	1,118	93,318,050
2024	74	1,118	78,859,000

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

Between 2002 and 2024, fish stocking activities (carp) in Türkiye have shown a general increasing trend in terms of the number of provinces involved, the number of water resources utilized, and the quantity of fish released. In 2002, stocking activities were conducted in 28 provinces and 200 water resources, with a total of 5,540,000 fish released. Although the following years exhibited fluctuations, both the number of resources and the quantity of fish increased notably after 2010. By 2021, the number of provinces involved in stocking had risen to 73, the number of water resources to 1,017, and the total quantity of fish released reached 54,018,450. The highest quantity of fish stocking occurred in 2023, with 93,318,050 fish, while in 2024, 78,859,000 fish were released across 74 provinces and 1,118 water resources. These data indicate that fish

stocking activities have expanded significantly over the years, both geographically and quantitatively, with a marked increasing trend in recent years.

According to the Eleventh Development Plan, in addition to carp, fish stocking activities are also conducted for species naturally present in marine and inland waters but whose stocks have declined. Ten thousand sturgeon, a species under conservation and prohibited from capture, were released into inland water resources. Additionally, 100,000 turbot juveniles produced through aquaculture were released into various regions of the Black Sea, and 5,000 Black Sea trout were released into rivers in Eastern Black Sea. Since 2017, fish stocking with gilt-head seabream and European seabass juveniles has been carried out in the Aegean and Mediterranean regions (Eleventh Development Plan, 2019–2023).

8.3. 2024 Aquaculture Economic Data

8.3.1. Production Quantity and Value of Aquatic Products

As of 2024, total fisheries production in Türkiye reached 933,119 tons, with a total value of 128.3 billion TRY. Aquaculture activities, which account for 62% of total production, contributed 577,124 tons and 106.0 billion TRY, representing the majority share in total production. Capture fisheries, on the other hand, amounted to 355,995 tons with a value of 22.3 billion TRY, holding a smaller share within total production. Overall, aquaculture's contribution to total production is higher than that of capture fisheries in both volume and value (Table 77) (Turkstat; DGFA).

Table 77. 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
2024	355,995	22,309,727,710	577,124	106,026,648,000	933,119	128,336,375,710

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

8.3.2. Türkiye's Import and Export of Aquatic Products

As of 2024, Türkiye's fisheries foreign trade amounted to 312,397 tons of exports valued at 2.0 billion USD, while imports reached 120,237 tons with a value of 289.3 million USD. In terms of Turkish Lira, exports corresponded to 66.3 billion TRY, and imports to 9.5 billion TRY. Both in quantity and value, exports exceeded imports. Overall, within total foreign trade of fisheries, exports accounted for a higher share than imports in both volume and value (Table 78) (Turkstat; DGFA).

Table 78. 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
2024	312,397	2,015,924,620	66,370,298,811	120,237	289,264,292	9,537,683,718

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

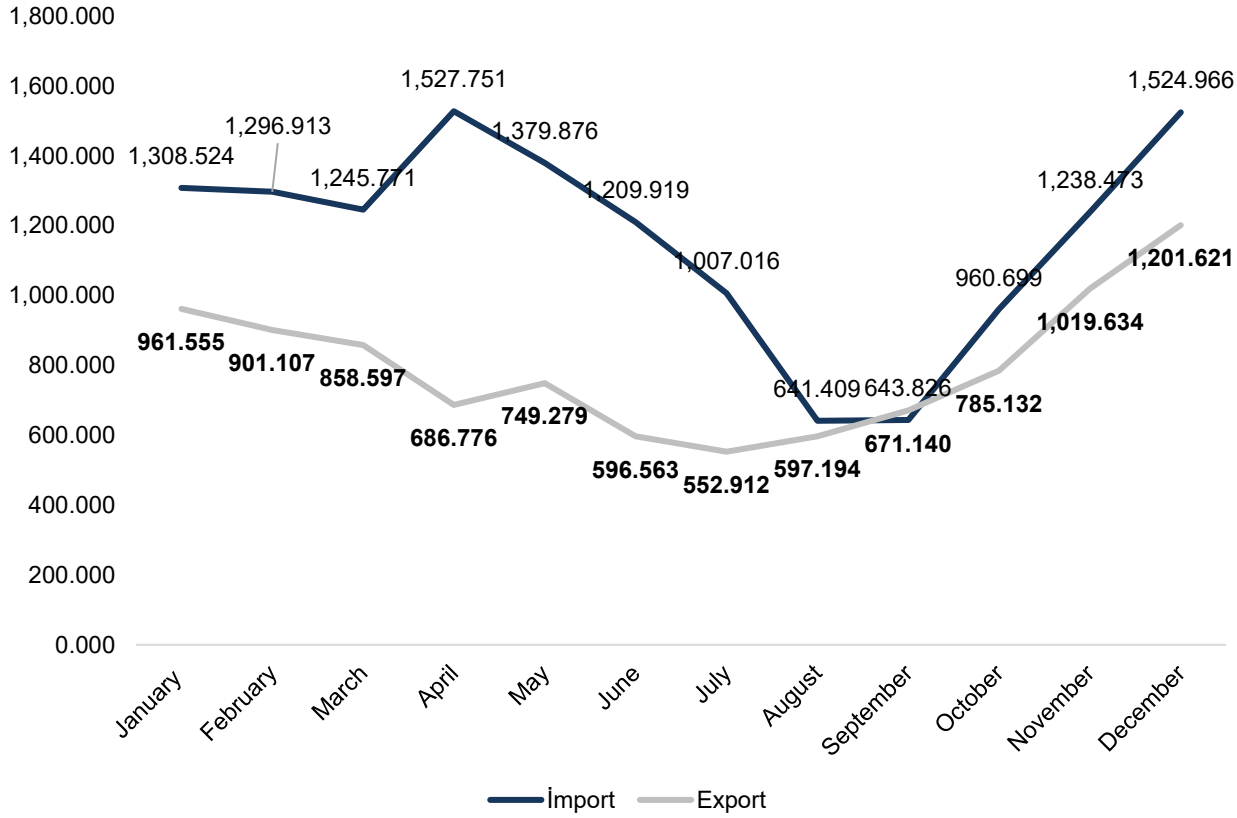
8.3.3. Foreign Trade

According to fisheries and aquaculture foreign trade data for the January–December 2025 period, export and import values exhibited fluctuations throughout the year. Imports started the year at 1,308,524 thousand USD, decreased to 1,245,771 thousand USD in March, and increased to 1,527,751 thousand USD in April. In the following months, a downward trend continued, reaching 1,007,016 thousand USD in July and 641,409 and 643,826 thousand USD in August and September, respectively. In the final quarter of the year, imports rose again, reaching 1,524,966 thousand USD in December.

Regarding export values, exports amounted to 961,555 thousand USD in January and gradually declined during the first half of the year, reaching 552,912 thousand USD in July. From August onwards, exports began to recover, recording 785,132 thousand USD in October, 1,019,634 thousand USD in November, and 1,201,621 thousand USD in December.

This pattern indicates that fisheries foreign trade experienced significant fluctuations throughout the year, with a recovery trend particularly evident in the second half. The increase in imports towards the end of the year may reflect a revival in domestic demand or increased dependency on foreign supply during periods of insufficient domestic production. On the other hand, the strong growth in exports in the final quarter, following a mid-year decline, demonstrates a renewed momentum in international markets. Overall, the sector appears to be sensitive to both domestic and international market conditions, showing an improvement in foreign trade performance, especially in the last quarter of the year.

Graph 58. Export and Import Values (Thousand US$) of Fisheries and Aquaculture Sector, January-December 2025



Source: Turkish Statistical Institute

8.3.4. Production and Consumption in Aquaculture

Fish and other aquatic products are important animal-based foods, offering numerous nutritional advantages such as high-quality protein, energy, vitamins, minerals, and excellent digestibility. Individuals of all age groups are recommended to consume these nutritionally superior foods (Eleventh Development Plan, 2019–2023).

As of 2024, the supply and utilization balance of fisheries in Türkiye indicates a total production of 933,119 tons, exports of 312,630 tons, and imports of 120,237 tons. Accordingly, domestic consumption was estimated at 662,189 tons, corresponding to a per capita consumption of 7.7 kg. During the same period, fishmeal and fish oil production amounted to 78,380 tons, while the quantity not utilized totaled 157 tons. Fisheries products, due to their high-quality protein content, richness in omega-3 fatty acids, vitamins, and minerals, play a significant role in a balanced diet, and their regular consumption provides positive health effects, particularly in the maintenance of cardiovascular health (Table 79).

Table 79. 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	
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
2024	933,119	312,630	120,237	662,189	78,380	157	7.7

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.

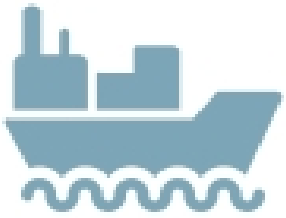
The portion of fisheries products consumed by humans—whether fresh, chilled, frozen, or processed—varies according to fluctuations in capture production and the quantities processed in the fishmeal and fish oil industry. Domestic consumption is calculated by subtracting exported products from the total of domestically produced and imported quantities. From this figure, the amounts used for fishmeal and fish oil production or otherwise unutilized are deducted to determine the volume of fisheries products available for human consumption. Dividing this figure by the population provides the per capita consumption value (Eleventh Development Plan, 2019–2023).

Globally, fish consumption has increased from 9 kg per capita in 1961 to 20,5 kg in 2019. In 2019, 75% of per capita fisheries consumption consisted of fish, 12% of mollusks, and 13% of crustaceans. Although consumption varies across regions and countries, certain trends have been identified, primarily related to consumer behavior and dietary culture. In 2019, per capita fish consumption was 5,4 kg in low-income, food-deficient countries, 15,2 kg in middle-income countries, and 26,5 kg in high-income countries (FAO, 2022; TEPGE, 2022).

In Türkiye, per capita fisheries consumption has shown a fluctuating but generally modestly increasing trend in recent years. Consumption per capita decreased from 6,8 kg in 2020 to 6,6 kg in 2021, before increasing again to 7,2 kg in 2023 (an increase of 0,6 kg compared to 2021), and reaching 7,7 kg in 2024 (an increase of 0,5 kg over the previous year). Over the 2020–2024 period, per capita consumption increased by a total of 0,9 kg. Despite this growth, current consumption levels remain low compared to many countries. This situation is associated with factors such as consumption habits, the underdeveloped culture of fisheries consumption, the preference for fresh and seasonal products, and limited demand for processed fisheries products. Although fisheries consumption in Türkiye exhibits regional variations, considering the importance of fisheries in a balanced diet, increasing both the availability and consumption of these products throughout the year remains essential.

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 14.05.2026 and numbered 33253, 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 31.12.2025, there are a total of 1,401 shipping agency companies operating in our country with a ship agency authorization certificate. This number reaches 1,684 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 80. Data of Ship Agencies Authorized by Years

	Head Office	Branch Office	Total	%
2014	800	194	994	0.2
2015	872	201	1,073	7.9
2016	937	196	1,113	3.7
2017	985	212	1,197	7.5
2018	1,008	221	1,229	2.7
2019	1,082	213	1,295	5.4
2020	1,074	222	1,296	0.1
2021	1,117	229	1,346	3.9
2022	1,207	247	1,454	8.0
2023	1,293	269	1,562	7.4
2024	1,314	269	1,583	1.3
2025	1,401	283	1,684	6.4

Source: Ministry of Transport and Infrastructure (16.03.2026)

Table 81. Distrubion of Ship Agencies By 6 Provinces

Number	Name Of Province	Head Office	Branch Office	Total Number of Company	%
1	İstanbul	**592**	31	623	73%
2	İzmir	126	67	193	46%
3	Muğla	187	20	207	48%
4	Mersin	110	54	164	50%
5	Hatay	87	32	119	33%
6	Kocaeli	65	25	90	11%

Source: Ministry of Transport and Infrastructure (16.03.2026)

Table 82. Distrubion of Ship Agencies By 4 Regions

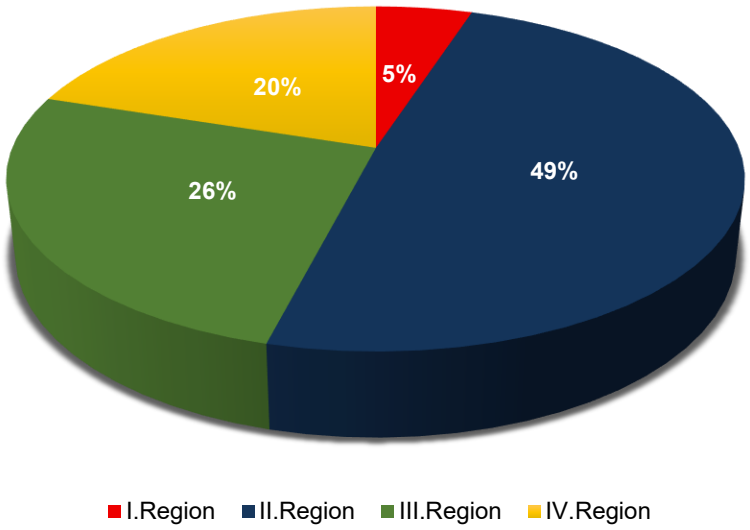
Regions	Head Office	Branch Office	Total Number of Company	%
I.Region (Black Sea)	**62**	**20**	**82**	5%
II.Region (Marmara Sea)	**771**	**76**	**847**	49%
III.Region (Agea)	**334**	**91**	**425**	26%
IV.Region (Mediterranean)	**234**	**96**	**330**	20%
Total	**1.401**	**283**	**1.684**	-

Source: Ministry of Transport and Infrastructure (16.03.2026)

More than half of a total of 1.684 shipping agency companies operate in the 2nd Region, where the industrial cities Istanbul, Kocaeli and Bursa are located.

It is observed that 26% 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 59. Distrubion of Ship Agencies By 4 Regions (%)



Source: Ministry of Transport and Infrastructure (16.03.2026)

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.

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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