



Ministry of Transport, Maritime Affairs and Communications

DG for Merchant Marine

Ownership, Governance Structures, and Performances of Turkish Ports

Ankara, 2015



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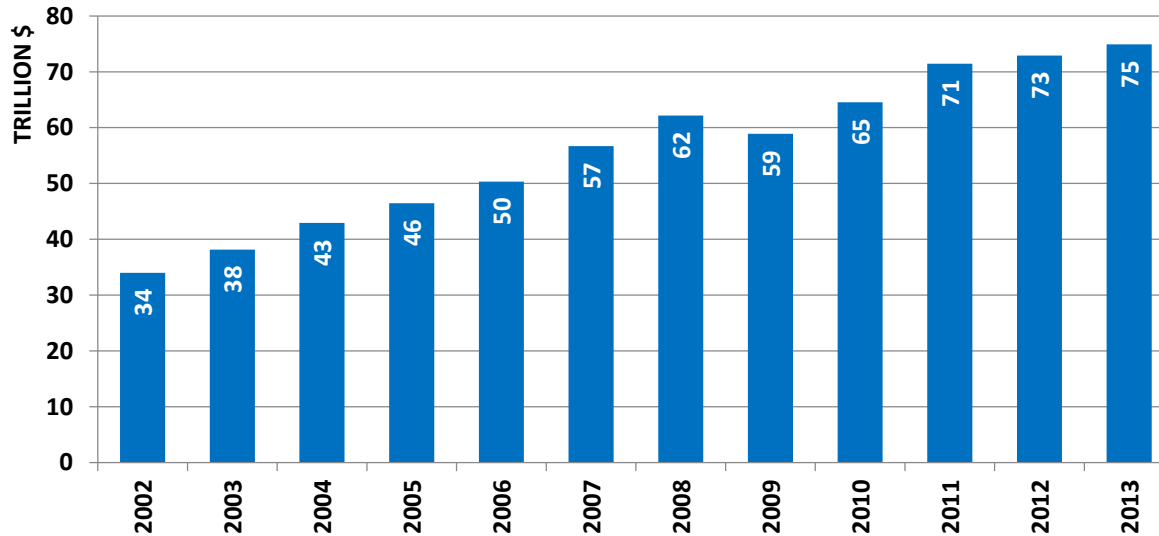




WORLD GDP and SHARE of COUNTRIES

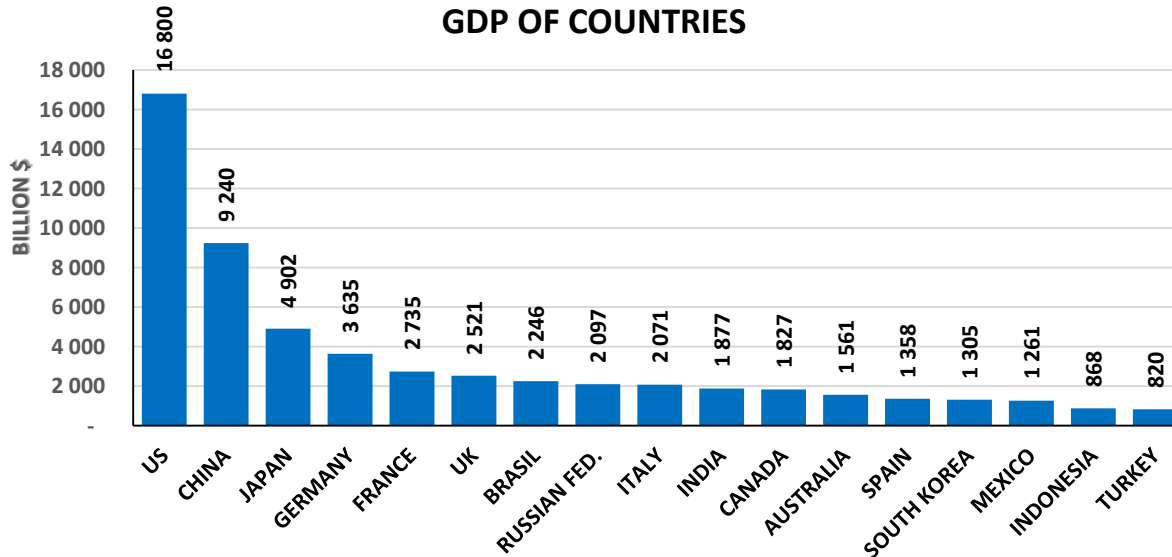


WORLD GDP



2013 Total World GDP 75 Trillion US\$

GDP OF COUNTRIES



Turkey is the 18. biggest economy of the world with 813 Billion US\$ GDP in 2014.



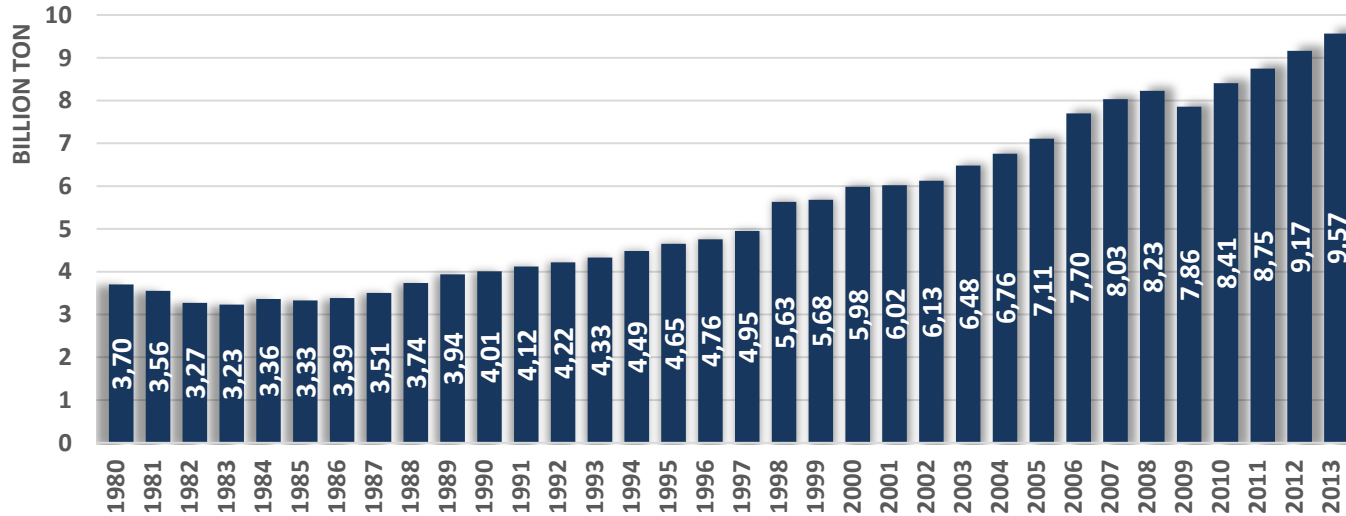


WORLD SEABORNE TRADE



World Seaborne Trade (Loading)

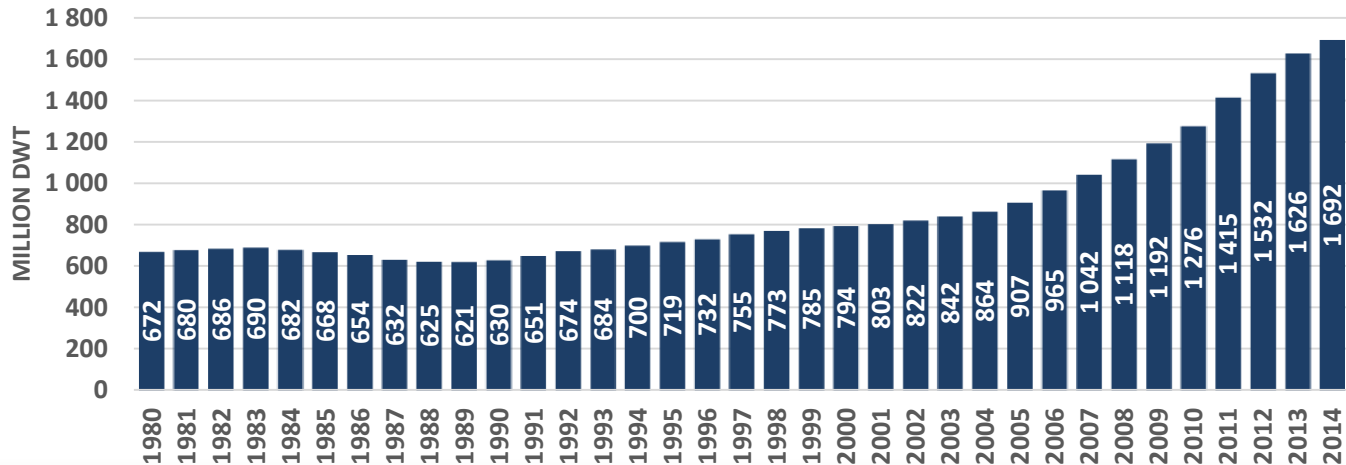
Source: UNCTAD



World seaborne trade has increased from 3,7 million tons to 9,6 million tons from 1980 to 2013.

World Merchant Fleet (≥ 100 GT)

Source: UNCTAD

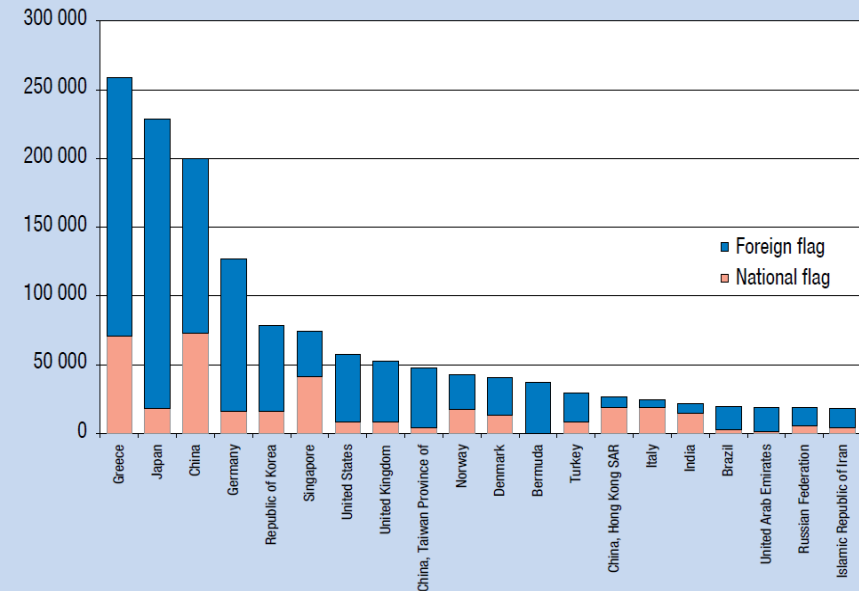
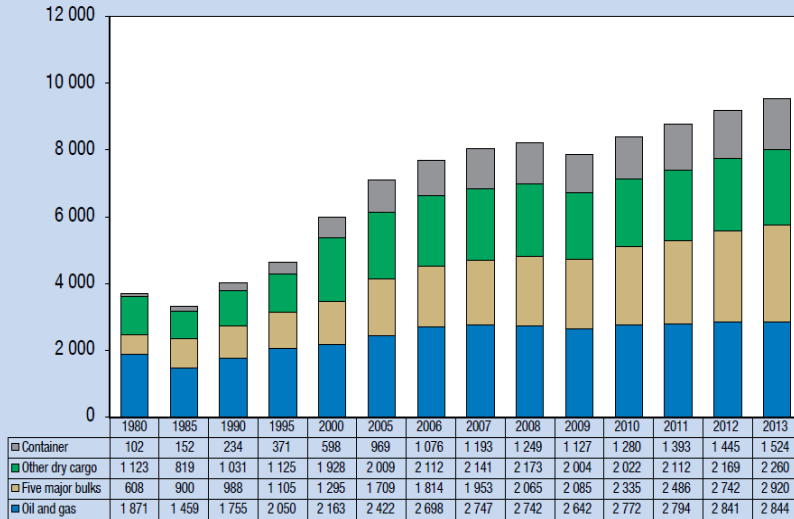


World merchant fleet has increased from 672 million DWT to 1,69 billion DWT from 1980 to 2013.





SHARE OF TURKISH SEABORNE TRADE IN THE WORLD



Source: UNCTAD *Review of Maritime Transport*, various issues. For 2006–2013, the breakdown by type of cargo is based on Clarkson Research Services, *Shipping Review and Outlook*, various issues.

Source: UNCTAD secretariat, based on data provided by Clarkson Research Services.
Note: Propelled seagoing merchant vessels of 1,000 GT and above.

INDICATORS	WORLD	TURKEY	SHARE (%)
TOTAL NUMBER OF SHIP (≥1.000 GT) (ISL, 2014)	40.246	1.489	3,7
TOTAL MERCHANT FLEET (DWT) (≥1.000 GT) (ISL, 2014)	1.595.921.000	30.427.000	1,9
TOTAL CARGO LOADED (TONNES) (UNCTAD, RMT, 2013)	9.568.000.000	136.484.425	1,4
TOTAL CONTAINER LOADED (MILLION TEUs) (UNCTAD RMT, 2013)	160	3,66	2,3
TOTAL CONTAINER LOADED (MILLION Tons) (UNCTAD RMT, 2013)	1.578	41,74	2,6
TOTAL SEABORNE TRADE (BILLION USD) (WTO, 2013)	11.000	83	0,8



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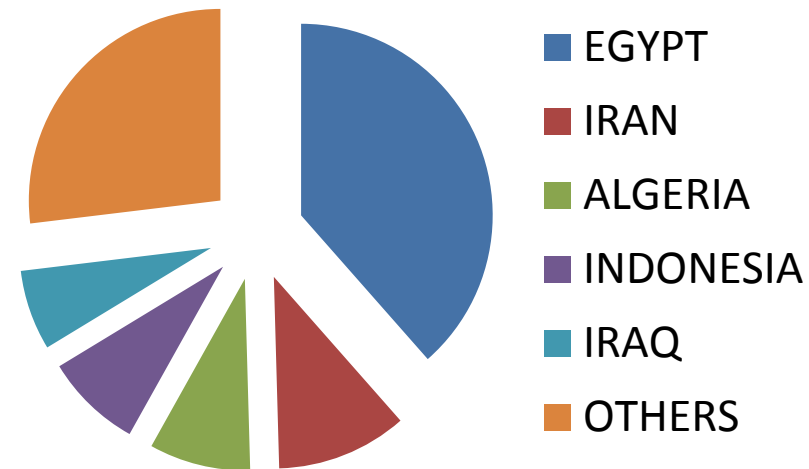




TURKISH SEABORNE TRADE WITH COMCEC MEMBERS



COUNTRY	EXPORT	IMPORT	TOTAL
EGYPT	9.875.050	11.625.803	21.663.760
IRAN	8.457	6.241.080	6.249.537
ALGERIA	774.532	4.068.790	4.849.290
INDONESIA	3.999.220	603.155	4.608.649
IRAQ	6.743	3.860.933	3.867.676
MALAYSIA	350.169	2.595.549	2.975.930
SAUDI ARABIA	1.458.859	630.557	2.128.584
TUNUSIA	1.237.919	288.189	1.536.786
MOROCCO	612.599	874.604	1.488.480
JORDAN	375.437	315.318	690.755
MOZAMBIQUE	2.130	587.596	590.247
SENEGAL	41.606	0	41.606
SURINAM	0	5.015	5.015
OTHERS	8.194.307	6.898.153	15.107.284
TOTAL	26.937.028	38.594.742	65.803.599
GRAND TOTAL	157.759.902	225.360.717	383.120.619



Almost %20 of Turkish international seaborne trade is carried out with with COMCEC members.





FROM 2003 TO 2014



	2003	2014	INCREASE
Total Cargo Handling (Million Tons)	189,9	383,1	%101
Total Container Handling (Million TEUs)	2,5	7,82	%212
Cabotage Cargo (Million Tons)	28,7	50	%85
Project Capacity of Shipyards (Million DWT)	1	3,6	%277
Maritime Agreements (Pcs)	35	57	%62
Cruise Passengers (1000 Prs)	581	1,790	%208



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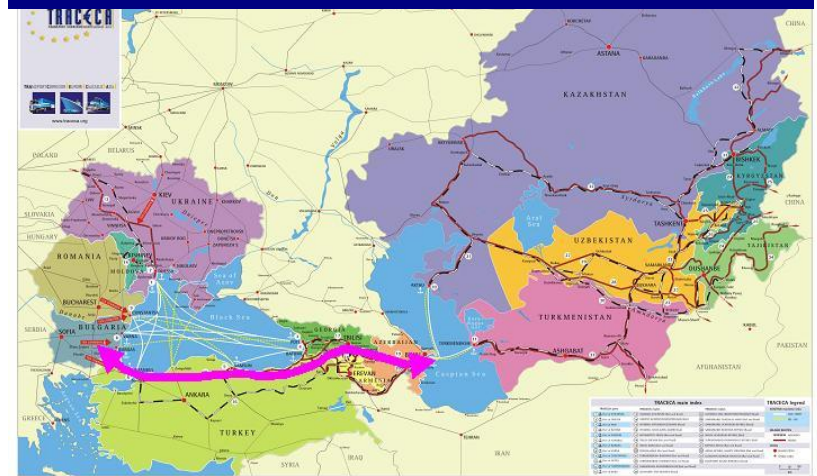
INTERNATIONAL TRANSPORTATION PROJECTS



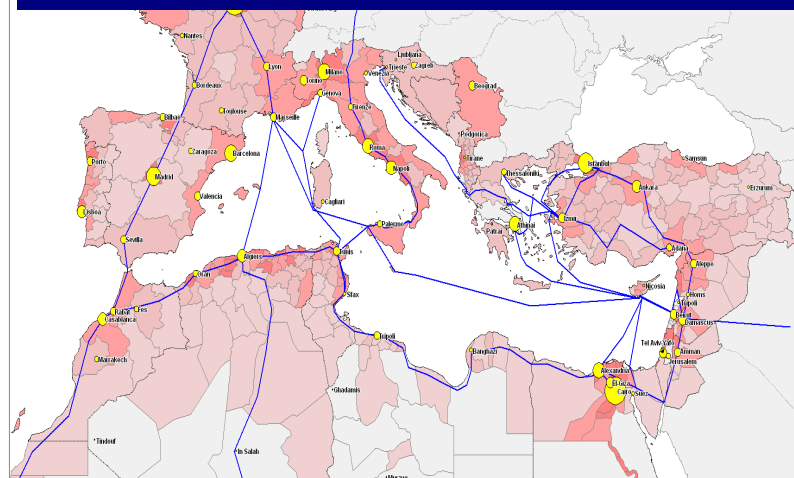
National bridge of continents - TÜRKİYE



TRACECA - Transport Corridor Europe Caucasus Asia



MEDAMOS ve KEIMOS – Motorways of the Seas



BS- PETrA Black Sea – PAN European Transport Area



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MARITIME SAFETY/DEVELOPMENTS IN LAST 10 YEARS



Safety of Navigation

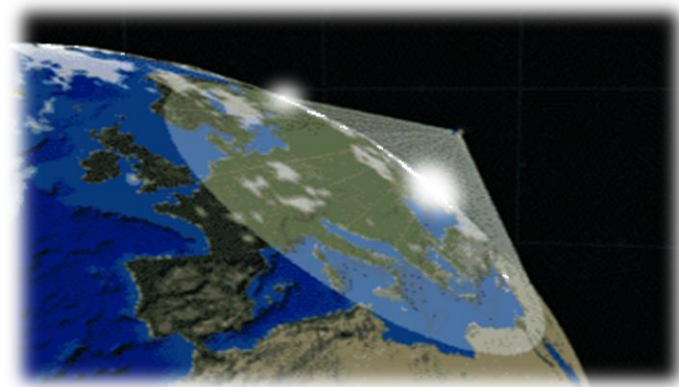
TSVTS (2003), VTS (2007), AIS (2007) and LRIT (2009) Systems have been settled and operated by national authorities.

Ship Inspection

Turkish Flagged vessels detention rate has decreased to 7% in 2008 and 4,6% in 2012 compared to 24% in 2002 acc.to Paris MoU. For the last five years Turkish Flagged Vessels are in the white list of Paris MoU.

Search and Rescue

New generation S&R system COSPAS-SARSAT MEOSAR system has been settled and operational since August 2010. Coast Guard's SAR capability has been increased by 2 SAR vessels capable of navigating under heavy weather conditions. In addition, 2 more SAR ships became operational in 2014.

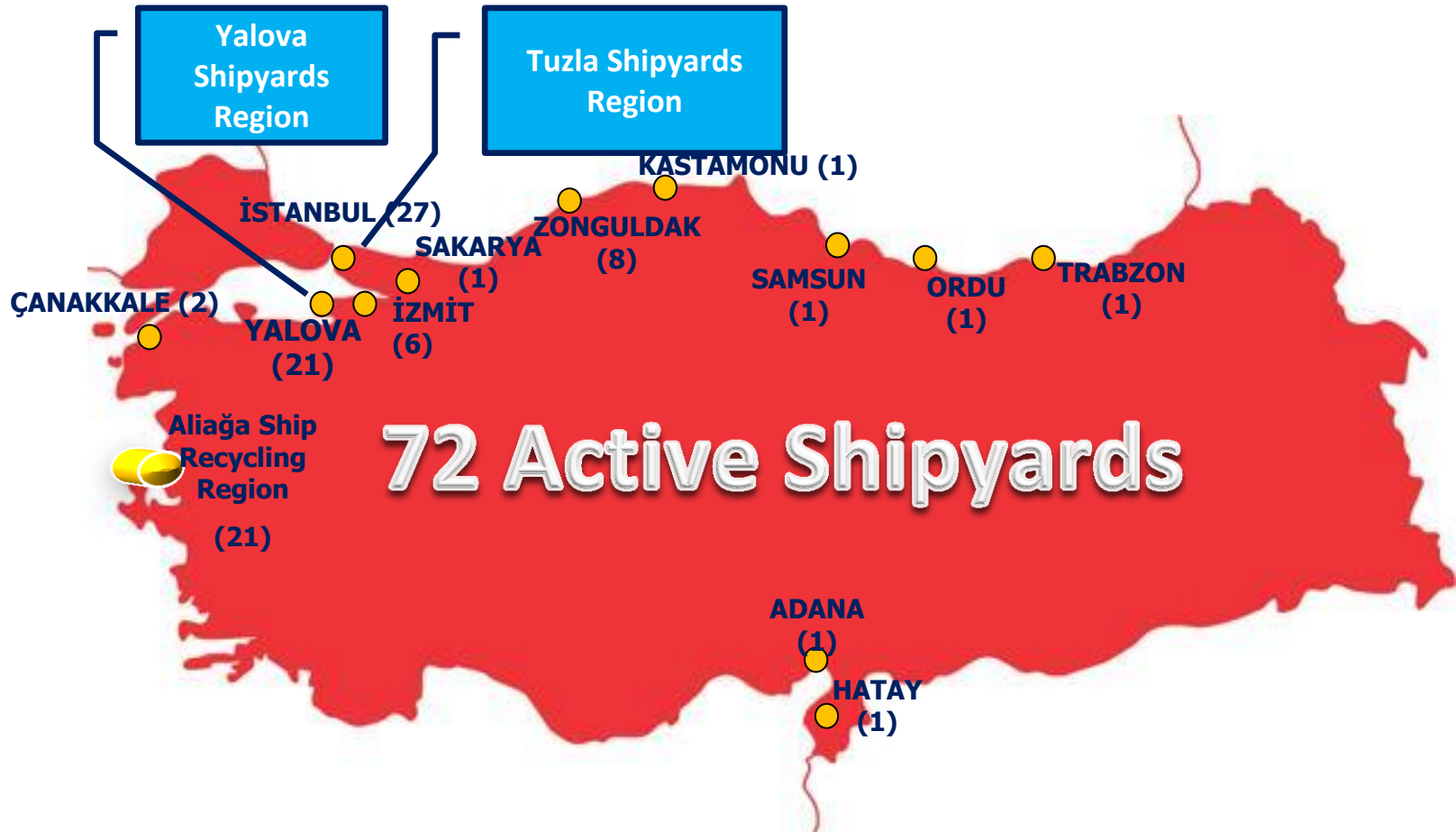


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SHIP CONSTRUCTION FACILITIES



Project Capacity : 3,66 million DWT/Year



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PORT MANAGEMENT



PORT MODEL	INFRASTRUCTURE	SUPERSTRUCTURE	STEVEDORING
Service	Public	Public	Public
Tool	Public	Public	Private
Landlord	Public	Private	Private
Private	Private	Private	Private



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PORTS OPEN TO INTERNATIONAL TRAFFIC



12 State Owned,
17 Municipality,
151 Private Port Operators

Total 180 ports within ISPS
Code



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Turkish Ports Master Plan-2030



Capacity	2010	2020	2020 Capacity Gap	2030	2030 Capacity gap
Container (mio TEUs)	9,3	15,1	5,8	29,8	20,5
General and Bulk (mio tons)	265,4	267,4	2	484	218,6
Liquid Bulk (mio tons)	143	113	0	180	36,5

Container (mio TEUs)	2010 Capacity	2020 Capacity gap	2030 Capacity gap
Marmara	5,1	2	8
Aegean	1,6	0,8	2,9
Mediterranean	1,9	2,5	8,1
Black Sea	0,5	0,7	1,7
Total	9,3	5,8	20,5

Containerization of EU: 78%

- Germany: 89%
- Netherlands:82%
- Italy: 77%
- Turkey: app. 70%

still room for containerization.
Till 2018 %30 growth expected.





NEW PORT INVESTMENT PROJECTS



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COOPERATION TOPICS



- **Capacity Building&Exchange of Experts:**
 - **PSC/FSC Application**
 - **Port management**
 - **Green port**
- **Facilitation of cross border procedures**
- **Contribution of Joint Venture between maritime companies**
- **Encourage NGO's and private stakeholders**





THANK YOU

MoTMC
DG For MERCHANT MARINE