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TURKISH PORT SECTOR 2023 REPORT

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TURKISH PORT SECTOR 2023 REPORT

Sustainable Ports

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FOREWORD

Aydın ERDEMİR
Port Operators' Association of Türkiye (TÜRKLİM)
Chairman of the Board

SUSTAINABLE PORTS

When we look at the targets set before us by ATATÜRK in 2023, the year when we enter the second century of our Republic, with the statement *"We must consider maritime as the great national ideal of the Turks and achieve it in a short time"*, we can see that we, as the port sector, have made significant progress, and that we continue to work with all our means to achieve these targets with our close to 208 coastal facilities operating in every region of our country from Hopa to Iskenderun. We know that we still have a long way to go and many tasks to accomplish. As a sector, we understand better every day how important the existence of TÜRKLİM is in the realization of these targets with its experience of nearly 30 years, its institutionalized and organized nature, its leadership and guidance in the realization of the targets through the reports and vision documents it produces, and its structure organized to represent the entire sector.

The great earthquake we had in February, in which more than fifty thousand of us lost our lives and nearly a hundred thousand of our citizens were injured, was the biggest disaster we experienced as we entered the second century of our Republic. Approximately 24 years after the Kocaeli earthquake in 1999, it hurts us to be in the same situation as a country. Although many countries in the world such as Japan, Chile, Indonesia and the USA have experienced earthquakes larger than Turkey, we observe that these countries have been made earthquake-resistant in every sense with the measures taken and policies implemented. Instead of taking earthquakes for granted as fate and waiting for the disaster, we should make all settlements, cities, transportation modes, industrial and production facilities, ports, airports, hospitals, etc. earthquake-resistant in order to minimize the damages that will arise, and thus, we should succeed in minimizing disaster risks through long-term planning, project design and construction works. These should be our most urgent tasks as a country in the coming years. As the port sector, we undoubtedly have a lot to do to make our ports earthquake resistant. The year 2023 and beyond will be a time when all of these will be discussed more and action will be taken.

"Maritime will be understood not just as a transportation business but as an economic business, and shipyards, ships, ports and piers will be built, sea sports clubs will be established and protected and developed. Because: The boundary of a nation whose land is surrounded by the sea on three sides is the boundary of the might and ability of its people. Türkiye, which is in the most favorable geographical position and surrounded by sea on three sides, is capable of raising a maritime nation with its industry, trade and sports. We must know how to utilize this ability. We must consider maritime as the great national ideal of the Turks and achieve it in a short time.."

Mustafa Kemal ATATÜRK
(01 November 1937, From the Opening Speech of the Fifth Term of the Turkish Grand National Assembly)

When we consider that 149 (72%) of our coastal facilities operating in Türkiye are located in the 1st degree earthquake zone, 17 (8%) in the 2nd degree earthquake zone, 26 (13%) in the 3rd degree earthquake zone and 14 (7%) in the 4th degree earthquake zone, it is more understandable how vital this issue is for our ports. When we take into account the fact that almost 40% of the port capacity in our country, where an Istanbul-centered Marmara earthquake is expected, is located in the Marmara Region, 18% in the Aegean Region and 31% in the Mediterranean Region, it is clear that it is necessary to start work without losing time.

The importance of our ports in the national economy and foreign trade has become indisputable. With their strong infrastructures, ports are our most important logistics centers that not only develop industrialization, production and foreign trade, but also power the development of the country with the economic benefits they create, thus supporting the increase in the welfare of all citizens. Especially with the pandemic and the growth in the share of seaborne in all modes of transportation both globally and in Türkiye, it is better understood that our ports are extremely strategic logistics bases. For this reason, within the framework of the reality of public interest, we are creating our opinions, suggestions and vision reports as a sector on what needs to be done to realize our country's goals, and we share them with the relevant institutions and the public within the framework of public-private sector cooperation.

Türkiye must enter the second century of the Republic with an advanced, dignified, fair and environmentally friendly approach and a major breakthrough. We observe through global inequalities and competition that the main determinant of prosperity today is neither underground resources, physical capital nor unskilled labor. Today, the most important determinant of prosperity is intangible resources. In other words, the three essential elements of development in developed countries: human development & competence, science, technology & innovation, political, economic

& social institutions and rules. Such a breakthrough awaits Türkiye in the second century. ATATÜRK said, *"But we can never consider what we have done enough. Because we are obliged and determined to do more and greater works. We will raise our country to the level of the most prosperous and civilized countries of the world. We will provide our nation with the widest means and sources of prosperity. We will raise our national culture above the level of contemporary civilization".*

In this 2023 report, we are focusing on ***"Sustainability"***. The task of establishing the foundations and paradigm of a port sector that prepares the requirements of the green economy roadmap for the goal of becoming carbon-neutral in 2050, as stated in the "Vision 2050" section of last year's report, with the participation of all stakeholders, that creates corporate port structures which will implement all scientific and technological applications of our age, especially digital technologies, artificial intelligence and other digital applications in the sector with a holistic synergy, that considers the balance of the ecosystem, that offers future generations a port management model that has internalized green economic transformation and digital revolution, and above all, has made gender equality an indispensable business model in our port sector will undoubtedly continue to be TÜRKLİM's top priority vision. Therefore, ***"Sustainability"*** will be the most important item on our agenda from now on.

We would like to thank our esteemed consultant Dr. Ersel Zafer ORAL, who prepared this issue, Prof. Dr. Soner ESMER. Mr. Şadan KAPTANOĞLU, Chairman of the Board of Directors of TÜRMEPA, with whom we carried out the *"Blue Climate Ambassadors"* project, and to Ms. Nazlı SELEK, former Chairman of the Board of Directors of WISTA Türkiye, who also supported our Sustainability file with their articles. I would also like to thank Mr. Arcan FAYATORBAY (Container), Mr. Meriç Burçin ÖZER (General Cargo and Dry Cargo), Mr. Aziz GÜNGÖR (Cruise and Passenger) and Mr. Bilgin İŞLER (RORO and Automotive), who are the leaders of our working groups operating in the sub-sectors of ports at TÜRKLİM and are also members of the Board of Directors of TÜRKLİM. I would also like to thank all our stakeholders who supported our report with advertisements.

As we have done so far, we will have much more effective and result-producing activities, workshops, reports and publications, visits, collaborations and joint works with both public institutions and stakeholder organizations and NGOs in 2023. As TÜRKLİM grows, it becomes much more effective. In the second century of our Republic, you will see a TÜRKLİM that is more active and taking on more tasks. In the second century of our Republic, TÜRKLİM will continue to guide and lead our sector with activities in line with global developments and the requirements of the age in the second century of our Republic.

Sincerely,

PREFACE

The year 2022 started under the shadow of Russia's intervention in Ukraine and the ensuing war, which started a chain reaction affecting not only the maritime industry but the whole world. While the war caused significant human casualties and migration, it also had profound consequences and changes on the production and supply chains in the economic and social geography in the immediate region and especially in Europe, our most important trade market. While 2022 followed a fragile course in all areas in parallel with all these developments, the theme of sustainability maintained its importance and agenda in almost all discourses on the other hand.

In the light of all these developments, the Turkish Port Sector 2023 Report, the only port sector report in our country, was prepared for publication with the theme of "Sustainability", and the sustainable vision of our ports was determined within the scope of the report.

In the first three sections of the report, which consists of five sections in total, economic and commercial developments in 2022 are evaluated, the maritime and port sector in the world as well as in Türkiye are analyzed. The developments in the world economy and trade in 2022 are covered in the first section, developments in the world maritime and port sector are covered in the second section, and developments in the Turkish port sector are covered in the third section.The fourth section of the report includes an analysis of the theme of the 2022 report, "Sustainability". A historical and conceptual analysis of the concept of sustainability is presented in this section, as well as 17 development goals determined in the light of sustainability development goals. The agenda of the Turkish port sector and solutions to the problems are presented in the fifth and final section of the report.

We would like to thank the Ministry of Transport and Infrastructure, General Directorate of Maritime Affairs for providing the basic data required for the preparation of and sharing our "Turkish Port Sector 2023 Report" excitement, our esteemed members for their support, **Dr. Ersel Zafer ORAL** and **Prof. Dr. Soner ESMER** for their contribution to the writing of the report, and hope that the report will benefit the port sector.

Port Operators' Association of Türkiye
2023

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EXECUTIVE SUMMARY

Central bank rate hikes to combat inflation and events such as Russia's war against Ukraine continue to put pressure on economic activity around the world. The rapid re-emergence of COVID-19 in China slowed growth in 2022, but China's reopening and rapid normalization in the last quarter of 2022 paved the way for a faster-than-expected global recovery. The risk balance is still negative and, as mentioned, there has been a decrease in negative risks since the last quarter of 2022. It is possible that the demand, which has been suppressed due to market insecurity and high inflation in many economies, may decrease more strongly or inflation may decrease more rapidly with the recent developments.

On the other hand, Europe's economic growth in 2022 was more favorable than expected in the face of negative trade shocks stemming from the war in Ukraine. According to projections made in light of all these data, global growth, estimated to be 3.4% in 2022, is expected to fall to 2.9% in 2023 and rise again to 3.1% in 2024. Around 84 percent of countries are expected to have lower inflation in 2023 than in 2022. Global inflation is expected to fall from 8.8% (annual average) in 2022 to 6.6% in 2023 and 4.3% in 2024.

The escalation of the war in Ukraine remains a major concern. The war creates economic vulnerability, especially for Europe and low-income countries. Europe has faced lower than expected gas prices this winter as it has stored enough gas to avoid the possibility of shortages. However, there is a potential risk of refilling empty tanks, especially if gas not purchased from Russia is supplied from further afield.

Over the last three years, global trade has been greatly affected by the COVID-19 pandemic. In addition, the impact of supply chain disruptions on global trade has also become significant. World trade is expected to decline by 2.4% in 2023 and increase again by 3.4% in 2024, despite the easing of supply bottlenecks, driven by global demand for goods and services.

According to the production method, annual GDP, obtained by summing the four periods, increased by 5.6% in 2022 compared to the previous year as chained volume index. In parallel with the GDP development, Türkiye's foreign trade increased by 24.4% in 2022 compared to the previous year. The increase in exports was 12.9%, reaching 254 billion dollars in value, while the increase in imports was 34%, reaching 363 billion dollars in value. Thus, our foreign trade increased by a high rate of 24% in total, reaching $617 billion.

In the Logistics Performance Index (LPI) Report published by the World Bank's "Global Trade and Regional Integration Unit", Türkiye ranked 39th in 2010, and although it moved up 12 places to 27th in the 2012 report, it has been in a continuous downward

trend since then. In the 2018 report, the worst value (47th place) was obtained. In the 2023 report, Türkiye showed an improvement and was ranked 38th.

According to the projections of UNCTAD (United Nations Conference on Trade and Development), world maritime trade is estimated to increase by 1.4% in 2022 and by an average annual growth rate of 2.1% between 2023 and 2027. These growth rates are quite low compared to the average growth rate of 3.3% in maritime trade over the last 30 years. Container trade has been the fastest growing segment for many years. In addition to a slowdown in growth in 2022, container trade is expected to increase marginally by 1.9% in 2023.

In 2021, although global maritime transport significantly compensated for the losses in 2020, it declined again in 2022 due to reasons such as the Russia-Ukraine war mentioned in the previous sections and supply problems in China, and closed the year at 11.9 billion tons with a -0.3% decrease. Thus, after 2019 and 2021, maritime transports fell below the 12 billion tonnes level again.

Dry bulk cargo is the type of cargo with the largest share transported by sea. Dry bulk cargoes amounted to 5.5 billion tons in 2021, decreasing by -2.2% to 5.3 billion tons in 2022. Container carried by ships, which exceeded 200 million TEU for the first time with 208 million TEU in 2021, declined by -3.4% to 201 million TEU in 2022. Liquid bulk type cargo transportation reached a total of 3.9 billion tons with an increase of 3.4% in 2022 and has the highest share in maritime transportation after dry cargo. Among liquid bulk cargoes consisting of crude oil, petroleum products, gases, chemicals and various vegetable oils, only chemicals, which had the lowest share with 367 million tons, has seen a decrease in 2022. While crude oil transports increased by 5% to 1.9 billion tons, the increase in petroleum products and gases was 2% and 4%, respectively. In the cruise sector, according to CLIA data, the number of cruise passengers served in 2022 increased to 20.4 million passengers, while according to the forecasts of the same organization, the passenger forecast for 2023 and 2024 will reach 31.5 and 36 million passengers, respectively.

Cargo handled at Turkish ports during 2022 increased by 16.3 million tons year-on-year and reached 542,610,283 tons. The 5.9% year-on-year increase in 2021 decreased to 3.1% in 2022. When distribution of cargo handled at our ports according to regime is considered, about 72.6% of the cargo is foreign trade cargo. As of 2022, share of the cabotage cargo is 12.4% and share of transit cargo is 14.9%.

A total of 228.8 million tons of general cargo (+dry bulk), including 165.2 million tons of dry bulk cargo and 64.5 million tons of general cargo, 12.2 million TEU containers and 171.2 million tons of liquid bulk cargo were handled in 2022. RO-RO transportation reached 719 thousand vehicles in 2022 with an increase of 48 thousand vehicles. The number of international vehicles handled at our ports amounted to 1.6 million vehicles

in 2022. A total of 1,393,185 finished vehicles were handled at TÜRKLİM member ports. In 2022, the number of cruise passengers exceeded one million passengers again with the opening of Galataport Istanbul Cruise Port.

Liquid bulk cargo increased by 13.7%, general cargo increased by 5.1%, Ro-Ro cargo increased by 4.4%, dry bulk cargo increased by 3.1% and container cargo increased by 1.2% tonnage wise compared to previous year. Total cargo handled at our ports increased by 3.1% in tons compared to the previous year.

Ports, which constitute the most important link of the logistics chain whose main field of activity is to serve the ship and cargo, are also a player in sustainable development. The rapid depletion of natural resources, environmental pollution reaching a level that will affect our daily lives, and the instability in meteorological conditions due to global warming have brought the environmental and social responsibilities of businesses to the forefront. The "Sustainable Development Goals", which include 17 main goals and 169 sub-goals aiming to provide better living conditions for future generations, were adopted by 193 countries at the UN General Assembly in 2015. Sustainable development goals cover all three pillars of sustainability: economic, social and environmental. Today, a significant number of major ports have adopted the sustainable development goals as a guide.

Sustainable port management is defined in this study as "port management that continues port operations without moving away from financial targets by adhering to ethical values, and supports social development while being environmentally sustainable by considering the rights and interests of future generations".

Our TÜRKLİM member ports exhibit a business management approach that values their employees in all areas from employment policies to occupational health and safety, prioritizes their training, and pays attention to the safe and peaceful working environment of female employees. Our ports have turned to the use of solar energy and wind energy as renewable energy sources and have expanded the use of electrical energy in port equipment in order to reduce fossil fuel consumption within the port in order to minimize exhaust gas emissions.

While supporting the national economy, ports also strive to operate in a manner that prioritizes environmental and social responsibilities in line with sustainable development goals. However, for the growth of foreign trade, the development of the country's competitiveness, and the growth of industrial and commercial investments, port investments should be considered as **"Strategic Investments"** and all government supports and incentives currently given to strategic investments, especially interest support and grants, should also be given to port investments. Port services should

be considered as a **"Service Export"** transaction and all legal supports and incentives given to exporters should also be utilized by our port enterprises. Ports whose operating periods are decreasing have become unable to make investments due to the uncertain process ahead of them. In addition to a law or legislation on the port sector in the Turkish Grand National Assembly (TBMM), a Communiqué to be prepared by the National Real Property could solve the problem of extending the usage periods of almost all private ports in a short period of time, thus providing a convenience and advantage for ports to start new investments today without waiting for the end of the term of their existing usage contracts.

In recent years, interventions in the tariffs for services provided to ships and cargoes at ports have become more frequent, tariffs have been reduced without taking into account inflation, costs and other facts that determine the tariffs, and Turkish ports have been rendered much cheaper and uncompetitive, unlike the tariffs in the global port market. Since the tariffs determined are far below the tariffs applied in similar countries in our immediate vicinity and in ports in different parts of the world, it is seen that our ports have suffered income losses and damages, and Turkish ports have been forced to offer extremely low tariffs compared to the world ports. Port tariffs should be allowed to be established within free market conditions.

Private sector ports have come a long way in our country. However, considering the targets for 2050, it is obvious that there will be a serious capacity deficit. Making and implementing investment decisions in large enterprises such as ports involves a long process. The legal and legislative dimension of capacity increase is as important as its financial dimension. For this reason, the public has a major role in removing the obstacles to the development and growth of ports. If our ports are supported, they will continue to play a locomotive role in the development of our country in the future as in the past.

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RECENT DEVELOPMENTS

Aziz Güngör
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Cruise and Passenger Ports 2022 Review and 2023 Expectations

2022 was a transitional year in which cruise ship operators brought their ships back into operation on a very large scale - especially during the first half of the year after the devastating effects of the pandemic in 2020 and 2021. The cruise industry's all-out effort to get the wheels back in motion after a major two-year pause is being hailed as a major achievement. However, what is generally regarded as a great success has had confusing consequences for cruise lines and geographic markets.

To understand where the cruise industry is today, it is necessary to compare 2022 data with 2019 data based on challenges and opportunities.

Ship Passenger Capacities:

Although many of the old ships that have completed their economic life (40 years or more) have been withdrawn from the company fleets under the pretext of the pandemic, the cruise industry has been able to offer more passenger capacity (number of beds) by 2023 than in 2019 with the addition of new and large ships to the fleets.

Number of Passengers:

Considering the current development of the number of voyages and ship passenger capacities, 2023 is estimated to be a year of full recovery in terms of passenger numbers and revenues. Number of passengers in 2023 is considered highly likely to exceed 2019 (29.7 million).

Debt Burden of Cruise Ship Companies:

For reference, an analysis of the financials of the world's three largest cruise ship operators (Carnival Corporation, Royal Caribbean International, Norwegian Cruise Line Holding) traded on the American stock exchange shows that their total debt burden doubled or tripled during

and immediately after the pandemic. As a result of the high debt burden, cruise ship operators have started to implement different strategies and approaches. It is possible to list these different strategies and approaches as follows:

- Focusing on high efficiency and operational profitability by restructuring every phase of operations.
- Reducing or temporarily halting planned capital expenditures for non-priority projects.
- Seeking direct and indirect capital partnerships to rollover and reduce debt burden.
- Creating itineraries with shorter (3/4 nights, 5/5/4 nights) voyage durations and ports of call that are geographically close to each other in order to reduce fuel costs (11-13% of total costs), which are a significant part of operational costs.

This conservative and cautious approach of the major players may negatively affect their growth strategies or delay their growth, especially in terms of new ship investments. Indeed, the significant decline in ship orders in 2022 compared to 2019 is noteworthy. It is also seen that this seemingly negative situation is interpreted positively by some ship operators as maximizing profitability and reducing the need for external capital.

As major cruise ship operators continue to significantly restrict their capital expenditures, the gap in key infrastructure investments such as ports, passenger terminals and recreational areas in destinations is expected to be filled as an opportunity by other players in the sector such as private port operators, port public authorities and local governments in destinations.

Cruise Ports should be prepared for an increase in shorter cruise itineraries

Entering 2023, the Caribbean cruise market, the world's largest market with a 38% market share as of 2022, has seen a significant increase in passenger numbers. It would be inadequate to explain this only by the greater number and passenger capacity of ships deployed in this market. The growth of this market has also been driven by the significant increase in short cruise itineraries. By 2023, the strong trend towards the creation of shorter cruise itineraries, such as 3/4 night and 5/5/4 night programs, has already started to account for a significant share (from 38% to 44%) of total cruise itineraries in the Caribbean. This is expected to increase the Caribbean market share to 41% in 2023 (2022: 31%).

This difference in approach created by the post-pandemic economic situation is expected to have a major impact

on ports. This is because the recent evolution of the standard 7-night cruise itineraries to 3/4 nights and 5/5/4 nights means that the ship that used to call at the port once a week now calls at the port twice a week, resulting in a 100% increase in the number of calls. However, this significant change is expected to be felt mostly in ports operating in the Caribbean market for the time being. In a short time, it will be possible to see a similar change in ports of call located in markets with similar characteristics, such as the Mediterranean and its sub-markets (Western / Adriatic / Eastern Mediterranean). The increase in passenger numbers in the ports of these markets is expected to bring additional infrastructure investments and capital requirements to meet the growing business volume.

While number of passengers in 2023 is expected to exceed 2019 levels on a global basis, this mobility is expected to be distributed differently across geographic markets.

The Asia/Pacific market, which had become an important market with a 12% share in 2019, lost 7% of its market share to the Caribbean, Mediterranean, North/Western Europe and Alaska markets due to the fact that China has not yet opened to cruise ship traffic as of March 2023. Accordingly, in 2023, the Caribbean is expected to lead with a 41% market share (2022: 39%), the Mediterranean is expected to become the second largest cruise market with 17% (2022: 15%), North/Western Europe the third largest with 10% (2022: 9%) and Alaska the fourth largest with 6% (2022: 4%). It is considered inevitable that the Asia/Pacific market will continue to lose market share. The February 2022 outbreak of the Russia-Ukraine war has had a negative impact on the North/Western Europe market, reducing its pre-pandemic market share from 11.5% to 9% in 2022.

Uneven distribution of demand for Global Cruise Ports

While the cruise industry has shown a strong recovery in 2023 and efforts to meet or even exceed 2019 targets, the post-COVID recovery in 2022 has been characterized by an uneven recovery, with some major markets and submarkets recovering faster than others. This uneven recovery is expected to continue in 2023, reducing demand for some ports and increasing demand for others. The possibility of this uneven recovery having a permanent impact on the cruise industry is also being heavily scrutinized.

Situation in our country

The best year for Türkiye, one of the most important players in the Eastern Mediterranean market, a sub-market of the main Mediterranean market, was 2011 with 1,623 cruise ship calls, while

the best year in terms of passenger numbers was 2013 with 2.24 million passengers. Starting in the second half of 2016 (Gülenist Terror Network [FETÖ] Coup Attempt) and extending into 2019, there were dramatic losses. While 2016 ended with 590 ship calls and 628 thousand passengers for Türkiye, the biggest declines were experienced in 2017 and 2018. In 2017, the number of ship calls dropped to 311 and the number of passengers to 306 thousand. In 2018, the number of ship calls dropped to 247 ship calls and 214 thousand passengers. During the pandemic period, only 5 ships and 1,824 passengers visited our country in 2020 while 78 ships and 45 thousand passengers visited our country in 2021, revealing the devastating impact of the pandemic on the sector.

In the shadow of some negativities, we experienced a year 2022 in which expectations were met in terms of the number of ship calls and passengers.

The 2022 cruise tourism season, which opened under the ongoing negative impact of the pandemic, was particularly weak in the first quarter of the year with a low number of ship calls and low ship occupancy rates, but after the second quarter of the year, ship traffic and ship occupancy rates increased until the end of the year and closed in line with expectations with a strong recovery. The Russian-Ukrainian war also had a negative impact on cruise tourism. Cruise ship operators serving the Russian source market from Türkiye, especially from İstanbul, were forced to cancel their routes due to security risks in the Black Sea and insufficient demand in the Russian source market.

In 2022, a total of 1,010,767 cruise ship passengers visited 22 ports of our country (in order of busyness Kuşadası, İstanbul, Bodrum, İzmir, Antalya, Çeşme, Çanakkale, Marmaris, Sinop, Dikili, Alanya, Amasra, Trabzon, Bozcaada, Fethiye, Kaş, Göcek, Datça, Ünye, Taşucu, Mersin, Ayvalık) with 993 ship calls. Kuşadası ranked first with 464 ship calls and 496,211 passengers, İstanbul ranked second with 180 ship calls and 252,026 passengers and Bodrum ranked third with 98 ship calls and 95,462 passengers. In 2022, cruise ships calling at Turkish ports had an average occupancy rate of 70%.

Positive expectations for 2023

While the negative effects of the Russia-Ukraine war are expected to continue in 2023, in parallel with the recovery momentum in the global cruise industry, our cruise ports are expected to host more cruise ship calls and passengers in 2023. Accordingly, it is estimated that 1.5 million passengers will visit Türkiye in 2023 on 1,300 cruises with an average occupancy rate of 85-

90%. The number of passengers may increase depending on the increase in ship occupancy rates.

The tender for the construction of İstanbul Yenikapı Cruise Port, which will be a turning point in cruise port operations for Türkiye, is expected to happen in 2023. Project and survey studies for Fethiye Cruise Port, another important project for our country, are also expected to be completed and the construction tender phase is expected to start.

The Global Cruise Industry's 2050 "Zero Carbon Emission" targets are becoming a reality fast

The Global Cruise Industry's 2050 "Zero Carbon Emission" vision will continue to move rapidly towards its goal in 2023. In this respect, the priorities for 2023 are expected to include reducing the carbon footprint of ships in ports and at sea, continuing to invest in advanced environmental technologies on ships, and working in partnership with local governments and ports on sustainable destination management.

Again, the use of appropriate fuels in ships continues to be another important agenda item. With the widespread use of LNG fuel, ships are aiming for almost zero Sulphur emissions, 95% to 100% reduction in particulate emissions, 85% reduction in NO_x emissions and up to 20% reduction in greenhouse gas emissions. Work on sustainable marine fuels continues quickly, including biofuels and other advanced approaches such as biodiesel, methanol, ammonia, hydrogen and electric batteries. In particular, more than 15% of new ships to be launched in the next five years are expected to start using fuel cells or batteries as part of a hybrid approach.

Cruise ship operators continue to make significant investments in connecting their ships to shore power (Onshore Power Supply [OPS]). 98% of new ships expected to enter service between 2023 and 2028 are being built with shore power connections.

Twenty-nine ports worldwide have at least one cruise pier/dock equipped with onshore electrical interconnection power as of 2023. This represents less than 2% of the world's cruise ship berthing ports.

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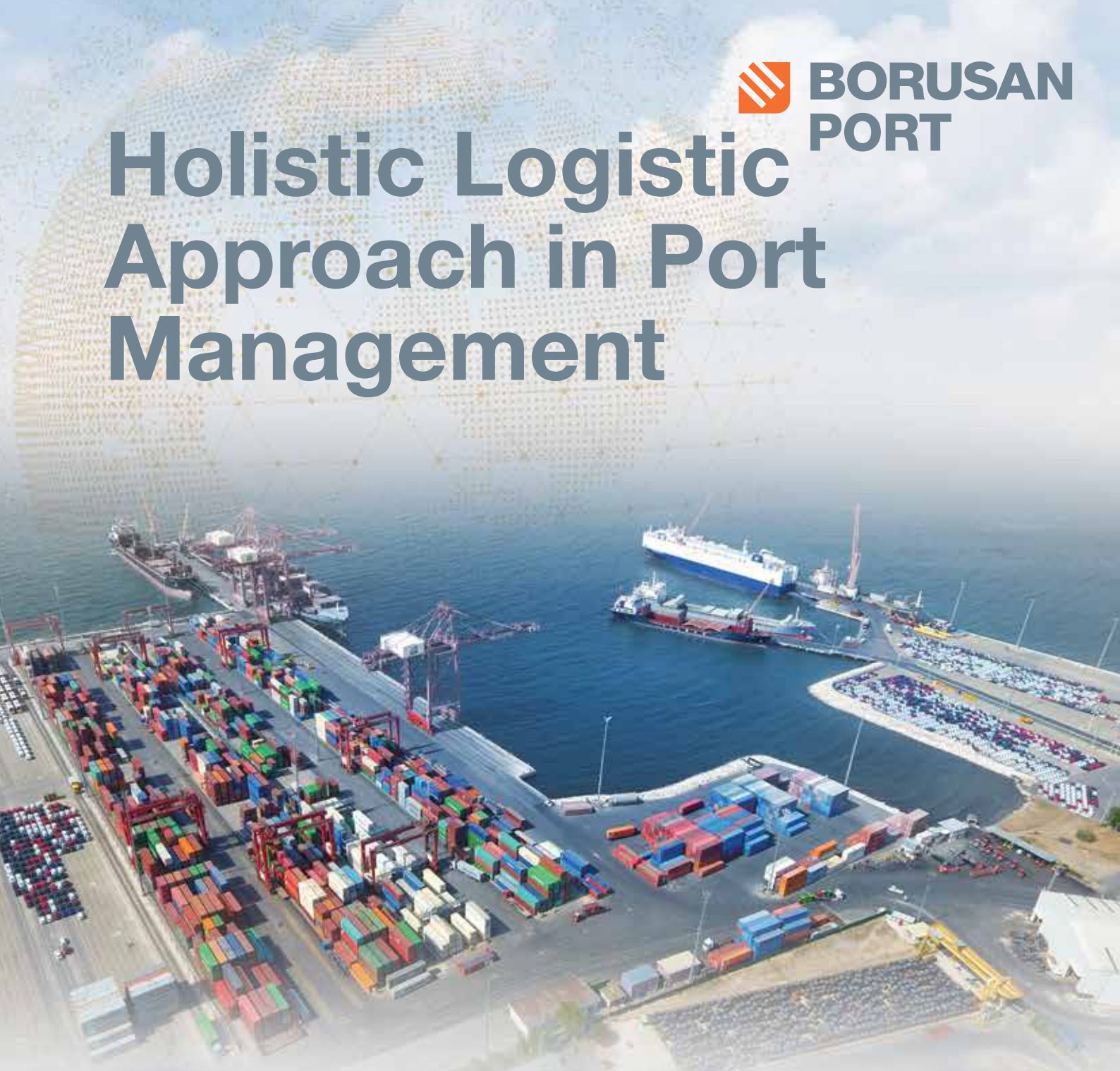

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UNIT 1: RECENT DEVELOPMENTS

1.1. Developments in World Economy and Trade[1]

1.1.1. Overall Economic Assessment

Central bank rate hikes to combat inflation and events such as Russia's war against Ukraine continue to put pressure on economic activity around the world. The rapid re-emergence of COVID-19 in China slowed growth in 2022, but China's reopening and rapid normalization in the last quarter of 2022 paved the way for a faster-than-expected global recovery. Global inflation is expected to fall from 8.8% in 2022 to 6.6% in 2023 and 4.3% in 2024. These inflation rates are still above the pre-pandemic (2017-19) average of around 3.5%.

The risk balance is still negative and, as mentioned, there has been a decrease in negative risks since the last quarter of 2022. It is possible that the demand, which has been suppressed due to market insecurity and high inflation in many economies, may decrease more strongly or inflation may decrease more rapidly with the recent developments. On the other hand, with a possible COVID-19 increase, it is still highly likely that China's re-closure policies will delay the recovery, Russia's influence, tension and spillover in the war in Ukraine, and global financing costs will worsen the debt distress of countries. Of course, these unfavorable developments may cause global inflation to resume its upward trend, and therefore, financial markets may re-price as a reaction to unfavorable inflation news.

As it is known, the COVID-19 pandemic has deepened the slowdown in China in 2022. Large-scale COVID-19 outbreaks in Beijing and other densely populated areas significantly slowed down economic activity in China in the fourth quarter. Curfews imposed under COVID-19 restrictions were lifted in November and December 2022, paving the way for a full reopening. Nevertheless, consumer and business sentiment in China remained stagnant until late 2022. For all these reasons, China's slowdown has led to a contraction in global trade and a decline in international commodity prices.

On the other hand, Europe's economic growth in 2022 was more favorable than expected in the face of negative trade shocks stemming from the war in Ukraine. This resilience of European countries is particularly evident in consumption and investment data for the third quarter. Among the most important reasons for the resilience against the downturn are the state support provided by the European Union to households and firms affected by the energy crisis, amounting to approximately 1.2% of GDP, and the revival of production/trade activities. Gas prices, on the other hand, fell more than expected due to the increase in liquefied natural gas (LNG) flows by pipeline and

1 The data under this heading are mainly compiled from the IMF, World Trade Organization and UNCTAD news bulletins. Since this section was written in March 2022, data for 2021 are generally estimated data.

sea (except for pipelines connected to Russia), lower gas demand in Europe and a warmer-than-usual winter.

On the other hand, reduced public support and financial indicators, especially in the fourth quarter, point to a contraction in the manufacturing and services sectors. Consumer confidence and business sentiment deteriorated in the EU. Inflation hovering at or above 10 percent in many Eurozone countries and the United Kingdom continues to strain household budgets. Accelerating interest rate hikes by the Bank of England and the European Central Bank tighten financial conditions, which significantly reduces demand for the housing sector and other sectors.

According to projections made in light of all these data, global growth, estimated to be 3.4% in 2022, is expected to fall to 2.9% in 2023 and rise again to 3.1% in 2024. When we look at this situation, the expected growth rates are projected to remain at a lower level than in 2022. Negative growth in global GDP or global GDP per capita (which usually occurs when there is a global recession) is not expected. However, the global growth forecast for 2023 and 2024 is expected to be below the historical (2000-19) average annual growth rate of 3.8% (Figure 1.1.)

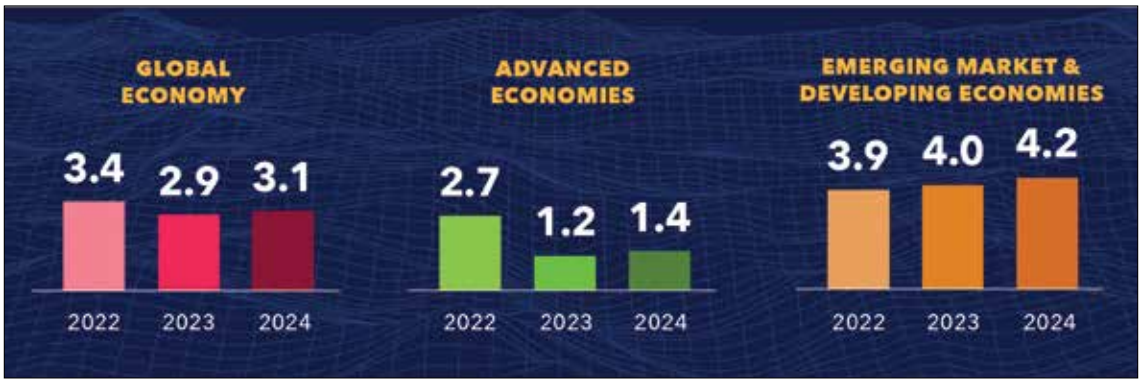

Figure 1.1 Growth projections[2]

The lower growth forecast for 2023 reflects the war and uncertainties in Ukraine, as well as an increase in central bank interest rates to combat inflation, especially in advanced economies. The likely decline in growth in 2023 relative to 2022 is driven by advanced economies, while growth in emerging market and developing economies is seen to decline considerably in 2022. Growth in China, on the other hand, is expected to pick up as the country fully reopens in 2023. The expected recovery in both economic poles in 2024 depends on a gradual recovery from the effects of the war in Ukraine and declining inflation.

These forecasts are based on a number of assumptions, including fuel and non-fuel commodity prices, which have been revised generally downwards since October

2 IMF

2022, and interest rates, which have been revised upwards. Oil prices are expected to fall by around 16% and non-fuel commodity prices by an average of 6.3% in 2023. Projections for global interest rate increases have also been revised upwards since October 2022.

Table 1.1. shows the IMF's economic growth projections for countries and country groups published at the beginning of 2023. In these projections, growth for advanced economies is projected to fall sharply from 2.7% in 2022 to 1.2% in 2023, before rising again to 1.4% in 2024. Growth is projected to decline in nearly 90 percent of advanced economies. On the other hand, growth is projected to rise moderately from 3.9% in 2022 to 4.0% in 2023 and again to 4.2% in 2024 for emerging economies. About half of emerging markets and developing economies will have lower growth in 2023 compared to 2022.

Table 1.1. IMF economic Outlook projections (%)[3]

			Forecast
	2022	**2023**	**2024**
WORLD	**3,4**	**2,9**	**3,1**
Advanced Economies	**2,7**	**1,2**	**1,4**
USA	2,0	1,4	1,0
Euro Area	3,5	0,7	1,6
Germany	1,9	0,1	1,4
France	2,6	0,7	1,6
Italy	3,9	0,6	0,9
Spain	5,2	1,1	2,4
Japan	1,4	1,8	0,9
United Kingdom	4,1	−0,6	0,9
Canada	3,5	1,5	1,5
Other Advanced Economies	2,8	2,0	2,4
Developing Economies	**3,9**	**4,0**	**4,2**
Asia	**4,3**	**5,3**	**5,2**
China	3,0	5,2	4,5
India	6,8	6,1	6,8
Developing Europe	**0,7**	**1,5**	**2,6**
Russia	−2,2	0,3	2,1
Türkiye	11,4	5,5	3,0
Latin America and the Caribbean	**3,9**	**1,8**	**2,1**
Brazil	3,1	1,2	1,5
Mexico	3,1	1,7	1,6
Middle East and Central Asia	**5,3**	**3,2**	**3,7**
Saudi Arabia	8,7	2,6	3,4
Africa	**3,8**	**3,8**	**4,1**
Nigeria	3,0	3,2	2,9
South Africa	2,6	1,2	1,3

IMF's growth forecast for the Turkish economy is 5.5% for 2023 and 3% for 2024 as can be seen in Table 1.1. However, it should be noted that different global institutions have different, albeit close, projections. For example, as of March 2022, Fitch Ratings, an international credit rating agency, raised its 2023 growth forecast for the global economy from 1.4% to 2%, while lowering it from 2.7% to 2.4% for 2024, due to the reopening of China, the easing of Europe's natural gas crisis and the resilience of consumer demand in the US. Türkiye's economy is expected to grow by 2.5% in 2023 and 3% in 2024. In its previous forecasts, Fitch Ratings had predicted that Türkiye would grow by 2.9% in 2023 and 2024.

Around 84 percent of countries are expected to have lower inflation in 2023 than in 2022. Global inflation is expected to fall from 8.8% (annual average) in 2022 to 6.6%

3 IMF

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in 2023 and 4.3% in 2024. Global inflation was around 3.5% in the pre-pandemic period (2017-19). The projected decline in inflation also reflects lower international fuel and non-fuel commodity prices due to weaker global demand. Global inflation (on an annualized basis) is expected to fall from 6.9% in Q4 2022 to 4.5% in Q4 2023, but it will still take time for inflation to fall. By 2024, average annual inflation in most economies will still be above pre-pandemic levels.

Although risks to the global outlook started to diminish in the last quarter of 2022, there are still some factors that may affect the upward and downward movements of inflation and need to be taken into account. Possible upside risks include subdued demand growth and labor markets that are still below potential, as well as strong wage increases. On the other hand, households still tend to save, which also dampens demand in markets, particularly in the tourism and consumption sectors.

The escalation of the war in Ukraine remains a major concern. The war creates economic vulnerability, especially for Europe and low-income countries. Europe has faced lower than expected gas prices this winter as it has stored enough gas to avoid the possibility of shortages. However, there is a potential risk of refilling empty tanks, especially if gas not purchased from Russia is supplied from further afield. The possibility of a cold winter and/or increased energy demand in China in the coming year could cause gas prices to rise again. In addition, disruptions in the global supply of grain from the Black Sea region (Ukraine and Russia) could lead to higher food and fuel prices, as well as the possibility of social unrest in countries dependent on imports, particularly of wheat.

The global debt problem is another reason for higher inflation. It is estimated that about 15% of low-income countries are indebted. 45% of these countries are already at high debt risk. Vulnerabilities caused by the pandemic, low growth rates, significant short-term dollar financing needs and high borrowing costs increase the vulnerability of these countries.

Finally, the geopolitical fragmentation triggered by the Russia-Ukraine war poses global risks. International sanctions aimed at pressuring for an end to the war in Ukraine are dividing the world economy into different blocs. This is similar to the geopolitical tensions arising from the US-China trade dispute in the recent past. These polarized divisions could be intensified by further restrictions on the cross-border movement of capital, workers and international payments. This could also lead to a restructuring of countries' multilateral cooperation on energy and product supply. The costs of such fragmentation are extremely high, especially in the short term as it would take time to replace disrupted cross-border flows. Indeed, a limited version of this scenario was experienced in 2022 as a result of the Ukraine-Russia war.

1.1.2. Expectations, Projections and Trends in Global Trade

Over the last three years, global trade has been greatly affected by the COVID-19 pandemic. In addition, the impact of supply chain disruptions on global trade has also become significant. World trade is expected to decline by 2.4% in 2023 and increase again by 3.4% in 2024, despite the easing of supply bottlenecks, driven by global demand for goods and services.

Compared to other recent trade downturns around the world, the decline in global trade in 2020 is comparable to the 2008/09 global financial crisis. This is because the situation in 2020 is significantly worse than the downturn caused by the global recession in 2015. The significant decline in 2020 was the result of widespread cross-border restrictions and other logistical disruptions due to the pandemic, followed by declines in global demand as the global health and economic crises unfolded. Nevertheless, with global trade starting to recover at the end of 2020, initial expectations of a double-digit contraction in global trade appear to be "overly pessimistic". In 2021, the value of global trade recovered rapidly on the back of a strong recovery in global demand and rising commodity prices. Since late 2020, the increase in trade has remained positive through mid-2022. However, the contraction resumed in the third quarter of 2022 (Figure 1.2).

Figure 1.2. Global trade trends[4]

In value terms, global trade stood at around $25 trillion in 2019, but decreased by around $2.5 trillion in 2020 as a result of the COVID-19 pandemic. With demand picking up again, trade increased by $5.5 trillion in 2021, reaching about $28 trillion. By the end of 2022, the value of international trade reached approximately USD 32 trillion. This represents an increase of about 26% compared to the pre-pandemic levels of 2019. Importantly, the growth of global trade has strongly outpaced the growth of the global economy over the past two years. As a result, the ratio of global exports to global output has increased from 29% in 2019 to nearly 32% in 2021. Given that global

4 UNCTAD

trade will continue to grow in the first half of 2022, this ratio is expected to reach a record high of around 34% in 2022.

Most of the international trade trends over the last three years can be explained by changes in global demand patterns. Quarantine measures during the pandemic caused demand to fall in many sectors. Also restrictions on the movement of people reduced demand even more, leading to sharp declines in the services sector. On the other hand, trade in goods has been more resilient (relative to the services sector) as a result of increased demand for pharmaceuticals and personal protective equipment, as well as household appliances, telecommuting and fitness equipment.

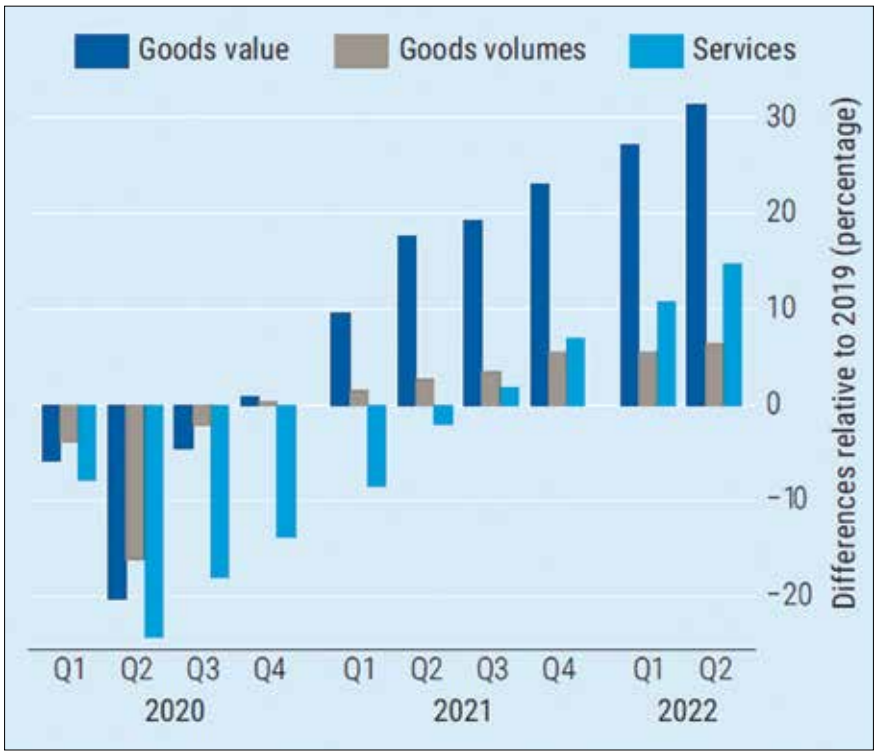

Figure 1.3 Trade recovery[5]

Business activity has recovered quickly in most manufacturing sectors as the pandemic subsides and global demand resumes. In late 2020, trade in goods is higher than in 2019. Persistent disruptions in people mobility continued to adversely affect trade in services, particularly tourism, for a much longer period. Trade in services did not return to pre-pandemic levels until late 2021. Trade growth remained strong in 2022 for both goods and services. By mid-2022, the value of global trade in goods is about 33% higher than in 2019, while trade in services is about 15% higher than in 2019 (Figure 1.3). In addition to all of these, trade growth prospects remain positive (Figure 1.4).

5 UNCTAD

Figure 1.4 WTO Global trade development projection (with index values)[6]

International trade patterns over the past three years reflect not only changes in global demand due to the COVID-19 pandemic, but also movements in international prices. Much of the growth in global trade has been nominal, as trade volumes have increased at a slower pace.

The difference in the growth rate between the value and volume of global trade can be partly explained by changes in commodity prices, particularly energy. This is evident from an analysis of trade trends across a number of economic sectors. For example, the price of energy products has fallen as demand has declined. As a result, the value of energy commodities traded in Q2 2020 fell by around 50%. Energy prices only recovered in early 2021 and the trade value of the energy sector returned to pre-pandemic levels. The value of trade in energy products increased further in 2021 and 2022, largely due to geopolitically driven energy price increases.

McKinsey, an international consulting firm, has emphasized that

- Businesses are turning to alternatives in supply sources,
- Critical product groups account for 25% of the imports of almost all countries,
- The supply of these products is currently trusted on 3 or fewer countries,
- About 30% of global trade wants to diversify its supply chain,
- Developed countries have not changed their import strategies in the last 5 years, but this is not sustainable,
- Decision makers need to detail commercial relationships to identify risks and opportunities as global business trends in the near term.

Of course, with the pandemic and the subsequent Russia-Ukraine tension, Russia's strategic position on the transportation geography has caused supply chains to become fragile, and the resilience of supply chains has become more questionable.

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It has been observed at this point that many organizations have developed some recommendations for supply chains for the sustainability of trade.

UNCTAD's (United Nations Conference on Trade and Development) recommendations for solving the supply chain crisis are as follows:

- It has become necessary to spend 20 percent more time than in the past to achieve the same trade volume especially in supply chains disrupted by congestion at ports. This means that we need more transportation capacity and equipment for the same trade volume as it takes time to build and procure them. These bottlenecks can harm trade and threaten sustainable development goals. In the short term, only improving the performance of existing facilities can alleviate this situation.

- The supply chain crisis is almost certainly caused by backlogs in major supply chain hubs, which will negatively impact trade and reshape trade flows around the world. Ongoing geopolitical tensions between some major economies could lead to new trade openings with significant repercussions for global supply chains, as countries can move production closer geographically and politically.

- In addition, agreements such as the African Continental Free Trade Area (AfCFTA) and the Regional Comprehensive Economic Partnership (RCEP) in the Asia-Pacific are expected to influence global trade patterns. It is quite possible that regional trade within Africa and the Asia-Pacific region will become less globalized, while at the same time increasing trade volumes.

- Regional integration not only increases trade flows but also facilitates structural change by paving the way for local firms to export higher value-added goods to regional markets, as it is easier to do so compared to international markets. Economic integration through regional trade agreements can also increase resilience to market conditions. Indeed, recent research by UNCTAD shows that trade under trade agreements is more resilient.

- On the other hand, digitalization driven by the pandemic has required countries to prioritize their digital infrastructure and supply chain investments. One example is the digitalization of ports, logistics processes and border protection agencies around the world. Customs automation, pre-arrival data processing, port optimization and other digital solutions are helping to speed up port and customs operations.

All of these developments and measures are motivated by the polarization in the world and require more flexible, agile and regional supply chains. Global trade and supply chains are expected to move along this axis in the coming years.

1.2. Developments and Expectations in Economy and Trade of Türkiye

According to the production method, annual GDP, obtained by summing the four periods, increased by 5.6% in 2022 compared to the previous year as chained volume index. When the activities that constitute GDP are analyzed; the total value added of finance and insurance activities increased by 21.8%, service activities including transportation by 11.7%, professional, administrative and support service activities by 9.9%, information and communication activities by 8.7%, other service activities by 5.8%, public administration, education, human health and social service activities by 4.8%, real estate activities by 4.3%, industry by 3.3% and agriculture sector by 0.6% in 2022 compared to the previous year as chained volume index. The construction sector decreased by 8.4%.

Total quarterly and annual GDP data can be seen in Table 1.2.[7]

Table 1.2. Türkiye's GDP Growth (Current prices)[8]

Year	Quarter	GDP Million TL	GDP Million $	Change (%)
2020	I	1.073.528	176.579	4,4
	II	1.035.789	152.268	-10,4
	III	1.413.883	196.582	6,3
	IV	1.524.085	191.535	6,2
	Annual	**5.046.883**	**716.902**	**1,8**
2021	I	1.395.931	189.106	7,5
	II	1.592.926	190.006	22,5
	III	1.931.231	227.406	7,9
	IV	2.328.700	200.330	9,6
	Annual	**7.248.789**	**807.106**	**11,4**
2022	I	2.511.885	180.920	7,6
	II	3.428.260	219.943	7,8
	III	4.265.712	241.968	4,0
	IV	4.800.717	262.669	3,5
	Annual	**15.006.574**	**905.501**	**5,6**

In parallel with the GDP development, Türkiye's foreign trade increased by 24.4% in 2022 compared to the previous year. The increase in exports was 12.9%, reaching 254 billion dollars in value, while the increase in imports was 34%, reaching 363 billion

7 http://www.tuik.gov.tr/

8 http://www.tuik.gov.tr/

dollars in value. Thus, our foreign trade increased by a high rate of 24% in total, reaching $617 billion (Table 1.3.).

Table 1.3. Foreign Trade Data 2013-2022 (Million $)[9]

	Export		Import		Volume		Foreign	
	Value	Change (%)	Value	Change (%)	Value	Change (%)	Trade Balance	Imp/Exp (%)
2013	161.481	-	260.823	-	422.304	-	-99.342	61,9
2014	166.505	3,1	251.142	-3,7	417.647	-1,1	-84.638	66,3
2015	150.982	-9,3	213.619	-14,9	364.601	-12,7	-62.637	70,7
2016	149.247	-1,1	202.189	-5,4	351.436	-3,6	-52.942	73,8
2017	164.495	10,2	238.715	18,1	403.210	14,7	-74.221	68,9
2018	177.169	7,7	231.152	-3,2	408.321	1,3	-53.984	76,6
2019	180.833	2,1	210.345	-9,0	391.178	-4,2	-29.512	86,0
2020	169.637	-6,2	219.516	4,4	389.154	-0,5	-49.840	77,3
2021	225.214	32,8	271.425	23,6	496.640	27,6	-46.133	83,0
2022	254.201	12,9	363.708	34,0	617.909	24,4	-109.508	69,9

In 2022, Germany, the USA and Iraq were the countries we exported to the most, while Russia, China and Germany were the countries we imported from the most. Our trade volume with some of the countries with which we have the highest foreign trade has increased at very high levels in terms of rates. For example, exports to the USA increased by 14.7%, while exports to Iraq increased by 23.6%, Russia by 61% and the Netherlands by 18.7%.

On the other hand, while our imports with Russia increased by a very high rate of 103% in 2022, our imports with China and Switzerland increased by 28% and 402%, respectively. The weakness of our exports with China and Russia, the countries we import the most, is one of the most important reasons for our foreign trade deficit. The trade deficit arising from our trade with these two countries alone reached 88 billion dollars in 2022. This shows that 80% of our foreign trade deficit stems from these two countries.

The top 20 countries with strong foreign trade account for 66% of total exports and 67% of total imports (Table 1.4.).

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Table 1.4. Top 20 Countries in Foreign Trade (*000 $)[10]

	Export				Import		
Country	2021	2022	21/22	Country	2021	2022	21/22
Germany	19.311.023	21.143.619	9,5%	Russia	28.959.361	58.848.989	103,2%
USA	14.720.364	16.887.056	14,7%	China	32.238.052	41.354.587	28,3%
Iraq	11.125.650	13.750.006	23,6%	Germany	21.726.305	24.033.037	10,6%
United K	13.703.695	13.005.266	-5,1%	Switzerland	3.054.869	15.335.262	402,0%
Italy	11.473.021	12.397.863	8,1%	USA	13.147.623	15.228.577	15,8%
Spain	9.619.642	9.650.356	0,3%	Italy	11.562.694	14.081.547	21,8%
France	9.111.137	9.534.620	4,6%	India	7.936.146	10.697.331	34,8%
Russia	5.774.392	9.342.871	61,8%	France	7.931.536	9.429.722	18,9%
The Netherlands	6.764.786	8.026.959	18,7%	South Korea	7.597.023	9.004.399	18,5%
Israel	6.355.775	7.032.526	10,6%	Spain	6.311.611	7.004.002	11,0%
Romania	5.175.021	6.955.288	34,4%	United K.	5.558.194	5.904.013	6,2%
Poland	4.673.825	5.417.895	15,9%	Brazil	3.827.073	4.830.986	26,2%
UAE	5.493.362	5.252.691	-4,4%	Japan	4.389.292	4.640.829	5,7%
Belgium	4.899.300	4.779.139	-2,5%	The Netherlands	4.508.587	4.497.259	-0,3%
Bulgaria	3.953.436	4.722.021	19,4%	UAE	2.442.660	4.470.951	83,0%
Egypt	4.513.693	4.556.419	0,9%	Ukraine	4.524.675	4.455.399	-1,5%
Greece	3.118.900	3.302.410	5.9%	Belgium	5.628.385	4.420.570	-21.5%
China	3.662.748	3.281.152	-10,4%	Poland	3.635.826	4.294.420	18,1%
Morocco	2.976.888	3.094.360	3,9%	Malesia	3.098.059	4.288.702	38,4%
Iran	2.770.743	3.068.702	10,8%	Saudi Arabia.	3.456.314	4.152.071	20,1%
Top 20	149.197.398	165.201.218	10,7%	Top 20	181.534.285	250.972.654	38,3%
Türkiye	225.214.458	254.201.009	12,9%	Türkiye	271.425.553	363.708.915	34,0%
Top 20 Share	66,25%	64,99%	-1,9%	Top 20 Share	66,88%	69,00%	

The top 10 cities in our foreign trade are naturally led by İstanbul followed by İzmir, Kocaeli and Bursa in exports and Kocaeli, Ankara and İzmir in imports. The top 10 cities with the highest volume of foreign trade account for 82% of our total exports and 77% of our total imports. The high share of İstanbul, located in an earthquake zone, leads to a significant difference in trade volume between cities, which poses a significant risk potential for Türkiye (Table 1.5.).

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Table 1.5. Top 10 cities in foreign trade (*000, $)[11]

Export				Import			
2021	**2022**	**21/22**		**2021**	**2022**	**21/22**	
İstanbul	108.666.008	124.654.897	14,7%	İstanbul	138.122.531	178.740.544	29,4%
İzmir	14.737.269	17.014.319	15,5%	Kocaeli	14.838.591	18.388.579	23,9%
Kocaeli	12.271.836	14.456.931	17,8%	Ankara	14.601.816	14.500.516	-0,7%
Bursa	11.647.717	12.796.109	9,9%	İzmir	10.956.663	13.625.509	24,4%
Ankara	9.496.357	12.001.246	26,4%	Bursa	8.534.858	10.183.818	19,3%
Gaziantep	10.284.899	11.195.087	8,8%	Gaziantep	7.383.898	8.493.152	15,0%
Mersin	4.247.690	6.164.610	45,1%	Hatay	6.640.766	7.611.168	14,6%
Sakarya	5.325.110	5.272.637	-1,0%	Mersin	3.966.542	6.854.903	72,8%
Denizli	4.214.377	4.450.566	5,6%	Adana	3.545.959	4.876.024	37,5%
Hatay	4.390.306	4.066.993	-7,4%	Çorum	887.312	3.842.848	333,1%
Top 10	**185.281.569**	**212.073.395**	**14,5%**	**Top 10**	**209.478.936**	**267.117.061**	**27,5%**
Türkiye	**225.214.458**	**254.201.009**	**12,9%**	**Türkiye**	**271.425.553**	**363.708.915**	**34,0%**
Top 10 Share	**82,27%**	**83,43%**	**1,4%**	**Top 10 Share**	**77,18%**	**73,44%**	**-4,8%**

When the top 10 chapters in foreign trade are analyzed, it is seen that motor vehicles ranked the highest in exports in 2022 with a volume of 27 billion dollars, followed by boilers and machinery with 23 billion dollars, and mineral fuels and mineral oils with 16 billion dollars in third place. In the same year, the top 3 most traded imports were mineral fuels (up 91% to USD 97 billion), boilers and machinery (USD 35 billion) and iron and steel (USD 28 billion) (Table 1.6.).

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Table 1.6. Top 10 chapters in our foreign trade (*000, $)[12]

Export			
Chapters	**2021**	**2022**	**21/22**
Road vehicles etc.	25.022.476	26.801.106	7,1%
Boilers, machineries etc.	20.774.806	22.672.501	9,1%
Mineral fuels, mineral oils etc.	8.506.562	16.404.053	92,8%
Iron and steel	17.062.504	14.672.061	-14,0%
Electrical machinery and equipment	12.010.761	13.704.659	14,1%
Plastic and articles thereof	10.015.069	11.571.879	15,5%
Knitted and crocheted goods	10.780.807	11.007.419	2,1%
Articles of iron and steel	8.801.101	10.533.701	19,7%
Precious or semi-precious stones etc.	10.964.702	10.206.401	-6,9%
Non knitted and crocheted goods	7.513.226	8.462.732	12,6%
Top 10 Total	**131.452.013**	**146.036.513**	**11,09%**
Türkiye Total	**225.214.458**	**254.201.009**	**12,87%**
Top 10 Share	**58,37%**	**57,45%**	**-1,57%**
Imports			
Chapters	**2021**	**2022**	**21/22**
Mineral fuels, mineral oils etc.	50.691.986	96.548.914	90,5%
Boilers, machineries etc.	30.966.641	34.573.689	11,6%
Iron and steel	27.618.092	28.367.022	2,7%
Precious or semi-precious stones etc.	7.073.921	23.457.037	231,6%
Electrical machinery and equipment	19.964.151	21.534.296	7,9%
Plastic and articles thereof	17.590.483	18.975.893	7,9%
Road vehicles etc.	15.595.859	17.678.549	13,4%
Organic chemicals	9.341.411	11.119.596	19,0%
Aluminum and articles thereof	6.592.847	7.683.173	16,5%
Copper and articles thereof	5.265.610	5.510.345	4,6%
Top 10 Total	**190.701.001**	**265.448.514**	**39,20%**
Türkiye Total	**271.425.553**	**363.708.915**	**34,00%**
Top 10 Share	**70,26%**	**72,98%**	**3,88%**

In 2022, $150 billion worth of exports (up 12% compared to 2021) were transported by sea, followed by road ($79 billion) and air ($21 billion). The value of export products transported by rail is only 2.4 billion dollars.

Maritime transportation is also dominant in our imports. In the same year, $193 billion worth of imported products were transported by sea, followed by road ($59 billion) and pipelines ($68 billion). The value of products imported by railroad was only 3 billion dollars. These data can be seen in Table 1.7. and Table 1.8. Proportional data are presented in Table 1.9. Proportionally, 59% of our imports are imported by maritime transportation, while this ratio is 53% in our exports.

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Table 1.7. Exports by mode of transport (Million $)[13]

Transport Mode	2018	2019	2020	2021	2022	21/22
Sea	**108.803**	**109.114**	**100.908**	**133.714**	**150.313**	**12,41%**
Road	52.222	54.462	53.128	68.749	78.852	14,70%
Air	14.128	14.849	12.733	18.736	20.685	10,40%
Other	1.262	1.436	1.582	2.367	1.892	-20,07%
Rail	754	971	1.288	1.648	2.458	49,15%
Total	**177.169**	**180.833**	**169.639**	**225.291**	**254.201**	**12,83%**

Table 1.8. Imports by mode of transport (Million $)[14]

Transport Mode	2018	2019	2020	2021	2022	21/22
Sea	**136.737**	**112.966**	**114.838**	**157.390**	**193.797**	**23,13%**
Road	39.129	37.177	41.883	48.897	59.446	21,57%
Air	28.757	29.238	39.260	26.057	38.581	48,06%
Other	25.230	29.514	21.390	36.190	68.917	90,43%
Road	1.299	1.448	2.145	2.891	2.968	2,66%
Total	**231.152**	**210.343**	**219.516**	**271.425**	**363.709**	**34,00%**

Table 1.9. Types of transport and regimes value shares in foreign trade (%)

	Sea		Road		Air		Rail	
Import	Export	Import	Export	Import	Export	Import	Export	
2017	58,1	56,8	16,9	31,0	14,4	10,5	0,5	0,4
2018	59,2	61,4	16,9	29,5	12,4	8,0	0,6	0,4
2019	53,7	60,3	17,7	30,1	13,9	8,2	0,7	0,5
2020	52,3	59,5	19,1	31,3	17,0	7,5	1,0	0,8
2021	58,0	59,4	18,0	30,5	9,6	8,3	1,1	0,7
2022	53,3	59,1	16,3	31,0	10,6	8,1	0,8	1,0

The weight shares in foreign trade by transportation modes and regimes can also be seen in Table 1.10. As can be seen from the table, the share of maritime transportation has been above 80% in exports and 85% in imports for the last 3 years.

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14 http://www.tuik.gov.tr/

Table 1.10. Types of transport and regimes tonnage shares in foreign trade (%)

	Sea		Road		Air		Rail	
	Import	Export	Import	Export	Import	Export	Import	Export
2017	95,6	76,5	4,0	22,1	0,1	0,8	0,4	0,6
2018	95,5	78,3	4,1	20,4	0,1	0,8	0,4	0,5
2019	95,1	81,1	4,4	17,6	0,1	0,9	0,4	0,5
2020	95,3	82,8	4,0	16,2	0,0	0,4	0,6	0,6
2021	92,6	80,9	5,3	17,8	0,1	0,5	0,6	0,8
2022	93,0	83,9	5,1	14,9	0,0	0,4	0,7	0,7

1.3. Türkiye in the 2023 Logistics Performance Index (LPI) Report

The purpose of the Logistics Performance Index (LPI) report prepared by the World Bank's "Global Trade and Regional Integration Unit" is to rank and compare countries in the world according to their logistics performance. Published in 2007 for the first time, the report was not published in 2008 and 2009, and then continued to be published every 2 years from 2010 until 2018. The report, which was not published for 5 years due to the pandemic period, was re-published in April 2023. Considering all these reports, there are a total of 7 reports published so far.

The report questions 6 main variables. While the inputs expressed as policy regulation areas of businesses and the public are customs, infrastructure and logistics competence/equality, the outputs of service delivery performance are identified as variables of timeliness, international shipments and tracking/tracing. As can be seen from the measurement model, the quality of output variables directly depends on the quality of input variables (Figure 1.5.).

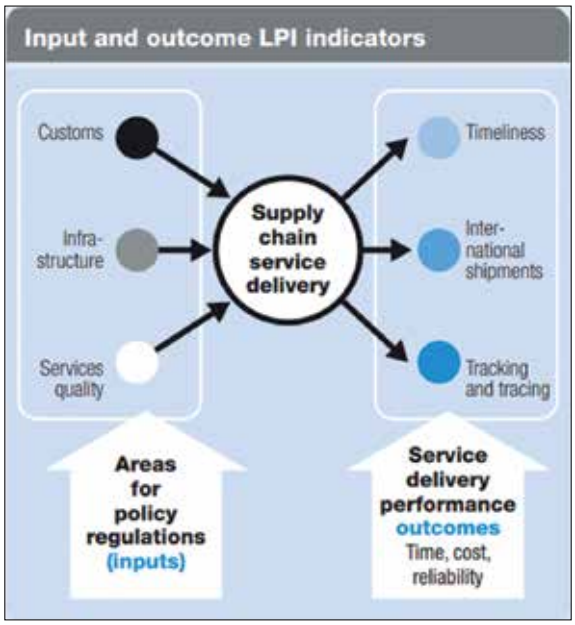

Figure 1.5. Input and outcome LPI indicators

The number of countries compared in the 2023 report is 139. With this index, these countries can see how they are perceived in the world in terms of logistics, as well as their strengths and weaknesses. Since the country ranking in the LPI is determined by points, even a decrease of 0.1 points causes countries to fall down in the ranking. While our country was ranked 39th in the 2010 report, it moved up 12 places to 27th in the 2012 report, but thereafter it has been on a continuous downward trend. In the 2018 report, the worst value (47th place) was obtained. In the 2023 report, Türkiye showed an improvement and was ranked 38th (Figure 1.6).

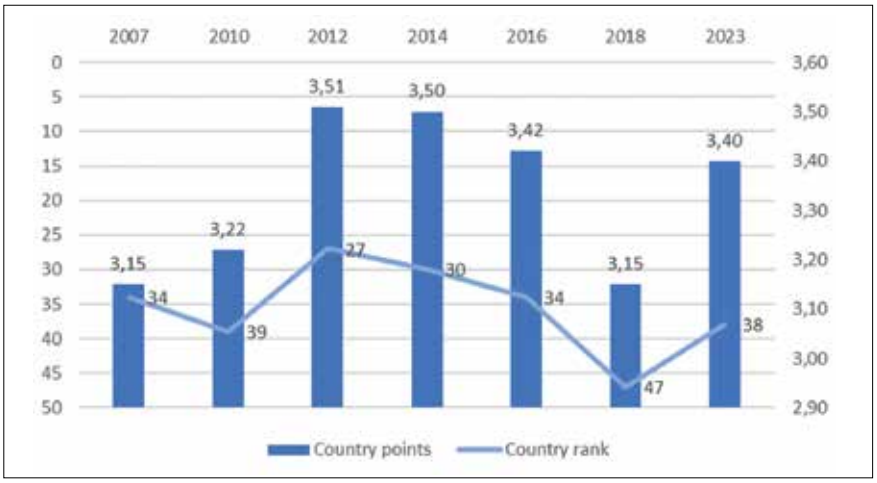

Figure 1.6. Development in Türkiye's LPI value

In the 7 reports published since 2017, Türkiye's scores in main and sub-criteria and country ranking can be analyzed in Table 1.11.

Table 1.11. Development in Türkiye's LPI value

		2007	2010	2012	2014	2016	2018	2023
LPI	Country rank	34	39	27	30	34	47	38
	Country points	3,15	3,22	3,51	3,50	3,42	3,15	3,40
Customs	Country rank	33	46	32	34	36	58	47
	Country points	3,00	2,82	3,16	3,23	3,18	2,71	3,00
Infrastructure	Country rank	39	39	25	27	31	33	43
	Country points	2,94	3,08	3,62	3,53	3,49	3,21	3,40
International shipments	Country rank	42	44	30	48	35	53	26
	Country points	3,07	3,15	3,38	3,18	3,41	3,06	3,40
Logistics competence and equality	Country rank	30	37	26	22	36	51	38
	Country points	3,29	3,23	3,52	3,64	3,31	3,05	3,50
Timeliness	Country rank	52	31	27	41	40	44	35
	Country points	3,38	3,94	3,87	3,68	3,75	3,63	3,60
Tracking and tracing	Country rank	34	56	29	19	43	42	37
	Country points	3,27	3,09	3,54	3,77	3,39	3,23	3,50

The countries with the highest LPI values in 2023 are Singapore with 4.3, Finland with 4.2 and Denmark with 4.1 points. Türkiye's LPI value is 3.4. LPI value is the average of the 6 criteria values used in the measurement. Therefore, it is necessary to focus on these 6 variables to understand the changes in the LPI value. Comparisons of the variables for 2018 and 2023 are as follows:

- **Customs:** Türkiye was ranked 58th in 2018 and 47th in 2023 with 3.0 points.
- **Infrastructure:** While Türkiye was ranked 33rd in 2018, it dropped to 43rd in 2023 with 3.4 points.
- **International shipments:** Türkiye was ranked 53rd in 2018 and raised to 26th place in 2023 with 3.4 points.
- **Logistics competence and equality:** Türkiye was ranked 51st in 2018 and raised to 38th in 2023 with 3.5 points.
- **Timeliness:** Türkiye was ranked 44th in 2018 and raised to 35th in 2023 with 3.6 points.
- **Tracking and tracing:** Türkiye was ranked 42nd in 2018 and raised to 37th in 2023 with 3.5 points.

There is an improvement in all variables except infrastructure compared to 2018 when the 2023 values are analyzed, with the best value in the international shipments criterion and the worst value in the customs criterion.

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UNIT 2

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Arcan FAYATORBAY
SOCAR Terminal, COO, TÜRKLIM Board Member, Container Working Group Leader

Agenda of Container Transportation

The importance of container transportation for world trade and development has never been more evident than in the past year. Historically high and volatile freight rates, port congestion, new maritime demands in the wake of COVID-19, and the war in Ukraine have all been key drivers of this realization. Unfortunately, rising maritime transportation costs and the supply chain problems caused by port congestion around the world have fueled rising inflation across countries.

After spending the first half of 2022 at high levels, container freight rates turned downwards in the summer months with the spot freight rate decreases that started especially on Transpacific and Asia-Europe trade routes. The last quarter of 2022 signaled the end of a period of extremely favorable freight rates for container lines. This favorable period, which was caused by the reversal of the supply-demand balance in line with the impact of the COVID-19 pandemic, lasted from May 2020 to September 2022. At the beginning of 2022, although a downward trend in spot freight values was expected during the year, a much steeper decline was observed throughout the year. The main reason behind this sharp decline was the severe contraction in demand in western countries. Three determining factors - political, economic and sectoral - have come to light as the causes of this contraction;

- Political; the uncertainties created by the Russia-Ukraine war, which began with Russia's invasion of Ukraine on February 24, 2022, and the ever-increasing trade tensions between the United States and China.
- Economic; high inflation around the world, negatively affecting the production capacity of companies and the purchasing power of households.
- Sectoral; full warehouses encourage companies to take a waiting position and avoid placing new orders.

Even if often negotiated, the increases in the value of the long-term contracts in force in 2021 had a shock-absorbing effect and softened the impact of the declining spot freight values. As a reflection of this situation, 2022 will be

remembered as a historic year in terms of financial results for many container lines.

Global Container Volume

Global container volume which amounted to 849 million TEUs in 2021 closed 2022 with a decline of approximately 4% based on the reports published by the top five major global container lines. Expectations for 2023 are also downward, mainly due to weak indicators for global economic growth. Despite the tight monetary policy stance of central banks, inflation in most economies continues to remain firm, persistent and high. As a result, a slowdown in the global economy in 2023 is inevitable and discussions about the possibility of recession in some advanced economies continue.

The International Monetary Fund (IMF) stated that the global economy grew by 3.4 percent in 2022 and the global growth rate is estimated at 2.9 percent in 2023 and 3.1 percent in 2024 in its latest report dated January 2023. The projected growth rate for the next two years is expected to be below the average of 3.8 percent for the 2000-2019 period. IMF also points to downside risks to growth, including the possibility that the Russia-Ukraine war could escalate, in which tighter global financing costs could exacerbate debt distress, financial markets could suddenly reprice in response to negative inflation news, and further geopolitical fragmentation could hamper economic progress.

These pessimistic economic expectations, as well as the high number of new vessel contracts signed by liner operators between 2021 and 2022, point to a fleet capacity increase of around 8% in 2023. As a result, 2023 is much more likely to see the start of a new normal than a reversal of the weakening of the supply/demand balance that started in the second half of last year.

Service Quality Still Has Not Achieved Pre-Pandemic Level

Global Container Operators are taking measures to mitigate the disruptive effects of vessel overcapacity by taking into account how it is a threat with devastating cost implications and taking measures to mitigate the disruptive effects by anchoring their vessels, delaying their departures or making them sail slow voyages during periods of lack of demand. This is slowly becoming the new normal and the whole industry is adapting to it.

According to Sea Intelligence's data, fluctuations in service quality continued throughout 2022. Although schedule reliability generally increased in 2022, it unfortunately did not reach its pre-pandemic levels. While the average duration of delayed vessels was around 4 days before the pandemic, it decreased from 8 days at the beginning of the year to 5.5 days at the end of 2022.

As a result of the level of the container freight price index, which has spent almost all of 2022 in a downward trend, slow ship speeds and increased transit

times will be an inevitable reality when the current green transformation costs and rising fuel prices are added to the falling revenues of global container lines. Due to the intertwined nature of value chains in logistics, this reality will bring the nearshoring alternative to the agenda, which can be briefly defined as the transportation of business activities from a greater distance to a nearby country, albeit complex to implement. In some sectors, such as textiles, the relocation of production, especially to the Mediterranean basin, is likely to make nearshoring a viable option.

The Pressure of Green Energy Transitions

While the maritime sector has relatively successfully navigated the first phase of the green energy transition, which started with the IMO 2020 regulation, it will be challenged to adapt to more challenging constraints to meet the 2030 and 2050 targets. In addition to facing the challenge of reducing CO_2 emissions by 40% and 70%, it will have to comply with new ship decarbonization standards that will come into force in 2023.

While some shipping companies are uncomfortable with these new regulations, others see an opportunity to decommission excess capacity in the market. One thing that is certain, however, is that tougher market conditions will force ship operators to make major fleet changes by decommissioning vessels that do not meet decarbonization standards.

The cost of shipping companies' efforts to transition to green energy is emerging as a challenging reality for companies in the sector. This cost is expected to be passed on to exporters and importers. Experts estimate that the impact of the transition to green energy on container freight could be between 200-300 USD for 40-foot container transportation.

Container Volume in Türkiye

Due to the downward trend that started in July 2022, Türkiye's container throughput closed at 12.4 million TEU, down 1% from 2021, with a 1.5% year-on-year increase in local cargoes and a nearly 10% decline in transit cargoes due to the war between Ukraine and Russia and the impact of sanctions. While import full container handling increased by 5.7% in 2022 compared to the previous year, the amount of export full containers handled at ports decreased by 2.1% in 2022 compared to the previous year.

In the first half of 2023, it is expected that the decline in transit cargoes will continue to lose momentum and local cargoes will realize at lower levels in line with the growth figures of the world and Turkish economy. In the second half of 2023, container throughput is expected to recover in the summer months compared to the first half of the year as the negative impact of the earthquake on foreign trade diminishes. Looking at 2023 as a whole, container throughput is expected to continue the downward trend that started last year and may be below 12 million TEU by the end of the year.

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UNIT 2: THE MARITIME AND PORT SECTORS IN THE WORLD

2.1. Developments in the Global Seaborne Trade

Following a -3.3% decline in international maritime trade in 2020, a significant recovery process started in 2021 which closed with a cargo volume of 12 billion tons. This cargo volume is also below the level before the COVID-19 period. There are many reasons for this (explained in the first part of the report). However, the most important of these reasons include prolonged pandemic conditions, unexpected disruptions in the global supply chain, and the inability to establish a global supply/demand balance due to problems in global product supply, especially from China. On the other hand, it can be easily said that the development between 2020-2021 is mainly driven by the demand for cargo transported in containers.

Figure 2.1. shows the proportional development of world maritime trade compared to world Gross Domestic Product (GDP). Under normal circumstances, these two data are generally known to have a strong correlation and causality relationship. Indeed, this strong relationship can be seen in Figure 2.1 below. World GDP declined during the global financial crisis of 2009, when global maritime transportation declined, and during the global pandemic of 2020. In terms of causality, it can be said that the GDP data, which includes the demand for global trade and the logistics sector, appreciates or depreciates as a result of changes in these data.

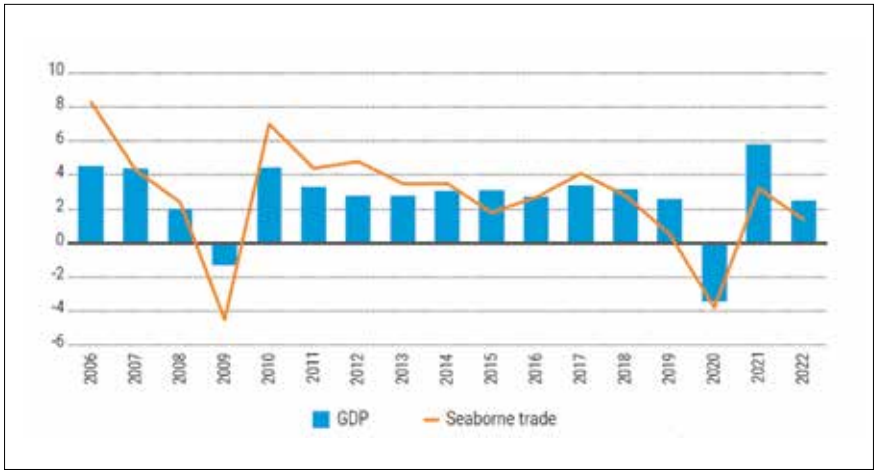

Figure 2.1. International maritime trade and world GDP (%)[1]

According to the projections of UNCTAD (United Nations Conference on Trade and Development), world maritime trade is estimated to increase by 1.4% in 2022 and by an average annual growth rate of 2.1% between 2023 and 2027. These growth rates are quite low compared to the average growth rate of 3.3% in maritime trade over

1 Review of Maritime Transport, 2022

the last 30 years. Container trade has been the fastest growing segment for many years. In addition to a slowdown in growth in 2022, container trade is expected to increase marginally by 1.9% in 2023. The projected slowdown is not only a result of pandemic-induced closures, but also strong macroeconomic headwinds coupled with a weakening Chinese economy. In addition, consumers, faced with rising inflation and the cost of living, are spending less and to some extent shifting their spending from goods to services.

Business activities have developed at a complex level in 2022. Inflation and the cost of living increased globally. In China, the world's largest exporter, the zero-COVID policy triggered shutdowns and significantly disrupted production, logistics and supply chains. The Black Sea ports of Ukraine, a major food exporter, remained closed since the beginning of the war, while global supply of strategic commodities such as wheat could be ensured to a significant extent thanks to the significant efforts and organization of countries including Türkiye (Grain corridor policy).

Industrial action and labor strikes at ports in countries including Germany, South Korea, South Africa and the United Kingdom also have a negative impact on shipping. At the same time, a number of extreme weather events, such as floods, hurricanes and heat waves in Australia, Brazil, Pakistan, East Africa, Europe and the United States, have been extremely influential.

All these issues have meant more problems for global supply chains, logistics and maritime trade. As of the fourth quarter of 2022, projected global economic growth was revised downwards, amid fears that the world economy could slip into recession and stagflation, before this pessimism was replaced by little optimism.

To some extent, maritime trade has been and continues to be driven by market and supplier substitution. While the Russian Federation, faced with economic and other restrictive measures, has been looking for alternative markets (or developing existing markets such as China), European importers have also considered other sources of supply, but both groups were caught unprepared at first, and serious supply problems have emerged, especially in European countries. All these developments have had a positive impact on maritime trade in some areas and a negative impact in others.

In the light of all these developments, developments in world maritime trade in 2022 are analyzed separately on the basis of the main markets in the maritime sector.

• Seaborne trade

In 2021, although global maritime transport significantly compensated for the losses in 2020, it declined again in 2022 due to reasons such as the Russia-Ukraine war mentioned in the previous sections and supply problems in China, and closed the year

at 11.9 billion tons with a -0.3% decrease. Thus, after 2019 and 2021, maritime transports fell below the 12 billion tons level again (Table 2.1.).

Table 2.1. Global maritime growth according to cargo types (million ton)[2]

All Cargo (tonnes)	2019	2020	2021	2022	Change 2021/2022	Change 2013/2022
Crude oil and products	3.097	2.826	2.867	2.981	4,0%	0,6%
Gas	479	481	509	530	4,1%	5,5%
Dry Bulk Cargo	5.372	5.286	5.464	5.344	-2,2%	2,0%
Container	1.778	1.764	1.869	1.817	-2,8%	2,6%
Other	1.300	1.271	1.313	1.311	-0,2%	2,3%
Total	**12.026**	**11.628**	**12.022**	**11.983**	**-0,3%**	**1,6%**

Crude oil and petroleum products increased by 4% to 2.9 billion tons in total (in line with the increase in global demand for energy resources), while gases increased by 4.1% to 530 million tons. There were declines in other main cargo groups in 2022. Dry bulk cargoes declined by -2.2% to 5.3 billion tons, while containers declined by -2.8% to 1.8 billion tons. On the other hand, there is still a positive increase in the main cargo groups between 2013 and 2022. Gas transportation, consisting of LPG and LNG, is the cargo type with the highest increase of 5.5% in 10 years, followed by containers.

The proportional distribution of cargo groups can be seen in Figure 2.2. In 2022, dry bulk cargoes had the highest share with 45%, followed by liquid bulk cargoes with 25% and containers with 15%. The share of gases is only 4%.

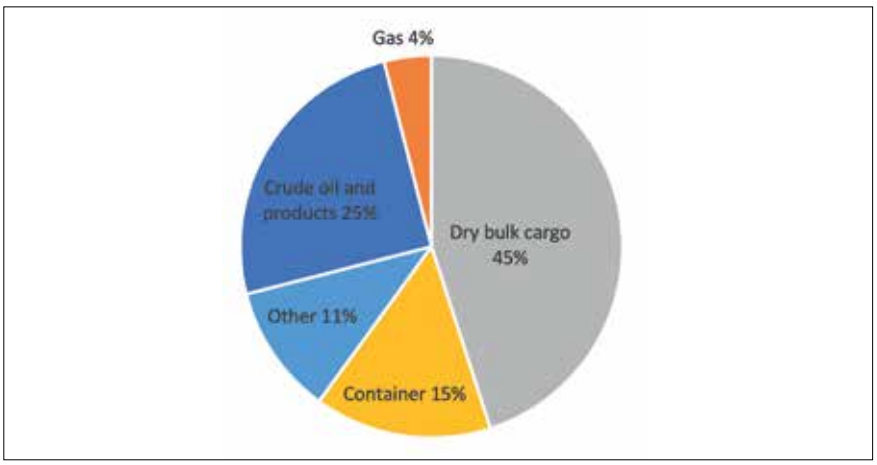

Figure 2.2. Share distribution of seaborne cargo transported in year 2022

The graph of growth between 1980-2021 according to the main cargo types can be seen from a different perspective in Figure 2.3.

2 Clarkson Research

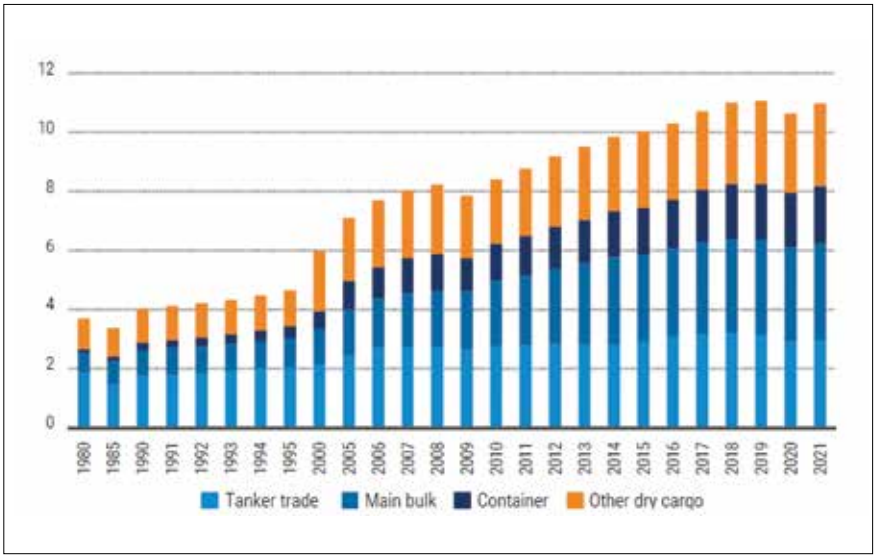

Figure 2.3. Growth according to cargo type (million tonnes)[3]

It is a fact that global growth in 2022 could have been much stronger than it is today had it not been for the recurrent COVID-19 waves and the global supply crisis. Global supply chains disrupted by imbalances in demand and supply have created global production bottlenecks, leading to severe shortages, especially for semiconductors and computer chips, with serious negative consequences for electronics and automobile production. The recovery in global trade has been hampered by port congestion, strikes, disruptions in inland transport, shortages of equipment and labor, all of which have made transport services less reliable and significantly increased logistics costs. By mid-2021, container freight rates had more than quadrupled from their pre-pandemic levels, although they fell back to more reasonable levels in 2022.

Different specialized institutions dealing with the maritime sector have different projections for the future of the sector. These projections are presented in Table 2.2 for both total cargo and containerized cargo. According to these forecasts, UNCTAD predicts that total maritime transportation will grow by less than 2% in 2022 and 2023, followed by an increase of more than 2% until 2026. In containers, the same organization forecasts an annual increase of over 3% after 2023. On the other hand, Clarksons forecasts a growth rate of over 2% in total cargo and containers in 2023 (Table 2.2).

3 UNCTAD, RMT, 2022

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Table 2.2. International seaborne trade growth forecast, 2022-2027 (annual percentage change)[4]

	Annual Growth (%)	Year	Maritime Trade
UNCTAD	1,4	2022	
	1,4	2023	
	2,2	2024	Total
	2,3	2025	Seaborne
	2,3	2026	Trade
	2,2	2027	
UNCTAD	1,2	2022	
	1,9	2023	
	3,0	2024	Container
	3,1	2025	Trade
	2,9	2026	Volume
	3,8	2027	
Clarksons	0,9	2022	Total
	2,2	2023	Seaborne
	-0,1	2022	Container
	2,4	2023	

• Merchant Vessel Fleet

As mentioned, the most important motivators of maritime trade are economic and commercial developments. The maritime trade fleet is shaped primarily by these dynamics, and the structuring in the fleet is naturally reflected in the ports. At this point, it should be underlined that the impact of the trends in the merchant fleet on the maritime sector is quite critical.

In Table 2.3., the development in the maritime merchant fleet can be examined according to the types of cargo they carry. The capacity of dry cargo ships, which has the highest share in the fleet with 43%, increased by 3.6% in terms of DWT, while the capacity of oil tankers, which ranked second with 29%, increased only by 1.6%. The highest increase in rate was in gas ships with 8%, followed by container ships with an increase of 4.1%.

4 UNCTAD, RWT, 2022

Table 2.3. World fleet by principal vessel type (*000 DWT and percentage)[5]

	2021		2022		
Principal Types	**DWT**	**Share (%)**	**DWT**	**Share (%)**	**2021-2022 Change**
Dry bulk carriers	913.175	42,8%	946,135	43,0%	3,6%
Oil tankers	619.331	29,0%	629,014	28,6%	1,6%
Container ships	281.825	13,2%	293,398	13,3%	4,1%
Other types;	243.949	11,4%	251,742	11,5%	3,2%
Offshore supply	83.805	3,9%	84,281	3,8%	0,6%
Gas carriers	77.458	3,6%	83,770	3,8%	8,2%
Chemical tankers	49.055	2,3%	49,662	2,3%	1,2%
Other	25.443	1,2%	25,690	1,2%	1,0%
Ferries and passenger ships	8.188	0,4%	8,340	0,4%	1,6%
General cargo ships	77.910	3,7%	78,819	3,6%	1,2%
World Total	**2.136.190**		**2.199,107**		**3,0%**

The proportional change in the capacity development in terms of DWT in the global merchant fleet between 1981 and 2022 can be seen in Figure 2.4. After the 2009 global financial crisis, the global merchant fleet has been growing at an average rate of 3% per year and the rate of increase in 2022 is 2.9%.

Figure 2.4. Annual growth of the world fleet (DWT percentage, 1981-2022)

At the beginning of 2022, the total merchant fleet consisted of 102,899 vessels of 100 Gross tons and above, equivalent to a capacity of 2.2 billion DWT. In the twelve months up to January 2022, the global merchant fleet grew by 2.95% in DWT. This growth rate is historically moderate and the second lowest since 2005. Over the same period, the merchant fleet carrying liquefied gas continued to grow by 8.15%, with strong support for global gas demand.

5 UNCTAD, RMT, 2022

The average age of the global merchant fleet was 21.9 years at the beginning of 2022. Since 2011, the total fleet has gotten younger by 7%, from 20.4 to just 21.9. Since 2013, on average, all ship types have aged except bulk carriers, which are the youngest vessels (Figure 2.5).

The global merchant fleet is aging as shipowners and operators, uncertain about future fuel prices, regulations and technological developments, postpone investments and keep their old ships in operation. By 2022, general cargo ships will be the oldest with an average age of 27.1 years, followed by oil tankers with an average age of 19.7 years and container ships with 13.7 years. As mentioned, bulk carriers are the youngest fleet with an average age of 11.1 years.

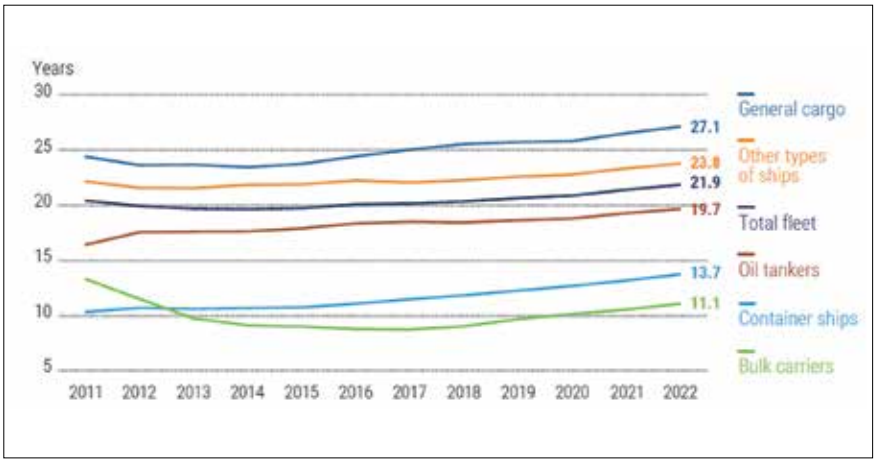

Figure 2.5. Average age of merchant fleet, 2011-2022

As of January 01, 2022, the top three ship owning countries in terms of both DWT and commercial value are Greece, China and Japan, as in previous years. Greece leads in terms of tonnage and China in terms of commercial value (Table 2.4).

In the twelve months to January 1, 2022, Switzerland recorded the highest increase in tonnage among the 25 largest ship owning countries with 17%, followed by China with 13%. Although the top 12 countries remained unchanged in the 2014-2022 period, Greece became even more prominent, while China overtook Japan.

Table 2.4. Top 25 country fleet statistics and fleet values (2022, 1000 GT and over)[6]

		Number of vessels			DWT				
	Country of territory of ownership	National flag	Foreign flag	Total	National flag	Foreign flag	Total	Foreign flag share (%)	Total as world share (%)
1	Greece	620	4.246	4.870	55.715.512	328.703.344	384.430.215	85,5%	17,6%
2	China	5.357	2.599	8.007	113.035.546	163.977.083	277.843.335	59,0%	12,7%
3	Japan	933	3.070	4.007	35.970.817	200.656.470	236.638.365	84,8%	10,9%
4	Singapore	1.371	1.400	2.799	67.869.137	68.312.248	136.243.709	50,1%	6,2%
5	S. Korea	861	948	1.822	72.061.117	39.473.538	111.587.729	35,4%	5,1%
6	Hong Kong	804	867	1.680	14.767.539	77.501.218	92.302.014	84,0%	4,2%
7	Germany	185	2.036	2.221	6.976.526	72.616.389	79.592.915	91,2%	3,7%
8	Bermuda	2	505	507	26.137	63.381.136	63.407.273	100,0%	2,9%
9	Norway	982	1.002	1.987	18.980.244	40.945.002	59.931.039	68,3%	2,7%
10	United King.	363	1.014	1.380	9.376.891	49.222.876	58.746.865	83,8%	2,7%
11	USA	774	1.001	1.783	10.193.014	44.123.048	55.113.272	80,1%	2,5%
12	Taiwan	150	856	1.014	6.590.724	48.326.874	54.974.072	87,9%	2,5%
13	Denmark	414	430	844	20.484.167	20.152.955	40.637.122	49,6%	1,9%
14	Monaco	0	393	393	0	38.011.632	38.011.632	100,0%	1,7%
15	Switzerland	17	480	497	911.905	29.975.783	30.887.688	97,0%	1,4%
16	Türkiye	406	1.175	1.583	5.768.553	24.653.060	30.433.830	81,0%	1,4%
17	Belgium	99	244	343	9.141.427	20.304.520	29.445.947	69,0%	1,4%
18	Indonesia	2.283	121	2.411	24.763.544	4.050.071	29.065.796	13,9%	1,3%
19	UAE	124	954	1.087	631.741	26.597.771	27.363.741	97,2%	1,3%
20	India	874	197	1.076	16.165.552	9.302.885	25.979.620	35,8%	1,2%
21	Russia	1.516	309	1.833	9.250.551	15.044.248	24.317.936	61,9%	1,1%
22	Iran	244	10	255	18.608.833	830.667	19.441.051	4,3%	0,9%
23	The Netherlands	665	524	1.189	5.392.304	12.519.434	17.911.737	69,9%	0,8%
24	S. Arabia	160	108	269	13.619.108	3.738.256	17.358.885	21,5%	0,8%
25	France	173	252	425	4.356.779	10.978.404	15.335.183	71,6%	0,7%
Top 25		19.377	24.741	44.282	540.657.668	1.413.398.912	1.957.000.971	72,2%	89,8%
Rest of the world		5.968	3.768	10.755	81.158.737	114.847.944	223.057.338	51,5%	10,2%
World		25.345	28.509	55.037	621.816.405	1.528.246.856	2.180.058.309	70,1%	100,0%

The value of the world's maritime fleet increased significantly in 2021. Strong market conditions pushed up ship prices, with the largest increase in container ships. On the other hand, there was more demand for second-hand ships in 2022 due to disruptions in world trade, a shortage of new cargo ships and the war in Ukraine. Today, the total value of the ships owned by China is 155 billion dollars, while Greece's is 148 billion dollars and Japan's is 145 billion dollars. The total value of Türkiye's merchant fleet of 1,583 vessels with a capacity of 30 million DWT is only around 14 billion dollars. With the purchase of a significant number of ships by Turkish shipowners in 2022, Türkiye's DWT volume exceeded 40 million DWT by 2023.

6 UNCTAD, RMT, 2020

The ranking of the commercial ship fleet in terms of flag registry shows that Panama, Liberia and Marshall Islands are at the top. While Türkiye is not among the top 25 countries in the flag ranking, the countries in the top 25 have 90% of the total flag registry. Türkiye ranks 32nd in the world in terms of ship registry with 1,237 Turkish flagged vessels (Table 2.5.)

Table 2.5. Leading flags of registration (100 GT and over, 2022)[7]

	Flag of registration	Number of vessels	Share of world vessel total (%)	DWT*000	DWT share (%)	Cumulative DWT share (%)	Average vessel size (DTW)	Growth in DWT tonnage 21/22 (%)
1	Panama	8.025	7,8	350.401	15,9	15,9	43.664	1,7
2	Liberia	4.311	4,2	335.114	15,2	31,2	77.735	11,9
3	Marshall Islands	4.042	3,9	289.781	13,2	44,3	71.693	5,7
4	Hong Kong	2.661	2,6	207.816	9,5	53,8	78.097	1,4
5	Singapore	3.227	3,1	131.369	6	59,8	40.709	-3,6
6	China	7.309	7,1	114.952	5,2	65	15.727	6
7	Malta	2.047	2	114.910	5,2	70,2	56.136	-0,9
8	Bahamas	1.307	1,3	72.998	3,3	73,5	55.851	-1,8
9	Greece	1.234	1,2	61.817	2,8	76,4	50.095	-4,3
10	Japan	5.590	5,4	40.263	1,8	78,2	7.203	2,4
11	South Cyprus	1.030	1	33.461	1,5	79,7	32.487	-1,7
12	Indonesia	11.015	10,7	29.332	1,3	81	2.663	1,1
13	Danish Int. Register	612	0,6	26.061	1,2	82,2	42.583	5,6
14	Maderia	672	0,7	25.863	1,2	83,4	38.486	13,7
15	Norwegian Int. Register	695	0,7	21.300	1	84,4	30.648	-3,1
16	Man Island	291	0,3	20.661	0,9	85,3	71.002	-6,1
17	Iran	942	0,9	20.195	0,9	86,2	21.439	-2,6
18	India	1.810	1,8	16.934	0,8	87	9.356	-1,1
19	Republic of Korea	2.063	2	15.635	0,7	87,7	7.579	-0,6
20	Saudi Arabia	413	0,4	13.887	0,6	88,3	33.625	1,6
21	USA	3.636	3,5	12.526	0,6	88,9	3.445	-0,1
22	Vietnam	1.975	1,9	12.331	0,6	89,5	6.244	19,4
23	United Kingdom	881	0,9	11.292	0,5	90	12.817	-3,8
24	Russia	2.917	2,8	11.039	0,5	90,5	3.784	1,1
25	Italy	1.266	1,2	9.969	0,5	90,9	7.875	-11,4
32	Türkiye	1.237	1,2	6.257	0,3	93,4	5.059	-2,3
World Total		**102.899**	**100**	**2.199.107**	**100**	**100**	**21.037**	**2,9**

• Container Line Operators

Maersk's leadership in the global container line operators ranking, which lasted for nearly 50 years, came to an end in 2021 when MSC took the lead. MSC maintained its leadership in 2022 by increasing the gap. As of February 2023, MSC operated 721

7 UNCTAD, 2022

ships with a total capacity of 4.6 million TEUs. Maersk, ranked second, operated 700 ships with a total capacity of 4.2 million TEU, while CMA CGM, ranked third, operated 597 ships with a total capacity of 3.4 million TEU.

In 2022, although the number of Turkish shipowners in the top 100 remained the same as in 2021, there were some changes in the ranking. ARKAS ranked 30th with 33 ships and 53 thousand TEU capacity, followed by AKKON with 17 ships and 17 thousand TEU capacity, TURKON with 8 ships and 16 thousand TEU capacity and MEDKON with 12 ships and 7 thousand TEU capacity. Thus, TURKON dropped from its long-standing second place among Turkish shipowners to third place and was replaced by AKKON (Table 2.6.).

Table 2.6. Top 10 container operators and Turkish operators (February 2023)[8]

Rank	Operator	Number of vessels	Number of owned vessels	Operating capacity (TEU)	Order book (TEU)	Number of ordered vessels	Average size of order book vessel (TEU)
1	MSC	721	427	4.631.403	1.825.276	133	13.724
2	Maersk	700	342	4.218.176	358.300	29	12.355
3	CMA CGM	597	232	3.399.953	660.476	77	8.578
4	COSCO	456	177	2.866.465	884.272	46	19.223
5	Hapag-Lloyd	248	120	1.795.177	362.544	18	20.141
6	Evergreen	209	128	1.662.531	463.442	49	9.458
7	ONE	204	90	1.531.624	418.430	30	13.948
8	HMM	75	37	816.365	184.027	17	10.825
9	Yang Ming	93	51	705.614	0	0	0
10	ZIM	138	8	533.823	378.034	43	8.791
30	ARKAS	33	33	52.893	3.100	1	3.100
51	AKKON	17	2	17.231	0	0	0
56	TURKON	8	6	15.703	8.000	2	4.000
87	MEDKON	12	10	6.791	0	0	0
	Top 10 Sub-total	**3.511**	**1.663**	**22.253.749**			
	Top 10 Share	**53,8%**	**25,5%**	**84,3%**			

The total capacity of the top 10 shipowners is 22.2 million TEU, which constitutes 84.3% of the total container ship fleet. The shipowners in the top 9 have also formed alliances within themselves, thus filling the mega ships they operate together. In this way, they have achieved economies of scale in transportation and reduced their unit costs, thereby increasing their profitability.

The global capacity of existing alliances reached 82% of the total capacity as of February 2022. Among these alliances, the 2M alliance, which decided to split in 2025, still ranks first in the capacity ranking with a 34% share, followed by the OCEAN alliance with a 30% share and THE ALLIANCE alliance with a 16% share (Table 2.7.).

8 https://alphaliner.axsmarine.com/PublicTop100/

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Table 2.7. Global capacities of existing alliances as of February 2022 (TEU)[9]

	2M ALLIANCE		
#	**Operator**	**Capacity**	**Share**
1	MSC	4.311.366	17,0%
2	Maersk	4.288.252	16,9%
	Total	**8.599.891**	**33,8%**
	OCEAN ALLIANCE		
#	**Operator**	**Capacity**	**Share**
3	CMA CGM	3.227.507	12,7%
4	COSCO	2.926.168	11,5%
7	Evergreen	1.471.496	5,8%
	Total	**7.625.171**	**30,0%**
	THE ALLIANCE		
#	**Operator**	**Capacity**	**Share**
5	Hapag Lloyd	1.751.870	6,9%
6	ONE	1.527.607	6,0%
9	Yang Ming	663.862	2,6%
	Total	**3.943.339**	**15,5%**
	Alliances sub-total	**20.168.401**	**79,4%**
	World total	**25.411.568**	**100,0%**

Global container ship operators, especially alliance shipowners, have transferred a significant portion of their profitability in 2021 and 2022 to new ship orders. In 2023, 2024 and 2025, container ship capacity supply is expected to be as high as 8.8%, 9.0% and 4.7%, respectively. With these ship supplies, it is clear that container freight rates will return to pre-pandemic levels.

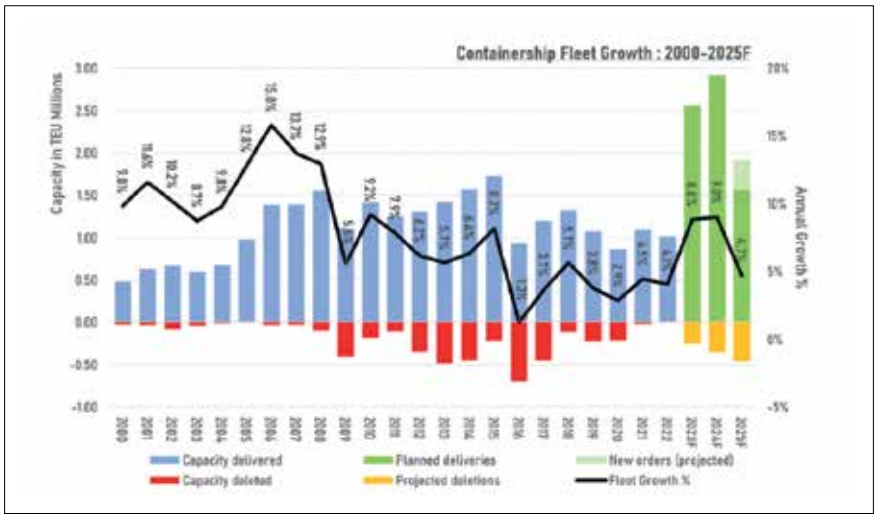

Figure 2.6. Container ship capacity expectations[10]

9 Compiled from Alphaliner and https://porteconomicsmanagement.org/pemp/contents/part1/ports-and-container-shipping/alliances-container-shipping/ .

10 Linerlytica

On the other hand, the "Global Liner Performance Index" published monthly by Sea-Intelligence measures the reliability of the port calls of the above-mentioned container shipowners. Figure 2.6. shows the reliability values of the voyages realized in 2022 and Figure 2.7. shows the average time spent by the ships in port during these calls.

The 2021 data was the lowest measured data since 2011. However, the confidence rate started to recover again in 2022 and was measured as 56.6%. The average delay time per vessel decreased from 7.3 days to 5.43 days.

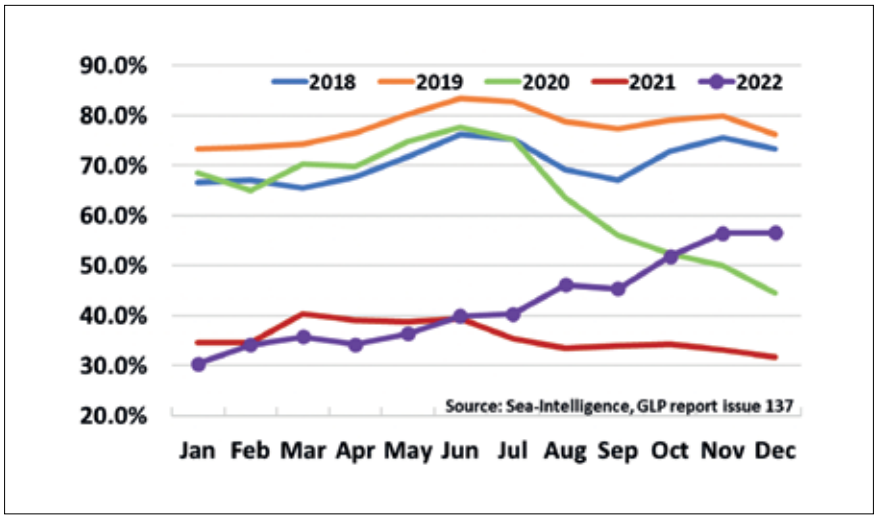

Figure 2.7. Global Schedule reliability[11]

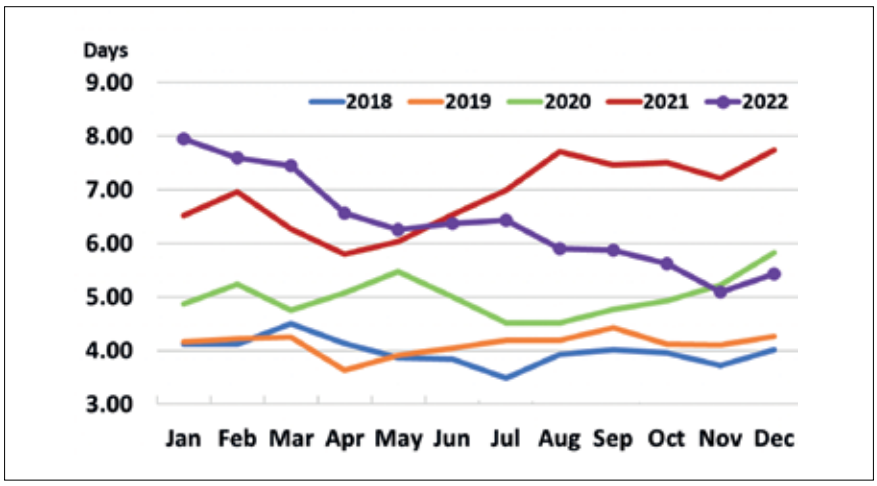

Figure 2.8. Global average delays for late vessel arrivals

• Shipbuilding industry

China, South Korea and Japan are the leading countries in the shipbuilding industry. In 2021, the share of these three countries is 94%. In 2021, ships with a total capacity of 60.7

11 Sea-Intelligence

million DWT were produced in the world, with bulk carriers taking the largest share with 35%, followed by crude oil tankers with 22% and container ships with 18% (Table 2.8.).

Table 2.8. Deliveries of newbuildings by major vessel types and countries of construction, 2021 (*000 GR)[12]

Vessel Type	China	South Korea	Japan	Philippines	Rest of the world	Total	Percentage
Bulk carriers	13.764	960	5.730	624	73	21.151	35%
Oil tankers	4.791	6.376	2.064		358	13.589	22%
Container ships	4.170	4.675	1.954		131	10.930	18%
Gas carriers	918	7.052	159		10	8.139	13%
Ferries and passenger ships	390	50	83	20	1.567	2.110	3%
Chemical tankers	1.017	56	223		256	1.552	3%
General cargo	641	402	9		317	1.369	2%
Offshore	662	109	226		50	1.047	2%
Other	510	6	278		97	891	1%
Total	**26.863**	**19.686**	**10.726**	**644**	**2.859**	**60.778**	
Percentage	**44%**	**32%**	**18%**	**1%**	**5%**	**100%**	

• Ship Recycling Sector

In parallel with the shipbuilding data, similar ship types dominate the ship recycling sector. In 2021, crude oil tankers were the most dismantled ship type with 54% share, followed by bulk carriers with 18% share and offshore vessels with 8% share.

The most active countries in the shipbreaking market are Bangladesh, India, Pakistan, Türkiye and China. These 5 countries have 97% of the market. Türkiye ranks 4th among these countries with a share of 6.8% (Table 2.9.).

Table 2.9. Reported tonnage sold for ship recycling by major vessel type and country of ship recylings, 2021 (*000 GR)[13]

Vessel type	Bangladesh	India	Pakistan	Türkiye	China	Diğer	Rest of the world	Percentage
Oil tankers	4.565	2.200	1.044	318	42	45	8.214	53,6%
Bulk carriers	2.011	477	133	112	60	22	2.815	18,4%
Offshore	160	116	470	274	37	125	1.182	7,7%
Liquefied gas carriers	703		35	7		7	752	4,9%
Ferries and passenger ships	101	178	316	148	1	6	750	4,9%
Chemical tankers	150	13	430	9		3	605	3,9%
General cargo	113	62	41	82		190	488	3,2%
Container ships	42		101			27	170	1,1%
Others	182		80	86		8	356	2,3%
Total	**8.027**	**3.046**	**2.650**	**1.036**	**140**	**433**	**15.332**	**100,0%**
Percentage	**52,4%**	**19.9%**	**17,3%**	**6,8%**	**0,9%**	**2,8%**	**100,0%**	

The next sections of the report present the developments in the main cargo types.

12 RMT, 2022

13 RMT, 2022

2.1.1 Dry Bulk Cargo

Dry bulk cargo is the type of cargo with the largest share transported by sea. Dry bulk cargoes amounted to 5.5 billion tons in 2021, decreasing by -2.2% to 5.3 billion tons in 2022. It is divided into two main groups as Minor and Major. This type of cargo has been increasing steadily by 2.3% on average every year since 2013. However, major bulk cargoes consisting of iron ore, coal and grains declined by -1.3% to 3.2 billion tons in 2022. All other dry bulk cargoes consisting of many products other than major bulk cargoes are called "Minor" bulk cargoes. These cargoes decreased by -3.6% to 2.1 billion tons in 2022. While minor bulk cargoes have increased by 1% on average every year since 2013, this rate decreased in 2022 (Table 2.10.).

Table 2.10. Growth in major and minor dry bulk cargo (million tonnes)[14]

Dry bulk cargo	2018	2019	2020	2021	2022	Change 21/22	Change 13/22
Major bulks	3.220	3.229	3.199	3.272	3.231	-1,3%	2,3%
Minor bulks	2.115	2.143	2.087	2.192	2.113	-3,6%	1,0%
Total bulks	**5.335**	**5.372**	**5.286**	**5.464**	**5.344**	**-2,2%**	**1,7%**

Seaborne transportation of iron ore, one of the three major dry bulk commodities and the most important input of the iron and steel industry, declined by -1.9% to 1.5 billion tons in 2022. Coal, the only product to show an increase among the major bulk cargoes, reached 1.2 billion tons with an increase of 0.5%, while grains, with the negative effects of the Russia-Ukraine war, decreased by -3.4% to 510 million tons (Table 2.11.).

Table 2.11. Major bulk cargo growth (million tonnes)[15]

Major bulks	2018	2019	2020	2021	2022	Change 21/22	Change 13/22
Iron ore	1.475	1.454	1.502	1.517	1.488	-1,9%	2,3%
Coal	1.271	1.296	1.179	1.227	1.233	0,5%	0,6%
Grains	474	479	518	528	510	-3,4%	3,9%

The exporters and importers of major cargoes can be analyzed in Table 2.12. This data also shapes the main trade routes in maritime transportation. For example, according to 2021 data, Australia and Brazil are the most important iron ore exporters with shares of 58% and 24% respectively, while China is the world's major iron and steel producer with a huge 73% share of iron ore imports. This trade mechanism is a concrete indication of the significant maritime transportation of iron ore from Australia and Brazil to China.

14 UNCTAD and https://www.hellenicshippingnews.com/dry-bulk-trade-in-2020-continuing-sluggish-growth/ (2020 data are estimates)

15 UNCTAD and https://www.hellenicshippingnews.com/dry-bulk-trade-in-2020-continuing-sluggish-growth/ (2020 data are estimates)

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A similar mechanism can be seen in the transportation of coal and grain (Table 2.12.).

Table 2.12. Major dry bulk trade (2021, %)[16]

Iron Ore Exporters		**Iron Ore Importers**	
Australia	58	China	73
Brazil	24	Japan	8
South Africa	4	Europe	6
Canada	3	Korea	5
India	2	Other	8
Sweden	2		
Other	7		
Coal Exporters		**Coal Importers**	
Indonesia	35	China	23
Australia	29	India	16
Russia	13	Japan	14
United States of America	6	Korea	10
South Africa	5	European Union	7
Colombia	5	Taiwan	6
Canada	3	Malaysia	3
Other	4	Other	21
Grain Exporters		**Grain Importers**	
United States of America	25	East and South Asia	53
Brazil	21	Africa	12
Argentine	12	Far East	11
Ukraine	10	South and Middle America	10
European Union and United Kingdom	8	European Union and United Kingdom	8
Australia	7	North America	1
Canada	6	Other	5
Russia	6		
Other	5		

On the other hand, minor bulk cargoes consist of a wide variety of cargoes. It is therefore also possible to group these cargoes. These products and product groups can be examined in Table 2.13. The table shows the change in the amount of minor cargo between 2020-2022 and the rate of change between 2021-2022.

With 961 million tons, metals are the most transported cargo group in minor bulk cargoes, followed by bulk products classified as grain and feed raw materials, consisting of soybean meal, oilseeds and rice, with 184 million tons and fertilizers with 177 million tons in 2022.

16 UNCTAD, RMT, 2021

Table 2.13. Minor bulk cargo (million tonnes)[17]

Minor bulk cargo	2020	2021	2022	Change 21/22
Raw Sugar	38	39	39	0,0%
White Sugar	28	25	25	0%
Total Sugar	**66**	**64**	**64**	**0%**
Soybean	59	61	64	5%
Oilseed/meal	53	55	51	-7%
Rice	45	52	55	6%
Total Agribulks	**169**	**181**	**184**	**2%**
Urea	53	51	48	-6%
Potassium	45	46	43	-7%
Sulphur	31	31	30	-3%
Phosphate Rock	27	28	26	-7%
Processed phosphates	35	36	29	-19%
Total Fertilizers	**192**	**192**	**177**	**-8%**
Coke	15	19	19	0%
Pet. Coke	70	69	70	1%
Bauxite	145	139	147	6%
Alumina	32	33	33	0%
Scrap	94	103	96	-7%
Manganese ore	46	47	46	-2%
Anthracite	32	33	34	3%
Cement	142	150	129	-14%
Salt	52	53	51	-4%
Nickel ore	49	54	42	-22%
Copper	34	36	37	3%
Stone &Aggregates	140	145	142	-2%
Other metals and minerals	239	248	243	-2%
Total metals and minerals	**948**	**983**	**961**	**-2%**
Steel products	347	386	357	-8%
Forrest products	365	386	370	-4%
Total Industrial Products	**713**	**772**	**727**	**-6%**
Total Minor Bulks	**2.087**	**2.192**	**2.113**	**-4%**

2.1.2. Container

Container carried by ships, which exceeded 200 million TEU for the first time with 208 million TEU in 2021, declined by -3.4% to 201 million TEU in 2022. In terms of routes, the most significant decline was on the Transpacific, Far East-Europe and Transatlantic routes, which are defined as the main trade routes. The decline in these routes was recorded as 59 million TEUs in 2022 with -7.8%. All of these main routes are East-West routes. While the same directional routes other than the main routes

17 Clarkson Research

maintained their 2021 data, the decrease in North-South container routes was -2.9%. Innland transportation totaling 88 million TEUs decreased by -1.1% in 2022 (Table 2.14.).

Table 2.14. Route based container shipment shares (million TEU)[18]

Routes	2020	2021	2022	Change 21/22
Main Routes	59	64	59	-7,8%
East/West other than Main Routes	19	22	22	0,0%
North-South Routes	32	34	33	-2,9%
Inland/Other	84	89	88	-1,1%
Total	**194**	**208**	**201**	**-3,4%**

In terms of main routes, the Transpacific route maintained its first place with 32.7 million TEUs (full) in 2022. China-US transports reached a volume of 26.1 million TEUs, while 6.6 million TEUs were carried in the opposite direction. Total transportation on the Far East-Europe route amounted to 26.3 million TEUs and a similar trade imbalance persists on this route as well. 19.6 million TEUs of the total transportation on this route is in the China-Europe direction. Transatlantic transportation between two economically developed regions is considerably lower than the other lines (8.9 million TEU). However, EU-America transportation is stronger in this line (Table 2.15.).

Table 2.15. Containerized trade on major routes (Full, 2018-2022 million TEU)[19]

	Trans-Pacific			Far East - Europe			Trans-Atlantic		
Year	West-East	East West-	Total	West-East	East West-	Total	West-East	East West-	Total
2018	20,7	7,4	**28,0**	7,0	17,3	**24,3**	3,1	4,9	**8,0**
2019	19,9	6,8	**26,7**	7,2	17,5	**24,8**	2,9	4,9	**7,8**
2020	20,6	6,9	**27,5**	7,2	16,9	**24,1**	2,8	4,8	**7,6**
2021	24,8	6,8	**31,6**	7,2	19,3	**26,5**	2,9	5,3	**8,2**
2022	26,1	6,6	**32,7**	6,6	19,6	**26,3**	3,0	5,3	**8,9**

2.1.3. Liquid Cargo

Liquid bulk type cargo transportation reached a total of 3.9 billion tons with an increase of 3.4% in 2022 and has the highest share in maritime transportation after dry cargo. Among liquid bulk cargoes consisting of crude oil, petroleum products, gases, chemicals and various vegetable oils, only chemicals, which had the lowest share with 367 million tons, has seen a decrease in 2022. While crude oil transports increased by 5% to 1.9 billion tons, the increase in petroleum products and gases was 2% and 4%, respectively (Table 2.16.).

18 Clarkson Research

19 RMT, 2019

Table 2.16. Tanker trade (million tonnes)[20]

	2020	2021	2022	Change 21/22
Crude oil	1.863	1.859	1.951	5%
Petroleum products	963	1.008	1.030	2%
Gas	481	509	530	4%
Chemicals	368	373	367	-2%
Total	3.675	3.749	3.878	3,4%

2.1.4. Cruise Sector

According to data from the Cruise Lines International Association (CLIA), while the number of passengers preferring cruise tourism was approximately 30 million passengers in 2019, this volume decreased by a significant 81% to 5.8 million passengers in 2020 and 4.8 million passengers in 2021 due to the pandemic conditions.

The COVID-19 pandemic has caused significant damage to the cruise industry, both in the tourism sector and in shipbuilding, with billions of dollars in losses. Since the beginning of the pandemic, almost no new ships have been ordered, only 15 small luxury or expedition ships have been ordered. According to Clarksons Research, during the same period, ship owners sold 28 cruise ships for scrapping, a new record for the cruise industry. Only an average of four ships per year were taken out of service during the 2005-2019 period before the pandemic.

The strong increase in bookings since the beginning of 2022 gives significant hope to the sector, which has been used to success in the past. Major companies such as Carnival Cruises and Royal Caribbean Cruises reported a boom in bookings in the first quarter of 2022 compared to the pre-pandemic period. As a result, shipping companies are again offering significantly more cruise lines. According to Clarksons Research, approximately 310 ships are in service worldwide in July 2022, corresponding to 93% of the fleet capacity. With the effect of the pandemic, half of the cruise fleet was still idle at anchor or in ports in 2021. By 2022, the situation has changed rapidly.

With these developments, according to CLIA data, the number of cruise passengers served in 2022 increased to 20.4 million passengers, while according to the forecasts of the same organization, the passenger forecast for 2023 and 2024 will reach 31.5 and 36 million passengers, respectively (Figure 2.9.).

20 RMT

Figure 2.9. CLIA Cruise passenger data (Million passengers)

According to data from the Cruise Lines International Association (CLIA), the most important source of passengers for cruise tourism is North America with 51%, followed by Northern Europe with 21%, Asia with 12%, Australia with 5% and South America with 5%.

The most preferred destination was the Caribbean, Bahamas & Bermuda with 44% share followed by Asia & China with 13%, Central & Western Mediterranean with 8%, Australia with 5% and Panama Canal & South America with 5% (Figure 2.10.).

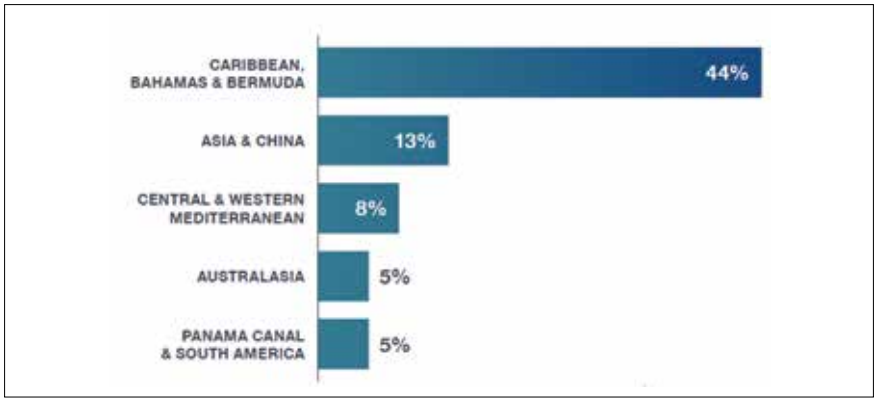

Figure 2.10. Cruise line deployment by region (%)[21]

While 2022 is seen as a "transition year", the industry hopes for a full recovery in 2023. CLIA forecasts that pre-corona levels will be exceeded by the end of 2023 and that passenger numbers will even increase by 12% in 2024 compared to 2019. This is also good news for the shipbuilding industry.

21 2020 Cruise Industry Outlook

2.2. Developments in Global Port Sector

Developments in major ports and the ports around us are analyzed under this title.

2.2.1. Developments at major ports

Since many ports did not disclose their 2022 data as of March 2023, when the report was written, Table 2.17. presents the 2021 data of the busiest ports in the world. The data for container terminals for 2022 were obtained and included in the report.

Table 2.17. Global top 10 ports by cargo throughput (million tonnes)[22]

	Port	Country	2020	2021	Change
1	Ningbo-Zhoushan	China	1.172,4	1.224,1	**4,4%**
2	Shanghai	China	711,0	769,7	**8,3%**
3	Tangshan	China	702,6	722,4	**2,8%**
4	Qingdao	China	604,6	630,3	**4,3%**
5	Guangzhou	China	612,4	623,7	**1,8%**
6	Singapore	Singapore	590,7	599,6	**1,5%**
7	Suzhou	China	554,1	565,9	**2,1%**
8	Port Hedland	Australia	547,1	553,3	**1,1%**
9	Rizhao	China	496,2	541,2	**9,1%**
10	Tianjin	China	502,9	529,5	**5,3%**
11	Rotterdam	Netherlands	436,8	468,7	**7,3%**
12	Busan	R. of Korea	411,2	442,5	**7,6%**
13	Yantai	China	399,4	423,4	**6,0%**
14	Taizhao	China	301,1	352,9	**17,2%**
15	Jiangyin	China	247,1	337,6	**36,6%**

Ningbo-Zhoushan port, the only port to handle over one billion tons of cargo in 2020, continued to do so in 2021. According to the statement made by the port authority, Ningbo-Zhoushan port handled 1.22 billion tons of cargo in 2021, an increase of 4.4% compared to the previous year. Ningbo-Zhoushan port is followed by Shanghai with 770 million tons and Singapore with 722 million tons. Eleven of the ports in the top 15 are Chinese ports. These ports account for 73% of the total cargo handling in the world.

Table 2.18 presents the top busiest 30 ports handling containers in the world in 2022. Shanghai remains at the top with 47.3 million TEU, followed by Singapore with 37.3 million TEU and Ningbo with 33.5 million TEU. It is calculated that the top 20 ports experienced a 1.4% increase in cargo in 2022, handling 392 million TEUs throughout the year.

22 SISI, Global Port Development Report 2019

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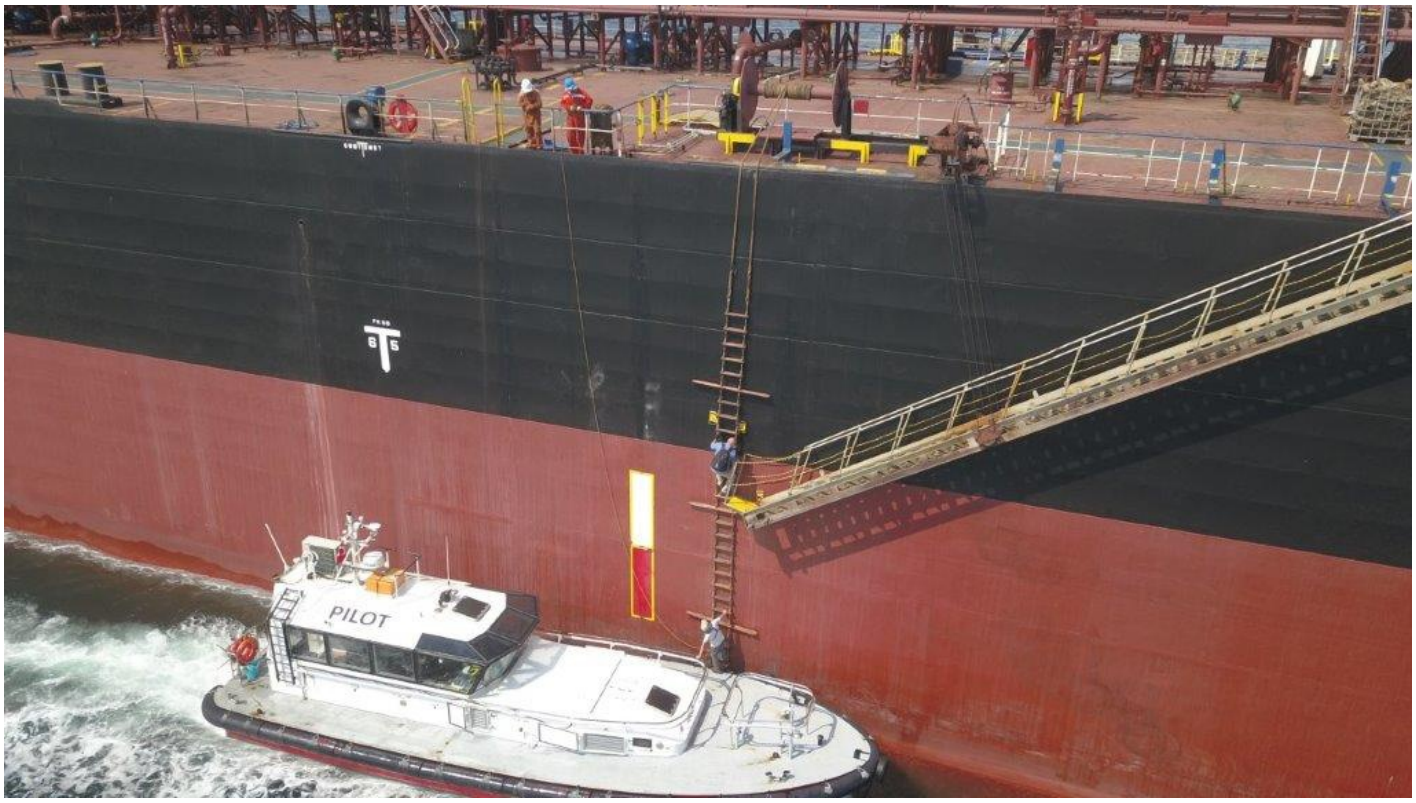

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Table 2.18. Busiest container ports (million TEU)[23]

	Port Name	Country	2021	2022	21/22
1	Shanghai	China	47,03	47,30	**0,6%**
2	Singapore	Singapore	37,47	37,29	**-0,5%**
3	Ningbo	China	31,08	33,35	**7,3%**
4	Shenzen	China	28,77	30,04	**4,4%**
5	Qingdao	China	23,71	25,67	**8,3%**
6	Guangzhou	China	24,47	24,60	**0,5%**
7	Busan	S. Korea	22,71	22,07	**-2,8%**
8	Tianjin	China	20,27	21,02	**3,7%**
9	Los Angeles/Long Beach	USA	20,06	19,04	**-5,1%**
10	Hong Kong	China	17,80	16,69	**-6,2%**
11	Rotterdam	The Netherlands	15,30	14,46	**-5,5%**
12	Dubai	UAE	13,74	13,97	**1,7%**
13	Antwerb	Belgium	12,02	13,48	**12,1%**
14	Port Klnag	Malaysia	13,72	13,22	**-3,6%**
15	Xiamen	China	12,05	12,43	**3,2%**
16	Tanjung Plepas	Malaysia	11,20	10,51	**-6,2%**
17	New York/New Jersey	USA	8,99	9,49	**5,6%**
18	Kaohsiung	Taiwan	9,86	9,49	**-3,8%**
19	Suzhou	China	8,11	9,08	**12,0%**
20	Leam Chabang	Thailand	8,52	8,74	**2,6%**
21	Hamburg	Germany	8,80	8,33	**-5,3%**
22	Tanger Med	Morocco	7,17	7,60	**6,0%**
35	Valencia	Spain	5,60	5,08	**-9,3%**
36	Pireaus	Greece	5,31	5,00	**-5,8%**
42	Algeciras	Spain	4,80	4,76	**-0,8%**
50	Port Said	Egypt	3,77	3,90	**3,4%**

According to Drewry data, total container handling at world ports increased by 6.8% to 857 million TEU in 2021. Asian ports account for almost 2/3 of the total global container handling with 461 million TEU. European ports are in second place with 142 million TEU, while North American ports are in third place with 77 million TEU (Table 2.19.).

23 LloydsList

Table 2.19. World container port throughput by region (*000 TEU)[24]

Region	2020	2021	Change 20/21
Asia	437.151,0	461.250,0	5,5%
Europe	135.972,0	142.755,0	5,0%
North America	67.484,0	77.224,0	14,4%
Middle East and South Asia	68.643,0	73.818,0	7,5%
Latin America	49.308,0	54.489,0	10,5%
Africa	30.396,0	33.298,0	9,5%
Ocenaia	12.888,0	13.857,0	7,5%
World	**801.842,0**	**856.691,0**	**6,8%**

Drewry forecasts an average annual growth of 3% in container volumes over the next five years to 2026, with total handling increasing from 857 million TEUs in 2021 to 994 million TEUs in 2026, an increase of 137.5 million TEUs (Figure 2.11).

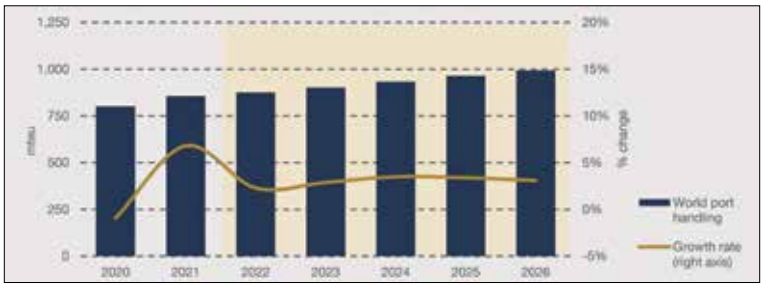

Figure 2.11. Drewry container handling forecast[25]

In 2021, the geographical classification according to Drewry shows a 1.2% growth in the Eastern Mediterranean-Black Sea region, which includes Türkiye. This growth realized was 6.9% in the Western Mediterranean, 6.5% in Northern Europe and 6.0% in China (Figure 2.12).

Figure 2.12. Regional development scenarios for container handling ports[26]

24 Drewry

25 Drewry

26 Drewry

In 2021, 80% of the handling at container terminals was carried out by global terminal operators. With 110.6 million TEUs handled, CHINA COSCO is the busiest terminal operator with 16.2% market share, followed by APM Terminals with 92.1 million TEUs and PSA International with 91.8 million TEUs. Yıldırım/YILPORT group, a company of Turkish origin, ranks 17th in the list of global terminal operators consisting of 20 members with 6.7 million TEUs in 2021 (Table 2.20)[27].

Table 2.20. Business volume chart of global terminal operators (million TEU, %)[28]

#	Operator	2019 TEU	2020 TEU	2021 TEU	2020/2021 Change	2021 Share
1	China Cosco Shipping	109,8	104,4	110,6	5,9%	16,2%
2	APM Terminals	84,2	83,7	92,1	10,0%	13,5%
3	PSA International	84,8	86,6	91,8	6,0%	13,4%
4	Hutchison Ports	82,6	80,6	85,6	6,2%	12,5%
5	DP World	69,4	69,5	76,3	9,8%	11,2%
6	Terminal Investment Limited (TIL)	50,8	55,3	57,8	4,5%	8,5%
7	China Merchant Ports	35,6	34,3	36,4	6,1%	5,3%
8	CMA CGM	26,1	25,9	28,6	10,4%	4,2%
9	SSA Marine	13,0	12,2	13,6	11,5%	2,0%
10	ICTSI	11,8	11,8	12,9	9,3%	1,9%
11	Eurogate	11,7	10,4	11,8	13,5%	1,7%
12	HMM	9,5	9,5	11,1	16,8%	1,6%
13	Evergreen	10,1	9,7	10,7	10,3%	1,6%
14	MOL	7,8	8,4	8,1	-3,6%	1,2%
15	NYK	8,2	7,8	7,3	-6,4%	1,1%
16	HHLA	7,7	6,9	7,1	2,9%	1,0%
17	Yildirim/YILPORT	6,1	5,9	6,7	13,6%	1,0%
18	Bollore	6,0	5,5	6,3	14,5%	0,9%
19	Yang Ming	4,3	4,1	5,0	22,0%	0,7%
20	SAAM Puertos	3,1	2,8	3,1	10,7%	0,5%
	GTO Total	**645,7**	**635,9**	**682,8**	**7,4%**	**79,3%**

Port of Rotterdam maintained its position at the top of Europe with 15.3 million TEUs, followed by Antwerp with 12 million TEUs and Hamburg with 8.7 million TEUs when the 15 busiest container ports are analyzed, as shown in Table 2.21. It is seen that the Port of Piraeus, which became the leader in the Mediterranean in 2020, left the leadership to the Port of Valencia in Spain in 2021. While 78 million TEUs were handled in total in the top 15 ports in Europe, the rate of change was 1.6% compared to 2020 and -1.3% compared to 2019.

27 https://www.turklim.org/en/gto-report/

28 Drewry

Table 2.21. Top 15 container ports in Europe (*000 TEU)[29]

#	Port	2019	2020	2021	Change 20/21 (%)	Change 19/21 (%)
1	Rotterdam	14.811	14.349	15.300	6,6	3,3
2	Antwerp	11.860	12.023	12.020	0,0	1,3
3	Hamburg	9.259	8.527	8.715	2,2	-5,9
4	Valencia	5.441	5.415	5.614	3,7	3,2
5	Piraeus	5.650	5.437	5.317	-2,2	-5,9
6	Bremerhaven	4.871	4.770	5.019	5,2	3,0
7	Algeciras	5.120	5.106	4.749	-7,0	-7,2
8	Barcelona	3.324	2.958	3.531	19,4	6,2
9	Gioia Tauro	2.523	3.193	3.147	-1,4	24,7
10	Le Havre/Rouen	2.786	2.445	3.070	25,6	10,2
11	Marsaxlokk	2.720	2.440	2.970	21,7	9,2
12	Ambarlı	3.101	2.882	2.737	-5,0	-11,7
13	Genoa	2.635	2.353	2.558	8,7	-2,9
14	Gdansk	2.073	1.928	2.118	9,9	2,2
15	MIP	1.939	2.009	2.097	4,4	8,1
	Top 15 Ports	**78.113**	**75.835**	**78.962**	**4,1**	**1,1**
	Top 3 Ports	**35.930**	**34.899**	**36.035**	**3,3**	**0,3**

The global recession that started especially in the 3rd quarter of 2022 due to the Russia-Ukraine war and the disruptions in China directly affected the ports and reduced the cargo throughput of 9 ports out of 15 in Table 2.21. A similar situation is observed in the Black Sea ports directly affected by the Russia-Ukraine war.

Ukraine has the highest container volume among the Black Sea countries with 1 million TEU, followed by Russia with 834 thousand TEU and Romania with 615 thousand TEU in 2021 (Table 2.22).

Table 2.22. Handled container movements in the Black Sea countries (*000 TEU)[30]

Black Sea Country	2019	2020	2021	Change 20/21	Change 19/21
Ukraine	995	1.018	1.015	-0,3%	2,0%
Russia	769	786	834	6,1%	8,5%
Romania	640	615	611	-0,7%	-4,5%
Georgia	644	490	395	-19,4%	-38,7%
Bulgaria	260	253	244	-3,6%	-6,2%
Total	**3.311**	**3.164**	**3.099**	**-2,1%**	**-6,4%**

29 Theo Notteboom

30 http://www.informall.biz/

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Although there was a normally downward trend in container handling in the Black Sea countries during the pre-war period, this downward trend has deepened due to the tensions and war. Container handling in the Black Sea has decreased significantly due to the Russian-Ukrainian tensions. An analysis of the 9-month data for 2022 shows that there was an 80% decline in Ukrainian ports, while the decline in Russian ports in the Black Sea reached 11%. The total container handling in the Black Sea has declined by 25% in total (Table 2.23).

Table 2.23. 2022 container growth in the Black Sea countries (TEU)[31]

	2021 9 months	2022 9 months	Change
Russia	613.810	554.724	%-11,3
Romania	468.865	526.571	%12,3
Georgia	301.823	332.126	%10,0
Bulgaria	185.689	194.135	%4,6
Ukraine	756.702	146.933	%-80,6
Total	**2.326.889**	**1.744.489**	**%-25,0**

2.2.2. Ship Performance at Ports[32]

According to UNCTAD data, the average time spent by ships at world ports in 2021 can be seen in Table 2.24.

Dry bulk carriers have the longest stay at ports with 2.11 days, followed by general cargo ships with 1.17 days and LNG ships with 1.13 days. The lowest average port time is seen in container ships with 0.80 days.

Table 2.24. Time in port, age, and vessel sizes, by vessel type, World total (2021)

Vessel type	Median time in ports (days)	Average size of vessels (GT)	Average age of vessels	Max. Cargo handling capacity (DWT)
Container ships	0,80	237.200	14	-
Dry break bulk carriers	1,17	91.784	21	116.173
Dry bulk carriers	2,11	204.014	14	404.389
LNG	1,13	168.189	11	155.159
LPG	1,03	61.000	15	64.220
Other wet bulk carriers	0,98	170.618	14	323.183
All vessels	**1,05**	**237.200**	**16**	**404.389**

31 http://www.informall.biz/

32 UNCTAD data

Table 2.25, Table 2.26, and Table 2.27 show the handling performance of dry bulk, tanker and container ships at the ports of the countries they call at.

According to data on dry bulk vessels, the country with the highest waiting time for loading is Brazil with 184 hours, while the same country (Brazil) has the highest waiting time for unloading with 181 hours. Brazil was also the country with the highest value in this regard in 2021. Türkiye, on the other hand, has an average of 58 hours for loading and 72 hours for unloading (Table 2.25).

Tablo 2.25. Port handling performance for dry cargo vessels in 2022

Country	Average waiting time for loading (hours)	Average waiting time for unloading (hours)
China	78,8	38,9
Australia	132,6	54,5
USA	88,0	30,2
Brazil	184,7	181,6
Russia	43,8	63,0
Canada	146,3	24,2
Argentine	27,6	12,4
South Africa	146,3	91,2
Japan	27,6	40,8
India	57,7	32,3
Ukraine	41,5	17,3
UAE	47,8	31,4
Indonesia	19,9	43,5
Korea	22,3	52,4
New Zealand	43,0	21,8
Chile	107,7	176,6
Türkiye	**57,8**	**72,3**
Vietnam	22,7	25,9
Colombia	57,7	25,7
Malesia	50,6	75,9
Mexico	57,0	52,2
Taiwan	29,7	41,6
Peru	86,4	110,1
Oman	65,8	19,8
Norway	38,4	6,8
France	18,1	40,3
Saudi Arabia	57,9	39,7
Morocco	125,7	101,7
Romania	71,4	78,1
Mozambique	137,0	128,3

For tankers, Belgium and Kuwait had the highest average waiting time for loading and

unloading with 81 hours and 115 hours, respectively. Türkiye's loading and unloading averages were 54 and 30 tons per minute, while average vessel waiting times for loading and unloading were 36 and 37 hours. For tankers, Türkiye has an average of 39 hours for loading and 36 hours for unloading (Table 2.26).

Table 2.26. Port handling performance for oil tankers in 2022

Country	Average waiting time for loading (hours)	Average waiting time for unloading (hours)
USA	39,3	30,7
Russia	39,9	12,6
China	39,7	54,4
Brazil	43,8	50,2
Saudi Arabia	36,2	34,5
UAE	43,6	55,1
Korea	64,7	37,1
Singapore	52,3	47,8
India	48,9	41,7
Malesia	35,8	29,0
The Netherlands	57,6	33,8
Indonesia	40,9	40,9
Italy	57,1	37,4
Mexico	95,4	70,5
Nigeria	19,3	59,0
Kuwait	53,7	115,0
Iraq	22,8	0,1
Canada	20,4	26,1
Spain	43,4	36,2
Qatar	19,9	11,3
Japan	25,3	16,3
United Kingdom	36,5	39,6
Türkiye	**38,9**	**35,5**
Norway	13,3	19,5
Angola	19,2	17,1
Belgium	81,8	56,6
Venezuela	66,8	7,3
Taiwan	65,6	32,6
Argentine	40,4	5,0
Greece	50,9	15,7

A more comprehensive assessment was made for container ships. While the highest number of calls was made to Chinese ports with 71 thousand vessels, the highest average time spent in port was reached at US ports with 1.25 days, and the highest

value in the average container carrying capacity per calling vessel was seen in Brazilian ports with 5,799 TEU.

The highest capacity vessels called at ports were in China, South Korea, Taiwan, Spain, Singapore, Hong Kong, the Netherlands, UAE, Germany, Morocco, France and Belgium. In 2022, 12 thousand container ships called at Turkish ports, the largest of which had a capacity of 23.7 thousand TEU. The average port time of the ships was 0.8 days, while the average container carrying capacity per ship was 3,431 thousand TEU (Table 2.27.).

Table 2.27. Port calls and median time spent in port, container ships in 2022

Country	Number of arrivals	Median time in ports (days)	Average age of vessels (years)	Average container carrying capacity per vessel (TEU)	Maximum container carrying capacity of vessels (TEU)
China	70.506	0,73	13	4.401	23.992
Japan	35.526	0,36	13	1.541	21.237
South Korea	20.652	0,72	14	2.958	23.992
USA	18.816	1,25	15	5.417	21.237
Indonesia	15.648	1,06	15	1.218	6.921
Taiwan	14.909	0,57	14	2.644	23.992
Spain	14.705	0,65	15	3.029	23.964
Malesia	14.577	1,00	14	3.649	23.992
Singapore	13.408	1,03	13	5.421	23.964
Türkiye	12.171	0,63	17	2.969	23.756
The Netherlands	11.516	0,89	15	2.819	23.992
Vietnam	11.367	0,83	14	2.229	19.273
Hong Kong	10.435	0,65	14	3.395	23.964
India	8.983	0,93	16	4.017	15.000
Thailand	8.321	0,75	12	2.059	19.630
Italy	7.746	0,96	16	3.642	23.964
United Kingdom	7.513	0,83	16	3.114	23.992
Brazil	7.284	0,85	11	5.799	12.690
UAE	7.228	1,00	17	4.026	23.964
Germany	7.082	1,13	13	4.497	23.992
Philippines	5.816	0,94	16	1.673	6.258
Panama	5.444	0,88	13	4.630	15.000
Belgium	4.960	1,20	15	4.760	23.964
Morocco	4.541	0,76	15	4.210	23.964
France	4.521	0,96	14	5.105	23.964
Top 25 countries	**343.675**		**14**	**3.477**	**23.992**
World total	**446.589**	**0,80**	**14**	**3.431**	**23.992**

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2.3. Türkiye in Linear Shipping Connectivity Index (LSCI)[33] [34]

The purpose of the LSCI is to measure the level of integration in regular liner shipping. The index measures both at country and port level. The index can be considered as an indicator of access to global trade through the maritime transportation network. High values of the index indicate the presence of high-capacity and frequent maritime transportation, which means that the country is efficiently involved in international trade. When calculating the index, 5 major elements are taken into account:

- **Scheduled Ship calls:** Number of vessels calling on a weekly basis. Import, export and transit cargoes are processed in these calls. If the transit density is high, these vessel calls are not taken into account for the global trade system and the port is shown as a transit cargo center. Nevertheless, it is accepted that import and export services exist in these ports.
- **Deployed Capacity:** While the factor mentioned in the previous item is related to the frequency of vessel calls, the capacity allocated for these vessels is another measurement element. A high capacity increases the trade potential with global markets.
- **Number of Shipping Companies:** A measure of the number of shipping companies serving a particular country and port.
- **Average Vessel Size:** There are very few ports in the world serving ships of 10,000 TEU and above. The fact that large-scale ships call is an important indicator for economies of scale and means low transportation costs per TEU.
- **Directly Connected Ports:** This measure shows the number of ports that are directly connected to the relevant port by ship calls. Since there is no transshipment between these ports, a stronger commercial mechanism can be established commercially.

For the measurements made within the scope of the index, the value of 2006 was accepted as 100. In this way, a reference value was obtained for the comparison of subsequent years. Naturally, countries with high index values are those that are actively involved in international trade. For example, China and Hong Kong rank first among export-oriented economies, while Singapore tops the transshipment hub rankings. The United Kingdom, Germany, South Korea, the United States and Japan are in the top 15, while Malaysia, Spain, UAE, Egypt and Oman are among the major transshipment hubs.

Figure 2.13. shows the values in our immediate region according to both port and country index values. While Türkiye as a country is in the 50-70 index range, our ports

33 Liner Shipping Connectivity Indeks (LSCI)

34 https://porteconomicsmanagement.org/pemp/contents/part1/ports-and-container-shipping/country-port-level-liner-shipping-connectivity-index/

have various index values between 25-75 according to the criteria mentioned above. The details of these values can be seen in Figure 2.13. and Table 2.28.

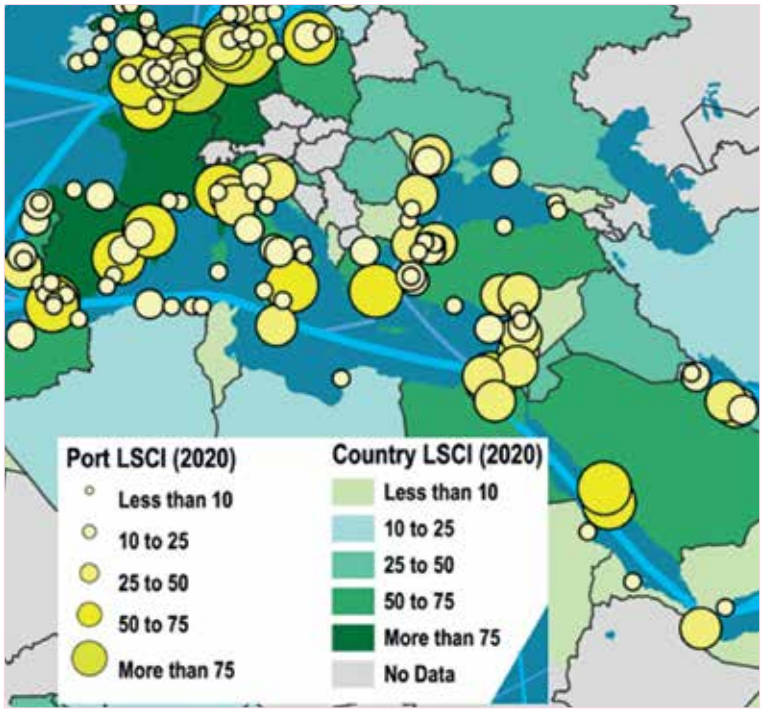

Figure 2.13. Türkiye's status in indices[35]

Looking at the last quarter values for 2020, 2021 and 2022, Ambarlı has the highest index value, followed by Gulf of İzmit, Tekirdağ, Aliağa and Mersin (Figure 2.14.).

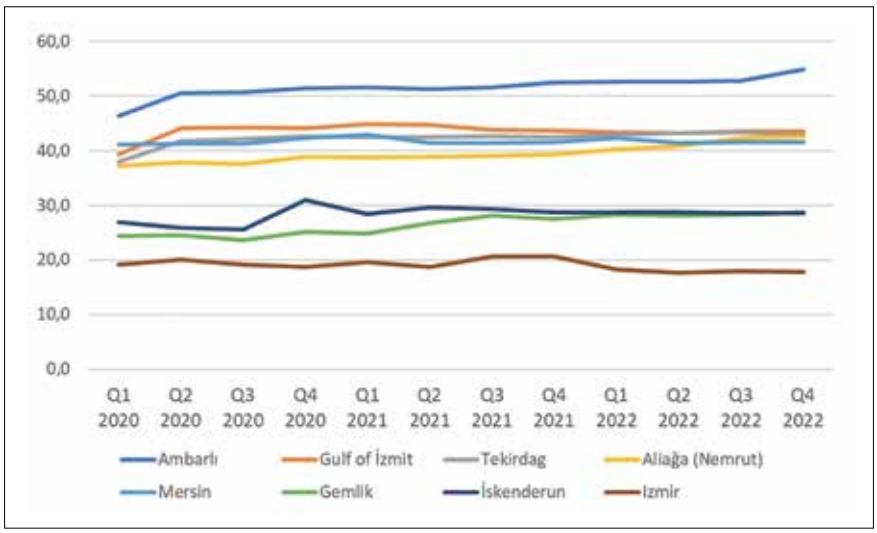

Figure 2.14. Turkish ports in Linear Index[36]

35 UNCTAD and MDS Transmodal.

36 https://unctadstat.unctad.org/wds/TableViewer/tableView.aspx?ReportId=92

Index values are also shown in Table 2.28. Comparing the last quarter of 2021 with the last quarter of 2022, it is seen that there is an increase in Ambarlı, Tekirdağ, Aliağa and Gemlik port regions, and Aliağa Bay is the region with the fastest development with an increase of 8.4% on the basis of index value.

Table 2.28. LSCI values of major ports in Türkiye

Ports	Q4 2020	Q4 2021	Q4 2022	Change 2021 Q4 / 2022 Q4
Türkiye, Ambarlı	51,3	52,5	54,9	4,6%
Türkiye, Gulf of İzmit	44,1	43,7	43,5	-0,4%
Türkiye, Tekirdağ	42,6	42,5	42,8	0,8%
Türkiye, Aliağa (Nemrut)	38,8	39,3	42,6	8,4%
Türkiye, Mersin	42,3	41,6	41,6	-0,1%
Türkiye, Gemlik	25,1	27,5	28,7	4,6%
Türkiye, İskenderun	31,0	28,7	28,5	-0,5%
Türkiye, İzmir	18,7	20,7	17,8	-14,0%

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UNIT 3

PORT SECTOR IN TÜRKİYE

Meriç Burçin ÖZER
TÜRKLİM General and Dry Bulk Cargo Working Group Leader, Park Denizcilik and HopaPort Inc. General Manager

General Cargo and Bulk Cargo 2022 Review and 2023 Expectations

2022 Review

Considering the different expectations and results, especially as 2022 is the second year after the pandemic, our ports have generally left a consistent impression on the general cargo and bulk cargo handling volume compared to 2021.

When we look at the data for 2021 and 2022 published by the Ministry of Transport and Infrastructure, the amount of Dry Bulk Cargo handled in Türkiye in 2021 was 170,629,055 tonnes and General Cargo was 61,462,127 tonnes, totaling 232,091,182 tonnes. The amount of Dry Bulk Cargo handled at Turkish ports was 165,629,741 tonnes and General Cargo was 64,567,384 tonnes, for a total of 229,863,125 tonnes in 2022.

Looking at the 2022 general cargo and dry bulk cargo handling figures, there was a 0.5% decrease in dry bulk cargo handling tonnage and an increase of approximately 0.01% in general cargo handling tonnage in 2022 compared to 2021, thus a decrease of approximately 0.01% in total.

For the 2023 assessment, when the total tonnage of all types of cargo handled in March 2022 and 2023 is analyzed, the total tonnage handled as of the end of March 2022 was 135,349,488 tonnes, while it was 125,214,805 tonnes as of the end of March 2023. The cumulative total tonnage of cargo handled as of March 2023 decreased by 7.5% compared to the first 3 months of 2022.

The average monthly tonnage of general cargo and dry bulk cargo was 19,155,260 tonnes in 2012, which decreased to 16,440,754 tonnes in the first three months of 2023 which corresponds to a 14% decrease on a monthly average basis for the first three months of 2023.

According to the above-mentioned handling tonnages in total as well as in general cargo and dry bulk cargo in the first three months of 2023, general cargo and dry bulk cargo tonnage decreased by an annual average of 10%.

2023 Expectations

We, as a sector, expect our ports to work actively by creating an environment where production and exports are encouraged and the added value to be produced by the national economy is transformed into labor and labor force by the sector representatives.

Our mission will be to closely follow the geopolitical and strategic developments all over the world and to work in order to increase our country's share in the foreign trade volume to be made through the developing and renewing transportation geography corridors and to increase foreign exchange revenues.

In this context, our goal for 2023 is to overcome the financial and economic constraints and impossibilities experienced during and after the pandemic in our country as a sector, and to contribute to the provision of the infrastructure and resources necessary for the improvement of our sector at regional and national level within the limits of reason, common sense and science.

Medium- and Long-Term Expectations

As you know, our sector is improving on medium- as well as long-term investment, improvement and business development models. The process we think of as medium term should be considered and planned for an average of 5 years, while the long-term approach should be considered and planned for at least 10 years.

The development of green port applications within the framework of integrated management systems, the provision of all energy resources used through clean and renewable resources, the creation of energy infrastructures and the storage of the energy produced in our ports, providing added value to our ports primarily by meeting the energy needs of our ports with the energy produced, meeting the energy needs of the ships in the port during accommodation, and smart port applications in the concept of industry 4.0 are among our main road targets as a sector in the medium term.

The Paris Climate Agreement aims to reduce carbon emissions worldwide by 50% by 2030 and reduce them to zero by 2050 in order to prevent climate change due to the increasing temperature caused by the increase in carbon emission gas in the long term. Investments to be developed in our ports within the scope of the zero-carbon emission project and projects, studies and practices related to carbon footprint will have a strategic importance for our ports in the long term.

UNIT 3: PORT SECTOR IN TÜRKİYE

3.1. Developments at Turkish Ports

As of 2022, the number of coastal facilities serving maritime trade (in the form of pier, buoy, dolphin and platform) is 216, including Lake Van (Tatvan and Van ferry port). Of the said coastal facilities, 192 serve maritime transport actively.

In our country, 81 of the said coastal facilities, which correspond to approximately 43%, are in the Marmara Region, 50 corresponding to 26% are in the Mediterranean Region, 31 corresponding to 16% are in the Black Sea Region and 28 corresponding to 15% are in the Aegean Region (Figure 3.1).

When one looks on a city basis, a total of 35 facilities that actively serve seaborne trade are in the city of Kocaeli. There are 17 facilities of different specification and size in Istanbul, coming second followed by 20 in Hatay, and 18 in Izmir.

Figure 3.1. TÜRKLİM member ports operating on the Turkish coast

Cargo handled at Turkish ports during 2022 increased by 16.3 million tons year-on-year and reached 542,610,283 tons. The 5.9% year-on-year increase in 2021 decreased to 3.1% in 2022. Port cargoes showed a significant increase in 2021 due to postponed demands as a result of the pandemic in 2019-2020. Demand stabilized and normal growth values were reached again by 2022.

Considering the 2013-2022 period, the amount of cargo loaded at our ports increased from 163 million tons to 250 million tons during the 2013-2022 period. Unloaded cargo during the same period increased from 225 million tons to 292 million tons (Figure 3.2).

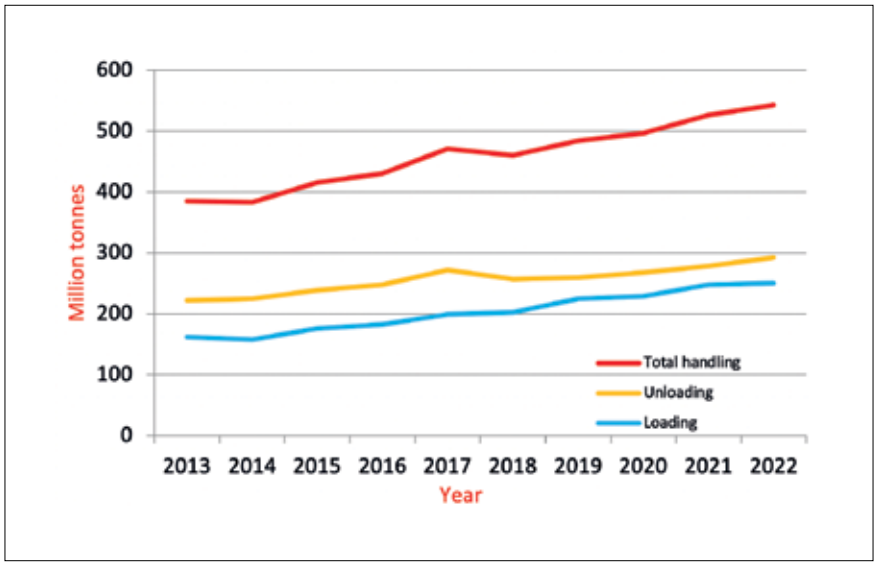

Figure 3.2. Volume of cargo handled at our ports in the last decade

Considering the 1-, 5- and 10-year rates of change in the cargo handled at our ports, there was an increase of 4.9% in import (unloading) cargo and 1% in export (loading) cargo in 2021-2022. Looking at the short-term (2018-2022) cargo increase in ports, the highest increase was in export (loading) cargo with 23.2% (Figure 3.3).

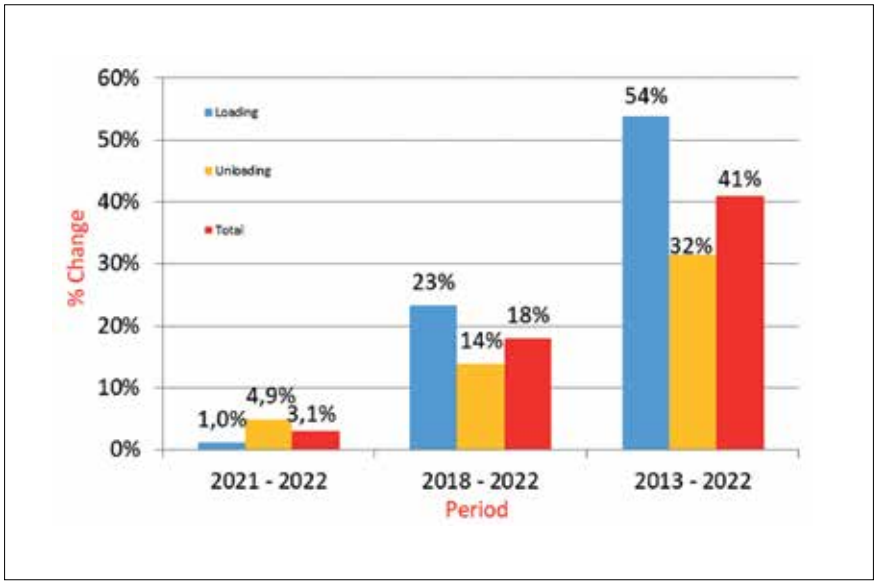

Figure 3.3. Growth rates during 1, 5 and 10 year periods

When distribution of cargo handled at our ports according to regime is considered, about 72.6% of the cargo is foreign trade cargo. As of 2022, share of the cabotage cargo is 12.4% and share of transit cargo is 14.9% (Figure 3.4).

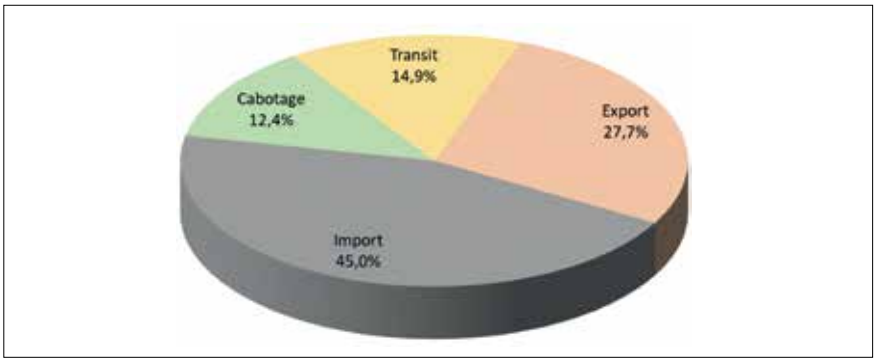

Figure 3.4. Regime distribution of cargo handled at our ports.

243.9 million tons of import, 150.1 million tons of exports, 81 million tons of transit and 67.5 million tons of cabotage for a total of 542.6 million tons of cargo have been handled at Turkish ports in 2022 (Table 3.1).

Table 3.1. Distribution of cargo handled at our ports on regime basis

Cargo Regime	2018	2019	2020	2021	2022
Import	218.544.820	221.404.812	226.539.473	232.633.060	243.917.119
Export	110.424.635	131.676.578	138.902.823	153.763.658	150.172.902
Transit	71.628.260	74.974.298	72.402.972	78.008.944	81.018.986
Cabotage	59.555.845	56.112.724	58.797.384	61.901.122	67.501.276
Total	**460.153.560**	**484.168.412**	**496.642.652**	**526.306.784**	**542.610.283**

When the change rates of the cargo handled at our ports are evaluated in 2021-2022, the highest increase is in cabotage cargo with 9%. Compared to the previous year, import cargo increased by 4.9% and transit cargo by 3.9%. Export cargoes decreased by 2.3%. When the cargo volume at our ports is analyzed in the short term (2018-2022), there was an increase in all cargo regimes in the period in question. The highest increase among cargo types in the short term was in export cargoes with 36%. In the same period, cabotage cargo increased by 13.3%, transit cargo by 13.1% and import cargo by 11.6% (Figure 3.5).

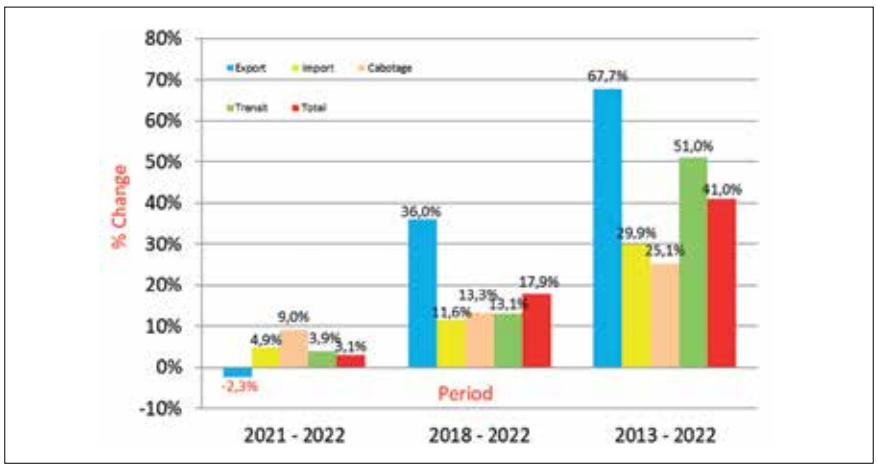

Figure 3.5. Growth rates of cargo handled at our ports based on regime

The ten-year growth rate of total cargo handled at our ports was 3.5% since 2013. Compared to 2013, the ten-year growth rate was 5.3% for export cargo, 2.6% for import cargo, 2.3% for cabotage cargo and 4.2% for transit cargo (Figure 3.6).

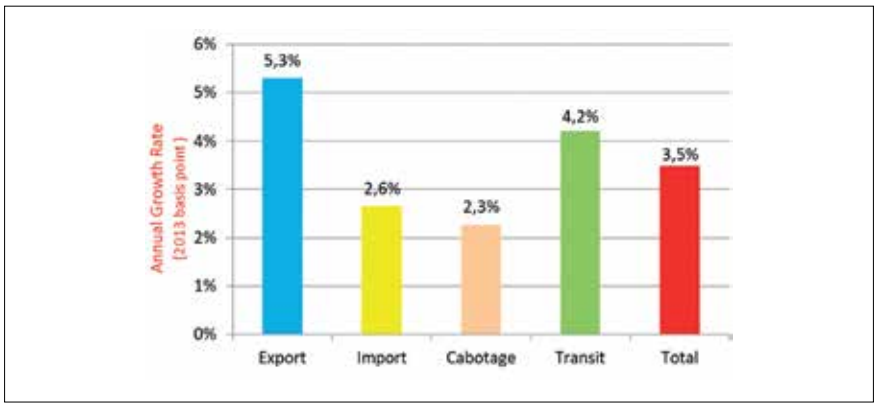

Figure 3.6. Ten-year growth rate of cargo handled at our ports

Thirty-two percent of cargo handled at our ports is liquid bulk cargo according to 2022 data. Liquid bulk cargo is followed by dry bulk cargo with 30%, containers with 24% and general cargo with 12%. The share of RO-RO cargo weight wise stayed at only 2% as of 2022 (Figure 3.7).

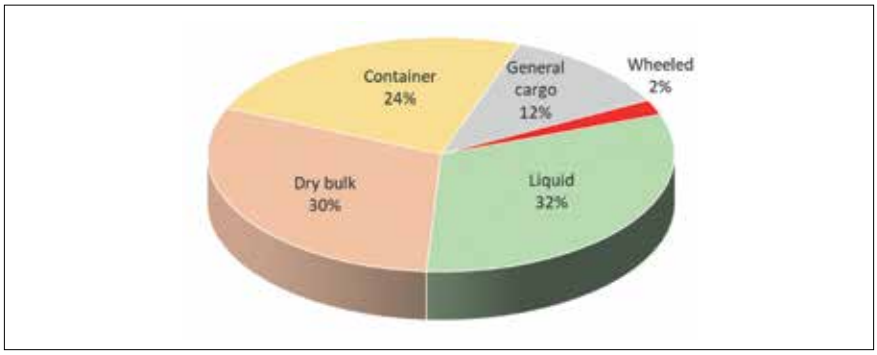

Figure 3.7. Cargo distribution at our ports (2022)

Cargo handled increased by 16.3 million tons to 542.6 million tons in 2022. The rate of increase in total cargo handled at our ports year-on-year was 3.1%. Including all cargo types (liquid bulk, container, etc.) and customs regimes (transit, cabotage, etc.), 53.9% (292.4 million tons) of the cargo handled in tons was unloading and 46.1% (250.1 million tons) was loading. In terms of tons handled in our ports, the highest amount of unloading was dry bulk cargo with 106.6 million tons and the highest amount of loading was container cargo with 74.5 million tons (Table 3.2).

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Table 3.2. Loading/unloading according to cargo type (tonnes, 2022)

Cargo type	Loading	Unloading	Total
Liquid Bulk	83.552.385	87.648.764	171.201.149
Dry Bulk	60.723.561	104.572.180	165.295.741
Container	72.764.316	57.480.493	130.244.809
General	27.007.397	37.559.987	64.567.384
Wheeled	6.102.915	5.198.285	11.301.200
Total	**250.150.574**	**292.459.709**	**542.610.283**

Liquid bulk cargo increased by 13.7%, general cargo increased by 5.1%, Ro-Ro cargo increased by 4.4%, dry bulk cargo increased by 3.1% and container cargo increased by 1.2% tonnage wise compared to previous year. Total cargo handled at our ports increased by 3.1% in tons compared to the previous year (Figure 3.8). The largest share in the increase in total cargo handled at ports came from liquid bulk cargo, which increased by 20.6 million tons.

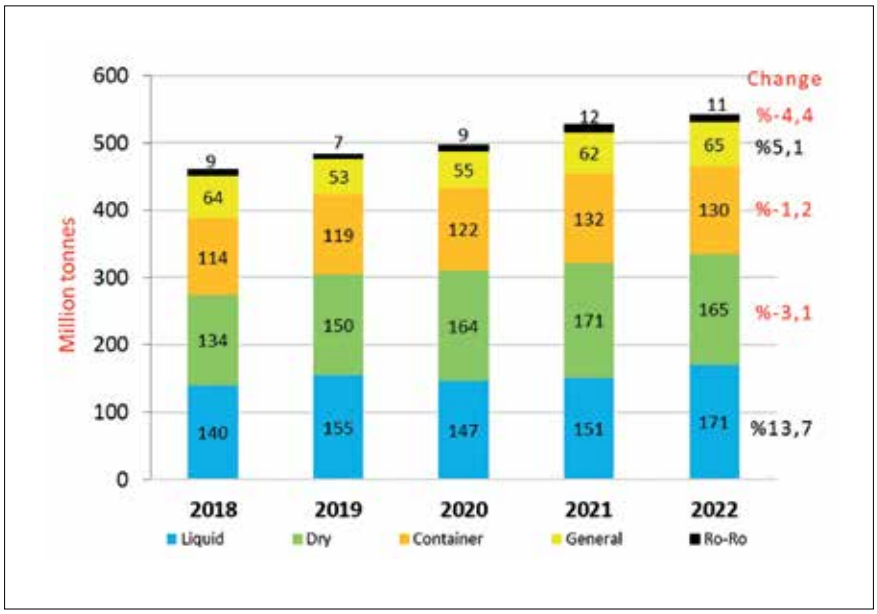

Figure 3.8. Growth rate of cargo during 2018-2022 (million tonnes)

On a regime basis, most handled type of cargo in export was dry bulk cargo as well as in import. In cabotage and transit it was liquid bulk (Table 3.3).

Table 3.3. Distribution of cargo handled at our ports according to cargo type (tonnes, 2022)

Cargo Type	Export	Import	Cabotage	Transit	Total
Liquid Bulk Cargo	15.629.517	69.612.852	35.197.141	50.761.639	171.201.149
Dry Bulk Cargo	53.893.719	98.361.181	11.958.483	1.082.358	165.295.741
Container	53.110.090	38.658.736	10.116.169	28.359.814	130.244.809
General Cargo	21.448.487	32.099.289	10.204.433	815.175	64.567.384
Wheeled Cargo	6.091.089	5.185.061	25.050	0	11.301.200
Total	**150.172.902**	**243.917.119**	**67.501.276**	**81.018.986**	**542.610.283**

When cargo types handled at ports is analyzed after unifying them based on their key features; 30.1% of the cargo handled at ports are petroleum products, 27.3% are machinery, machinery parts and containers, 9.4% are raw and manufactured minerals, construction materials, 8.4% are solid mineral fuels and metal products, 7.4% are ores and metal scraps, and 6.4% are metal products. The remaining products are all below 5% (Table 3.4).

Table 3.4. Types of cargo most handled at our ports (tonnes, 2022)

#	Cargo type	Loading	Unloading	Total	%
1	Oil and derivatives	81.471.435	81.977.423	163.448.858	30,12
2	Machines, machine parts and containers	82.989.881	65.353.229	148.343.110	27,34
3	Raw and manufactured minerals, construction materials	45.637.965	5.301.315	50.939.280	9,39
4	Solid mineral fuels	3.069.776	42.440.220	45.509.996	8,39
5	Ore and metal residues	8.995.272	30.974.454	39.969.726	7,37
6	Metal products	15.322.110	20.709.110	36.031.220	6,64
7	Chemical products	7.115.907	10.853.632	17.969.539	3,31
8	Agricultural products and live animals	881.462	14.823.608	15.705.070	2,89
9	Food and animal feed	2.351.695	13.016.761	15.368.456	2,83
10	Fertilizer	2.071.276	6.695.135	8.766.411	1,62
11	Others	243.795	314.822	558.617	0,10
	Total	**250.150.574**	**292.459.709**	**542.610.283**	**100**

Port authorities where more than 10 million tonnes of cargo have been handled are given in Table 3.5. The port authority with most cargo throughput in 2022 is Kocaeli Port Authority with 82,8 million tonnes. Aliağa Port Authority handled 81,1 million tonnes of cargo, followed by BOTAŞ (Ceyhan) Port Authority with 68,2 million tonnes, İskenderun Port Authority with 67,6 million tonnes and Tekirdağ Port Authority with 44,1 million tonnes and (Table 3.5).

Table 3.5. Cargo rankings of port authorities (2022-tonnes)

#	Port Authority	Tonnes
1.	Kocaeli	82.799.204
2.	Aliağa	81.056.935
3.	Ceyhan	68.227.434
4.	İskenderun	67.635.537
5.	Tekirdağ	44.172.813
6.	Mersin	38.896.567
7.	Ambarlı	30.732.465
8.	Gemlik	15.393.111
9.	Karabiga	13.691.307
10.	Samsun	13.584.153
11.	Zonguldak	12.085.143

Regional-wise, 39% (211.7 million tons) of the cargo handled at our ports was handled in the Marmara Region. The Mediterranean Region ranked second with 34% (186.6 million tons), the Aegean Region ranked third with 18.4% (99.8 million tons) and the Black Sea Region ranked fourth with 8% (44.6 million tons) (Figure 3.9.).

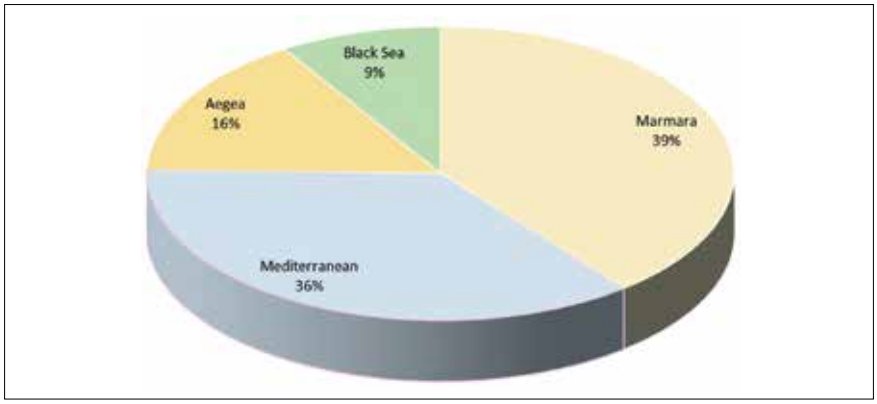

Figure 3.9. Regional share of cargo handling (%)

In terms of cargo handled by the regions, the Marmara region had the highest increase in terms of tons. The lowest figure was in the Black Sea Region which had an annual %2.2 decrease (Table 3.6.).

Table 3.6. Cargo handled at regions (tonnes)

Regions	2019	2020	2021	2022	Change % 2020 - 2021
Marmara	183,285,486	189,807,265	205.511.451	211.707.897	3,0
Mediterranean	174,723,830	175,560,233	181.889.799	186.452.430	2,5
Aegean	83,939,833	85,890,473	93.259.848	99.793.264	7,0
Black Sea	42,219,263	45,384,680	45.645.686	44.656.692	-2,2
Grand Total	**484,168,412**	**496,642,652**	**526.306.784**	**542.610.283**	**3,1**

Ports close to each other geographically are also similar in cargo types since they share the same hinterland. Due to this similarity, geographic regions can be analyzed as sub port regions on a sea and road transportation and cargo type basis. The sub-regions grouped on this basis and previously included in TÜRKLİM's sector reports were used in the sector reports prepared in previous years.

Marmara Region has been analyzed in three sub regions (Northwest Marmara, East Marmara and South Marmara), Aegean Region in two sub regions (North Aegean and South Aegean), Mediterranean in two sub regions (West Mediterranean and East Mediterranean) and Black Sea region in two sub regions (West Black Sea and East Black Sea) (Figure 3.10.).

Figure 3.10. Port sub regions

When the distribution and number of terminals within the 192 ports operating today are evaluated according to their operating permits, the Eastern Mediterranean region has the highest number of terminals with 94 terminals. The Eastern Mediterranean Region is followed by the Eastern Marmara region with 87 terminals and Northwest Marmara with 75 terminals (Table 3.7 and 3.8). There are no port facilities providing container services in the South Aegean Region. The number of terminals is based on operating permits (including temporary operating permits). There are many port facilities that do not actually provide this service although they have the operating permit. For example, there are ports such as TTK Zonguldak Port, Güllük Port, Bandırma Bağfaş Port, which do not provide container services even though their operating permits include containers.

Table 3.7. Number of terminals on sub-regional basis (excluding liquid)

Regions / Terminals	Ferry /Passenger	General Cargo	Bulk Cargo	Ro-Ro	Container
East Black Sea	6	14	13	7	7
West Black Sea	3	6	6	4	4
Northeast Marmara	0	20	20	6	7
South Marmara	9	18	18	11	7
Northwest Marmara	8	9	10	10	8
North Aegean	5	10	10	4	4
South Aegean	4	2	1	3	1
West Mediterranean	2	2	2	1	2
East Mediterranean	3	18	20	9	6
Total Terminals	**40**	**99**	**100**	**55**	**46**

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Table 3.8. Number of liquid bulk terminals on sub-regional basis

Regions / Terminals	Crude Oil/ Products	Chemical tanker	LPG/LNG
East Black Sea	9	5	5
West Black Sea	5	3	3
Northeast Marmara	14	15	5
South Marmara	2	7	3
Northwest Marmara	6	4	4
North Aegean	6	5	8
South Aegean	1	0	0
West Mediterranean	5	1	1
East Mediterranean	22	9	7
Total Terminals	**70**	**49**	**36**

On a sub-regional basis, most cargo has been handled at East Mediterranean Region where ports in the Gulf of Mersin and Gulf of İskenderun are located (Table 3.8). North Aegean sub region where ports in Gulf of Aliağa are located is ranked second, Northeast Marmara Region where ports in Gulf of İzmit are located is ranked third. The main reason in the difference between cargo throughput on tonnage basis between the regions is the existence of oil and derivatives in addition to iron-steel products.

Table 3.9. Cargo handled at our ports on sub-regional basis

Sub-regions	Handled Cargo (tonnes)
East Mediterranean (EM)	179.553.017
North Aegean (NA)	91.781.314
Northwest Marmara (NWM)	84.398.521
East Marmara (EMA)	82.799.204
South Marmara (SM)	44.510.172
West Black Sea (WBS)	39.150.546
South Aegean (SA)	8.011.950
West Mediterranean (WM)	6.899.413
East Black Sea (EBS)	5.506.146
Total	**542.610.263**

On a sub-regional basis, when one looks at the distribution of the handled cargo weight wise 33% of cargo handled at Turkish ports have been handled at ports in the East Mediterranean region followed by North Aegean region and at 17% and Northeast Marmara region at 15% (Figure 3.11.).

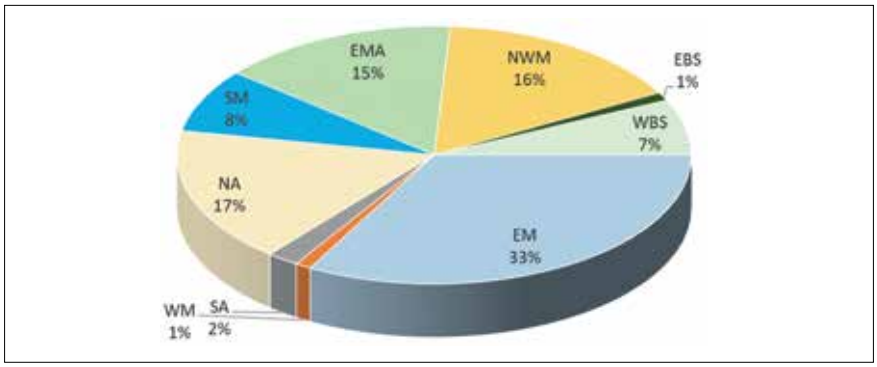

Figure 3.11. Proportional distribution of cargo handled at our ports on sub-region basis

Italy is placed first in export cargoes loaded at our ports in 2022 with 61,7 million tonnes. Italy is also first in transit cargoes with 36,8 million tonnes. Russia is placed first in import cargoes unloaded at our ports with 72 million tonnes. Top three countries in total cargo handled (Russian Federation, Italy and United States of America) form 36% of total cargoes. Top ten countries in total cargo handled form around 60% of total cargoes (Table 3.9.).

Table 3.10. Country distribution of cargoes handled at our ports* (tonnes)

Rank	Country	Total 2021	Export 2022	Import 2022	Transit 2022	Total 2022
1	Russian Fed.	59.303.039	3.535.432	72.059.264	3.019.105	78.613.801
2	Italy	61.783.942	14.756.240	8.280.942	36.866.732	59.903.914
3	USA	27.097.690	16.267.238	15.913.157	606.591	32.786.986
4	Egypt	19.930.311	9.784.124	11.033.299	1.708.283	22.525.706
5	Israel	18.712.414	10.676.543	6.309.655	1.788.215	18.774.413
6	Spain	19.415.981	11.571.247	3.409.527	3.220.209	18.200.983
7	Greece	18.272.313	5.976.893	8.343.882	2.341.741	16.662.516
8	China	11.583.289	3.827.330	7.723.038	2.630.803	14.181.171
9	Belgium	12.531.360	5.875.362	5.122.120	1.039.549	12.037.031
10	Colombia	14.563.920	227.992	11.554.031	0	11.782.023
11	Romania	8.853.206	4.977.666	3.000.648	2.803.346	10.781.660
12	Ukraine	20.081.043	1.433.813	7.440.037	745.907	9.619.757
13	India	6.104.251	1.280.538	4.199.774	3.005.987	8.486.299
14	Brazil	8.569.735	849.044	7.258.398	46.167	8.153.609
15	Iraq	8.717.986	114.132	7.835.894	0	7.950.026
16	Algeria	7.791.541	1.465.488	5.861.843	338.542	7.665.873
17	The Netherlands	8.402.372	3.599.904	3.558.283	398.334	7.556.521
18	England	7.903.187	3.233.222	2.936.058	1.121.251	7.290.531
19	France	5.689.724	3.377.893	3.043.518	507.230	6.928.641
20	Saudi Arabia	6.960.150	2.132.146	2.552.063	2.223.102	6.907.311

* Republic of Türkiye, The Ministry of Transport and Infrastructure

3.2. Dry Bulk and General Cargo Ports

There are 105 ports that serve general cargo and / or dry bulk cargo in our country (Figure 3.12). In 2022, a total of 228.8 million tons of general cargo (+dry bulk) cargo was handled, of which 165.2 million tons were dry bulk cargo and 64.5 million tons were general cargo. In terms of tons, approximately 71.9% of this cargo was dry bulk cargo and 28.1% was general cargo. Among all cargo groups, general cargo (+dry bulk) cargoes accounted for 42.4%. Considering the cargo handled in Türkiye, excluding buoy and dolphin type coastal structures serving liquid bulk cargo, ports handling general cargo (+ dry bulk cargo) constitute the largest group in the sector.

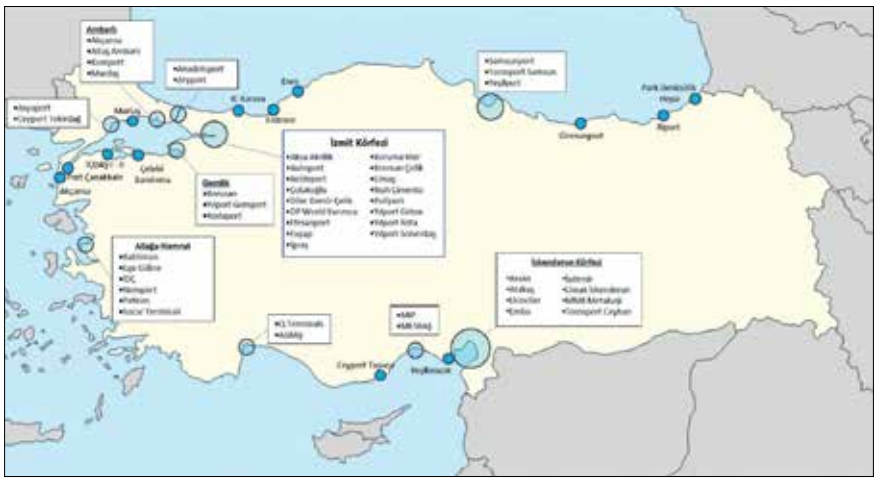

Figure 3.12. Our TÜRKLİM member ports that have permit to handle dry bulk and general cargo

Considering the ports handling general cargo (+ dry bulk cargo), the highest rate of handling in terms of tons was realized in the Mediterranean Region ports (39%) with 89.8 million tons. Mediterranean Region ports were followed by Marmara Region ports with 61.4 million tons (27%), Aegean Region ports with 42 million tons (18%) and Black Sea Region ports with 37.2 million tons (16%) (Figure 3.13.).

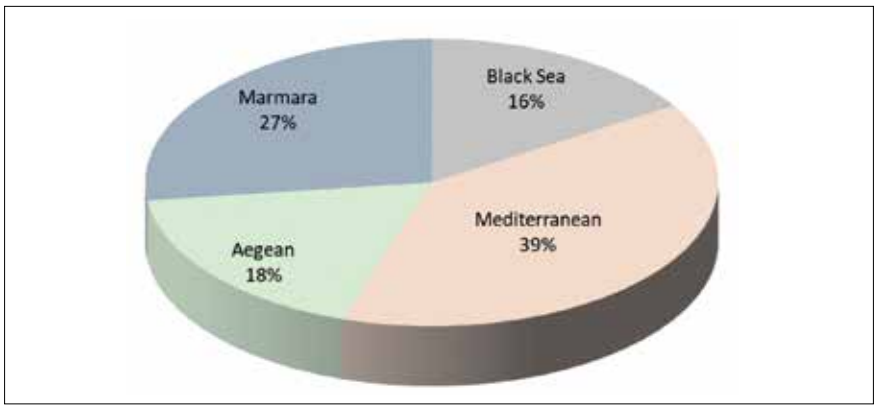

Figure 3.13. Proportional distribution of general type (+dry bulk) of cargo on regional basis

Approximately 69.8% of dry bulk cargo and general cargo, which has reached in total to 229 million tonnes as of 2022, have been handled at TÜRKLİM member ports. The ports that have handled the most general (+dry bulk) cargo in tonnage have been İsdemir Port, Eren Port and Port of Erdemir (Table 3.10).

Table 3.11. Our ports that handle dry bulk cargo and general cargo

Rank	Port name	2020	2021	2022
1	İSDEMİR	12.641.715	13.817.579	12.679.955
2	EREN	9.598.411	8.618.846	10.075.942
3	ERDEMİR	10.264.136	11.210.065	9.624.318
4	MIP	7.597.805	8.225.217	8.732.800
5	ATAKAŞ	6.065.210	8.513.717	8.182.862
6	MMK	6.468.293	7.434.830	6.558.959
7	İÇDAŞ	9.970.728	9.773.590	6.332.000
8	İDÇ	4.244.999	4.749.629	5.609.073
9	YEŞİLYURT	5.421.909	5.580.908	5.575.650
10	NUH ÇİMENTO	5.245.845	5.297.874	5.529.368
11	BATILİMAN	5.161.060	5.168.043	5.111.533
12	ÇELEBİ BANDIRMA	3.876.200	4.377.533	4.386.561
13	EKİNCİLER	2.879.628	3.602.393	4.172.882
14	YEŞİLOVACIK	3.989.976	3.771.348	4.061.556
15	ÇOLAKOĞLU	5.367.859	4.609.419	3.848.601
16	BORUSAN	2.856.862	3.486.395	3.456.744
17	TOROSPORT CEYHAN	3.719.727	2.465.759	3.400.201
18	CEYPORT	N/A	2.867.191	3.230.579
19	CEYNAK SAMSUNPORT	3.382.910	3.230.604	3.230.579
20	MARTAŞ	2.864.928	2.982.995	3.050.135
(Tonnes)	TÜRKLİM Total	145.812.952	154.180.071	160.536.651
(Tonnes)	Türkiye Total	219.106.533	232.091.182	229.863.125
(%)	**TÜRKLİM Share**	**%66,5**	**%66,4**	**%69,8**
	Other Private Ports	67,926,263	77.911.111	69.471.419
(%)	**Private Ports' Share**	**%31,0**	**%31,9**	**%28,3**
	Public Ports*	9,003,415	3.796.788	4.237.383
(%)	**Public Ports' Share***	**%3,1**	**%1,6**	**%1,8**

* İzmir and Haydarpaşa ports

3.3. Container Ports

A total of 46 ports, including temporary operating permits, are authorized to serve container ships and cargoes in Türkiye. However, only 28 of these ports are able to serve container ships and cargoes. Currently, 18 of the ports providing container services are located in the Marmara Region. There are 4 ports serving container ships and cargoes each in the Mediterranean and Aegean regions (Figure 3.14).

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Figure 3.14. TÜRKLİM member ports with container handling permits

The highest rate in container throughput belongs to ports in the Marmara Region with 62%. Mediterranean Region ports follow Marmara Region with 22% followed by Aegean Region ports with 15%. Share of Black Sea region ports in total container throughput is only 1% (Figure 3.15.).

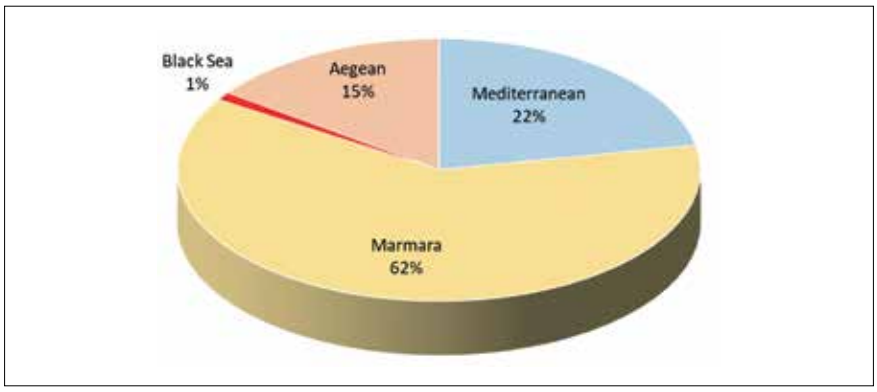

Figure 3.15. Proportional distribution of container cargo on regional

Total container throughput at our ports is 12.215.269 TEUs as of 2022. Foreign trade and Cabotage container throughput is at 9.065.610 TEUs and transit container throughput is 3.149.656 TEUs (Figure 3.16, Tables 3.12 and 3.13). Container cargo subject to foreign trade and cabotage handled at our ports increased by 9.3% in total. Transit container handling decreased by approximately 8.5%. Total number of containers handled at our ports decreased 1.8% compared to previous year.

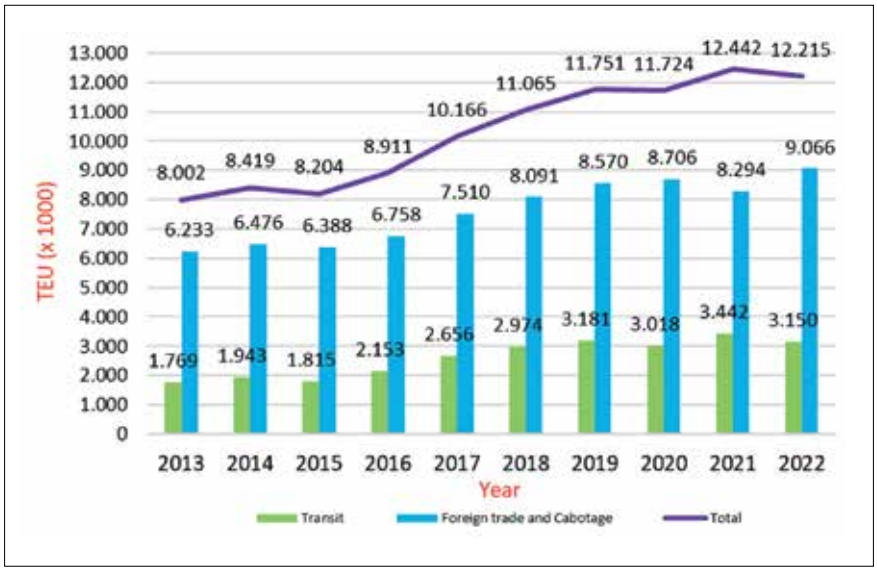

Figure 3.16. Growth of container throughput at Turkish ports (TEU)

MIP Mersin International Port maintained its first place by handling over 2 million TEU containers, 16.2% of the cargo handled in Türkiye in 2021. Asyaport ranked second with 1.8 million TEU and Marport ranked third with 1.5 million TEU. Kumport became the fourth port to handle over one million containers with 1.1 million TEU (Table 3.11.). The share of public ports handling containers, namely TCDD İzmir Port and TCDD Haydarpaşa Port, in total container handling has been steadily declining for ten years. In 2013, 10.5% of total container handling was handled at public ports, while this share declined to 3.5% in 2022.

Table 3.12. Growth of container throughput at Turkish ports that handle containers (TEU)

Rank	Port	2019	2020	2021	2022
1	MIP	1.939.029	2.009.724	2.097.349	2.020.967
2	ASYA PORT	1.353.409	1.437.921	1.802.517	1.796.876
3	MARPORT	1.679.340	1.557.391	1.503.254	1.340.099
4	KUMPORT	1.281.850	1.210.780	1.211.515	1.175.741
5	EVYAP	499.908	509.757	599.566	680.650
6	GEMPORT	547.190	570.427	682.064	676.782
7	DP WORLD	616.749	676.731	666.174	623.217
8	NEMPORT	430.014	484.371	544.568	558.648
9	YILPORT	564.531	524.065	566.447	546.866
10	EGE GÜBRE	380.790	460.297	488.507	512.015
11	LİMAK İSKENDERUN	388.328	478.614	476.627	496.583
12	SOCAR TERMİNAL	311.162	307.250	357.314	414.702
13	TCDD İZMİR	605.727	531.687	529.131	406.081
14	ASSAN	248.594	244.643	214.484	177.661
15	BORUSAN	206.395	176.117	138.491	122.796
16	SAMSUNPORT	87.840	97.998	102.155	106.042
17	RODA PORT	99.668	82.226	92.408	94.330
18	MARDAŞ	139.580	114.069	22.629	88.730
19	QTERMİNALS AKDENİZ	148.750	123.983	116.786	93.016
20	BELDEPORT				49.300
21	HAYDARPAŞA	45.565	41.586	27. 221	18.155
22	AKÇANSA	26.512	12.522	16.776	15.847
23	ÇELEBİ BANDIRMA	18.581	13.340	6.981	10.616
24	LİMAŞ	17.914	17.687	. 25812	4.641
25	ULUSOY ÇEŞME	2.424		3.451	2.639
(TEU)	TÜRKLİM Total	10.988.558	11.109.913	11.803.620	11.608.774
(TEU)	Türkiye Total	11.750.660	11.723.887	12.442.449	12.215.269
(%)	TÜRKLİM Share	%93,5	%94,8	%94,9	%95,2
(%)	Other Private Ports	%0,9	%0,3	%0,7	%1,5
(%)	Private Ports' Share	%94,5	%95,1	%95,5	%96,7
(%)	Public Ports Share*	%5,5	%4,9	%4,5	%3,5

* İzmir and Haydarpaşa Ports,

Derince Port and Trabzonport, which are not TÜRKLİM members, have not been added to the list.

Approximately 95.2% of the total 12.3 million TEU containers were handled by TÜRKLİM member ports as of 2022.

Marmara Region has become a significant transit center, especially for Black Sea cargo. Marmara Region ports handle 83.3% of transit cargo handled at our country. East Mediterranean region where MIP Mersin, Limak İskenderun and Assan ports are located is second with 15.2% share. Asyaport, Marport, Kumport and MIP Mersin International Port are the ports that had the highest transit container throughput in 2022 (Table 3.12.).

Table 3.13. Transit cargo throughput (TEU)

Ports	2019	2020	2021	2022
ASYAPORT	1,042,969	1,134,848	1.443.235	1.375.789
MARPORT	790,407	657,560	702.220	549.691
KUMPORT	625,649	542,059	556.436	444.818
MIP	480,977	429,070	456.225	437.064
MARDAŞ	31,177	14,696	4.732	88.730
DP WORLD	167,440	173,353	141.184	57.507
EVYAP	6,796	14,059	54.286	54.168
LİMAK İSKENDERUN	15,252	21,195	24.698	30.359
GEMPORT	594	4,371	10.179	24.424
EGE GÜBRE	522	9,270	9.261	22.872
RODA	3,998	2,412	3.133	22.781
SOCAR TERMİNAL	N/A	1,808	13.068	15.660
ASSAN	9,854	5,789	8.622	10.711
NEMPORT	4,333	4,855	11.009	10.588
YILPORT	889	2,222	3.584	4.315
BELDEPORT	N/A	N/A	N/A	182
Transit container	**3,180,858**	**3,017,567**	**3.441.872**	**3.149.656**
Foreign trade + cabotage	**8,569,803**	**8,706,321**	**8.294.003**	**9.065.610**
Grand total	**11,750,660**	**11,723,887**	**12.442.449**	**12.215.269**

3.4. Liquid Cargo Ports

171.2 million tonnes of liquid bulk cargo have been handled at our ports in 2022. Of this, 69.6 million tonnes have been import, 50.7 million tonnes have been transit, 35.1 million tonnes have been cabotage and 15.61 million tonnes have been export cargo.

Table 3.14. Growth of liquid bulk cargo over the years

Year	Export	Import	Cabotage	Transit	Total
2015	14.690.154	57.292.199	20.644.569	53.927.270	146.554.192
2016	11.555.158	59.213.777	18.522.994	55.732.438	145.024.367
2017	21.255.057	64.856.860	19.645.258	47.140.172	152.897.347
2018	7.097.622	58.727.643	21.484.957	52.406.847	139.717.069
2019	15.222.293	61.319.859	25.139.744	53.572.018	155.253.914
2020	10.798.291	59.112.900	26.943.079	49.798.126	146.652.396
2021	11.160.418	61.069.525	30.071.646	48.229.787	150.531.376
2022	15.629.517	69.612.852	35.197.141	50.761.639	171.201.149

In 2021, liquid bulk cargoes increased by 13.7% compared to previous year. For liquid bulk cargoes, exports increased by 40%, followed by cabotage at 17%, imports at 14% and transits at 5%. Liquid bulk cargoes accounted for 32% of the cargo handled at our ports in tons. There are 106 terminals (including buoys, dolphins and pipelines) that provide service to liquid bulk cargo in our country (Figure 3.17.).

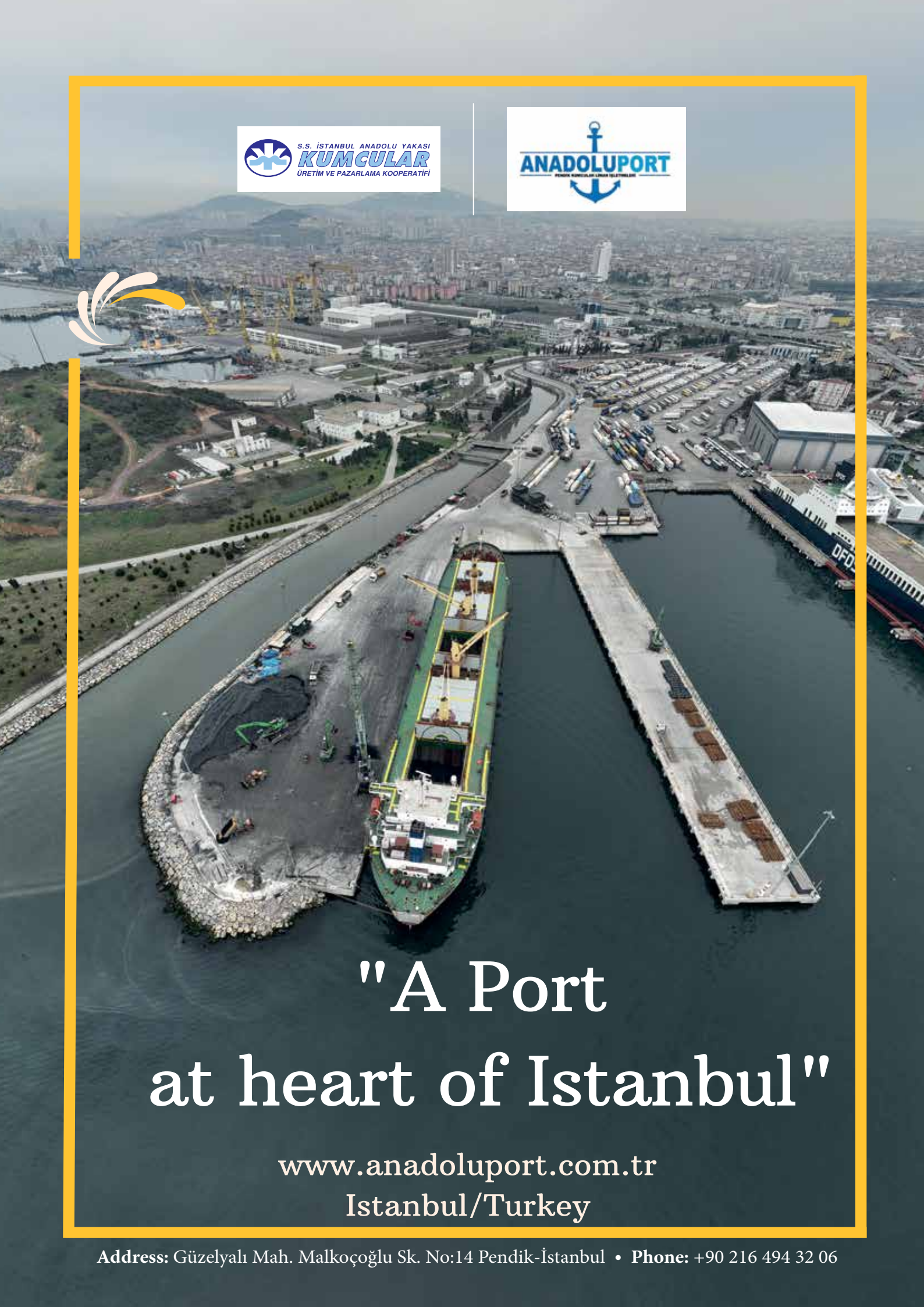
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Figure 3.17. TÜRKLİM member ports with liquid cargo handling permits

While Global Terminal, TFS and Solventaş are the TÜRKLİM member ports that have handled the most petroleum products, Torosport (Ceyhan) terminal, Limaş, Poliport and Petkim have handled the most liquid chemicals (Tables 3.14. and 3.15.).

Table 3.15. TÜRKLİM member ports that handle petroleum products (tonnes)

Ports*	2019	2020	2021	2022
GLOBAL Terminal	1.383.023	2.211.605	1.626.455	3.355.717
TFS PORT	N/A	N/A	1.768.964	2.947.671
SOLVENTAŞ	1.440.411	1.276.305	1.164.193	1.194.357
AVES DEPOCULUK	N/A	N/A	389.756	704.364
ALTINEL	658.777	511.476	540.353	480.542
MESBAŞ	N/A	N/A	361.494	422.918
POLİPORT	958.079	1.068.290	717.166	413.464
LİMAŞ	N/A	N/A	306.621	398.068
ÇANAKKALE LİMANI	N/A	N/A	90.959	66.313
EGE GÜBRE	N/A	N/A	13.796	13.910
TOROSPORT CEYHAN	79.465	509.590	267.928	5.439
TOTAL**	**5.033.166**	**6.614.524**	**7.270.620**	**10.002.763**

* Total of TÜRKLİM member ports

Table 3.16. TÜRKLİM member ports that handle liquid cargo

Ports	2019	2020	2021	2022
TOROSPORT CEYHAN	981.342	1,008,805	1.153.100	1.230.106
LİMAŞ	925.661	995,307	1.305.266	1.167.804
POLİPORT	614.704	658,804	737.255	713.073
PETKİM	1.697.116	1,514,005	1.145.855	672.644
ÇELEBİ BANDIRMA	438.337	619,706	531.187	652.859
SOLVENTAŞ	494.463	590,561	625.984	588.188
TOROSPORT SAMSUN	529.109	390,543	521.817	542.583
AKSA	289.992	279,527	333.589	347.480
LIKIT PORT			26.655	234.988
ALTINTEL	358.401	378,500	228.528	232.469
MESBAŞ	394.866	398,590	388.494	218.956
EGE GÜBRE	212.654	236,183	284.584	193.462
KORUMA KLOR	146.774	129,042	132.430	173.573
İGSAŞ	106.352	194,090	144.661	116.614
AKTAŞ	142.280	128,235	91.901	75.129
YILPORT	62.670	126,726	143.079	64.745
İSDEMİR	97.913	122,649	87.380	63.878
ERDEMİR	56.166	42,412	45.706	29.934
MARTAŞ	116.690	164,745	142.862	11.678
HOPAPORT				10.014
TOTAL	**8.466.125**	**8,840,257**	**8.145.509**	**7.340.177**

Liquid vegetable oils are included in other liquid bulk cargoes (Table 3.16.)

Table 3.17. TÜRKLİM member ports that handle other liquid bulk cargo (tonnes)

Ports*	2021	2022
MİP MERSİN	808.342	854.552
EVYAP	724.482	774.286
AVES DEPOCULUK	100.552	487.984
TOROS TARIM CEYHAN	N/A	280.397
CEYPORT TEKİRDAĞ LİMANI	159.080	262.152
EGE GÜBRE	145.534	224.504
LİMAŞ	N/A	222.209
ALTINTEL	121.971	117.182
İGSAŞ	N/A	90.279
MESBAŞ	N/A	78.540
ÇELEBİ BANDIRMA	22.900	59.467
SAMSUNPORT	N/A	55.025
ZEYPORT	N/A	6.057
TOTAL*	**2.082.861**	**3.512.634**

* Total of TÜRKLİM member ports

Bilgin İŞLER
General Manager / Autoport Terminal Operators Inc.
TÜRKLİM Board Member and Ro-Ro & Automotive Working Group Leader

Agenda of Automotive Sector and Finished Vehicle Logistics

Turkish Automotive Market

If we take a quick look at the recent past, the Turkish automotive market reached the 1 million unit mark in 2017, before declining to 641 thousand units in 2018 due to the sharp movements in exchange rates. This decline continued in 2019 and the market closed the year above 490 thousand units. Despite the pandemic conditions affecting the world with the collection of postponed demands, growth was experienced and sales were recorded at 796 thousand units in 2020. The increase in exchange rates made automotive products an investment instrument, and the market reached 773 thousand units despite the chip crisis, accessibility of vehicles and other logistical problems in 2021. Turkish automobile and light commercial vehicle sales increased and reached 827 thousand units in 2022 despite the continuation of multiple crises in raw materials, vehicle availability, etc. - despite the contraction in Europe and the US. The market increased by 54.9% compared to the same period of the previous year and reached 247,904 units in the January-March period of 2023.

General Situation in the World

Looking at the general situation in the world, stagnation is predicted in developed economies and growth in developing countries. The development of environmentally friendly policies, the fight against carbon emissions and the effects of climate change have accelerated the transition to electric mobility. Global disruptions in supply chains are expected to continue in 2023 and 2024 due to the pandemic, global recession effects, war, energy and raw material problems seen in the last 2 years.

2022, War Impact and Ro-Ro Ports' Capacities

The Russia-Ukraine war that started in the first quarter added a new dimension to the struggle on the logistics side. In addition to the chip crisis that started with the pandemic, there was trouble in the supply of materials such as aluminum, nickel and palladium, and problems in cable supply. This situation

affected production, assembly processes could not be completed, vehicles could not be made ready, and factory stock areas were filled. Irregular material flow also caused interruptions in production, reduced efficiency and negatively affected the distribution of finished vehicles. As the plans went awry, the basic pillars of logistics began to be shaken; road transportation problems and inefficiencies in the use of internal and external storage areas emerged. Vehicles were transported with irregular schedules at frequencies that did not conform to the usual flow, shipped to ports with high volumes from time to time and hence even killed operational loading/unloading stock capacities, and the entire traffic, in short, the supply chain was adversely affected.

On the other hand, due to the embargoes, trade in the Black Sea region has slowed down considerably, and shipowners have canceled lines to these regions, which were deemed unsafe. Transit cargoes were unloaded at European ports, significantly increasing the throughput of the region's terminals. Within the framework of the measures taken, the last demand of the ports from the manufacturers was to bring cargo up to the number of vehicles to be loaded to the terminal areas. Another bottleneck awaiting European ports is the new players coming from China. It is known that the ports have been concentrating on regional manufacturers until now. As Chinese vehicles, which are expected to take a large share in the market, arrive at European ports, which are already not self-sufficient due to the impact of unaccounted transit vehicle traffic, ports are expected to become even more congested with this additional traffic. The most natural reaction expected from ports is to increase local costs and pressure for shorter average storage times.

Transportation Capacities and Sea Freights

Transportation capacity has shifted from Europe to the Transatlantic trade and the Far East at record freight rates in recent years. The number of ships operating in the Mediterranean has decreased. The reduced number of employees in European ports during the pandemic period, harsh seasonal conditions, frequent strikes, etc. have affected the berthing and departure processes of the ships and the regular stopover agendas on the route have started to deviate. Unforeseen schedule changes negatively affected all logistics planning of OEMs and distributors.

Another issue that we will see the impact of is the emission regulations that shipowners must comply with after 2024. Although ship operators have already ordered new ships that have been restored in the appropriate form, the first deliveries are expected in the second half of 2025 and beyond. In the meantime, the first expectation for compliance purposes is a roughly 20% reduction in shipping speeds. This will further strain freight capacity, which is

not at an adequate level. In this period when production tends to increase, we will see whether Ro-Ro freight rates will remain high for at least 2 more years and then gradually decrease depending on the extent to which the new capacities will shift to the Far East.

Road Transportation Processes

The Turkish automotive market has been breaking records continuously in the last 3 months with the increasing demand due to the perception that exchange rates will rise. In a scenario where deposit rates are below the inflation level, the market is expected to continue to grow. Depending on the circulation - if the vehicles can be delivered - the stocking time does not exceed 10 days in distributors' storage areas and authorized dealers' stacks. However, due to the developments in the last 5 years, investments in road transportation have been postponed and negatively affected, thus weakening carrier capacities. New investments triggered by the improvement in conditions and the revival in the market cannot meet the increasing volume. Iraqi transit vehicle traffic continues at a rapid pace, with southern ports experiencing congestion and vehicles being transported to northern ports requiring additional capacity. On the other hand, deadlines for tractor and trailer production have exceeded 12 months. With the start of reconstruction after the devastating earthquake in and around Kahramanmaraş, heavy commercial vehicle manufacturers have prioritized truck and concrete mixer deliveries and have not been able to quickly focus on auto transporter production. It is known that there is a shortage of drivers in Europe. In Türkiye, there seems to be no solution in the short term due to the insufficient number of trailers. As a result, there are delays in domestic port transports and dealer shipments, and especially the transportation of ready-to-sell vehicles to authorized dealers can take up to 20 days.

Keep on fighting

To make a general assessment in light of all these developments and expectations, it is anticipated that both exports and imports may increase, exports due to the capacity increase plans of Turkish manufacturers and imports due to the high demand in the automotive market. On the other hand, the deteriorating supply chain, rising costs in an inflationary environment, congestion at key ports, terminals and stockyards, unforeseen irregularities in scheduled sea voyages and inadequacies in road transportation do not give positive signals in the short term in terms of meeting the need for increased capacity. It should be kept in mind that the slowest unit in a functioning system determines the speed of the entire process, all links in the supply chain should be strengthened, the capacities of ports, especially those at the main gateways, should be rapidly increased, inland transportation conditions should be improved, and new investments should be encouraged with incentives.

We provide the widest line option to
Turkish importers and exporters.

3.5. Wheeled Cargo Ports

Wheeled cargoes are analyzed under three main groups. The first one consists of TIR, Truck and Trailer cargo within the scope of international regular line transportation. Ro-Ro transportation, which provides the delivery of cargo to the target market in short time, is concentrated in Black Sea, Marmara and Aegean ports. Ro-Ro transportation is preferred if the cargo will continue its route through motorway after a short seaborne transportation. The second group is brand new vehicle logistics. Vehicles manufactured in our country are transported to the world markets through our ports, and similarly, vehicles manufactured abroad arrive to our country by sea. The automotive industry, most of which is located in the Marmara Region, has an important place in our economy due to export of sedans, light commercial vehicles and commercial vehicles. The last group consists of vehicles transported on the cabotage line, especially in the Marmara and Çanakkale regions.

Wheeled cargoes form the smallest group on tonnage basis among all types of cargo. There are 29 ports that provide service to wheeled cargo (Figure 3.18.).

Figure 3.18. TÜRKLİM member ports with permission for wheeled cargo handling

• RO-RO transportation

International regular RO-RO transportation in our country has increased since 2016, excluding 2020, when there was a decrease due to the pandemic. International regular RO-RO transportation handled at our ports reached 719 thousand vehicles in 2022 with an increase of 48 thousand vehicles (Figure 3.19.)

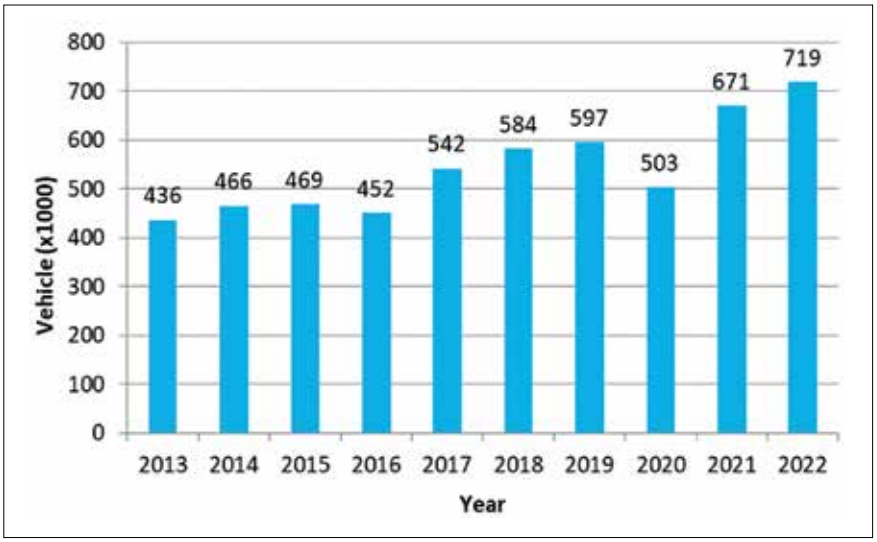

Figure 3.19. Our Ro-Ro transports (Vehicle)

Ro-Ro transportation is mainly (48%) Trieste (Italy) bound (Figure 3.20.). Transportation to Trieste exceeded 352 thousand vehicles (Table 3.17.) as of 2022. A significant portion of Trieste-bound transportation is carried out through TÜRKLİM member DSDF ports.

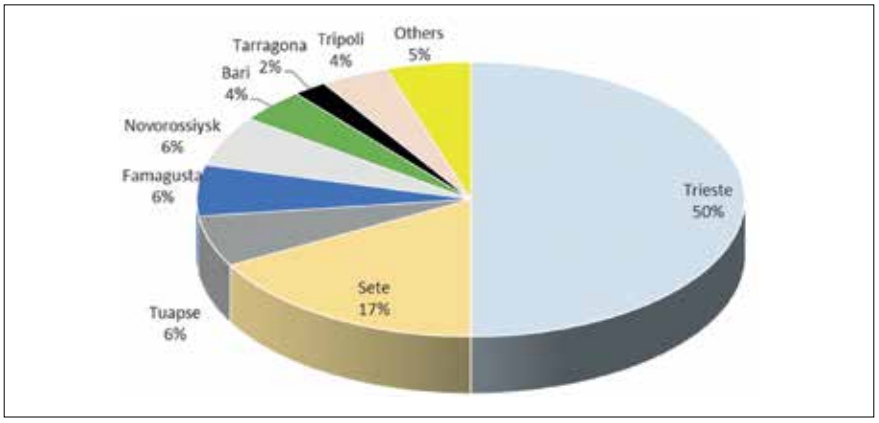

Figure 3.20. Shares of foreign ports where Ro-Ro transportation is carried out

There are regular Ro-Ro services from 13 ports in Türkiye to 22 ports abroad (Table 3.17.). The first three routes with regular Ro-Ro services to Trieste bound abroad are Tuzla with 216 thousand vehicles, Yalova with 118 thousand vehicles to France-Sete bound and Çeşme with 70 thousand vehicles.

Table 3.18. Ro-Ro statistics on regular overseas routes*

Routes	Arriving vehicles	Departing vehicles	Total vehicles
Tuzla (Pendik)-Trieste	108.599	108.005	216.604
Yalova-Sete	58.157	60.210	118.367
Çeşme-Trieste	34.848	35.165	70.013
Mersin-Trieste	32.893	24.924	57.817
İzmir-Tarragona	6.542	7.128	13.670
Yalova-Lavrio-Trieste	3.099	5.370	8.469
Tuzla (Pendik)-Patras	2.978	2.822	5.800
Yalova-Bari	1.307	3.349	4.656
Çeşme-Chios	393	1.221	1.614
Tuzla (Pendik)-Bari	795	684	1.479
İzmir-Sete	527	746	1.273
İzmir-Thessaloniki	24	917	941
Yalova-Tarragona	470	390	860
Kocaeli-Zeebrugge	0	794	794
Yalova-Patras	680	0	680
Gemlik-Salerno	400	47	447
Kocaeli-Anvers	218	28	246
Kocaeli-Bremerhaven	0	224	224
Kocaeli-Portbury	0	134	134
Samsun-Tuapse	20.779	21.362	42.141
Samsun-Novorossiysk	19.163	22.006	41.169
Karasu-Chornomorsk	3.693	3.406	7.099
Samsun-Temryuk	2.718	3.180	5.898
Samsun-Kavkaz	1.852	2.618	4.470
Karasu-Kavkaz	1.627	2.075	3.702
Zonguldak-Chornomorsk	899	976	1.875
İstanbul (Haydarpaşa)-Chornomorsk	723	675	1.398
Karasu-Tuapse	247	308	555
Mersin-Famagusta	19.647	19.384	39.031
Taşucu-Kyrenia	12.745	14.048	26.793
Taşucu-Tripoli (Lebanon)	13.311	13.363	26.674
Mersin-Haifa	4.042	4.336	8.378
Mersin-Kyrenia	1.264	637	1.901
Taşucu-Famagusta	614	26	640
Kocaeli-Ashdod	5	122	127
İskenderun-Dar es Salaam	0	238	238
Mersin-Sittwe	147	0	147
Other	2.186	1.078	3.264
Total	**357.592**	**361.996**	**719.588**

* Ministry of Transport and Infrastructure, Republic of Türkiye

Overseas bound vehicles handled at our ports increased by 12.8% to 1.6 million vehicles in 2022. TÜRKLİM member ports have handled 73.1% of the aforementioned handling (Table 3.18.).

Table 3.19. Vehicle handling at our ports on regular overseas route basis*

Ports	Total 2021	Arriving vehicles	Departing vehicles	Total 2022
Autoport	335.987	113.614	187.302	300.916
Ford Otosan Yeniköy	273.288	5.892	208.804	214.696
Borusan Port	185.703	19.951	158.016	177.967
Gemport Gemlik	150.863	10.537	150.011	160.548
Port Yarımca	10.121	85.877	37.103	122.980
Efesanport	124.807	102.922	897	103.819
Limakport İskenderun	35.656	50.658	249	50.907
Port of Ceyport Taşucu	19.668	12.777	14.850	27.627
MIP Mersin International Port	11.673	6.037	5.216	11.253
Bodrum Cruiseport		353	355	708
IC Karasu Port	3.342	163	406	569
Samsunport		88	253	341
Sanko	286			
TÜRKLİM Total	**1.131.579**	**408.869**	**763.462**	**1.172.331**
Alsancak Port	4.736	1.491	3.047	4.538
TCDD Haydarpaşa Port	288	256	148	404
Public Total	**5.024**	**1.747**	**3.195**	**4.942**
Other Private Ports	265.186	163.382	263.589	426.971
Other Private Ports Total	**265.186**	**163.382**	**263.589**	**426.971**
Total	**1.421.604**	**573.998**	**1.030.246**	**1.604.244**
TÜRKLİM Share	**79,6%**	**%71,2**	**%74,1**	**%73,1**

* Ministry of Transport and Infrastructure, Republic of Türkiye

• Foreign trade oriented automobile handlings

The ports handling the highest number of vehicles in automotive foreign trade are all located in the Marmara Region and are Autoport, Ford Otosan, Borusan and Efesan ports, respectively (Table 3.19.). Due to the contraction in the automotive sector, automotive handling decreased by 10% in 2018, 16% in 2019 and 18% in 2020 compared to the previous year and was realized as 1.1 million vehicles. The number of vehicles increased by 7.1% to 1,914,783 vehicles, including transit and internal transportation in 2021. A total of 1,393,185 finished vehicles were handled at TÜRKLİM member ports in 2022 (Table 3.19.).

Table 3.20. Vehicle export and import numbers on port basis

Port	Internal/Transit	Export	Import	Total
AUTOPORT	9.408	178.504	114.220	302.132
BORUSAN	24.550	146.569	8.434	179.553
EFESAN PORT	0	900	103.890	104.790
FORD OTOSAN	0	205.485	5.893	211.378
GEMPORT	4.727	149.487	10.936	165.150
LİMAK (1)	51.024	931	0	51.955
MİP MERSİN	3.523	50.856	35.875	90.254
PORT YARIMCA	36.740	67.320	19.121	123.181
SAMSUN PORT	16	2.478	94	2.588
DFDS0		81.342	80.862	162.204
TOTAL	**129.988**	**883.872**	**379.325**	**1.393.185**

(1) LİMAK (İSKENDERUN)

• Vehicles transported at cabotage routes

There have been 10,8 million vehicles transported at cabotage routes in 2020. The number of vehicles has increased by 15.9% to 12.6 million by 2021 and decreased by 13.2% to 10.9 million by 2022. (Table 3.20.).

Table 3.21. Transported vehicles at cabotage routes

	Routes	2021 Vehicles (Number of)	2022 Vehicles (Number of)	% Change
İstanbul Region	Eskihisar-Topçular/Tavşanlı	3.927.814	3.871.747	-1,4
	Sirkeci-Harem	1.764.693	1.347.862	-23,6
	İstinye-Çubuklu	516.924	495.616	-4,1
	Zeyport-Maltepe	3.586	0	-100,0
	Erdek-Avşa (Türkeli)	40.701	4.772	-88,3
	Tekirdağ-Avşa (Türkeli)	15.625	1.757	-88,8
	Marmara A.-Erdek	58.152	6.567	-88,7
	Marmara A.-Tekirdağ	966	1.881	94,7
Marmara Basin	Erdek-Tekirdağ	9.819	8.188	-16,6
	Derince-Tekirdağ	0	10.184	-4,1
	Ambarlı-Bandırma	128.206	106.626	-16,8
	Tekirdağ-Bandırma	31.306	19.784	-36,8
	Yenikapı-Yalova	349.268	461.452	32,1
	Yenikapı-Bandırma	45.785	0	-100,0
	Yenikapı-Bursa	193.840	21.477	-88,9
	Pendik-Yalova	558.746	597.318	6,9
	Other	76.990	193.107	150,8
Çanakkale Basin	Gelibolu-Çardak	351.981	98.117	-72,1
	Gelibolu-Lâpseki	1.348.123	1.014.192	-24,8
	Çanakkale-Kilitbahir	946.199	595.010	-37,1
	Çanakkale-Eceabat	413.030	308.784	-25,2
	Karabiga-Tekirdağ-Bandırma	8.667	1.303	-85,0
	Kabatepe-Gökçeada	201.104	218.677	8,7
	G.Yükyeri-Bozcaada	215.842	233.324	8,1
İzmir Region	Bodrum-Datça	22.222	19.100	-14,0
	Bostanlı-Üçkuyular	1.366.774	1.298.576	-5,0
Lake Van	Tatvan-Van	12.488	22.961	83,9
	TOTAL	**12.619.473**	**10.958.382**	**-13,2**

* Ministry of Transport and Infrastructure, Republic of Türkiye

3.6. Cruise Ports

Cruise ports and terminals are among the touristic coastal structures of the transportation sector. There are 27 ports that provide service to passenger and cruise ships in our country (Figure 3.21.).

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Figure 3.21. TÜRKLİM member ports with passenger handling permits

Passenger movements at our ports will be evaluated separately as cruise and cabotage.

• Developments at our cruise ports

Cruise tourism, which constitutes an important component of maritime tourism with its financial dimension, has an important role in regional development. The Mediterranean basin has important destinations for cruise tourism with its natural and historical richness and geographical features. Since 1990, cruise tourism, which showed regular growth until the COVID-19 pandemic that started in 2019, started to grow again in 2021 after two years. However, the number of cruise passengers only reached the 2016 level in 2021. In 2019, the global cruise industry welcomed 29.7 million passengers, creating 1.8 million jobs worldwide and contributing over $154 billion to the global economy [1].

Having hosted more than one million cruise passengers between 2006 and 2015 and more than two million between 2011 and 2013, the number of cruise passengers in Türkiye dropped dramatically to 628 thousand in 2016. When we look at the developments in our country, which has been extremely negatively affected in terms of tourism, the number of passengers decreased to 1,824 people in 2020 with the negative impact of the pandemic that started in 2019. After a six-year break, the number of cruise passengers exceeded one million passengers again in 2022 with the opening of Galataport Istanbul Cruise Port. (Figure 3.22).

1 https://www.cruisemummy.co.uk/

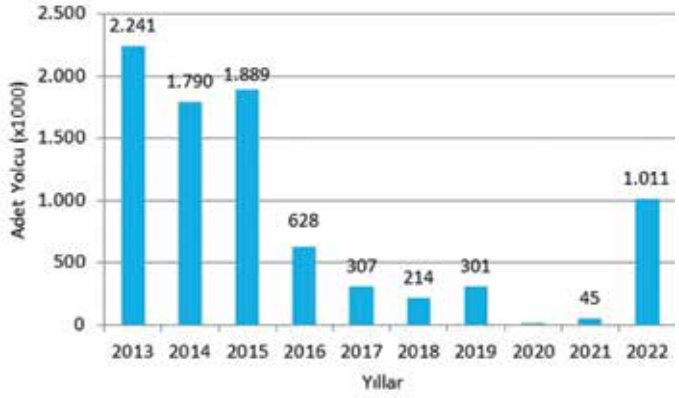

Figure 3.22. Number of cruise passengers

Kuşadası Port Authority ranked first with 465 cruise ships and 496 thousand passengers in 2022 followed by Istanbul Port Authority with 180 ships and 252 thousand passengers, Bodrum Port Authority with 98 ships and 95 thousand passengers and Çeşme Port Authority with 56 ships and 20 thousand passengers (Table 3.21).

Table 3.22. Number of cruise ships and passengers on port authority basis

Port Authority	Ship	Passenger
Kuşadası	465	496.211
İstanbul	180	252.026
Bodrum	98	95.462
Çeşme	56	20.651
Çanakkale	35	13.905
Dikili	28	6.410
İzmir	28	52.134
Antalya	25	33.109
Marmaris	14	11.562
Sinop	14	7.906
Others	50	21.391
Total	**993**	**1.010.767**

The number of passengers arriving at TÜRKLİM member ports by cruise ships and ferries exceeded 1.2 million in 2022.

Table 3.23. Passenger handling at TÜRKLİM member ports

	Passenger		
Port	**Cruise ship**	**Ferry**	**Total passenger**
Ege Ports - Kuşadası	493.665	68.518	562.183
Salıpazarı-Karaköy	220.082	0	220.082
Ceyport Taşucu	0	202.796	202.796
Bodrum Cruise Port	76.115	98.732	174.847
Mersin	31.225	0	31.225
Port of Çanakkale	13.951	0	13.951
Total	**835.038**	**370.046**	**1.205.084**

• Cabotage passenger transportation

The number of passengers on cabotage routes increased by 30% in 2022 compared to the previous year and exceeded 126 million people (Table 3.22).

Table 3.24. Passenger statistics at Cabotage routes

	Routes	2021	2022	% Change
	Eskihisar-Topçular/Tavşanlı	21.723.707	20.478.325	-5,7
İstanbul	Eskihisar-Altınova	491.982	511.488	4,0
Region	Other lines	49.905.590	74.024.576	48,3
	Total	**72.121.279**	95.014.389	31,7
	Erdek-Avşa (Türkeli)	113.876	12.846	-88,7
	Tekirdağ-Avşa (Türkeli)	30.827	6.609	-78,6
	Marmara Adası-Erdek	161.264	18.027	-88,8
	Marmara Adası-Tekirdağ	1.748	4.114	135,4
	Erdek-Tekirdağ	10.238	9.385	-8,3
	Marmara Ereğlisi-Bandırma	5.005	0	-100,0
	Ambarlı-Bandırma	128.206	106.626	-16,8
Marmara	Tekirdağ-Bandırma	31.395	20.993	-33,1
Basin	Avşa-Marmara Adası	2.309	1.304	-43,5
	Armutlu-Mudanya	6.207	8.884	43,1
	Yenikapı-Yalova	1.667.996	2.320.132	39,1
	Yenikapı-Bandırma	398.243	326.350	-18,1
	Yenikapı-Bursa	791.449	1.219.335	54,1
	Pendik-Yalova	2.110.378	2.689.566	27,4
	Other lines	2.164.938	2.425.864	12,1
	Total	**7.624.079**	9.170.035	20,3
Gulf of	Other lines	293.503	499.494	70,2
İzmit	**Total**	**293.503**	**499.494**	70,2
	Gelibolu-Çardak	455.368	124.060	-72,8
	Gelibolu-Lâpseki	1.779.635	1.570.676	-11,7
	Çanakkale-Kilitbahir	1.684.093	1.486.819	-11,7
Çanakkale	Çanakkale-Eceabat	1.108.717	1.229.285	10,9
Region	Karabiga-Tekirdağ-Bandırma	4.530	3.382	-25,3
	Kabatepe-Gökçeada	427.490	511.372	19,6
	G.Yükyeri-Bozcaada	703.381	894.078	27,1
	Total	**6.163.214**	**5.819.672**	-5,6
İzmir	Bodrum-Datça	101.538	102.701	1,1
Region	Bostanlı-Üçkuyular	10.741.263	15.632.855	45,2
	Total	**10.842.801**	**15.698.433**	44,8
Lake Van	Tatvan-Van	587	2.006	241,7
	Total	**587**	**2.006**	241,7
	Grand Total	**97.045.463**	**126.204.029**	30,0%

* Ministry of Transport and Infrastructure, Republic of Türkiye

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UNIT 4

SUSTAINABLE PORTS

Şadan KAPTANOĞLU
Turkish Marine Environment Protection Association/ TURMEPA Chairman of the Board

We Have to Face the Climate Crisis

The increasing number of adverse natural events such as fires, floods and mucilage in our country and the world seriously warns us about the importance of living a nature-friendly life. These events, which are becoming more frequent due to the climate crisis, are actually messages that nature has been giving us for many years. Nature has tried to make its voice heard many times. However, humanity's unconscious consumption approach and the fact that it takes more and more from nature every day while expanding its own living space have made it inevitable for us to face these frightening consequences. Our seas, water resources and nature are under great threat from both the climate crisis and pollution. The climate crisis is no longer a reality at our doorstep, but unfortunately in our homes, in our lives.

Maritime industry seeks solutions to climate crisis

The maritime industry also has its own responsibilities in tackling the climate crisis that we all have to face. The first is to reduce carbon emissions. Rapid decarbonization is vital in achieving the climate change targets of the Paris Agreement, and this is of course also true for international shipping. For the maritime sector, the fight to protect the seas and ecosystems is vital. International maritime transport is currently responsible for around 2 percent of the world's anthropogenic carbon emissions. The International Maritime Organization (IMO), the global regulator of shipping, has broken new ground, setting an absolute target for emissions reductions in support of the UN Sustainable Development Goals and the Paris Agreement climate targets. International shipping is the first global sector to take this seriously. IMO has set a target to reduce carbon emissions from international maritime transport by at least 50 percent by 2050 compared to 2008 levels, and to reduce carbon intensity by 40 percent by 2030. Meeting these targets requires new zero-carbon technologies such as green hydrogen and ammonia, fuel cells, batteries and synthetic fuels produced from renewable energy sources. In the next 20 years, we will see all fuel types change. No more

fossil fuels. Maybe gas as a bridge, hybrid models will come. In fact, in 30 years, these solutions will be so advanced that ships will use whatever fuel is available in the port they go to. In short, a very, very big change awaits us.

We have been developing solutions to environmental problem for 29 years

The most important fight we have today is to stop climate change from getting worse. There are many things we can do to make our world more energy-efficient, cleaner and climate-friendly. We need sustainable solutions to combat climate change. Founded 29 years ago with great foresight, TURMEPA is an important partner at the solution point. To date, we have reached 9 million people with our environmental and marine trainings. The number of volunteers has reached 11 thousand. We collected 47 million liters of liquid waste with our 7 waste reception boats to protect our paradise bays. We supported the Zero Waste movement, which was initiated under the leadership of the Ministry of Environment, Urbanization and Climate Change and turned into a mobilization across the country, with the Zero Waste Blue approach. The trainings we provided were included in Education Information Network (EBA), the digital platform of the Ministry of National Education. Our 19 educational films have reached more than 580 thousand students and this number is increasing. Again, together with the Ministry of National Education, we shot five training films on Zero Waste and Climate Change, this time for our teachers.

Our ports play a leading role in tackling the climate crisis

Last year, we launched another very important project. We came together with the Port Operators' Association of Türkiye (TÜRKLİM) and WISTA Turkey (Women's International Shipping & Trading Association) to bring the Blue Climate Ambassadors Project to ports in order to draw attention to the increasing climate change events in the world and to develop sustainable solutions for environmental problems. Within the scope of the project, awareness was raised against the climate crisis under the leadership of women working in ports for a year. Women seafarers led the sector to implement zero waste transformation in ports through trainings and coastal cleanups, and to offer solutions to combat and adapt to climate change. In the first step of the project, 1200 port employees were provided with climate change awareness training by TURMEPA. In the second step of the project, 2 tons of waste was collected and removed from our seas through coastal cleaning activities.

If we want the world economy to gain a certain momentum, we cannot think of it independently of nature. Governments, companies, NGOs must join forces. Our society and our world have to see the devastating impact of the climate crisis. This is why we must work together to fight against the climate crisis and protect the environment.

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UNIT 4: SUSTAINABLE PORTS

4.1. Sustainability

The basic motivation of all living things is to survive. The most important root cause of all migrations and wars to date has been famine, drought or the desire to have richer places in terms of natural resources. People settled down and started the agricultural revolution in order to cope with hunger in the winter months due to adverse weather conditions approximately 12 thousand years ago. One of the best examples of this period is Göbeklitepe in Şanlıurfa. The Beldibi and Belbaşı caves in Antalya, which date back to 14 thousand years ago, show that mining had begun in Anatolia. Therefore, it has been more than 12 thousand years since non-renewable natural resources began to be consumed.

The Age of Enlightenment, which began with the end of the Middle Ages, marked the beginning of a period in human history in which scientific research became widespread and inventions accelerated. This process led to the industrial revolution which began with the invention and spread of the steam engine in the 17th century. While industrialization facilitated human life, it also accelerated the consumption of natural resources. Population growth accelerated with the control of epidemics, the improvement of living conditions and the prolongation of the average human life. Industrialization and population growth led to uncontrolled consumption of natural resources. Another negative reflection of industrialization is the deterioration of the ecological balance due to environmental pollution. As a result, limited underground resources formed over millions of years have begun to be depleted, fertile agricultural areas have lost their productivity as a result of tens of thousands of years of agricultural activities, and forest areas have begun to shrink rapidly. New species have been added to the list of endangered and extinct species every day in the last fifty years.

The debate on the inadequacy of the Earth's finite natural resources for an ever-increasing human population dates back more than two hundred years[1]. Public awareness of the global decline in environmental quality and the deterioration of the ecological balance has begun to increase since the 1960s. The fact that depleted natural resources cannot be replaced and that a dramatic decline in the human population and consequently in the use of the resources needed is not expected has increased concerns about the future of humanity.

At the United Nations Conference on the Human Environment held in Stockholm in 1972 with the participation of representatives of 114 countries, environmental issues

1 Anand, S.; Sen, A. (2000). Human development and economic sustainability. World Development, 28, 2029-2049.

became the subject of an international conference for the first time.[2] The "Stockholm Declaration" published as a result of this conference consists of 26 principles[3]. The first principle states that *"Man has the fundamental right to freedom, equality and adequate conditions of life, in an environment of a quality that permits a life of dignity and well-being, and he bears a solemn responsibility to protect and improve the environment for present and future generations."* In the second principle, by stating *"The natural resources of the earth, including the air, water, land, flora and fauna and especially representative samples of natural ecosystems, must be safeguarded for the benefit of present and future generations through careful planning or management, as appropriate."* sustainability was emphasized for the first time without being named. Again, the third principle of the Stockholm Declaration emphasizes the need to restore the disrupted balances by stating that *"The capacity of the earth to produce vital renewable resources must be maintained and, wherever practicable, restored or improved"*. The Stockholm Declaration, which has an important place as the first of its kind, states that it is the special responsibility of people to protect and wisely manage natural life and its habitat, and that the duty to protect and improve the environment belongs to governments.

Considering that the age of the Earth is approximately 4.5 billion years, it has only been fifty years since the Stockholm Declaration, but the deterioration of the natural balance has gone beyond documentaries showing melting glaciers, shrinking rainforests and scientists' warnings of global warming, and has begun to manifest itself with extreme climatic conditions in all areas. The deterioration of the natural balance and the decline in environmental quality have accelerated the search for solutions at the global level. On the one hand, meeting the needs of the growing population, on the other hand, the necessity for people to continue development for a better life and future has brought the concept of sustainability into our lives.

With *"Humanity has the ability to sustain development that meets the needs of present generations without compromising its ability to meet the needs of future generations"*, the word "Sustainability" was first used in the "Our Common Future" report[4] published in 1987 by the World Commission on Environment and Development under the United Nations.

The concept of "*sustainability*", which comes from the Latin word "*sustenare*", means "to sustain, support". The word has evolved over time to mean "the continuation

2 Dinç, G. (2008), Avrupa İnsan Hakları Sözleşmesi'ne Göre Çevre ve İnsan. Stockholm konferansı ile Başlayan Uluslararası Süreç [Environment and Human according to the European Convention on Human Rights. - The International Process Starting with the Stockholm Conference] (Unit 1, pp.7).

3 https://hukukbook.com/stockholm-bildirgesi-milletler-insan-ve-cevre-konferansi-bildirgesi/

4 United Nations World Commission on Environment and Development (known as the Brundtland Commission), Our Common Future (Oxford: Oxford University Press, 1987)

or prolongation of something" and has taken on meanings such as "providing the support and requirements that make the extended period possible", "causing a certain state, power or intensity to continue", "continuing without any interruption[5, 6]".

The concept of sustainability was used in conjunction with ecology and environment for a long time and expressed a limited definition. However, it has been realized that only the imposition of restrictions by states through laws and regulations will not bring a solution to the negative trend, and that the economic and social dimensions of the restrictions imposed should also be taken into consideration.

Sustainable development was defined under three sub-headings; Economic Development, Social Development and Environmental Protection at the 2005 United Nations Earth Summit[7]. This approach, also called the "Triple Bottom Line" by John Elkington, has shown that in addition to the protection of natural resources and the sustainability of the ecological balance, cost-benefit analysis should also take into account the economic and social impacts. At this point, it is understood that it is insufficient for companies to focus only on their short-term economic interests and achievements in order to continue their development and growth, and that their social and environmental achievements are as valuable as their financial achievements. In today's civilized world, a company that focuses only on making profit and avoids its social and environmental responsibilities will bring more harm than profit in the medium and long term. The aim of corporate sustainability, which has become more widely used today, is to ensure balance and integrity between the three dimensions of sustainability while fulfilling the environmental and social responsibilities of businesses towards the society in which they operate[8].

In the early 2000s, the social and environmental contributions and projects carried out in these areas, which corporations saw as brand image and which they usually announced through the press, have turned into corporate sustainability reports that are regularly published and shared with all stakeholders in a short period of time. Businesses now publish many parameters such as liquid, solid and gaseous wastes arising from their activities, sustainability indexes that directly affect the natural balance such as the energy they consume, set targets for the coming years, and try to achieve the targets they set by declaring them as a commitment to society.

5 A. M. Hasna, "Sustainability Classifications in Engineering: Discipline and Approach", International Journal of Sustainable Engineering, vol. 3, no. 4, 2010, pp. 258-276

6 . B. Kiriş, D. Y. Börekçi, "Sürdürülebilir Liman İşletmeciliğini Yönlendirici ve Engelleyici Faktörler: Bir Üçlü Bilanço Yaklaşımı" [Drivers and Barriers to Sustainable Port Management: A Triple Bottom Line Approach], İstanbul Gelişim University Sosyal Bilimler Dergisi [Journal of Social Sciences], 5, (1), April 2018, pp. 192-220.

7 United Nations. (2005). "World Summit Outcome"

8 Baumgartner, R.J. ; Ebner, D. (2010). Corporate Sustainability Strategies: Sustainability Profiles and Maturity Levels. Sustain. Dev., 18 (2), pp.76-89.

4.2. Sustainable Development Goals

As a result of the United Nations Conference on Environment and Development held in Rio de Janeiro in 1992, the participating countries adopted Agenda 21, which sets out the steps and measures to be taken globally, nationally and locally in areas of human impact on the environment, based on economic growth, social justice and environmental protection. International support for the implementation of this document and the principles agreed upon in Rio was reaffirmed at the "World Summit on Sustainable Development" in Johannesburg in 2002[9].

The final declaration of the Rio+20 Summit, which took place in 2012 on the occasion of the 20th anniversary of the UN Conference on Environment and Development held in Rio, also decided to establish "Sustainable Development Goals" as a continuation of the Millennium Development Goals. The Sustainable Development Goals (SDGs) and the 2030 Agenda, which includes 17 main goals and 169 sub-goals, were adopted by the UN General Assembly with the signatures of 193 countries as a result of a nine-month study that started in January 2015 with the participation of all UN member countries and relevant stakeholders to determine the "Sustainable Development Goals" (Figure 4.1).

Sustainable development goals primarily aim to improve people's quality of life for a better future. The sustainable development goals are a strategy document for ensuring better living conditions on a global scale and leaving a better world for future generations.

Figure 4.1. Sustainable Development Goals[10]

9 https://www.tika.gov.tr/tr/duyuru/birlesmis_milletler_surdurulebilir_kalkinma_rio20_konferansi_20_22_haziran_2012_tarihleri_arasinda_rio_de_janerioda_gerceklestirilecek-9293

10 Image : https://www.un.org/sustainabledevelopment/news/communications-material/

Sustainable development goals cover all three pillars of sustainability: economic, social and environmental. Achieving sustainable development goals, whether set at the level of governments or at the level of public and private institutions, is the joint responsibility of all parties and the goals will be achieved through joint work. Global Reporting Initiative (GRI) Standards have been widely used around the world in order to report the efforts made for a better tomorrow in a standardized manner. GRI standards, which include the current situation and the actions taken to achieve the targets, have been applied in many ports, including the ports of our country (Kumport, MIP Mersin International Port, etc.), and the results have been shared with all stakeholders as open source.

The 17 main sustainable development goals are given below[11].

1 - No poverty End poverty in all its forms everywhere.

2 - Zero hunger (No hunger) End hunger, achieve food security and improved nutrition, and promote sustainable agriculture.

3 - Good health and well-being Ensure healthy lives and promote well-being for all at all ages.

4 - Quality education Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all.

5 - Gender equality Achieve gender equality and empower all women and girls.

6 - Clean water and sanitation Ensure availability and sustainable management of water and sanitation for all.

7 - Ensure access to affordable, reliable, sustainable and modern energy for all Ensure access to affordable, reliable, sustainable and modern energy for all.

8 - Decent work and economic growth Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all.

9 - Industry, Innovation and Infrastructure Build resilient infrastructure, promote inclusive and sustainable industrialization, and foster innovation.

10 - Reduced inequality Reduce income inequality within and among countries.

11 - Sustainable cities and communities Make cities and human settlements inclusive, safe, resilient, and sustainable.

12 - Responsible consumption and production Ensure sustainable consumption and production patterns.

13 - Climate action Take urgent action to combat climate change and its impacts by regulating emissions and promoting developments in renewable.

14 - Life below water Conserve and sustainably use the oceans, seas and marine resources for sustainable development.

15 - Life on land Protect, restore and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, and halt and reverse land degradation and halt biodiversity loss

16 - Peace, justice and strong institutions Promote peaceful and inclusive societies

11 https://www.kureselamaclar.org/en/

for sustainable development, provide access to justice for all and build effective, accountable and inclusive institutions at all levels.
17 - Partnership for the goals Strengthen the means of implementation and revitalize the global partnership for sustainable development.

4.3. Sustainable Ports

Maritime transportation is at the center of world trade. All of the vital resources on earth, including agricultural products, are distributed across different geographies. This is the main reason why a huge volume of cargo is transported from one country to another and from one continent to another. As of 2022, 11.9 billion tons of cargo were handled in the world's ports. This enormous cargo traffic through maritime routes is the engine of development and progress on a global scale.

Whether it is a private or a public port, port services are a public service. However, ports have to generate the financing they need to sustain their operations and make the necessary investments. As a fragile sector, ports are directly affected by national and international economic and political developments. Sudden changes can occur especially in regional cargoes and different cargo types. The best example of this is the COVID-19 pandemic and the Russia-Ukraine crisis.

Whether in the shipping or port sector, the capacity supplied is always higher than the available cargo volume due to the long investment period. For this reason, the maritime sector is an area of intense competition. In order to maintain their commercial activities, ports have to compete with other ports while at the same time not compromise on service quality.

The maritime sector is governed by national and international regulations. Ports have to reorganize their activities according to the laws and regulations put into effect. Safety and security concerns, environmental risks, political developments and public pressure are transformed into legal sanctions as laws and regulations after a while. The expectations of port customers and stakeholders from the port are changing as well. It is difficult to make long-term strategic plans in such a dynamic sector. However, ports still have to implement long-term strategies for sustainable growth rather than short-term commercial gains.

Sustainable port management is defined in this study as "port management that continues port operations without moving away from financial targets by adhering to ethical values, and supports social development while being environmentally sustainable by considering the rights and interests of future generations".

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Globalization has not only led to the free movement of goods and services, but with the widespread use of the internet, information has also eliminated the borders between countries. The rapid spread of information supported by visual elements has increased environmental and social sensitivities in many areas. A fire in an industrial facility that adversely affects the environment, a hurricane hitting a coastal town or an earthquake affecting the lives of thousands of people can spread around the world within hours. The globalization of information has increased the perception selectivity and made many fundamental problems of humanity, such as the rapid consumption of natural resources, deterioration of ecological balance, rapid destruction of agricultural lands, famine and hunger, more important to the masses. As a natural consequence of this, stakeholders no longer only look at the attributes and quality of the product or service they buy, but also consider the environmental impacts and social consequences of the product or service. Similarly, environmental sensitivity and contribution to social responsibility projects have started to be among the criteria taken into consideration in obtaining financing. The fact that ports which fulfill their social and environmental responsibilities are a step ahead has become a source of motivation for other ports and the number of ports adopting sustainable development goals has started to increase.

The maritime sector is an international sector which is positively seperated from other sectors in many areas, from legal regulations related to maritime to port equipment, from ongoing operations to occupational standards. For example, there is no child labor in the maritime sector, safety and security practices are much higher than in other sectors. Similar equipment is used in ports, although the models are different. Each equipment requires skilled labor and expertise.

Sustainable development goals are the shared responsibility of all individuals, including private and state institutions. Ending poverty, hunger, eliminating gender inequality, decent work, reducing inequalities are ethical values of the 21st century let alone a United Nations resolution. Considering the 17 “Sustainable Development Goals”, although each goal is important, some of the development goals directly concern ports, while others indirectly concern them. While ports play an active role in directly related goals (such as increasing the proportion of renewable energy used in the port, reducing marine pollution, taking measures to address climate change), in indirectly related goals (such as eradicating poverty, access to safe and nutritious food), ports can only make joint efforts with other sectors, especially public administration and government policies.

The first two goals of sustainable development are ending poverty and ending hunger. These goals require global efforts and solutions with the participation of the public and private sectors. In this section, the Sustainable Development Goals, which are

directly related to ports, are examined along with their sub-goals. Examples of good practices are also included without naming the port as well.

"Sub-target 3.3 Fight communicable diseases" and "3.9 Reduce illnesses and deaths from hazardous chemicals and pollution" under ***"Goal 3. Good Health and Well-being"*** within the sustainable development goal are among the priority issues of the port sector. "The highest attainable standard of health is one of the fundamental rights of every human being" is guaranteed by the constitution of the World Health Organization (WHO). According to the WHO constitution, " Health is a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity., and the enjoyment of the highest attainable standard of health is one of the fundamental rights of every human being without distinction of race, religion, political belief, economic or social condition."[12]

In the last quarter of 2019, WHO declared the COVID-19 pandemic, which started in the People's Republic of China during the last quarter of 2019 and spread rapidly in a short time and is called one of the biggest disasters of the last century, as a global pandemic on January 30, 2020 and called for a public health emergency. In this process, the ports at our country also gave a successful test by prioritizing health, safety & security, and continuing to provide services with minimum risk with appropriate and effective measures. The uninterrupted service of the ports during the pandemic has been the most up-to-date and beautiful example of sustainable development.

In our ports, occupational accidents with and without day loss are recorded and corrective & preventive measures are taken to minimize accidents in every department. Especially in the field of occupational health and safety (OHS), not only port employees but also subcontractor employees are trained. Our ports work to provide all employees with the necessary knowledge, skills, attitudes and behaviors to prevent accidents. In some of our ports, visitors who will enter the port area are given a short OHS training at the entrance gates and are allowed to enter the port area if they pass the exam held afterwards. In addition, OHS management in our ports is carried out according to the "Very Dangerous" and "Dangerous" class characteristics in accordance with the OHS legislation.

The infirmary, ambulance and private health insurance for port employees in our ports are examples of good practices which indicate the management approach that prioritizes the health of port employees.

12 https://www.who.int/about/governance/constitution

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"Sub-target 4.4 Increase the number of people with relevant skills for financial success" under ***"Goal 4. Quality education"*** within the sustainable development goals is one of the goals that the port sector directly contributes to. The port sector is a line of business that requires qualified labor force. In a significant number of our ports, employees are subjected to in-house or external trainings for their professional and personal development starting from the first day of their employment and throughout their business life. Our main ports provide inclusive and equitable quality training and promote lifelong learning opportunities for all. To this end, port academies have been established in many ports. The competencies and performance of our employees increase with the trainings provided. In this way, the risk of accidents are minimized without sacrificing the speed of operation. Occupational health and safety is among the trainings that our ports emphasize. "Toolbox" awareness raising and awareness trainings are provided to increase operation effectiveness and efficiency, especially OHS at our ports. While operational efficiency provides cost advantage on the one hand, it also supports the financial success of the port by increasing customer satisfaction on the other. Our ports provide internship opportunities for maritime students, who are the guarantee of our future, and award scholarships to successful students.

Launched in 2022, "TÜRKLİM Port Academy" aims to train qualified employees for the employment of qualified employees in ports through its training programs; employees who attach importance to safety and security, are knowledge-oriented, open to experience, change and development, sensitive to the environment and gender equality, support the employment of more blue and white collar women, observe the balance of the ecosystem and internalize green economic transformation in future generations. "TÜRKLİM Port Academy" aims to be the leading institution of sectoral training with trainings provided by expert trainers in many fields.

Ports are an important source of employment. There is a wide range of indirect employment related to port services, far exceeding the number of people working in port services. The port sector is above the standards of our country in terms of working conditions. Worldwide, the rate of female employment in the maritime sector is two percent[13]. In addition to heavy working conditions, the port sector is a shift-working sector. As a natural consequence of this, the number of female employees in our ports is not yet at the desired levels. When we consider all of our ports, the number of women working in the field, especially at the operator level, is at negligible levels. However, the sub-target 5.7 "Equal rights to economic resources, property ownership and financial services" under ***"Goal 5 Gender Equality"*** within the sustainable

13 Mersin Uluslararası Limanı 2020 Sürdürülebilirlik Raporu [Mersin International Port 2020 Sustainability Report]

development goals has an equivalent in a significant portion of our ports. Women's rights are human rights and all businesses, including ports, are obliged to respect gender equality.

There is no gender discrimination in both salaries and internal promotions at our ports. A zero tolerance policy against harassment and mobbing is implemented to ensure that female employees work in a safe and peaceful environment. Women are encouraged to participate in business life through inclusive working models. In addition, trainings on harassment and protection from harassment are provided at some of our ports.

Clean water resources on earth are rapidly decreasing. There are 785 million people in the world, or 1 out of 9 people, who do not have access to clean water. By 2050, at least 1 in 4 people will live in a country affected by chronic or recurrent freshwater scarcity[14]. Controlled use of natural resources is important to leave a livable world for future generations. ***"Goal 6 Clean water and sanitation for all"*** of the sustainable development goals includes the objective of "To ensure availability and sustainable management of water and sanitation for all." In this context, minimizing the water footprint is one of the success criteria. The water footprint is not only related to the amount of water consumed, but also considers where and for what purpose the water is used. In addition, the quality of wastewater (gray water) is as important as water consumption. Recycling and reuse of water is as beneficial as reducing water consumption.

A significant portion of our ports use city water. Water consumed in ports can be classified in two groups as water consumed in port facilities and water consumed in operations. Water generated from port facilities is domestic waste. In new generation ports, all wastewater (bilge water, sludge, sewage, etc.) generated during port operations (maintenance and repair activities, washing the port area, washing the inside of containers, etc.), including rainwater, is sent to treatment.

One of the important issues of our age is the increasing use of and the problems arising from energy consumption. In addition to the environmental risks posed by fossil fuels, the rapid depletion of these limited resources has accelerated the search for alternative resources. The first commercial use of petroleum, which remains the primary energy source, was in Russia and the first refinery complex was established near Baku in 1820[15]. Therefore, more than two centuries have passed since the use of fossil fuels. On a global scale, the most important problem of our time is climate

14 https://www.ideauniversal.org/en/idea-universal-en/

15 Kara V., 1997, Petrole Dayalı Stratejiler ve Uluslararası İlişkilerde Petrolün Önemi [Oil-Based Strategies and the Importance of Oil in International Relations], İstanbul University, (Master's Thesis)

change. Fossil fuel use is the main cause of greenhouse gases, which rank first among the causes of climate change. ***"Goal 7 Affordable and Clean Energy"*** is one of the sustainable development goals. One of the biggest efforts of our ports is to switch to electric energy instead of diesel fuel within the port, especially in port equipment. The transition to electrical energy in port equipment such as MHC, RTG, which have high energy consumption, has accelerated in our main ports during the last decade. Increased use of electrical energy reduces carbon dioxide emissions on the one hand and reduces operating costs on the other. The cleanest energy is the energy saved. Examples of good practices in our ports include LED-type field lighting, which saves energy, and the use of more solar energy in lighting and heating of buildings. Another practice to reduce greenhouse gas emissions in the maritime sector is the use of shore energy on ships. The so-called Cold Ironing or On Shore Power Supply, where the main and auxiliary engines of the main ship are switched off while at port, and is powered by the electrical energy it receives from the port, plays an important role in reducing air pollution from ships. Another benefit of ships receiving the electrical energy they need from the port is the reduction of noise pollution.

Another critical component in the case of port self-use or shore supply of ship energy is the origin of the energy sources used to generate the electrical energy used. In 2022, 56.8% of electricity in our country was generated from fossil fuels, 34.6% from coal and 22.2% from natural gas. Our ports have turned to the use of solar energy and wind energy as renewable energy sources and are taking steps towards generating their own needs and the shore power needed by the ships with on-site rooftop solar power plants and off-site solar and wind power plants.

It is the most natural right of every individual to have decent living conditions. Considering their socio-economic impacts, ports are among the main actors of development and growth, providing resources to the national economy. The role of maritime trade in the global economy is undeniably growing. ***"Goal 8 Decent Work and Economic Growth"***, which constitutes the 8th of the sustainable development goals, aims to increase employment on the one hand, while protecting employee rights and creating safe working environments on the other. While ensuring a safe and healthy working environment is guaranteed by law, it is also a moral obligation.

Employee motivation and a peaceful working environment are important parameters in the efficient and effective operation of ports. Practices such as a salary policy based on equity, valuing employees, enabling professional and personal development of employees strengthen their loyalty to their workplaces. All personal rights of employees are fully provided at our ports. Average employee wages are higher than other sectors. Remuneration system is determined based on the knowledge, skills and seniority of employees. Necessary measures have been taken to ensure a safe

and healthy working environment at our ports. In addition to the legal rights applied in some of our ports, additional rights such as compassionate leave in special cases, gifts on holidays and special occasions, seniority awards, health insurance, etc. are indicators of the value given to employees.

Ports, which constitute the basic infrastructure of foreign trade, contribute to the national economy on the one hand, and ensure the transportation of vital cargoes such as food, medicine, fertilizer and coal within the supply chain on the other hand. Therefore, it is not only a matter of port operators to ensure that the infrastructure features of ports are suitable for the conditions of the day. ***"Goal 9 Industry, Innovation and Infrastructure"***, which constitutes the 9th of the sustainable development goals, also includes ports that can continue their activities in natural disasters. Developing sustainable, resilient and inclusive infrastructures is among the sub-targets of Goal 9. The increase in the level of automation at our ports and the increase in efficiency resulting from digitalization will be a very important milestone in achieving sustainability targets. Our ports are trying to develop and adapt to the conditions of the day with their own efforts and resources. However, it is essential to have the state's contribution and support to the ports, which are the basic infrastructure. The contribution expected by the ports is not a financial contribution, but a reduction in bureaucracy, laws and regulations, and playing a role in solving the bottlenecks of the ports.

Ensuring equality of opportunity among employees, regardless of the sector, and non-discrimination in all areas, including salaries and personal rights, will increase the motivation of employees and strengthen their loyalty to their workplaces. The 10th sustainable development goal is ***"Goal 10 Reducing Inequality"***. Human discrimination cannot be found in the culture and traditions of our country. All employees in our ports are employed under equal conditions in positions appropriate to their areas of expertise. There is no discrimination among our port employees in all matters such as salaries, working conditions, promotions, personal rights, etc. on the basis of language, race, color, gender, religion, sect, political opinion, age and similar reasons.

Nearly 4 billion people live in cities today. Almost all of the world's ports are located in urban areas. The business opportunities and employment opportunities provided by the port increase urbanization and population density in and around the port. If there is no planned growth both in the city and in the port, after a while the port-city interaction will have negative consequences. ***"Goal 11 Sustainable cities and communities"***, which constitutes the 11th of the sustainable development goals, is directly related to city ports. The city and the port naturally use the same infrastructure and facilities. It is the responsibility of the public to regulate port connection roads,

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to strengthen the railway connections of ports, and to take port activities into account in zoning plan regulations in port expansion areas. As a result, the economic contribution of the effective and efficient operation of ports will be primarily to the national economy and thus to all citizens.

Road transportation is predominantly used in urban freight transportation. Road transportation is a mode of transportation with high environmental risks, especially exhaust gases. Therefore, sourcing possible products from suppliers as close to the ports as possible will contribute to the regional economy as well as reducing greenhouse gas emissions.

Among the sustainable development goals, ***"Goal 12 Responsible consumption and production"*** is included as the 12th goal. In today's world, the desire to consume has increased tremendously. Individuals now shop beyond their needs and live accordingly[16]. The 20th century, especially in developed countries, was a period in which the transformation into a consumer society began and accelerated. Consumption is not only a financial issue, but also the consumption of natural resources. The first condition for living in a sustainable environment and leaving a livable world to future generations is to control consumption. Consumption is not only limited to goods. Uncontrolled consumption of natural resources during the production of goods and services is also important. Our ports pay utmost attention to energy saving. In order to minimize energy, fuel and fuel oil consumption, timely maintenance of port equipment, increasing operation efficiency with good planning, reducing the water used in buildings and operations as much as possible are among the things that ports can do for responsible consumption.

Climate change, floods, tornadoes and hurricanes due to extraordinary meteorological events have reached dimensions that directly affect human life in recent years. Global warming has caused a series of changes in every field from trade to economy, agriculture to tourism. The main cause of global warming is human-induced activities.

The "Kyoto Protocol", an international agreement adopted as an annex to the "United Nations Framework Convention on Climate Change (UNFCCC)", aims to stabilize the concentration of greenhouse gases in the atmosphere at levels that will not have a dangerous impact on the climate. The protocol, adopted in Kyoto, Japan in 1997, entered into force in 2005. The Kyoto Protocol had two periods. The First Commitment Period covered the years 2008-2012 and the Second Commitment Period covered 2013-2020. In the Second Commitment Period, it was agreed that the parties listed

16 Ürkek R., 2019, Jean Baudrillard ve Tüketim Toplumu [Jean Baudrillard and Consumer Society] Sivas Cumhuriyet University, (Master's Thesis)

in Annex B would reduce their emissions by at least 18% by 2020 compared to 1990. The Second Commitment Period of the Kyoto Protocol (Doha Amendment) entered into force on December 31, 2020. The Kyoto Protocol has completed its function with the entry into force of the Paris Agreement, which regulates the post-2020 climate regime.

Türkiye became a party to the Kyoto Protocol in 2009. As Türkiye was not yet a party to the UNFCCC in 1997 when the Kyoto Protocol was adopted, it was not included in the Annex B list of the Protocol, where quantified greenhouse gas emission reduction or limitation obligations are defined. Therefore, Türkiye had no quantified greenhouse gas emission reduction or limitation commitments under the Kyoto Protocol[17]. Many international initiatives to accelerate the transition to renewable and clean energy sources, such as the UN Sustainable Development Goals, the EU Green Deal and the EU Circular Economy Action Plan, have been widely welcomed.

Compensating for the damage caused by the deteriorating natural balance has made it necessary to take a series of measures in every field. One of these areas is the maritime sector. The concept of sustainable environment shows that a new road map is needed at national and international level for ship and port activities, which are the two main components of maritime. One of the biggest contributors to the deterioration of the natural environment is undoubtedly greenhouse gases that cause global warming. The United Nations has set ***"Target 13 Climate Action"*** as the 13th sustainable development goal. Reducing carbon emissions in our ports is one of the top priorities. Carbon emissions in ports come from two main sources. The first one is mainly the emissions generated by port equipment. Today, a significant portion of port equipment (MHC, RTG, etc.) is powered by electricity. However, the exhausts of land vehicles (TIRs, trucks and other land vehicles) coming to the port to receive and deliver cargo affect air quality. The second main source of exhaust emissions at ports is the ships receiving service at the port. The issue of green transformation was examined in detail in TÜRKLİM 2020 Port Sector Report.

Today, emission amounts per ton and per TEU are determined and future targets are set to reduce emissions at our environmentally sensitive ports. In this context, port equipment is converted from diesel fuel to electric and hybrid vehicles to reduce carbon emissions and save fuel. In addition, applications are made to make more use of the sun for heating and lighting needs in our port buildings. In recent years, as higher amounts of renewable energy needs have emerged as a requirement for the implementation of Cold Ironing or On Shore Power Supply systems, some large ports

17 https://www.mfa.gov.tr/united-nations-framework-convention-on-climate-change-_unfccc_-and-the-kyoto-protocol.en.mfa

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have started to work on the construction of wind power plants and solar power plants without a license outside their own facilities. The legislation in force on renewable energy, particularly Energy Market Regulatory Authority (EPDK), allows ports to do so.

In order to draw attention to climate change and find solutions to environmental problems, the Blue Climate Ambassadors project was launched in cooperation with the Port Operators' Association of Türkiye (TÜRKLİM), the Turkish Marine Environment Protection Association (TURMEPA) and Women's International Shipping & Trading Association (WISTA) Türkiye. The project, which covers the seas and coasts of Türkiye, aims to leave a cleaner environment for future generations. The project also aims to draw attention to global climate change. Within the scope of the project, trainings are provided to increase social awareness, meetings are organized, visual and printed publications are made, and cleaning activities are carried out in coastal and marine areas.

One dimension of environmental pollution is marine pollution. In 2020, widespread mucilage in the Marmara Sea as a result of marine pollution increased the sensitivity to marine pollution. 95% of marine pollution is of terrestrial origin. Domestic and industrial wastes in coastal cities reaching the sea through rivers and offshore discharges have disrupted the natural balance. Although our ports have no effect on the formation of marine mucilage, they have played an active role in the fight against mucilage. The 14th sustainable development goal, which includes the sub-goals of reducing marine pollution, protecting and restoring ecosystems, conserving coastal and marine areas within the sustainable development goals, is ***"Goal 14 Life below water"***. Waste water is not discharged into the sea in any of our ports. All necessary measures are taken to prevent solid and liquid wastes generated during operations from being dumped into the sea. Efforts are made to minimize the amount of waste by recycling recyclable wastes. Wastes generated by ships and port operations are classified in hazardous and non-hazardous temporary storage areas in our ports, stored, processed, dewatered and transported by licensed companies to licensed recycling or disposal facilities within the scope of legal permits. Related wastes are disposed of at these facilities, which are also legally licensed. Packaging wastes such as glass, plastic and paper are given to recycling facilities authorized by the municipality.

Our ports are making efforts to obtain "Zero Waste" certificate. "Zero Waste Project" is a waste management project that includes the prevention of waste, more efficient use of resources, prevention or minimization of waste generation by reviewing the causes of waste generation, collection of waste and recovery of waste at its source in case of waste generation within the scope of the regulation published on July 12, 2019. Zero Waste is defined as a waste prevention approach that includes more efficient

use of natural resources, reducing the amount of waste generated, preventing waste, establishing an effective collection system, and recycling waste.[18] Our ports make the necessary efforts to minimize all waste by adhering to the main philosophy of the zero-waste project. All solid wastes (office wastes) generated in port facilities are separated and collected as stipulated by the legislation.

Sea saliva (mucilage) experienced in 2020 as a natural consequence of marine pollution caused by industrial, domestic and agricultural discharges of terrestrial origin in the Marmara Sea has seriously damaged the marine ecosystem. "Declaration of the Marmara Sea and Islands as a Special Environmental Protection Area" was published in the Official Gazette dated 05.11.2021 and numbered 31 650, with the Presidential Decree dated 04.11.2021 and numbered 4 758 regarding the declaration of the Marmara Sea and Islands as a Special Environmental Protection Area due to the resulting mucilage. Although port activities cannot be found among the causes of the mucilage, problems have started to be experienced in the permit approval phase of new port investments.

One of the current issues of aquatic life is to reduce the impact of underwater noise on the life of marine species. Underwater noise especially affects marine mammals such as whales, dolphins and fish, limiting their living conditions. The main source of underwater noise is the construction of marine structures and ship propellers. For this purpose, the International Maritime Organization (IMO) has prepared a new guideline for the reduction of underwater noise from ships in 2023, and improvements are expected in the near term in the underwater noise of ships in port approaches and marine vessels serving around the port such as tugboats and pilot boats.

The protection of terrestrial ecosystems is at least as important as that of marine ecosystems, as recognized by the ***"Goal 15 - Life on Land"*** target. Forest fires, loss of agricultural land due to various reasons, the risk of desertification due to drought, and the shrinking or destruction of the natural habitats of many species also negatively affect human life. Some of our ports participate in tree planting activities within the scope of social responsibility projects and contribute to the growth and rejuvenation of forest areas and rehabilitation of burnt areas.

Ports are gaining importance in global logistics as energy centers as well as freight transportation. The loading and unloading of fossil fuels through terminals plays a major role in the world energy supply, and even if pipelines become widespread, maritime transportation plays a major role due to the remoteness of fossil fuel export

18 https://cygm.csb.gov.tr/yonetmelikler-i-440

centers. Low carbon fuels, especially hydrogen and hydrogen derivatives such as ammonia and methanol, are expected to become widespread between 2030 and 2050, and the role of ports in both the production and transportation of hydrogen and derivative fuels from fossil fuel transportation is expected to increase.

Although ships are the most effective means of transportation in terms of greenhouse gas emissions, they account for 3% of global greenhouse gas emissions, due to having a share of 85-95% in global cargo transportation. The carbon intensity indicator (CII) rules for ships introduced to reduce these emissions will result in the fast unloading/loading of ships in ports and a shift towards ports with energy supply from land, and the port preferences of ships will result in the sustainability of ports that work more effectively.

The United Nations General Assembly adopted the Sustainable Development Goals as a roadmap to be completed by 2030 with the aim of eradicating poverty, protecting our planet and combating inequality and injustice with the participation of a significant number of member states in 2015. The issue has been addressed with the UN Sustainable Development Goals in mind in the TÜRKLİM Sector Report. “Ports are at the heart of sustainable development” is stated in an article published on the official website of UNCTAD[19].

TÜRKLİM member ports have not only set an example for other ports in our country with their economic, social and environmental sustainability practices, but have also been a source of inspiration for other sectors. Our ports will continue to be pioneers for a better future.

19 https://unctad.org/news/why-ports-are-heart-sustainable-development

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Gender Equality Goals in the Maritime Sector

The maritime sector is one of the areas where gender equality is most sharply debated. It is in this sector that the classical roles of men and women are most often compared and debated. So much so that even among women, there are some who believe that the maritime profession, especially the performance of the maritime profession on board ships, should not be a priority for women. The general comments on this issue can be summarized as follows: "Women have difficulty in the maritime sector, this sector requires physical strength, the classical duties and roles of women in society cannot be carried out together with this profession, therefore, it should not be preferred by women".

Yet technology is advancing. Artificial intelligence applications are on the agenda everywhere in our lives. Many professions are in danger of almost disappearing with artificial intelligence applications. Considering all these, physical strength will no longer be a determining factor in any field. It will also be inevitable that the concept of "physical strength", which is the most important factor justifying that women are not suitable for the maritime sector, will no longer be a factor. Likewise, considering the classical social role assigned to women, namely the responsibility for a home, family and children, it is clear that developing technology will also differentiate these roles. Indeed, we can observe that crewless ships and smart equipment to be used in ports are developing at an unbelievable pace. If we take ships as an example, ships with minimum personnel, intensive use of artificial intelligence systems and intermittent or permanent dispatching by a control center on land are targeted. Even now, it is clear that the activities of many ships can be easily carried out with the help of developing technology. Likewise, similar smart equipment applications are becoming increasingly common in ports. In the meantime, taking into account the fact that women have the same education and skills as men, it will not be difficult to achieve

the goal of achieving social equality in the maritime sector when awareness of these developments increases.

It is clear that Türkiye has to adapt to the developing and changing world order. According to various studies, the biggest obstacle to equality between women and men in the maritime sector is considered to be anxiety and learned helplessness. The way to overcome this is, first and foremost, to educate both men and women, especially through training modules to be added to the trainings to be provided in relation to vocational qualifications. Educating and raising the awareness of the male population in the sector will affect the number of working women in direct proportion. Vocational training should therefore be one of the main objectives.

Another goal to ensure gender equality and increase women's orientation towards this sector is to make success stories and sources of inspiration visible. Chambers and non-governmental organizations have the biggest role in providing this visibility and bridge between women and men. It is a fact that inspirational resources where examples from the developing and changing world are shared, success stories and successful practices are highlighted through trainings, events and projects to be organized will eliminate learned helplessness.

In addition, IMO has various programs to develop women's leadership skills or to support women in various areas of the maritime industry in certain regions of the world. WISTA International, in its advisory status at IMO, supports these programs. For example, The Maritime SheEO leadership accelerator program, a joint initiative of WISTA and IMO, aims to enhance women's leadership capabilities so that they can participate in decision-making in maritime transport. IMO sponsors selected women to benefit from the leadership program, which includes training, mentoring and networking opportunities. The program is being successfully implemented.

Another example is the *ArabWomen in Maritime-Biofouling Management Workshop*, which was held by IMO in Jeddah, Saudi Arabia in May 2023, with the penalist and moderator support of WISTA International.

Realizing these practices in Türkiye, selecting exemplary areas and issues, and receiving support from international organizations such as IMO to remove the obstacles to social equality in the sector should be aimed for.

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UNIT 5

AGENDA OF AND SOLUTION PROPOSALS FOR PORT SECTOR

UNIT 5: AGENDA OF AND SOLUTION PROPOSALS FOR PORT SECTOR[1]

As one of the most important infrastructures and logistics bases of the transportation sector, our ports are directly affected by national and international developments, legal regulations, tensions and economic changes. In periods when the economy grows and the barriers to international trade are removed, the volume of cargo at ports increases, while in periods of economic contraction and the emergence of barriers to international trade, the volume of cargo at ports decreases. However, a more important issue than the increase or decrease in cargo volume is the effective and efficient operation of the ports and ensuring that they can make the necessary investments on time in accordance with the economic developments in maritime transportation. This is closely related to the port policy of the country. Policies such as the support and implementation of maritime policies that prioritize the planned development and growth of ports, and the solution-oriented actions of the relevant public institutions to solve the problems faced by the ports and the bottlenecks of the sector, both in the investment and operation phase, make positive contributions to the development of the port sector as well as to the national economy and the competitiveness of the country.

As Port Operators' Association of Türkiye (TÜRKLİM), we actively participated in the work of the Specialized Commission on Maritime Transportation of the 12th Development Plan covering the years 2024-2028. The bottlenecks, problems and solution proposals of the sector, which have been raised on every platform relevant to the port sector, have been put into a report and presented to the Specialized Commission on Maritime Transportation. The problems requiring solutions and solution proposals of the port sector, which have been raised by TÜRKLİM on various platforms for years, and which are generally included in the sector report every year, are summarized in this section of our report. In addition, with the earthquake on 06.02.2023, the agenda and solution proposals on the earthquake preparations of ports and the phenomenon of earthquake resistant ports have been added.

1. Simplification, Updating and Acceleration of Port Legislation:

Agenda item: When we look at the design, project design, feasibility file preparation, planning, environmental impact assessment (EIA) permit, approval, project and construction permit, construction and commissioning processes related to port investments, we see a long, complex and challenging bureaucracy involving local and central units of many Ministries and General Directorates, especially the Ministry

1 Taken from the report submitted by TÜRKLİM to Specialized Commission on Maritime Transportation of 12th Development Plan.

of Transport and Infrastructure, Ministry of Environment, Urbanization and Climate Change, and local municipalities. It is estimated that this process takes a minimum of 2 years and a maximum of 4 years.

Solution proposals: Unfortunately, as in the world, there is no public authority that can perform these tasks by managing the entire process, including master plans, projects, permitting processes, including the use and operation permits of ports and coastal facilities, from a single source. The currently active Ministry of Transport and Infrastructure is only authorized for a certain part of this process. The fact that the fisheries sector is under the responsibility of the Ministry of Agriculture and Forestry, marinas under the Ministry of Culture and Tourism, ports and shipyards under the responsibility of many Ministries and General Directorates, including the Ministry of Transport and Infrastructure, as mentioned above, does not make it possible to institutionalize an integrated management of the problems and to solve the problems from a single source.

For many years, there have been different opinions and suggestions from many sub-organizations and sub-sectors of the maritime sector regarding the establishment of a "Ministry of Maritime Affairs" in Türkiye, similar to the Ministry of Bahriye (or Ministry of Maritime Affairs), which was active in the early years of the Republic. In many countries in the world, there is a single ministry or authority that covers all modes of transportation, including the maritime sector and maritime transportation, and manages the entire process related to them, as well as organizations specific to the maritime sector, which are defined as "Port Management Model" or "Port Authority", in which the relevant ministry is actively involved, central and local administrative units are also involved, and which manage all processes related to ports, as mentioned above. Unfortunately, in Türkiye, as in the world, there is not a similar "Port Management Model" and a "Port Authority" to perform this task, and it is seen that all processes related to the maritime and port sector are carried out in a complex bureaucracy with many heads and taking too long.

In this respect, even though it is foreseen that proposals or evaluations such as the establishment of a Ministry of Maritime Affairs will be made for many more years, the shortest and most feasible implementation for Türkiye would be the establishment of a "Port Authority" to be established on a regional basis within the framework of a "Port Management Model" specific to Türkiye. Thus, with this port authority to be established, it will ensure that the main problems of the ports are solved on a regional scale in accordance with the national port policies and master plans, and will reduce bureaucracy and speed up all processes and remove the obstacles in front of the sector.

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2. Supporting Port Investments, Incentives and Supports to be provided to the Sector:

Agenda item: Ports are the most valuable and strategic logistics centers that determine the competitiveness of countries' foreign trade and industry, as well as improving the investment attractiveness of the country. In parallel with global developments since the pandemic, the share of cargo transported by sea has been increasing in Türkiye. According to the figures announced by Turkish Statistical Institute (TURKSTAT), 96% of import and 80% of export cargoes are transported by sea in terms of tonnage, while more than 60% of both import and export cargoes are transported by sea in terms of USD value. These rates are expected to increase further in the coming years. The superiority of maritime transportation in terms of economy, environmental features and transportation costs is gradually widening compared to other modes of transportation, and the share of maritime transportation is gradually increasing. In this respect, ports, which are the main centers of maritime transportation, are becoming the most strategic logistics centers of countries in global competition. In addition, the increase in the competitiveness of a country's industry and especially its exports strengthen the country's attractiveness to attract investment from abroad. In terms of all these economic developments, the importance of port investments has increased considerably.

When we look at the *"Presidential Decree Amending the Decree on State Aids in Investments"* published in the Official Gazette dated 30.11.2022 and numbered 32 029, we see that a new paragraph has been added to Article 8 of the "Strategic Investments" section of the "Decree on State Aids in Investments" dated 15.06.2012 and numbered 2012/3305. When we look at the new paragraph added to the Decree; "***"(7) Port and storage facility investments of minimum three billion Turkish Liras to be realized in industrial zones may be decided to be supported as strategic investments. For these investments, an incentive certificate is issued without seeking the conditions in the first paragraph and the Commission assessment in the third paragraph."***

This regulation has been made only for the limited number of Industrial Zones in Türkiye, and the port facilities in these zones constitute only a small portion of the total port capacity in Türkiye. In addition, this regulation, which was enacted only for Industrial Zones, leads to unfair competition in the support of port investments that need to be built and developed in terms of capacity outside these zones.

Solution proposals: For the growth of our country's foreign trade, the development of the country's competitiveness, and the growth of industrial and commercial investments in particular it is important that;

a) Port investments are recognized as ***"Strategic Investments"*** and that all state supports and incentives currently provided to strategic investments, including interest support and grants, are also provided to port investments.
b) Port investments are expensive investments with a long payback period for the capital invested. For this reason, the demand for port investments remains limited and the biggest negative impact of this is on the Turkish industry. In order to encourage port investments, investment and operation incentives and supports should be put into practice.
c) Port services should be considered as a ***"Service Export"*** and all legal supports and incentives given to exporters should also be utilized by our port enterprises.
d) Our coasts are under the occupation of dense and irregular construction. In coastal areas suitable for port investments, it is almost impossible to make port investments with sea filling if the backland ownership does not belong to the investor. Regulations should be made to facilitate and accelerate port investments on the areas gained by filling in the coastal and marine areas on the seaward side of the coastal edge line and in the possession and disposal of the state.
e) It is important to support green transformation, especially renewable energy investments, Cold-Ironing/Onshore Power Supply, digitalization and technological investments within the framework of ***"Special Investment Incentives"*** within the scope of strategic investments. Again, within the framework of this development and transformation, there is an urgent and rapid need to simplify and update the existing port legislation in line with the green transformation targets, and to address the legislation and legal processes related to green transformation in accordance with global developments within a special incentive, grant and support system that will support these investments.

3. Extension of Contract Periods to Pave the Way for Investments:

Agenda item: Acceleration, support and facilitation of port investments, which take a minimum of 2-4 years when the planning, project, permit and construction periods as well as the commissioning period of the constructed port facility are taken into consideration, are extremely important for the timely realization of the port capacity that our country needs. In order to make port investments attractive, it has become necessary to extend the existing use and/or operation contracts of the ports already in operation well before the expiry of the relevant contract periods. Among both privatized and private ports, it is not economically feasible for ports with shorter contract periods (less than 10 years) to make additional investments within the remaining period. Waiting for the end of the current contract periods of the relevant ports to make investments will lead to the inability to make the port capacity increases

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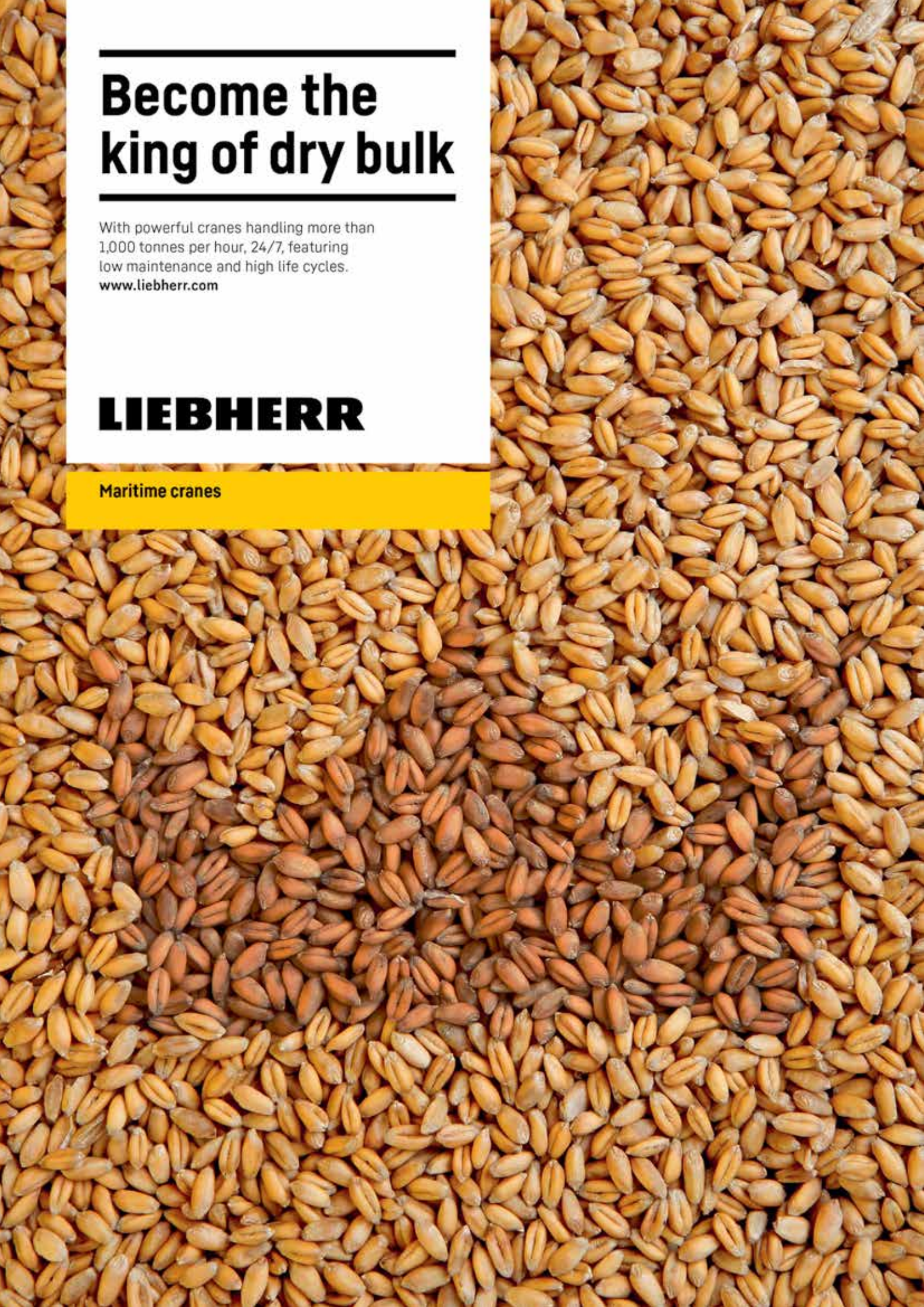

that our country needs in a timely manner, so that the bottlenecks and delays to be experienced in the ports in the future will increase the cost of our country's foreign trade, as well as the competitiveness of our country, our industry and our exports will be seriously adversely affected, and ultimately this situation will have a negative impact on Türkiye's development and progress.

When we look at the ports in Türkiye, two of them (Turkish State Railways [TCDD] Haydarpaşa Port and TCDD İzmir Port) are currently operated by the public sector. Of the 192 ports in operation in total, 17 ports were privatized from TCDD and 5 ports were privatized from Turkish Maritime Enterprise (TDI) and by granting/transferring operating rights within the framework of the provisions of Law No. 4046. In addition, when we include the port facilities constructed by the private sector and tendered by the Republic of Türkiye Ministry of Transport and Infrastructure with the Build-Operate-Transfer (BOT) model, approximately 13% of the existing port capacities in Türkiye are the ports that have been privatized from the public sector, while 87% are ports constructed and operated entirely by the private sector. When we look at the situation from this point of view and consider that the private sector is also the one investing in and operating the privatized ports, we can see that the private sector has played an extremely important role in the port sector in Türkiye. It is foreseen that this situation will continue in this way in the future.

The usage agreements valid for our private ports are signed between the relevant private port enterprises and the Directorate General of National Property within the framework of the *"Law and Regulation on the Administration of Treasury Immovables"* in force, and the process is managed within the framework of the Communiqués published by Directorate General of National Property on the subject and currently in force.

An example of the extension of use contracts in Türkiye is the arrangement made by the Turkish Grand National Assembly (TBMM) in 2016 for the shipyard sector in Tuzla. As a coastal facility, our shipyards also have usage contracts signed with the Directorate General of National Property. With the Provisional Article 20 added to the *"Law on the Evaluation of Immovable Properties Owned by the Treasury and Amendments to the Value Added Tax Law"* numbered 4706, which entered into force after being published in the Official Gazette dated November 22, 2016 and numbered 29896, the use contracts of our shipyards were extended to 49 years, 18 years before the end of the remaining lease period. Provisional Article 20 added to the relevant law is below;

"Provisional Article 20 - (Additional: 31/10/2016-KHK-678/29 art.; Adopted as it is: ½/2018-7071/28 art.) Before the effective date of this article, shipyards may be

established on immovable properties under the private ownership of the Treasury or under the provision and disposal of the State, In the event that an application is made to the Ministry by the investors in favor of whom an easement right has been established and/or an occupancy permit has been granted for the purpose of investing in boat manufacturing and boatyard (excluding yacht boatyard) and the conditions specified in the fifth paragraph of the additional article 2 of this Law are fulfilled, an independent and permanent easement right for a period of forty-nine years shall be established and/or an occupancy permit shall be granted in favor of these investors by issuing a new contract, valid as of the effective date of this article, by taking a one-thousandth share from the total annual revenue without taking the easement right and/or occupancy permit fee. After the completion of the investment, the easement right and/or occupancy permit may be transferred with the consent of the Ministry of Transport, Maritime Affairs and Communications and the permission of the Ministry. The adequate pay collected from the investors within the scope of the fifth paragraph of the additional article 2 of this Law for the period after 18/4/2013 shall be deducted from the revenue shares to be received."

With this arrangement made in the TBMM, the adequate pay collected from the shipyards for the period after 18.04.2013 were deducted from the revenue shares to be collected after the relevant amendment, enabling our shipyards to better see their future, make better plans and increase their creditworthiness, and with these new advantages, shipyard investments in Türkiye increased rapidly. The successful export performance of the shipyard sector, which was clustered in the Yalova-Altınova region after Tuzla, has a great share in the successful export performance of the sector today.

As mentioned above, various arrangements are being made in the TBMM regarding the extension of the term of the ports that have already been privatized through the transfer of operating rights for a certain period of time. It is also of utmost importance to extend the usage contracts of our private ports, which constitute 87% of the port capacity in Türkiye and have signed usage contracts with the National Property. One of the biggest obstacles to the planning and realization of these investments in a way that will allow the development and growth of our private ports is that the duration of the use agreements signed between the investors and the General Directorate of National Property is getting shorter and shorter and there is no regulation and/or circular to give priority to easement rights or usage permits to these investors by considering the rights of the private sector port investors in the area where they request and the rights in the backyard together.

The General Communiqué on National Real Property (Sequence No: 373) published in the Official Gazette dated 08.10.2016 and numbered 29 851 regulates the procedures

and principles regarding the easement rights and/or use permits to be granted in favor of investors for the purpose of constructing new marinas and new piers, berths and docks that will provide mooring and shelter services to yachts and private boats on immovable properties owned by the Treasury and/or on lands under the exclusive ownership of the State.

When we look at Article 6 of the relevant Communiqué titled "Tender procedure";

6.1. Tender procedures for the establishment of easement rights and/or granting of occupancy permits on Treasury immovables by the Ministry shall be conducted by bargaining procedure in accordance with subparagraph (g) of the first paragraph of Article 51 of the Law by making the announcements specified in Article 17 of the Law, except for the exceptions in the second paragraph.
6.2. In case there are Treasury immovable properties in the back field of the areas requested for the construction of a facility, which are owned by the investor, which are actually in use based on a legal right, or which were previously leased to this investor by the Ministry, or for which an easement right was established or an occupancy permit was granted by the Ministry, and if it is determined that these areas have plan and project integrity with the facility requested to be constructed and must be used together, an easement right may be directly established and/or an occupancy permit may be granted to the requesting investor without making an announcement according to Article 17 of the Law." is stated.

With the Communiqué No. 373 published by the General Directorate of National Property, the procedures for granting easement rights and/or occupancy permits to the requesting investor directly without making an announcement in accordance with Article 17 of the Law have also been facilitated in the event that there is Treasury real estate in the back field of the requested areas that is owned by the requesting investor, is actually in use based on a legal right, or has been leased or an easement right has been established or an occupancy permit has been granted to this investor by the Ministry before, and it is determined that these areas have plan and project integrity with the facility requested to be constructed and that it is mandatory to be used together.

Solution proposals: As it is known, regulations have been made in the Turkish Grand National Assembly regarding the extension of the operation periods of the ports that have already been privatized.

If we look at the issue in terms of private ports; in port investments to be made on the immovable properties under the private ownership of the Treasury and/or the places

under the provision and disposition of the State, the issue of granting easement rights or usage permits without any announcement, or that the relevant user will be prioritized in case there are treasury immovable properties in the back area of the requested areas that are in the ownership of the investor, are actually in use based on a legal right, or have been previously leased to this investor by the Ministry or easement rights have been established or usage permits have been granted by the Ministry, should also be regulated in terms of private sector ports. In this way, it may be possible to resolve the uncertainty about whether the period will be extended long before the end of the period of use and thus ensure the continuity of port investments. For this purpose, a law or legislative arrangement can be made in the Turkish Grand National Assembly for the port sector, as was done for the shipyard sector, and in addition to this arrangement, the process can be regulated more clearly and in the public interest by a Communiqué to be issued by the National Property.

When we look at the situation of the private ports operating in Türkiye, it is seen that almost all of the private ports have the ownership of the land immediately behind the pier or port facility that has been leased or granted easement rights or usage permits. This situation, as mentioned above, in addition to a law or legislative regulation on the port sector in the Turkish Grand National Assembly, a Communiqué to be prepared by the National Property could solve the problem of extending the usage periods of almost all private ports in a short period of time, thus providing a convenience and advantage for ports to start new investments today without waiting for the end of the term of their existing usage contracts.

4. Regulation of Port Services and Port Tariffs within the Market Mechanism:

Agenda item: In recent years, interventions in the tariffs for services provided to ships and cargoes at ports have become more frequent, tariffs have been reduced without taking into account inflation, costs and other facts that determine the tariffs, and Turkish ports have been rendered much cheaper and uncompetitive, unlike the tariffs in the global port market. Since the tariffs determined are far below the tariffs applied in similar countries in our immediate vicinity and in ports in different parts of the world, it is seen that our ports have suffered income losses and damages, and Turkish ports have been forced to offer extremely low tariffs compared to the world ports.

On the other hand, when we look at the issue from a different perspective, it is seen that in the world, port infrastructures and other basic investments are predominantly made by the public sector within the port authority model, while port companies, as operators, only complete the superstructures & equipment and operate the relevant ports during the periods given to them within the legal framework. In Türkiye, on the

other hand, it is clear that all infrastructure and superstructures of ports are mainly constructed by private port investors, and despite this situation, they are forced to work with tariffs below the world ports. This situation forces our ports into unfair competition in the global port market and our ports suffer from revenue losses. An important condition for the attractiveness of port investments, which require large-scale investment amounts and have a very long feasibility payback period, is that the tariffs of ports should be liberalized within a free and properly functioning market system and in accordance with the global port market, intervention in tariffs should be avoided as much as possible, and port tariffs should be determined by the new ports themselves.

An example of this is the "Communiqué on Services Provided to Ships in Coastal Facilities" published in the Official Gazette dated 11.12.2020 and numbered 31 331. When we look at Article 5 titled "General provisions" of this Communiqué, which is to determine the procedures and principles regarding the determination and implementation of the base or ceiling fees of the service items provided to ships in coastal facilities,

5.1. The service items provided to the vessels are determined by the shore facilities. 5.2 In the event that issues preventing competition are detected in the tariffs applied in the coastal facilities within the scope of this Communiqué, ceiling and base prices may be determined with the approval of the Ministerial Authority by taking the necessary regulatory and supervisory measures by the Administration regarding the service items and service tariffs provided to the ships, limited to ensuring a fair and sustainable competitive environment." is stated.

Article 6 of the Communiqué titled *"Responsibilities of the coastal facility"* states; *"(1) The coastal facility shall publish the tariff list including the service items provided to the ships and the scope of the services on its corporate website."*

As can be seen from the above Communiqué, instead of intervening in the tariffs in the market, it would be more appropriate to examine the high tariff complaints on the basis of the coastal facility subject to the complaint. In addition, in Türkiye, investigations can be easily carried out on a port-by-port basis through both the relevant Ministry and the Competition Authority, administrative fines or anti-competitive fines can be imposed, and the relevant tariffs can be brought in line with the market. Existing legislation grants the necessary powers to the relevant administrations. As port infrastructures develop, our ports operate in accordance with the world ports they compete with, and tariffs function as they should according to the needs of the market. Every intervention harms the sector and hinders the ability to invest.

Solution proposals: In addition to the tariffs for services provided to ships and cargoes at ports, warehousing, control, inspection, etc. by the Ministry of Transport and Infrastructure and the Ministry of Trade, Directorate General of Customs, it would be the healthiest and most appropriate model for global market conditions if the tariffs that can be determined by different institutions and organizations at ports are determined by the ports themselves based on notifications to be made in advance to the relevant ministries, institutions and organizations, and then published on the port websites. In the audits and controls to be carried out by the administration regarding the tariffs, the tariffs determined by the ports themselves and announced on their websites will facilitate the control and supervision of the implementation of these tariffs, and thus, the port tariffs applied by the ports themselves to their customers will provide the legal basis for the port market to operate under free market conditions.

5. Preparation of Port Management Model and Legal Framework:

Agenda item: "Port Management Model" or "Port Authority" is defined by national laws and regulations in many developed countries, especially in the EU, and is an official organization whose purpose is the administration and management of port infrastructure and the coordination and control of the activities of different operators within the port or port system. In general, they are composed of central and local administrations. The port authority may include several different units or may be responsible for more than one port.

When we look at the duties of port authorities; public safety and security, compliance with environmental, health and maritime conventions and laws, port site selection and investment planning, all kinds of permits, approvals and project design authorities, supervision of maritime operations and marketing and promotion activities of the port are among them. The duties of port authorities are generally categorized under 3 headings: "landowner", "regulator" and "operator". While the regulatory duties of port authorities consist of enforcing laws and regulations, ensuring safety & security, and setting policies, the operator duties consist of duties related to the services provided by ports. Ports, port authorities have duties related to infrastructure, superstructure, expansion, capacity increase, projects, permits, approvals and port operations as port landowner.

In this respect, it is seen that the Port Authority, which emerged with the implementation of the Port Management Model, acts on behalf of the public, develops port projects as the owner of the land, plans, designs and constructs port projects by financing all infrastructures, reserves and plans the expansion areas of the port, and transfers the coastal facilities on a terminal basis within the port to private investors and port

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companies or operators (concession) to develop their superstructures and operate them within specified periods.

As an example, the Piraeus Port Authority in Greece gave the container terminal of the port of Piraeus to COSCO, a Chinese state-owned company, to operate for 35 years in return for a commitment to invest 707 million dollars and triple the cargo capacity of the port. These transfers do not involve a sale price for the port, but a transfer of operation on condition of investment. This model is already applied to many countries in the EU.

In Türkiye, public ports owned by TDI and TCDD, which account for 13% of the existing capacity, were transferred to private investors through operating rights at a sale price, while all infrastructure and superstructures of private ports, which account for 87% of the port capacity, were built by the private sector. In this respect, the Port Management or Port Authority, as practiced around the world, is not suitable for the current structure of the port sector in Türkiye in terms of powers such as public safety and security, compliance with environmental, health and maritime conventions and laws, port site selection and investment planning, all kinds of permits, approvals and project design authorities, supervision of maritime operations and marketing and promotion activities of the port. Unlike the rest of the world, the vast majority of ports are currently built and operated by the private sector. In this respect, the Port Management Model should be designed differently in accordance with the current situation of the sector in Türkiye, where the state does not contribute to port infrastructures.

When we look at the issue from this point of view, it is seen that the port management model in Türkiye, especially in the gulf regions (İskenderun, Kocaeli, Gemlik, Aliağa, etc.) where the ports are concentrated, should be structured in such a way as to include all of the port investments, planning, project design, permission and approval procedures, including the preparation of zoning plans, nationalization and EIA permits when necessary, and to have a legal status to perform these tasks.

In Türkiye, the Industrial Zones legislation of the Ministry of Industry and Technology of the Republic of Türkiye can provide a solution with considerable speed and ease in providing planned and legally approved industrial parcels and investment areas. These applications, which also include nationalization duties in terms of fast and strategic country targets, can also contribute to the expropriation and project design of existing backyards, public areas and lands suitable for use, especially in port areas, where expansion opportunities on land are increasingly limited and surrounded by urban areas.

Solution proposals: As mentioned above, joint studies and research should be carried out with the participation of many different institutions (public/private sector) for the Port Authority Model planned to be established in Türkiye. Since port infrastructure and other investments in Türkiye are made with private sector capital, it is imperative that the Port Authority envisaged to be implemented is developed within the framework of a "Special Port Authority System" and in a way that is unique to Türkiye. Again, the implementation of the port authority system may require the competent public authorities working in the ports to transfer some of their powers to the port authority. Therefore, from a holistic point of view, it becomes imperative that many ministries and institutions related to the port sector should be subject to a legal legislation in a way to hand over their powers and duties. In particular, the port management model may have a very effective role in ensuring the development of ports in line with the 2050 targets of our country and paving the way for new port investments.

6. Construction of Railway Connections to Ports and arrangement of Port Backyards

Agenda item: The existing backyards, public areas and lands suitable for use in the port areas, which are currently surrounded by urban areas and whose expansion opportunities on land are increasingly limited, especially in the gulf regions (İskenderun, Kocaeli, Gemlik, Aliağa, etc.) where ports are concentrated, will be projected and expropriated today in accordance with the 2050 targets of the sector in accordance with the Ports and Logistics Master Plan to be updated and re-prepared, and used for the needs of intermodal and combined transportation in accordance with the public interest. It is important to create railway, highway transfer and logistics centers in these backyards, and to allocate them to the port facilities in need and to use them in line with the growth targets of the sector. In this respect, the planning needs of industrial and production areas such as industrial centers and regions, organized industrial zones (OIZ), industrial zones, qualified industrial zones, free zones, etc., for which development plans are made for the same period, and port areas should be handled holistically and together, and thus, it would be beneficial to prepare logistics and port projects today by jointly developing plans in line with Türkiye's 2050 targets.

Solution proposals: One of the conditions for increasing the efficiency and productivity of existing ports is to strengthen their connections with the hinterland. Today, a significant portion of our ports are located in urban settlements. New highway and railway lines should be constructed by nationalization if necessary for the main highway arteries and railway connections that will ensure uninterrupted cargo flow to the ports.

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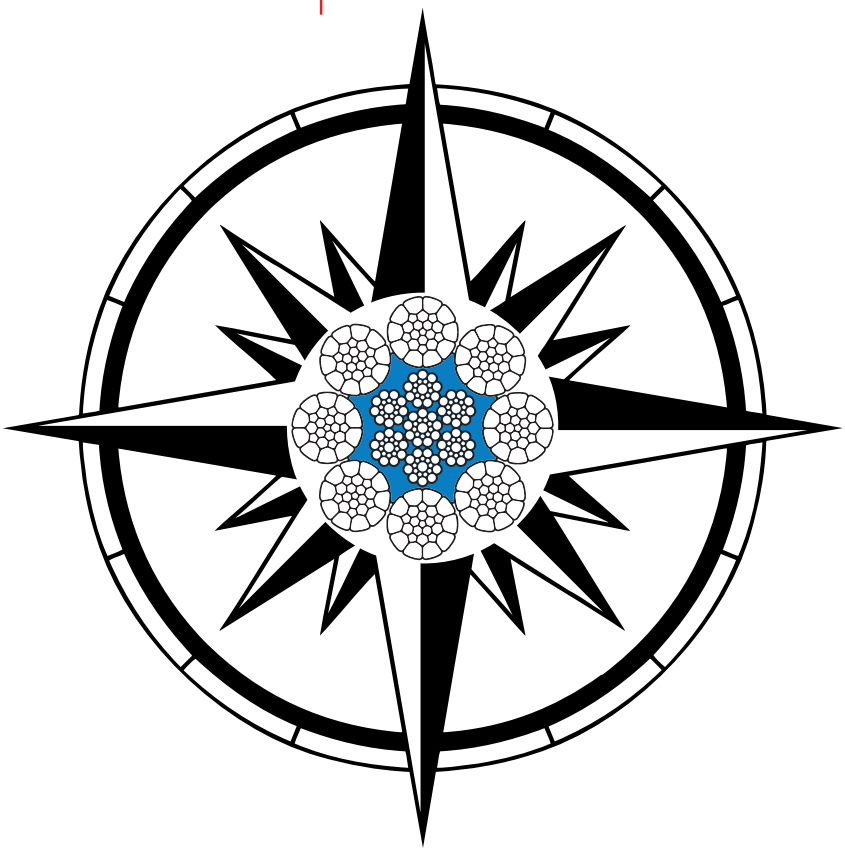

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In order to reach Türkiye's 2050 targets and to ensure the use of the existing ports and the backyards of the ports planned to be built in the future for the future growth needs of the port sector and logistics for the benefit of the country and the public, institutionalizations such as port investment or industrial zones to be established within the framework of the Port Management Model mentioned above will have an effective role, as well as the acceptance of ports as strategic investments and the state support of port investments can pave the way for this process. Within the framework of Ports Master Plans and similar plans to be prepared, fast and effective expropriations will pave the way for the planning and projecting of these areas for the future targets of the port and logistics sector. Thus, in line with the industrialization and growth targets of our country, both the modernization and capacity increases of existing ports will be paved the way, and all obstacles to the future growth targets of both existing and new ports will be overcome by reserving these back areas and planning them in accordance with the needs of the sector.

7. Making Ports Earthquake Resistant:

Agenda item: The fact that Türkiye is an earthquake country is, unfortunately, the biggest problem of this country, which is only brought to the agenda after major earthquake disasters and then disappears from the agenda after a certain period of time. About 24 years after the 1999 Kocaeli earthquake Kahramanmaraş was hit by two major earthquakes, and the suffering, losses and destruction caused by these two major earthquakes brought the disasters that occur with earthquakes back to the agenda. It is important to prepare Türkiye for earthquakes and reduce the risk through long-term planning, construction and studies by making all structures, including living spaces, transportation modes, industrial centers and ports, earthquake-resistant. It is important to learn important lessons if earthquakes in countries such as Japan, Chile, Indonesia and the United States where they are more severe no longer cause the consequences and disasters that they do in Türkiye.

Of the 206 coastal and port facilities operating in Türkiye; 149 (72%) are located in the 1st Degree Earthquake Zone, 7 (8%) in the 2nd Degree Earthquake Zone, 26 (13%) in the 3rd Degree Earthquake Zone and 14 (7%) in the 4th Degree Earthquake Zone.

Moreover, within the scope of the compulsory earthquake insurance regulated by the Turkish Catastrophe Insurance Pool (DASK), there is no separate compulsory earthquake insurance for ports. At this point, it would be appropriate to mention the deficiency in our legislation. Turkish Commercial Code No. 6102 regulating marine insurance and Insurance Law No. 5684 do not include any regulation on port insurance. In Japan, infrastructure assets owned and managed by Private and Semi-Public Companies such as Railways, Airports and Ports are partially subsidized by

the central government, while Private Insurance covers part of the risk. Securities and bonds suitable for the insurance sector have also been developed in the USA and Japan. The most common of these derivatives and securities are catastrophe bonds, which are traded in organized and unorganized (over-the-counter) markets as options, swaps, futures & bonds and issued by insurance or reinsurance companies.

As we have seen from the recent earthquakes centered in Kahramanmaraş, ports play an extremely important role in the first 72 hours after an earthquake. Especially when we foresee the expected Istanbul and Marmara earthquake, the first mode of transportation to be used during the period, when the main and secondary roads and railways reaching the city will be damaged and until they become operational again, will be maritime transportation. All marine vessels (ships, passenger ferries, RO-RO ships, fishing boats, passenger engines, all private boats, etc.) will be vitally important actors in the disaster logistics until the life returns to normal. In this respect, all operable ports, piers, fishing shelters, marinas and even private piers can be used. Again, in addition to the transportation of all expert teams, equipment and vehicles, especially debris removal personnel, to the disaster area, maritime transportation will be the priority in the transportation of materials such as clothing, food, health supplies, tents, living containers, etc. Ports will be used in the organization of hospitals and life ships, in the transfer of wounded and people. Ports can be used as storage, communication, logistics management centers with their facilities.

Solution proposals: What are recommended to be done in terms of preparing ports for earthquakes or making ports earthquake-resistant are as follows:

a) Coastal structures and harbors shall be constructed in accordance with the earthquake specifications and technical principles in force. “Investigation/ Examination” must be carried out by independent engineering firms authorized by the relevant ministry.

b) Risky coastal structures that need to be reinforced according to the results of the survey reports and the “Reinforcement” projects of the ports, EIA, zoning plan arrangement, leasing, plan and project approval, license and other procedures should be completed and implemented in an accelerated process with a separate regulation.

c) Carrying out this process will also ensure that the sector is aware of the current state of the sector on the basis of regions/basins or gulfs. This situation also makes it appropriate to implement a “Port Management Model” in line with the port management targets and expectations of our country.

d) With the reinforcement projects to be carried out together with this process, in the regions in need of Accelearated EIA, zoning plan arrangement, leasing, planning and project approval, license and other procedures should be completed. Thus, it is in the interest of our country to start the preparations of port capacities for 2050.

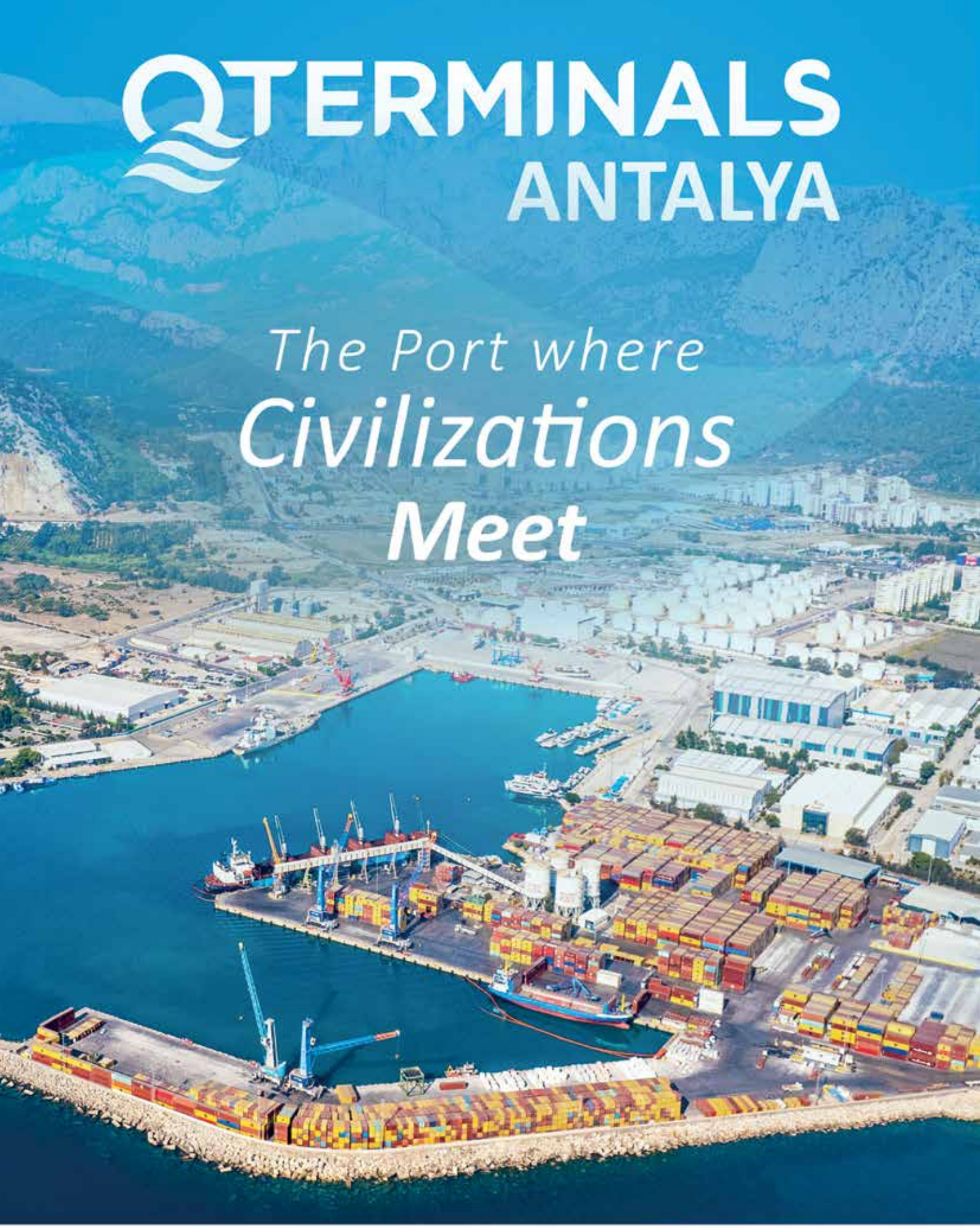
e) It would be appropriate to revise the Special Environmental Protection Area regulation for the Marmara Sea and the Islands in a way that would not hinder the implementation of port reinforcement and capacity increase projects.

f) Coastal facilities and port investments shall be included within the scope of "Strategic Investment" and it is imperative to pave the way for benefiting from all kinds of state incentives and supports. The regulation for Industrial Zones is an example of this issue, which is mentioned in Article 2 (Supporting Port Investments, Incentives and Supports to be provided to the Sector).

g) It is important to support and pave the way for the process by giving additional time to the "Use Periods" in Private ports and "Operation Periods" in already Privatized ports to enable them to see the way ahead before these works start to make the ports earthquake resistant, which is mentioned in Article 3 (Extension of Contract Periods to Pave the Way for Investments).

h) Section of Turkish Commercial Code No. 6102 regulating Marine Insurance and also Insurance Law No. 5684 should be amended to include new regulations on port insurance. It is also important to support the process of managing insurance risks by the public by developing securities and bonds suitable for the insurance sector, similar to Japan and the USA, which have a very high earthquake risk.

i) It is deemed necessary for all these investment plans be carried out within the framework of the "Holistic Approach" of all relevant institutions, including the Ministry of Transportation and Infrastructure, the Ministry of Environment, Urbanization and Climate Change, the Ministry of Industry and Technology, the Ministry of Treasury and Finance, and to make legal arrangements in accordance with this process.



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QTERMINALS
ANTALYA

OUR MEMBERS

AKÇANSA AMBARLI PORT

PORT FEATURES	
Operator	Akçansa Çimento San. ve Tic. A.Ş.
Coordinates	40° 58′ N - 28° 41′ E
Handled cargo	General Cargo, Bulk Cargo, Liquid Cargo, Container, Ro-Ro
Handling Capacity	4.000.000 ton - 45.000 TEU - 450.000 veh.
Storage area	50.205 m^2
Indoor warehouse	3.832 m^2
Bonded area	41.643 m^2
Non-bonded area	48.100 m^2
Total area	89.750 m^2

Berth-Pier Dimensions	
Length	930 m
Maximum draft	13,0 m
Ro-Ro ramp	2

Equipment	Quantity	Capacity (ton)
Sennebogen 835	2	8
Sennebogen 870	1	12
Liebherr A934 C	1	8
Fantuzzi MHC 200	1	100
Gotwald HMK 260	1	80
Liebherr LHM 500	1	140
Liebherr LHM 320	1	100

CONTACT DETAILS	
Contact person	Emre Akıncı
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AKÇANSA ÇANAKKALE PORT

PORT FEATURES	
Operator	Akçansa Çimento San. ve Tic. A.Ş.
Coordinates	39° 52' 48" N - 26° 09' 15" E
Handled cargo	General Cargo, Bulk Cargo
Handling Capacity (Ton/year)	4.500.000
Warehouse area	10.000 m^2
Bonded area	-
Outdoor area	14.400 m^2

Berth-Pier Dimensions	
Length	895 m
Maximum draft	13.5 m

Equipment	Quantity	Capacity (ton)
Sennebogen	1	10
Sennebogen	1	10
Siwertell ship loader	1	800 t/h
PH ship loader	1	500 t/h

CONTACT DETAILS	
Contact person	Sinan Inaç
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AKSA ACRYLIC CHEMICAL INDUSTRY INC.

PORT FEATURES

Operator	Aksa Acrylic Chemical Industry Inc.
Coordinates	40° 41′ 10″ N – 29° 24′ 30″ E
Handled cargo	Bulk Liquid and General Cargo

Handling Capacity

Liquid cargo (ton/year)	350.000
General cargo (ton/year)	600.000
Total port area	21.500 m^2
Parking area	1.000 m^2
Equipment parking area	1.000 m^2

Berth-Pier Dimensions

Liquid berthing length	36 m
General berthing length	175 m
Maxsimum draft	8,5 m

CONTACT DETAILS

Contact person	Bülent BİNGÖL
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Website	www.aksa.com

AK-TAŞ TERMINAL

PORT FEATURES	
Operator	Ak-Taş Dış Ticaret A.Ş.
Coordinates	29° 51′ N - 40° 42′ E
Handled cargo	Liquid Bulk

Handling Capacity	
Liquid bulk (ton/year)	100,000
Total port area	7.900 m^2
Indoor warehouse	38.000 m^2

Berth-Pier Dimensions	
Length	90 m
Maximum draft	8 m

Equipment	Quantity	Capacity (ton)
Forklift	2	3 ton

CONTACT DETAILS	
Contact person	Dinçer DEMİREL
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Website	www.aktasdis.com

ALTAŞ AMBARLI PORT FACILITIES

PORT FEATURES

Operator	Altaş Ambarlı Port Facilities Trade Co. Inc.
Coordinates	40° 58′ N – 28° 41′ E
Ports	Kumport, Akçansa, Mardaş, Marport
Handled cargo	Container, General Cargo, Bulk Cargo, Ro-Ro
Total port area	2.000.000 m^2

Berth-Pier Dimensions

Length	6.000 m
Minimum depth	7 m
Maximum draft	17 m

CONTACT DETAILS

Contact person	Gürdal KARADENİZ
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Website	www.altasliman.com

ALTINTEL PORT AND TERMINAL

PORT FEATURES

Operator	Altıntel Port and Terminal Enterprises
Coordinates	40° 46″ 06′ N - 29° 32″ 438′ E
Handled cargo	Liquid Bulk

Handling Capacity

Liquid bulk (ton/year)	1.000.000
Total port area	9.289 m^2
Customs area (outdoor)	9.289 m^2
Warehouse capacity	82.500 m^2 - Storage tanks capacity

Berth-Pier Dimensions

Length	237 m
Maximum draft	13.5 m

CONTACT DETAILS

Contact person	Kıvanç BOZTEPE
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Website	www.altintel.com.tr

ANADOLUPORT

PORT FEATURES

Operator	Anadoluport Pendik Kumcular Liman İşletmeleri
Coordinates	40° 51' 14.39" N - 29° 16' 3,36" E
Handled cargo	General Cargo, Dry Bulk Cargo, Ro-Ro

Handling Capacity

Dry bulk cargo (ton/year)	6.000.000
Vehicle/year	50.000
Total port area (m^2)	25.000
Bonded area (outdoor) (m^2)	25.000

Berth-Pier Dimensions	Length	Maximum Draft
Pier (West)	202 m	11,5 m
Pier (East)	222 m	11,5 m
Berth	205 m	8,5 m
Ro-Ro Ramp -1	Width 22 m	8,5 m
Ro-Ro Ramp -2	Width 25 m	8,5 m
Ro-Ro Ramp -3	Width 34 m	8,5 m

Equipment	Quantity	Capacity (ton)
Port crane	4	8-100
Forklift	3	3-16
Loader	2	7
Mini loader	3	1,5-20

CONTACT DETAILS

Related Person	Nabi Erberk
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Website	www.anadoluport.com.tr

PORT OF ASBAŞ - ANTALYA FREE ZONE

PORT FEATURES	
Operator	Asbaş - Antalya Serbest Bölge Kurucu ve İşleticisi A.Ş.
Coordinates	36° 50′ 18″ N - 30° 36′ 20″ E
Handled cargo	General Cargo, Bulk, Container

Handling Capacity (ton/year)	1.300.000
Warehouse area	-
Bonded area	-
Outdoor area	-
Total port area	23.097 m^2

Berth-Pier Dimensions	
Length	342 m
Maximum draft	9,50 m
Equipment	Quantity

CONTACT DETAILS	
Contact person	Volkan KURT
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Fax	+90(242) 259 09 32
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Website	www.asbas.com.tr

ASSAN LİMAN İŞLETMELERİ A.Ş.

ASSANPORT

PORT FEATURES

Operator	Assan Port Operator Inc.
Coordinates	36° 41' 06" N - 36° 11' 40" E
Handled cargo	Container, General Cargo, Project Cargo

Handling Capacity

Container (TEU/year)	250.000
General cargo (ton/year)	1.000.000
Total port area	225.000 m^2
Parking area	2.240 m^2

Berth-Pier Dimensions

Length	2 x 341 m + 30 m Dolphin
Maximum draft	14,8 m
Equipment	2 x HMK 7608
	2 x HMK 6407
	9 x Full Container Handler (Stacker)
	2 x Empty Container Handler (Stacker)

CONTACT DETAILS

Contact person	Toros Tolga KELEŞOĞLU
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E-mail	info@assanport.com
Website	www.assanport.com

ASYAPORT

asyaport

PORT FEATURES	
Operator	Asyaport Port Inc.
Coordinates	40° 54′ 00″ N - 27° 28′ 00″ E
Handled cargo	Container, General Cargo, Bulk Cargo, Ro-Ro

Handling Capacity	
Container (TEU/year)	2.500.000
Total port area	300.000 m^2
Land terminal	210.000 m^2

Berth-Pier Dimensions	
Length	2.010 m
Maximum draft	18 m

Equipment	Quantity
STS	11
SCR	4
RTG	30
TT	75
RST	4
ECH	5

CONTACT DETAILS	
Contact person	Besim DÖNMEZ
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Fax	+90(282) 273 19 29
E-mail	bdonmez@asyaport.com

ATAKAŞ PORT

PORT FEATURES

Operator	Atakaş Liman İşletmeciliği ve Tic. A.Ş.
Coordinates	36° 41′ 57″ N - 36° 11′ 03″ E
Handled cargo	Container, General Cargo, Dry Bulk Cargo, Project Cargo

Handling Capacity

Container (TEU/year)	
General cargo (ton/year)	2.000.000
Bulk cargo (ton/year)	8.000.000

Total Port area	Outdoor area	Warehouse
Bonded area (m^2)	168.520 m^2	2.200 m^2
Non-bonded area (m^2)	10.000 m^2	22.500 m^2

		Length (m)	Width (m)	Max. Draft (m)
Berth-Pier dimensions	Pier	716	35	(9 min, 27 max)

Equipment	Remarks	Quantity	Capacity (ton)
Crane	Gottwald HMK 7608	2	140
	Gottwald HSK 7528	2	125
	Sennebogen 895 EQ	1	60
	Sennebogen 880 EQ	3	40
Other equipment	Excavator	6	22-32
	Loader	11	11-25
	Stacker	3	46
	Forklift	14	3-32

	Meter	Line
Railway (connection line)	1.500 m	3

CONTACT DETAILS

Contact person	Özcan TOLUK
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Website	www.atakas.com.tr

AUTOPORT TERMINAL OPERATORS S.A.

PORT FEATURES

Operator	Autoport Terminal Operators S.A.
Coordinates	40° 43′ 22″ N - 029° 52′ 39 E
Handled cargo	Ro-Ro, General Cargo, Container

Handling Capacity

Ro-Ro (vehicle/year)	450.000
General cargo (ton/year)	2.000.000
Total port area	243.351,01 m^2
Temporary storage area outdoor	164.083,80 m^2
Temporary storage area indoor	6.020 m^2
Free storage area outdoor	62.361,21 m^2
Type A bonded warehouse (outdoor)	5.486 m^2
Type A bonded warehouse (indoor)	5.400 m^2

Berth-Pier Dimensions

Length	Berth No 1: 303 m / Berth No 2: 328 m
Berth 1 maximum draft	10,00 m (considering 200 m LOA vessel)
Berth 2 maximum draft	12,00 m (considering 200 m LOA vessel)

Equipment	Quantity	Capacity (ton)
MHC	2	80
Crane	2	140/60
Sennebogen	1	7
RMG	1	10
Forklift	6	16/12/8
Terminal tractor	2	100/150

CONTACT DETAILS

Contact person	Bilgin İŞLER
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Website	www.autoport.com.tr

AVES (SAVKA) DEPOCULUK VE ANTREPOCULUK A.Ş.

PORT FEATURES

Operator	Savka Platform ve Boru Hatları A.Ş.
Coordinates	36° 46′ 07″ N - 34° 43′ 49″ E
Handled cargo	Fuel oil, Vegetable oil

Handling Capacity

Liquid bulk (ton/year)	500.000

Berth-Pier Dimensions	East Berth	West Berth
Length	282 m	282 m
Maximum draft	13 m	13 m

CONTACT DETAILS

Contact person	Naci ZEREN, İsmail Hakkı TAS
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Website	www.savka.com.tr

BATILİMAN LİMAN İŞLETMELERİ A.Ş.

BATILİMAN

PORT FEATURES

Operator	Batıliman Liman İşletmeleri A.Ş.
Coordinates	38° 45′ 00″ N - 26° 53′ 50″ E
Handled cargo	General Cargo, Bulk Cargo, Project Cargo, Dangerous Goods

Handling Capacity	6.000.000 Ton/year (Total)
Total port area	238.450 m^2
Type A bonded warehouse (indoor)	26.630 m^2
Type A bonded warehouse (outdoor)	31.300 m^2
Non-bonded area (outdoor)	75.000 m^2
Temporary storage area	20.000 m^2

Berth-Pier Dimensions	**Pier 1**	**Pier 2**	**Pier 3**	**Pier 4**	**Berth 1**	**Berth 2**
Length (m)	182	290	281	164	178	178
Minimum draft (m)	12	17	12	9	3	7
Maximum draft (m)	17	32	32	12	10	9

Equipment	**Quantity**	**Capacity (ton)**
Liebherr LHM 250 MHC	1	64
Liebherr LHM 180 MHC	1	64
Liebherr LHM 150 MHC	2	40
Sennebogen 850 MHC	1	15
Shore Crane	2	10

CONTACT DETAILS

Contact person	Nuri DEMİRAY
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BELDEPORT

BELDEPORT | MED LOJİSTİK

PORT FEATURES

Operator	MED Lojistik A.Ş.
Coordinates	40° 46′ 18″ N - 029° 30′ 55″ E
Handled cargo	Container, General Cargo, Bulk Cargo, Project Cargo, Ro-Ro

Handling Capacity (Phase IA)

Container (TEU/year)	550.000
General and bulk cargo (ton/year)	2.000.000
Liquid cargo (ton/year)	-
Vehicle (PCC/year)	200.000 Units
Total port area (m^2)	600.000 m^2
Bonded area (outdoor) (m^2)	149.000 m^2
Non-bonded area (outdoor) (m^2)	110.000 m^2
TIR parking area (m^2)	12.000 m^2
Warehouse	1.100 m^2

Berth-Pier Dimensions

Length	450 m (1.671 m, when all phases are completed)
Draft (uniform)	16,5 m (18 m, further phases)

Equipment	Quantity	Capacity
Liebherr LHM 550	2	144 ton
Liebherr LHM 500	1	100 ton
Sennebogen 880	1	30 ton
Mantsinen 60	1	11 ton
Hyster CRS	1	45 ton
Konecranes CRS	2	45 ton
Konecranes ECH	1	11 ton
Terberg YTT	10	168 kW (225 Hp) at 1800 rpm
Seyit Usta trailer	10	65 ton
Forklift	9	3-33 ton capacity
Bromma twin-lift automatic spreader	3	
Bromma automatic overheight frame	2	
SMAG clamshell buckets (30 m^2)	2	
Reefer platform	1	60 plugs

CONTACT DETAILS

Contact person	Capt. Uğur KILIÇ - ugur.kilic@beldeport.com.tr
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Web	www.beldeport.com.tr

BODRUM CRUISE PORT

PORT FEATURES

Operator	Bodrum Yolcu Limanı İşletmeleri A.Ş.
Coordinates	37° 01′ 30″ N - 27° 26′ 13″ E
Handled cargo	Passenger
Total port area	21.856,32 m^2
Indoor warehouse	
Bonded area (outdoor)	2.081 m^2
Parking area	3.470 m^2

Berth-Pier Dimensions

Length	Berth No 1: 350 m Berth No 2: 330 m
Maximum draft	9 m (max depth 25 m)

CONTACT DETAILS

Contact person	Aziz GÜNGÖR-Global Ports Holding, East Med Regional Director Erkan ÖZTUNALI-Port Manager
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BORUSAN PORT

PORT FEATURES

Operator	Borusan Lojistik Dağıtım Depolama Taşımacılık ve Tic. A.Ş
Coordinates	40° 25′ 12″ N - 29° 05′ 18″ E
Handled cargo	General Cargo, Project Cargo, Container, Vehicle Handling (Ro-Ro)

Handling Capacity

Container (TEU/year)	450.000
General cargo (ton/year)	5.000.000
Ro-Ro (vehicle/year)	350.000
Total port area	465.000 m^2
Indoor warehouse	21.000 m^2
Bonded area (outdoor)	319.000 m^2
Truck parking area (pregate)	17.000 m^2

Berth-Pier Dimensions

Length	1.773 m
Maximum draft	14,5 m

Equipment	Quantity	Capacity (ton)
MHC	8	40-140
RTG	8	41
Stacker	3	45
SSG	3	10
Overhead Bridge Crane	12	60 (under spreader)
Forklift	20	20-35
Terminal Tractor	25	3-33
Reefer Plug	224	80-120

CONTACT DETAILS

Contact person	Rabia ÇAVUŞOĞLU
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E-post	rabia.cavusoglu@borusan.com limansatis@borusan.com
Website	www.borusanport.com

ÇELEBİ PORT OF BANDIRMA

PORT FEATURES

Operator	Çelebi Bandırma Uluslararası Limanı İşletmeciliği A.Ş
Coordinates	40° 21' 45" N - 27° 57' 50" E
Handled cargo	Container, General Cargo, Bulk Cargo, Project Cargo, Liquid Bulk, Ro-Ro, Car

Handling Capacity

Container (TEU/year)	188.000
Bulk and general cargo (ton/year)	11.951.000
Liquid bulk (ton/year)	4.320.000
Ro-Ro (vehicle/year)	500.000
Total port area (customs)	268.348 m^2
Indoor warehouse	8.250 m^2
Parking area	42.000 m^2

Berth-Pier Dimensions

Length	2.974 m
Maximum draft	12 m

Equipment	Quantity	Capacity (ton)
Reggiane MHC 200	1	100
Gottwald HMK 170	1	63
Liebherr LHM 400	1	104
Sennebogen 880 EQ	1	25
Sennebogen 835 R Special	2	13
Sennebogen 835 M Special	2	13
Sennebogen 870 R Special	1	16

CONTACT DETAILS

Contact person	Gürkan BAYIR, Serkan YARDIMCI
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Website	www.portofbandirma.com.tr

CEYPORT TAŞUCU

PORT FEATURES

Operator	Ceyport Taşucu International Port Management Inc.
Coordinates	36° 18′ 30″ N - 33° 53′ 30″ E
Handled cargo	Bulk Cargo (Solid/Liquid), General Cargo, Project Cargo, Container, Ro-Ro, Passenger, Livestock

Handling Capacity

Container (TEU/Yyear)	100.000
General and bulk cargo (ton/year)	3.000.000
Liquid bulk cargo (ton/year)	250.000
Vehicle/Passenger	250.000/200.000
Total Port Area	423.618,00 m^2
Indoor warehouse	9.655 m
Silo (ton)	-

Berth-Pier Dimensions

Length	1.190 m
Maximum draft	11 m

Equipment	Quantity	Capacity (ton)
Crane	3	8 - 110

CONTACT DETAILS

Contact person	RAHMAN ÇOBAN
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Website	www.ceyporttasucu.com.tr

CEYPORT TEKİRDAĞ

PORT FEATURES	
Operator	Ceyport Tekirdağ International Port Management Inc.
Coordinates	40° 57′ 43″ N - 27° 30′ 30″ E
Handled cargo	Bulk Cargo (Solid/Liquid), General Cargo, Project Cargo, Container, Ro-Ro, Passenger, Train Ferry, Livestock

Handling Capacity	
Container (TEU/year)	150.000
General and bulk cargo (ton/year)	7.000.000
Liquid bulk cargo (ton/year)	250.000
Vehicle/Passenger	150.000/100.000
Total port area	152.514 m^2
Indoor warehouse	-
Silo (ton)	-

Berth-Pier Dimensions	
Length	2.310 m
Maximum draft	12,00 m

Equipment	Quantity	Capacity (ton)
Crane	10	11 - 124

CONTACT DETAILS	
Contact person	İmdat Karakılıç
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ÇOLAKOĞLU METALURJİ A.Ş.

Çolakoğlu Metalurji

PORT FEATURES

Operator	Çolakoğlu Metalurji A.Ş.
Coordinates	40° 46′ N – 29° 31′ E
Handled cargo	General Cargo, Bulk Cargo

Handling Capacity

General cargo and bulk cargo	6.000.000 ton/year
Total port area	22.620 m^2

Berth-Pier Dimensions		Length (m)	Max. Draft (m)
	Pier No 1:	460	23 m
	Pier No 2:	290	13 m

Cranes	Quantity	Capacity (ton/day)	Remarks
American	2	5.000 ton/day	-

CONTACT DETAILS

Contact person	Mesut UĞRAŞ
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Telephone	+90(262) 676 75 00
Fax	+90(262) 754 84 20
E-mail	mugras@colakoglu.com.tr
Website	http://www.colakoglu.com.tr/

DFDS PENDİK PORT

PORT FEATURES

Operator	DFDS Shipping and Transportation Inc.
Coordinates	40° 51′ 30″ N - 29° 16′ 19″ E
Handled cargo	Ro-Ro
Total port area	117.500 m^2
Berth length	210 m

CONTACT DETAILS

Contact person	Levent ŞİNEL
Address	İstanbul Tersanesi Komutanlığı Yanı, Kemikli Dere Mevkii, Güzelyalı, 34903 Pendik / İSTANBUL
Telephone	+90(216) 392 50 50
Fax	+90(216) 392 50 51-2
E-mail	levent.sinel@dfds.com / lesin@dfds.com
Website	www.dfds.com.tr

DİLER DEMİR ÇELİK

PORT FEATURES	
Operator	Diler Iron & Steel Works Inc.
Coordinates	40° 46′ 42″ N – 29° 36′ 00″ E
Handled cargo	General Cargo, Bulk Cargo

Handling Capacity	
Bulk cargo (ton/year)	6.000.000
General cargo (ton/year)	6.000.000
Total port area	52.705 m^2
Indoor warehouse	5.551 m^2
Temporary storage area (indoor)	1.637 m^2
Temporary storage area (outdoor)	30.893 m^2
Parking area	2.500 m^2

Berth-Pier Dimensions	
Length	965 m
Maximum draft	11.5 m

Equipment	Quantity-Capacity
LHM MHC	1x180 rubber tired 1x150 rubber tired
Handling machine	9 x palletized
Forklift	1x3 ton, 2x5 ton, 4x5.5 ton, 3x10 ton

CONTACT DETAILS	
Contact person	Bülent YALABAÇOĞLU
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E-mail	dilerliman@dilerhld.com
Website	www.dilerhld.com

DP WORLD YARIMCA

PORT FEATURES	
Operator	DP World Yarımca Liman İşletmeleri A.Ş.
Coordinates	40° 45′ N – 29° 44′ E
Handled cargo	Container, General Cargo, Project Cargo

Handling Capacity	
Container (TEU/year)	1.300.000
Total terminal area	460.000 m^2
CFS & Inspection area	24.000 m^2
LCL warehouse	6.000 m^2

Berth Lenght	
Berth 1	457 m
Berth 2	465 m
Maximum draft	16 m

Equipment	Quantity
STS	8 (Remote control)
E-RTG	24 (Remote control – Proof of concept)
TT	58

CONTACT DETAILS	
Contact person	Gökhan YURTEKEN
Address	Mimar Sinan Mah. Mehmet Akif Ersoy Cad. No: 168, 41780 Yarımca - Körfez / KOCAELİ
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E-mail	gokhan.yurteken@dpworld.com
Website	www.dpworldyarimca.com

EFESANPORT

PORT FEATURES

Operator	Efesan Demir Sanayi ve Ticaret A.Ş.
Coordinates	40° 46' N - 29° 32' E
Handled cargo	Bulk Cargo, General Cargo, Asphalt, Ro-Ro

Handling Capacity

General cargo (ton/year)	2.000.000
Bulk cargo (ton/year)	500.000
Asphalt (ton/year)	150.000
Ro-Ro (auto) (vehicle/year)	300.000
Ro-Ro (truck) (vehicle/year)	15.000
Total port area	143.423 m^2
Parking area	116.000 m^2 (Multi-storey car parking area included)
Dry bulk cargo GDA	20.000 m^2

Berth-Pier Dimensions

Maximum draft	25 m
Total berth length	870 m

Equipment	Quantity	Capacity (Mton)
Terex Fuchs 880XL	3	22
Liebherr LHM 180	1	64
Sennebogen 3300	1	45
Sennebogen 850	1	17
Gottwald HMK 300E	1	104

CONTACT DETAILS

Contact person	İlker TUNCER
Address	Dilovası OSB, 1. Kısım D-1006 Sok., No: 8 Dilovası / KOCAELİ
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E-mail	ilker.tuncer@efesan.com.tr
Website	www.efesanport.com

EGE GÜBRE TERMINAL

EGE GÜBRE SANAYİİ A.Ş.

PORT FEATURES

Operator	Ege Gübre Sanayi A.Ş.
Coordinates	38° 45′ 65″ N - 026° 55′ 68″ E
Handled cargo	Container, General Cargo, Bulk Cargo, Liquid Bulk, IMDG Cargo

Handling Capacity

Container (TEU/year)	1.000.000
General cargo (ton/year)	2.500.000
Bulk cargo (ton/year)	5.000.000
Total port area	485.000 m^2
Custom warehouse	4.615 m^2
Warehouse	37.415 m^2
Bonded area (outdoor)	350.000 m^2
Parking area	25.000 m^2

Berth-Pier Dimensions

Length	EAST JETTY: 417m x 30m WEST JETTY: 367m x 40m
Maximum draft	28 m

Equipment	Quantity	Total Capacity (T)
STS (Single Boom)	1	75
STS (Double Boom)	2	140
MHC	2	160
LHM	3	228
Sennebogen 870EQ	1	30
RTG	10	400
Stacker	5	225
ECH	5	36
Terminal Trailer	36	60 (each)

CONTACT DETAILS

Contact person	Bülent Çiçek - Murat IRMAK
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Website	www.egegubre.com.tr

KUŞADASI CRUISE PORT-TRKUS

PORT FEATURES

Operator	Ege Liman İşletmeleri A.Ş. (Ege Ports)
Coordinates	37° 51′ 48″ N - 27° 15′ 18″ E
Handled cargo	Passenger
Total port area	23.096 m^2
Bonded area (outdoor)	2.164 m^2
Pier area	8.673 m^2
Equipment parking area	3.380 m^2

Berth-Pier Dimensions	Pier Number	Length	Depth
	1-2	300 m	9.5 m - 17.0 m
	3-4	253 m	10.0 m - 17.0 m
	5-6	331 m	10.0 m - 18.0 m
	7-8	387 m	10.0 m - 18.0 m

CONTACT DETAILS

Contact person	Aziz GÜNGÖR
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Web	www.kusadasicruiseport.com
	www.globalportsholding.com

EKİNCİLER – ORHAN EKİNCİ İSKELESİ

PORT FEATURES

Operator	Ekmar Shipping & Agency Inc.
Coordinates	36° 41′ 030″ N - 36° 11′ 46″ E
Handled cargo	Dry Bulk and General Cargo

Handling Capacity

Dry bulk cargo (ton/year)	5.000.000
General cargo (ton/year)	1.000.000
Storage area (outdoor)	50.000 m^2
Type A bonded area	32.000 m^2
Total storage area (indoor)	20.000 m^2
Railway connection	Railway line - 40 wagon capacity

Berth-Pier Dimensions

Length	2 x 430 m
Maximum depth	12 m -19 m

Equipment

	3 x Sennebogen 880
	2 x Sennebogen 870
	2 x Sennebogen 835
	1 x Sennebogen 6180

CONTACT DETAILS

Contact person	Capt. Vahtettin ERİŞEN - Capt. Bahri ÇARDAK
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E-mail	verisen@ekmar.com.tr - bcardak@ekmar.com.tr
Website	www.ekinciler.com

EMBA HUNUTLU THERMAL POWER PLANT PORT

PORT FEATURES

Operator	EMBA Electricity Production Inc.
Coordinates	36° 48′ 24″ N - 35° 51′ 44″ E
Handled cargo	Coal

Handling Capacity

Liquid bulk (ton/year)	3.000,000
Total port area	26.420 m^2
Indoor warehouse	3 x 90.000 ton

Berth-Pier Dimensions

Length	343 m
Maximum draft	20 m

Equipment	Quantity	Capacity
CSU	2	1250 ton/hour

CONTACT DETAILS

Contact person	Tamer Kırgıl
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Website	www.embapower.com

ERDEMİR PORT

PORT FEATURES

Operator	Ereğli Demir ve Çelik Fab. T.A.Ş.
Coordinates	41° 16′ N - 31° 15′ E
Handled cargo	General Cargo, Bulk Cargo, Liquid Bulk, Ro-Ro
Bulk cargo (ton/year)	13.750.000
General cargo (ton/year)	6.250.000
Total port area	750.000 m^2
Indoor warehouse	3.000 m^2
A Type bonded area	139.000 m^2

Berth-Pier Dimensions

Length / maximum draft	1.670 m (excluding Ro-Ro and train ferry berths) / 20 m

Equipment	Quantity	Brand	Capacity
Bulk cargo crane	4	Caillard-Kawaden	30-31 ton
General cargo crane	5	Caillard- Siemag- MŞM	40-25-15 ton
MHC	1	Liebherr	40 ton
Forklift	9	Konecrane-Doosan	3-10-16-20-32-42 ton
Loader	5	Doosan-Liu Gong	0,4-3-4 m^3
Excavator	1	Liebherr	1,8 m^3
Tele handler	1	Caterpilar	14 m
Palletized excavator	5	Doosan- Caterpilar	0,8-1,3-1,5 m^3
Tanker	1	Ford	7 m^3
Pilot boat	1	Erdemir Pilot	1200 hp
Moorings	1	M. Boat 14	160 hp
Towages	3	Med XXXII, Med XXXIII, Med XXIV	32, 32, 54 ton

CONTACT DETAILS

Contact person	Caner ÖZLEYEN
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E-mail	cozleyen@erdemir.com.tr erdemirport@erdemir.com.tr
Website	www.erdemir.com.tr

EREN ENERJİ ELEKTRİK ÜRETİM A.Ş.

PORT FEATURES

Operator	Eren Enerji Elektrik Üretim A.Ş.
Coordinates	31° 54′ 07″ N - 41° 31′ 45″ E
Handled cargo	Dry Bulk Cargo, General Cargo, Project Cargo, Ro-Ro
Total bulk and general cargo (ton/year)	15.000.000 ton/year
Total port area	924.230 m^2
Bonded area	200.000 m^2
Indoor warehouse	7.000 m^2

Berth-Pier Dimensions	Berth Number	Length	Maximum Draft
	Berth 1	300 m	20 m
	Berth 2	250 m	15 m
	Berth 3	200 m	14 m
	Berth 4	90 m	10 m

Equipment	Name	Quantity	Capacity
	Liebherr LPS 600 Portal Crane	2	1500 ton/h
	Liebherr LPS 420 Portal Crane	2	1000 ton/h
	Liebherr LPS 400 Portal Crane	2	750 ton/h
	Kawasaki 90Z6 Loader	2	5 m^3 bucket
	Cat 966GC Loader	2	5,5 m^3 bucket
	Cat 950H Loader	1	4 m^3 bucket
	Cat Telehunder	1	
	Bobcat 246C	1	

CONTACT DETAILS

Contact person	Ömer BUĞER, Türker ÖZPOYRAZ
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E-mail	omer.buger@erenholding.com.tr, turker.ozpoyraz@erenholding.com.tr
Website	http://www.erenport.com.tr http://www.erenlimani.com.tr

EVYAPPORT

PORT FEATURES

Operator	Evyap Deniz İşletmeciliği Lojistik ve İnşaat A.Ş.
Coordinates	40° 46' 15" N - 029° 42' 24" E
Handled cargo	Container, Liquid Bulk, General Cargo, Vehicle (Ro-Ro)

Handling Capacity

Container (TEU/year)	855.000
Liquid bulk (ton/year)	1.000.000
General cargo (ton/year)	500.000
Total port area	279.000 m^2
Bonded area (outdoor)	243.000 m^2
Bonded area (indoor)	2.000 m^2
Non-bonded area (outdoor)	14.000 m^2
Parking area	20.000 m^2

Berth-Pier Dimensions	Berth-Pier Number	Length
	Nr:1 Berth	35 m
	Nr:2 Pier	358 m
	Nr:3 Pier	358 m
	Nr:4 Berth	80 m
	Nr:5-6 Berth	455 m

Minimum depth 18,5 m

Equipment	Quantity	Capacity (ton)
SSG	4	65
MHC	2	140
MHC	3	100
RTG	26	40

CONTACT DETAILS

Contact person	Ali KESKİN
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E-mail	akeskin@evyapport.com
Website	http://www.evyapport.com

FORD OTOSAN YENİKÖY PIER

PORT FEATURES

Operator	Ford Otomotiv Sanayi A.Ş
Coordinates	40° 43′ N – 029° 51′ E
Handled cargo	Auto

Handling Capacity

Auto (vehicle/year)	400.000
Total port area	317.200 m^2
Bonded area (outdoor)	26.384 m^2
Parking area	290.816 m^2

Berth-Pier Dimensions

Length	132 m
Maximum draft	21 m

CONTACT DETAILS

Contact person	Rıza Alper ERALP
Address	Denizevler Mah. Ali Uçar Cad. Gölcük, KOCAELİ
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Website	www.ford.com.tr

GALATAPORT ISTANBUL

PORT FEATURES	
Operator	Galataport Istanbul Port Management and Investments Inc.
Coordinates	41° 01′ 33″ N - 028° 59′ 02″ N
Handled cargo	Cruise Port
Handling Capacity	1.500.000 Pax/Year
Total port area	29.000 m^2
Berth-Pier Dimensions	
	Salıpazarı Pier: 600 m Karaköy Pier: 380 m
Total length	980 m
Maximum draft (m)	Salıpazarı Pier: 14 Karaköy Pier: 13

CONTACT DETAILS	
Contact person	Figen AYAN (Cruise Operation Vice President)
Address	Kılıçali Paşa Mahallesi, Meclis-i Mebusan Caddesi, No: 8 İç Kapı No: 102, 34433 Beyoğlu / İSTANBUL
Telephone	+90(212) 939 42 00
Fax	+90(212) 293 41 45
E-mail	fayan@galataportistanbul.com portrequest@galataportistanbul.com
Website	www.galataport.com

GİRESUNPORT

PORT FEATURES

Operator	Giresunport Liman İşletmeciliği A.Ş.
Coordinates	40° 50′ 06″ N - 38° 22′ 51″ E
Handled cargo	Dry Bulk Cargo, General Cargo, Liquid Bulk, Ro-Ro, Passenger, Container

Handling Capacity

Container (TEU/year)	
Dry bulk cargo (ton/year)	3.000.000
General cargo (ton/year)	1.000.000
Ro-Ro (vehicle/year)	
Total port area	94.000 m^2
Warehouse	22
Indoor warehouse	29.800 m^2
Bonded area (outdoor)	64.200 m^2
Parking zone	
Non-bonded area	

Berth-Pier Dimensions

Length	800
Maximum draft	10

Equipment	Quantity	Capacity (ton)
Crane	5	63-25-8-5-2,2
Loader	4	21,2-2 x 18,6-10
Bobcat	2	2 x 3
Forklift	3	10-5-3,5
Stacker	1	45

CONTACT DETAILS

Contact person	Mehmet Nuh GÜL
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E-mail	mehmet.gul@giresunport.com.tr
Website	www.giresunport.com.tr

GLOBAL TERMINAL

PORT FEATURES	
Operator	Global Terminal Services Inc.
Coordinates	Pier 1 (YP1) 36° 08′ 02,25″ E - 36° 08′ 04,09″ E 36° 50′ 12,14″ N - 36° 50′ 14,35″ N 36° 08′ 04,76″ E - 36° 08′ 00,56″ E 36° 50′ 13,61″ N - 36° 50′ 12,88″ N Pier 2 (YP2) 36° 08′ 35,07″ E - 36° 08′ 35,51″ E 36° 50′ 31,56″ N - 36° 50′ 33,27″ N 36° 08′ 36,37″ E - 36° 08′ 34,21″ E 36° 50′ 32,33″ N - 36° 50′ 33,28″ N Pier 3 (YP3) 36° 08′ 54,54″ E - 36° 08′ 55,10″ E 36° 50′ 43,17″ N - 36° 50′ 44,66″ N 36° 08′ 55,84″ E - 36° 08′ 53,87″ E 36° 50′ 43,93″ N - 36° 50′ 43,90″ N
Handled cargo	Crude Oil, Black and White Products
Handling capacity	650.000 m^2
Total port area	62.251 m^2
Bonded area (outdoor)	222.576 m^2

Berth-Pier	
	2.300 m. Length jetty can accomodate between 1.000-230.000 displacement tonnage vessels.
Maximum draft	YP1: 16,5 m YP2: 12,5 m YP3: 7,5 m

CONTACT DETAILS	
Contact person	Erkin ÖZÇELİK
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Website	www.globalterminal-tr.com

PARK DENİZCİLİK ve HOPA LİMAN İŞLETMELERİ A.Ş.

HOPAPORT

PORT FEATURES

Operator	Park Denizcilik ve Hopa Liman İşletmeleri A.Ş.
Coordinates	41° 24′ 45″ N - 41° 21′ 45″ E
Handled cargo	General Cargo, Dry Bulk Cargo, Project Cargo, Liquid Bulk, Ro-Ro

Handling Capacity

Container (TEU/year)	320.000
Dry bulk cargo (ton/year)	2.500.000
General cargo (ton/year)	600.000
Liquid bulk (ton/year)	900.000
Total port area	216.000 m^2
Storage area (outdoor)	102.462 m^2
Indoor warehouse	18.220 m^2
Customs warehouse	5.000 m^2 + 22.000 m^3
Grain terminal	10 x 1.000 Ton
Cement terminal	7.700 Ton
Tank terminal	32.000 m^3
LPG terminal	2 x 210 m^3

Berth-Pier Dimensions

Length	1.346 m
Maximum draft	10 m

Equipment	Quantity	Capacity (ton)
Quay Crane	2	10-25
Coles	3	10-25
Sennebogen 835	2	7

CONTACT DETAILS

Kişi	Meriç Burçin ÖZER
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Web Sitesi	www.hopaport.com.tr

IC KARASU PORT

PORT FEATURES

Operator	IC İçtaş Sakarya Karasu Port Investment and Operating S.A.
Coordinates	41° 7' 17" N - 30° 40' 37" E
Handled cargo	Container, General Cargo, Dry Bulk Cargo, Ro-Ro, Passenger

Handling Capacity

Container (TEU/year)	150.000	Ro-Ro (vehicle/year)	110.000
General/bulk cargo (ton/year)	6.000.000		
Total port area	676.000 m^2		
Total storage area	198.130 m^2		
Indoor warehouse	6.500 m^2		
Total land area	250.000 m^2		
Bonded area (outdoor)	78.130 m^2		
Ro-Ro park area	48.179 m^2		
Non-bonded area (outdoor)	120.000 m^2		

Berth-Pier Dimensions

Length	1.108 m
Maximum draft	11 m

Equipment	Quantity	Capacity (ton)
MHC	3	24-124
Forklift	8	3-32
Terminal tractor	3	36
Bunker	2	60
Loader	2	-
Mini loader	2	-

CONTACT DETAILS

Contact person	Gökçen Erdem
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Website	www.karasuport.com.tr

İÇDAŞ PORT

İÇDAŞ

PORT FEATURES

Operator	İçdaş Steel Energy Shipbuilding and Transportation Inc.
Coordinates	40° 27′ N – 27° 08′ E

Handling Capacity

Dry bulk cargo (ton/year)	20.000.000
General cargo (ton/year)	15.000.000
Total port area	200.000 m^2
Indoor warehouse	250.000 m product warehouse capacity
Bonded area	75.000 m^2

Berth-Pier Dimensions	Berth 1	Berth 2	Berth 3	Berth 4	Berth 5	Breakwater
Length	275 m	275 m	325 m	325 m	475 m	350 m
Maximum draft	22 m	22 m	28 m	28 m	12 m	22 m

Equipment	Quantity	Capacity (ton)
Quay crane	2	45
Quay crane	2	50
Quay crane	5	100
Truck	26	150
Forklift	35	28/14

CONTACT DETAILS

Contact person	Türker ÖZMAN
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Website	www.icdas.com.tr

İÇDAŞ 2 PORT

PORT FEATURES

Operator	İçdaş Steel Energy Shipbuilding and Transportation Inc.
Coordinates	40° 24,5′ N – 27° 02,5′ E

Handling Capacity

Dry bulk cargo (ton/year)	15.000.000
General cargo (ton/year)	10.000.000
Total port area	100.000 m^2
Bonded area	15.000 m^2

Berth-Pier Dimensions	Berth 1	Berth 2
Length	350 m	450 m
Maximum draft	32 m	32 m

Equipment	Quantity	Capacity (ton)
Quay crane	2	100
Excavator	2	30
Bobcat	2	-
Truck	3	30
Forklift	2	28/14

CONTACT DETAILS

Contact person	Türker ÖZMAN
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E-mail	icdas@icdas.com.tr
Website	www.icdas.com.tr

İDÇ PORT

PORT FEATURES

Operator	İDÇ Liman İşletmeleri A.Ş.
Coordinates	38° 46′ N – 26° 56′ E

Handling Capacity

Dry bulk and general cargo (ton/year)	7.500.000
Total port area	196.717 m^2
Customs warehouse (indoor)	6.303 m^2
Customs warehouse (outdoor)	36.902 m^2

Berth-Pier Dimensions	Pier 1	Pier 2
Length	475	475
Maximum draft	28	28

Equipment	Quantity	Capacity (ton)
9300 Sennebogen	1	90
6200 Sennebogen	1	60
895E Sennebogen	1	50
880 Sennebogen	4	30
870 Sennebogen	1	20
850 Sennebogen	1	10
835 Sennebogen	1	10
630 M Sennebogen	1	15
Quay crane	2	12.5
Excavator	6	
Loader	8	
Forklift	12	2,5-3-7-9-12-16

CONTACT DETAILS

Contact person	Bülent NEREDE
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İGSAŞ İSTANBUL GÜBRE SANAYİİ A.Ş.

PORT FEATURES

Operator	İgsaş İstanbul Gübre Sanayii A.Ş.
Coordinates	40° 45″ N - 29° 45″ E
Handled cargo	General Cargo, Dry Bulk Cargo, Liquid Bulk Cargo (Ammonia, Molasses)

Handling Capacity

Dry bulk cargo (ton/year)	3.000.000
Total port area	20.953 m^2

Berth-Pier Dimensions

Length	375 m + 243 m
Maximum draft	21 m

Equipment	Quantity	Capacity (ton)
Sennebogen 880	1	30
Liebherr LHM 250	1	65
ATLAS	1	6
Liebherr LH 40	3	5
Sennebogen 835	3	7
Excavator (scraper)	5	*
Loading machine	1	Approx. 3.000 mt/daily
Bobcat	1	*
Loader	2	1
Forklift	3	5-10-32

CONTACT DETAILS

Contact person	Özkan UYGUR, Gürkan BİLGE
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Telephone	+90(262) 316 22 30-31
Fax	+90(262) 316 22 95-96-97
E-mail	ozkan.uygur@igsas.com.tr gurkan.bilge@igsas.com.tr
Website	www.igsas.com.tr

İSKENDERUN DEMİR ÇELİK A.Ş.

PORT FEATURES

Operator	İskenderun Demir Çelik A.Ş.
Coordinates	36° 43,30′ N - 036° 11,06′ E, 36° 43,35′ N - 33° 11,15′ E
Handled cargo	General Cargo, Dry Bulk Cargo, Project Cargo, Liquid Bulk

Handling Capacity

General cargo (ton/year)	7.000.000 Ton
Dry bulk cargo (ton/year)	13.000.000 Ton
Liquid bulk (ton/year)	1.000.000 Ton
Total port area	786.896 m^2
Type A bonded warehouse (indoor)	4.186 m^2
Type A bonded warehouse (outdoor)	69.640 m^2
Bonded area (outdoor) (Temporary storage area)	270.190 m^2

Berth-Pier Dimensions

Length	1.501 m
Maximum draft	19 m

Equipment	Quantity	Brand	Capacity (ton)
Unloader Quay crane	2	Kawaden	50
MHC	3	Liebherr-Sennebogen	10-120
Quay crane	4	Caillard-Ardelt	55
Forklift	11	Kalmar-TMC	5-7-10-45
Loader	5	Volvo-Komatsu-Cat	6,5-20,2
Excavator	9	Liebherr-Cat-Komatsu-Volvo	20-25,7
Mini Loader	2	Cat-Gehl	3
Cleaning Vehicle	1	-	7 m^3

CONTACT DETAILS

Contact person	Önder ÇAĞLAYAN
Address	İskenderun Demir ve Çelik A.Ş. Karşı Mahalle Şehit Yüzbaşı Ali Oğuz Bulvarı No: 1 31900 Payas / HATAY
Telephone/Fax	+90(326) 758 42 80 - +90(326) 758 52 41
E-mail	ocaglayan@isdemir.com.tr
Website	www.isdemir.com.tr

KORUMA KLOR ALKALİ

PORT FEATURES

Operator	Koruma Klor Alkali San. ve Tic. A.Ş.
Coordinates	40° 45′ 90″ N - 29° 51′ 75″ E
Handled cargo	General Cargo, Dry Bulk Cargo, Liquid Bulk

Handling Capacity

Dry bulk cargo (ton/year)	50.000
General cargo (ton/year)	100.000
Liquid bulk (ton/year)	250.000
Total port area	3.060 m^2

Berth-Pier Dimensions

Length	155 m
Maximum draft	12,5 m

CONTACT DETAILS

Contact person	Özgür GÖKKAYA
Address	Deniz Mahallesi Petrol Ofisi Cad. No: 43 41900 Derince / KOCAELİ
Telephone	+90(262) 239 22 70
Fax	+90(262) 223 12 12
E-mail	ozgur.gokkaya@koruma.com.tr
Website	www.koruma.com

KROMAN PORT

PORT FEATURES

Operator	Kroman Çelik Sanayi A.Ş.
Coordinates	40° 46′ 35″ N - 29° 35′ 45″ E
Handled cargo	General Cargo, Dry Bulk Cargo

Handling Capacity

Dry bulk cargo (ton/year)	3.000.000
Total port area	29.000 m^2
Storage area	16.000 m^2
Bonded area	16.000 m^2
Parking area	1.000 m^2

Berth-Pier Dimensions

Length	420 m
Maximum draft	13 m

Equipment	Quantity	Capacity (ton)
MHC	4	40-60
Excavator	7	8-15
Forklift	4	4-16

CONTACT DETAILS

Contact person	Yücel ODABAŞI
Address	Kroman Liman Tesisleri, Tavşancıl / DİLOVASI
Telephone	+90(262) 753 04 62-63
Fax	+90(262) 753 05 14
E-mail	yucel.odabasi@kromancelik.com.tr
Website	www.kromancelik.com.tr

KUMPORT

PORT FEATURES

Operator	Kumport Liman Hiz. ve Loj. San. Tic. A.Ş.
Coordinates	40° 58′ N – 028° 41′ E
Handled cargo	Container, General Cargo, Cabotage Ro-Ro

Handling Capacity

Container (TEU/year)	2.100.000
Total port area	477.867 m^2
Indoor warehouse	10.000 m^2
Bonded area (outdoor)	372.591 m^2

Berth-Pier Dimensions

Length	2.226 m
Maximum draft	16,5 m

Equipment	Quantity	Capacity (ton)
SSG	9	70
MHC	5	104
RTG	28	45
Stacker	12	45
Empty Stacker	7	8

CONTACT DETAILS

Contact person	Kaan ANUL
Address	Marmara Mah. Liman Cad. No: 43 34524, Beylikdüzü / İSTANBUL
Telephone	+90(212) 866 83 74
Fax	+90(212) 875 27 60
E-mail	kanul@kumport.com.tr
Website	www.kumport.com.tr

LIKIT PORT TERMINAL

PORT FEATURES

Operator	Likit Kimya San. ve Tic. A.Ş.
Coordinates	41° 00′ 29″ N - 27° 59′ 43″ E
Handled cargo	Liquid Chemical Products

Handling Capacity

Liquid bulk (ton/year)	4.000.000
Total port area	1.447 m^2

Berth-Pier Dimensions

Length	272 m
Maximum draft	17,5 m

Equipment	Quantity	Capacity (ton)
Hose handling crane	1	2,5 ton - 22 m

CONTACT DETAILS

Contact person	Burak DEMİRALP
Address	Sultanköy Nah. Ekşielma Cad. No: 28 Marmaraereğlisi / TEKİRDAĞ
Telephone	+90(282) 613 41 38 #204
Fax	+90(282) 613 41 39
E-mail	burak_demiralp@likitkimya.com
Website	www.likitport.com

LİMAKPORT İSKENDERUN

PORT FEATURES

Operator	Limak İskenderun Uluslararası Liman İşletmeciliği A.Ş.
Coordinates	36° 36′ N - 36° 11′ E
Handled cargo	Container, Project Cargo, General Cargo, Dry Bulk Cargo, Ro-Ro, Livestock

Handling Capacity

Container (TEU/year)	1.000.000
Dry bulk cargo (ton/year)	3.000.000
General cargo (ton/year)	1.000.000
Ro-Ro (CEU/year)	100.000
Total port area	1.000.000 m^2

Berth-Pier Dimensions

Length	1.652 m
Maximum draft	15.5 m

CONTACT DETAILS

Contact person	Gündüz ARISOY
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E-mail	musterihizmetleri@limakports.com
Website	www.limakports.com

LİMAŞ

PORT FEATURES	
Operator	Limaş Liman İşletmeciliği A.Ş.
Coordinates	40° 43′ 04″ N - 29° 53′ 07″ E
Handled cargo	Container, General Cargo, Dry Bulk Cargo, Liquid Bulk (Chemicals, Fuel oil and oil products, base oil)

Handling Capacity	
Dry Bulk cargo (ton/year)	1.000.000
General cargo (ton/year)	1.000.000
Liquid bulk (ton/year)	2.000.000
Container (TEU/year)	250.000
Total port area	120.000 m^2
Temporary storage area	44.100 m^2
Parking area	1.000 m^2

Berth-Pier Dimensions	Berth 1	Berth 2
Length	202 m	285 m
Width	20,4 m	22,0 m
Maximum draft	11,5 m	11,5 m

Equipment	Quantity	Capacity (ton)
Chemical and fuel oil storage tanks	63	212.984 m^3
MHC	2	160 (18 rows)
Sennebogen 835-R	1	8,5

CONTACT DETAILS	
Contact person	Dr. Kürşat BAL
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Website	www.limas.com.tr

MARDAŞ

PORT FEATURES

Operator	Mardas Maritime Management Inc.
Coordinates	40° 57.08′ N - 028° 40.07′ E
Handled cargo	Container, General Cargo, Bulk, Bulk Solid

Handling Capacity

Container (TEU/ year)	2.000.000
General cargo (ton/year)	3.000.000
Total port area	204.778,25 m^2
Non-bonded storage area	176.385,25 m^2
Customs warehouse	7.557 m^2
Bonded area	120.836 m^2
Parking area	10.000 m^2
CFS area	5.000 m^2

Berth-Pier Dimensions

Length	1.115 m
Maximum draft	16,5 m

Equipment	Quantity	Capacity (ton)
SSG	3	24 rows
Mobile Crane	9	100-140
RTG	8	40
Stacker	15	10-45
Excavator	5	10,7-22-22,3
MAFI	45	32-35-43,5
Forklift	26	3-5-10-12
Reach Truck	8	2
Loader	4	2,5-12-14,5

CONTACT DETAILS

Contact person	Gökhan BEKİRCAN
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E-mail	gokhanb@mardas.com.tr
Website	www.mardas.com.tr

MARPORT

PORT FEATURES	
Operator	Marport Terminal Operators S.A.
Coordinates	40° 57′ 50″ N - 28° 40′ 25″ E

Handling Capacity	
Container (TEU/year)	2.300.000
Total port area	434.914 m^2
Indoor warehouse	6.103 m^2
Bonded area	428.811 m^2

Berth-Pier Dimensions	
Length	2.026 m
Maximum draft	17 m

Equipment	Quantity
STS	10
MHC	5
RTG	41
CRS	8
ECS	10
Truck	102
Trailer	118

CONTACT DETAILS	
Contact person	Turgay GÜL, Özgür KALELİOĞLU
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Telephone	+90(212) 866 52 00
Fax	+90(212) 875 43 43
E-mail	info@marport.com.tr
Website	www.marport.com.tr

MARTAŞ PORT

PORT FEATURES

Operator	Martaş Port Facilities Inc.
Coordinates	40° 58′ N – 27° 56′ E
Handled cargo	General Cargo, Dry Bulk Cargo, Project Cargo, Liquid Bulk, Ro-Ro, Passenger, Container, Live Stock
Dry Bulk cargo (ton/year)	2.500.000
General cargo (ton/year)	2.500.000
Liquid bulk (ton/year)	500.000
Total port area	100.000 m^2
Storage area	25.000 m^2
Indoor warehouse	5.000 m^2
Customs warehouse	25.000 m^2
Bonded area	25.000 m^2
Parking area	20.000 m^2
Equipment parking area	5.000 m^2

Berth-Pier Dimensions

Length	1.500 m
Maximum draft	20 m

Equipment	Quantity	Capacity (ton)
MHC	9	15-20-35-120-180
Forklift	5	5-7-12-15-16
Excavator	9	

CONTACT DETAILS

Contact person	Capt. Fatih ÖZKURT
Address	Martaş Marmara Ereğlisi Liman Tesisleri Bahçelievler Mah. Limanyolu Cad., No: 19/ A Marmara Ereğlisi / TEKİRDAĞ
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E-mail	fozkurt@nurship.com
Website	www.kaptandemir.com.tr

MESBAS - MERSIN FREE ZONE

PORT FEATURES	
Operator	MESBAS - Mersin Free Zone Founder and Operator Inc.
Coordinates	36° 46' 20" N - 34° 39' 00" E
Handled cargo	General Cargo, Dry Bulk Cargo, Liquid Bulk

Handling Capacity (Ton/year)	2.000.000
Storage area	-
Bonded area	-
Outdoor area	6.000 m^2
Total port area	38.532 m^2

Berth-Pier Dimensions	
Length	521 m + 100 m
Maximum draft	9,8 m

Equipment	Quantity	Capacity (ton)
MHC	2	40
MHC	2	70

CONTACT DETAILS	
Contact person	Edvar MUM
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E-mail	mail@mesbas.com.tr
Website	www.mesbas.com.tr

MERSİN INTERNATIONAL PORT

PORT FEATURES

Operator	Mersin International Port Management Inc.
Coordinates	36° 47,15′ N - 034° 38,50′ E, 36° 47,30′ N - 034° 38,6′ E
Handled cargo	Container, General Cargo, Dry Bulk Cargo, Project Cargo, Liquid Bulk, Ro-Ro, Passenger

Handling Capacity

Container (TEU/year)	2.600.000
General cargo (ton/year)	1.000.000
Dry Bulk cargo (ton/year)	9.000.000
Vehicle/Passenger	150.000 / 20.000
Total port area	112 hectares
Indoor warehouse	8.412,80 m^2
Bonded area (outdoor)	1.253.355 m^2 (Including temporary storage area)

Berth-Pier Dimensions

Length	3.370 m (excluding Ataş, NATO and free zone berths)
Maximum draft	15,8 m

Equipment	Quantity	Capacity (ton)
SSG	12	40-65
MHC	5	70-150
RTG	38	35-41
Stacker	17	45
Empty Stacker	21	12

CONTACT DETAILS

Contact person	Yüksel Nuri PEKER
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Telephone\Fax	+90(324) 241 29 00 - +90(324) 232 46 71
E-mail	npeker@mersinport.com.tr
Website	www.mersinport.com.tr

MMK METALURJİ

PORT FEATURES

Operator	MMK Metalurji San. Tic. ve Liman İşletmeciliği A.Ş.
Coordinates	36° 46′ 51.7″ N - 36° 11′ 12″ E
Handled cargo	Container, General Cargo, Dry Bulk Cargo, Project Cargo

Handling Capacity

General cargo (ton/year)	4.000.000
Dry bulk cargo (ton/year)	6.000.000
Total port area	40.000 m^2
Indoor warehouse	15.000 m^2
Bonded area (outdoor)	20.000 m^2

Berth-Pier Dimensions		Length (m)	Width (m)	Max. Draft (m)
	Pier 1	265	42	14,00
	Pier 2	265	42	13,50
	Pier 3	155	30	6,20
	Pier 4	200	17	9,00
	Pier 5	200	17	11,50
	Pier 6	160	17	12,00
	Pier 7	265	42	13,50
	Pier 8	265	42	14,00

Cranes	Quantity	Capacity (ton/day)	Remarks
	1	6.000, 7.000	
	5	5.000, 6.000	
	7	3.000, 2.000	

CONTACT DETAILS

Contact person	Gürol ÇETİN
Address	Özerli Mah. Alparslan Türkeş Blv., No: 342/91 31600 Dörtyol / HATAY
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Website	www.mmkturkey.com.tr

NEMPORT LİMAN İŞLETMELERİ

PORT FEATURES	
Operator	Nemport Liman İşletmeleri ve Özel Antrepo Nakl. Tic. A.Ş.
Coordinates	38° 46' 07" N - 26° 55' 51" E
Handled cargo	Container, General Cargo, Project Cargo

Handling Capacity	
Container (TEU/ year)	1.750.000
General cargo (ton/year)	2.000.000
Total port area	285.000 m^2
Bonded area (outdoor)	240.000 m^2
Parking area	26.000 m^2

Berth-Pier Dimensions	
Length	1.689 m
Width	40 m / 55 m
Maximum draft	21,5 m

Equipment	Quantity	Capacity (ton)
SSG	5	65
MHC	5	4x100 T - 1x140 T
E-RTG	15	6+1 High -7 Side
CRS	8	5 High 45 T
ECS	2	6 High 10 T
ECH	4	8 High 9 T
Truck	45	60 T

CONTACT DETAILS	
Contact person	Hakan TURUNÇ
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E-mail	hturunc@nemport.com.tr
Website	www.nemport.com.tr

NUHPORT

PORT FEATURES

Operator	Nuh Çimento San. A.Ş.
Coordinates	40° 46,5′ N - 29° 36,5′ E
Handled cargo	General Cargo, Dry Bulk Cargo

Handling Capacity

Dry bulk cargo (ton/year)	5.000.000
General cargo (ton/year)	500.000
Total port area	57.000 m^2
Bonded warehouse	5.000 m^2

Berth-Pier Dimensions

Length	595 m
Maximum depth	16 m

Equipment	Quantity	Capacity (ton)
Ameco crane and conveyor line	1	800 ton/Hr
Liebherr LPS 400	1	Swl 104 m
Liebherr LHM 250	1	Swl 64 m
Mobile crane	4	Swl 7 m
Forklift	5	8 m - 3 m

CONTACT DETAILS

Contact person	Abdulhamit AKÇAY
Address	NUH ÇİMENTO SAN. A.Ş. - Liman Tesisleri, Hacı Akif Mh. D-100 Karayolu Cd. No: 92 41800 Hereke / KOCAELİ
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E-mail	nuhport@nuhcimento.com.tr
Website	abdulhamit.akcay@nuhcimento.com.tr www.nuhcimento.com.tr

PETKİM PORT

PORT FEATURES

Operator	Petkim Petrokimya Holding A.Ş.
Coordinates	38° 46.550′ N - 026° 55.408′ E 38° 46′ 30″ N - 026° 55′ 30″ E 38° 46′ 30″ N - 026° 55′ 49″ E
Handled cargo	Container, General Cargo, Dry Bulk Cargo, Project Cargo, Liquid Bulk, Ro-Ro
Handling Capacity	7.000.000 ton/year (total)

Berth-Pier Dimensions	**Berth-II**	**Berth -III/1**	**Berth -III/2 (salt)**	**Jetty-IV**	**Jetty -V**
Length (m)	175	175	120	90	221
Maximum depth (m)	10	9.5	5.5	Under Const.	10

CONTACT DETAILS

Contact person	Erdem KARAMAN
Address	Petkim Petrokimya Holding A.Ş, Siteler Mah., Necmettin Giritlioğlu Cad., No: 6/1, SOCAR Türkiye Aliağa Yönetim Binası, 35800 Aliağa / İZMİR
Telephone	+90(232) 616 12 40 (2690)
Fax	+90(232) 616 36 53
E-mail	liman@petkim.com.tr - erdem.karaman@socar.com.tr
Website	https://petkim.com.tr/port-operations/

POLİPORT

PORT FEATURES

Operator	Poliport Kimya Sanayi ve Ticaret A.Ş.
Coordinates	40° 46′ N – 29° 31′ E
Handled cargo	General Cargo, Dry Bulk Cargo, Liquid Bulk

Handling Capacity

Dry bulk cargo (ton/year)	3.000.000
General cargo (ton/year)	2.000.000
Liquid bulk (ton/year)	2.500.000
Tank storage capacity	272.127 m^3
Total port area	230.000 m^2
Customs warehouse (indoor)	5.500 m^2
Bonded area (outdoor)	37.460 m^2

Berth-Pier Dimensions

Length	1.200 m
Maximum draft	Min 11,0 m Max 27,0 m

Equipment	Quantity	Capacity (ton)
Crane	6	10-124

CONTACT DETAILS

Contact person	Erdoğan AKDENİZ, Süleyman ÇOKAN, Burçin YALAZAN
Address	Dilovası Organize Sanayi Bölgesi 1. Kısım, Liman Cd. No: 7, Dilovası / KOCAELİ
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E-mail	eakdeniz@poliport.com; scokan@poliport.com; byalazan@poliport.com
Website	www.poliport.com

PORT YARIMCA RO-RO TERMINAL

PORT FEATURES

Operator	Oyak NYK RO-RO Liman İşletmeleri A.Ş.
Coordinates	29° 45' 253" E - 40° 45' 731" N
Handled cargo	Ro-Ro

Handling Capacity

Vehicle (CEU/year)	780.000
Total port area	235.000 m^2
Multi storey car park	265.000 m^2

Berth-Pier Dimensions

Length	540 m
Maximum draft	12 m

Equipment	Quantity	Capacity
Terminal tractor	1	G.V.W 47 ton / G.C.W 130 ton
Gooseneck	2	SWL 36 ton / Tare 3.5 ton

CONTACT DETAILS

Contact person	Gökalp SÖZEN
Address	Mimar Sinan Mahallesi Seramik Caddesi No: 2 41780 Körfez / KOCAELİ
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Website	www.portyarimca.com

PORT OF ÇANAKKALE

PORT FEATURES

İşletmeci	Çanakkale Liman İşletmesi San. ve Tic. A.Ş.
Coordinates	40° 06′ 21″ N - 26° 22′ 41″ E
Handled cargo	Oil, Container, General Cargo, Bulk Cargo, Project Cargo, Liquid Bulk, Ro-Ro, Passenger, Fuel, Ferry

Handling Capacity

Bulk-general cargo (ton/year)	1.000.000
Liquid bulk (ton/year)	150.000
Container (TEU/year)	100.000
Ro-Ro (vehicle/year)	
Total port area	69.323 m^2
Indoor warehouse	2.688 m^2
Bonded area (outdoor)	28.746 m^2

Berth-Pier Dimensions

Length	214 m
Maximum draft	14-28 m

Equipment	Quantity	Capacity
Mobile crane	5	12 (ton) - 100 (ton)
Conveyor band	1	250 ton / hour
Forklift	3	4,5 ton
Bobcat	1	
Loader	2	

CONTACT DETAILS

Contact person	Berkan ÖZKAN
Address	Cumhuriyet Mahallesi Sahil Yolu Cad., No. 42 17110 Kepez / ÇANAKKALE
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Website	www.portofcanakkale.com

QTERMINALS ANTALYA

PORT FEATURES

Operator	Ortadoğu Antalya Liman İşletmeleri A.Ş.
Coordinates	36° 50′ 02″N - 30° 36′ 59″ E
Types of ships	All types of general, bulk cargo ships, container ships, Ro-Ro ships which carries vehicles on tyre, all types of cruise ships

Handling Capacity

Container (TEU/year)	350.000
Dry bulk cargo (ton/year)	4.000.000
Passenger	600.000
Total port area	203.920 m^2
Storage area	30.918 m^2
Bonded area	Whole port area
Temporary customs warehouse (indoor)	1.440 m^2
Parking area	5.000 m^2
CFS area	50.000 m^2
Non-bonded warehouse (indoor)	6.729 m^2

Berth-Pier Dimensions

Length	1.178 m
Maximum draft	9,50 m

Equipment	Quantity	Capacity (ton)
MHC	8	40 - 150
Excavator	9	5 - 15
Stacker	6	45
Side Lifter	2	8
Mini Loader	3	1,4 m^3
Last. Loader	2	2,5-5,5 m^3
Forklift	35	3-5-10-25-33

CONTACT DETAILS

Contact person	Özgür SERT
Address	Liman Mah. Liman Cad., 07130 Konyaaltı / ANTALYA
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Website	https://www.QTerminals-Antalya.com

RİPORT LİMAN İŞLETMESİ A.Ş.

PORT FEATURES

Operator	Riport Liman İşletmesi A.Ş.
Coordinates	41° 02′ 47″ N - 40° 34′ 20″ E
Handled cargo	General Cargo, Dry Bulk Cargo

Handling Capacity

Container (TEU/year)	10.000
Dry bulk cargo general cargo (ton/year)	3.000.000
Ro-Ro (vehicle/year)	4.000
Total port area	181.335,42 m^2
Storage area (outdoor)	30.000 m^2
Storage area (indoor)	14.348,62 m^2
General warehouse	1.000 m^2
Temporary storage area	3.360,62 m^2
Semi-enclosed storage area	11.542 m^2

Rıhtım ve İskele Özellikleri

Length	557,50 m
Maximum draft	11 m

Equipment	Quantity	Capacity (ton)
TUG BOAT “ALİBABA” (offshore tugboat)	1	32
TUG BOAT “Riport Pilot”	1	760 BHP
RİPORT-1 PALAMAR BOAT “mooring boat”	1	260 BHP
Tractor (NEW HOLLAND) (sweeping vehicle)	1	
Forklift (LINDE)	1	10
Sweeping vehicle	1	
Mobile crane (COLES)	1	10
210 KWA Generator	1	
Electronic scale	1	80

CONTACT DETAILS

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RODA PORT

PORT FEATURES

Operator	Roda Liman Depolama ve Lojistik İşletmeleri A.Ş.
Coordinates	40° 24″ N - 29° 32″ E
Handled cargo	Container, General Cargo, Bulk

Handling Capacity

Container (TEU/year)	200.000
Bulk and general cargo (ton/year)	3.000.000
Total port area	211.000 m^2
Terminal indoor & semiclosed warehouse	11.500 m^2
Total bonded area (outdoor)	110.000 m^2
Non-bonded area (outdoor)	61.000 m^2
Type A bonded warehouse (indoor)	23.000 m^2
Type A bonded warehouse (outdoor)	3.200 m^2
Non-bonded warehouse	15.000 m^2

Berth-Pier Dimensions

Length	1.200 m
Maximum draft	14,5 m

Equipment	Quantity	Capacity (ton)
MHC	5	100
Excavator	4	10-12
RTG	2	40
Reachsteaker (full)	5	45
Reachsteaker (empty)	1	10
Terminal tractor	14	Kalmar & Mercedes
Trailer	25	Multi Purpose
Loader	1	19 ton - 6 m^3
Portal crane	2	30-35
Heavy cargo forklift	4	16-32
Light cargo forklift	16	2-7
Overhead crane	17	5-35
Narrow corridor stacking mach.	2	1,5
Wide corridor stacking mach.	1	1,6
Electric pallet truck	2	2,5

CONTACT DETAILS

Contact person	Y. Ahmet YAVUZ
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SAMSUNPORT

PORT FEATURES

Operator	Samsunport - Samsun International Port Management Inc.
Coordinates	41° 18′ 00″ N - 36° 22′ 00″ E
Handled cargo	Container, General Cargo, Project Cargo, Bulk Cargo (Dry/Liquid), Ro Ro, Train Ferry, Passenger, Livestock, Yacht

Handling Capacity

Container (TEU/year)	300.000
General and bulk cargo (ton/year)	14.500.000
Liquid bulk cargo (ton/year)	100.000
Ro-Ro (truck)/Passenger	100.000/20.000
Total port area	445.000 m^2
Indoor warehouse	50.000 m^2
Silo (ton)	84.000

Berth-Pier Dimensions

Length	1.756 m
Maximum draft	11,00 m

Equipment	Quantity	Capacity (ton)
Crane	15	1 - 124

CONTACT DETAILS

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Website	www.samsunport.com.tr

SOCAR TERMINAL

PORT FEATURES

Operator	Socar Aliağa Liman İşl. A.Ş.
Coordinates	38° 46′ 44″ N - 26° 55′ 51″ E
ElleçlenenYük	Container, General Cargo

Handling Capacity

Container (TEU/year)	1.500.000 TEU
Total port area	420.000 m^2 (20.000 m^2 non-bonded area)
Indoor warehouse	225 m^2
Bonded area (outdoor)	400.000 m^2
Truck Parking area (Pre-gate)	30.000 m^2

Berth-Pier Dimensions

Length	700 m (container) / 150 m (general cargo)
Maximum draft	16 m (container) / 10 m (general cargo)

Equipment	Quantity	Capacity (ton)
STS	3	70
RTG	10	45
Reach stacker	3	45
Empty container handler	3	8
Terminal tractor	26	50

CONTACT DETAILS

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TFS FUEL SERVICES

PORT FEATURES

Operator	TFS Akaryakıt Hizmetleri A.Ş.
Coordinates	41° 18′ 48.12″ N - 28° 47′ 19.71″ E
Handled cargo	JET A-1

Handling Capacity

Liquid bulk (ton/year)	10.000.000
Total port area	543.077.027 m^2
	55.000.000 m^2

Berth-Pier Dimensions	125.000 DWT
Length	320 m
Maximum draft	18 m

Equipment	**Quantity**	**Capacity (ton)**
Tank	10	300.000 m^3
Loading Arm	3	1x16”+ 2x12”
Quick Release Hook	8	2x150 t (triple) + 6x100 t (double)

CONTACT DETAILS

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TOROSPORT CEYHAN

TOROSPORT

PORT FEATURES

Operator	Toros Tarım Sanayi ve Ticaret A.Ş. (Ceyhan Terminal)
Coordinates	West Jetty (Shore/Sea Side) 36° 55′ 00″ N - 35° 58′ 54″ E, 36° 54′ 24″ N - 35° 59′ 06″ E East Jetty (Shore/Sea Side) 36° 55′ 12″ N - 35° 59′ 18″ E, 36° 54′ 30″ N - 35° 59′ 34″ E
Handled cargo	General Cargo, Dry Bulk Cargo, Project Cargo, Liquid Bulk

Handling Capacity

D. bulk and G. cargo (ton/year)	26.000.000
Liquid bulk (ton/year)	13.500.000
Total port area	700.000 m^2
Storage area	750.000 m^2 - open warehouse area
Indoor warehouse	40.480 m^3 - chemicals tanks
	60.751 m^3 - dry bulk warehouse
Customs warehouse	219.679 m^3 - tanks
	10.500 m^3 - indoor grain warehouse
	40.000 m^3 - outdoor dry bulk area
Bonded area	28.100 m^2
Parking area	30.000 m^2
Equipment parking area	10.000 m^2

Berth-Pier Dimensions

Length	1.465 m
Maximum draft	13,00 m

CONTACT DETAILS

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TOROSPORT SAMSUN

TOROSPORT

PORT FEATURES	
Operator	Toros Tarım Sanayi ve Ticaret A.Ş. (Samsun Terminal)
Coordinates	36° 27′ 24″ E - 41° 15′ 02″ N
Handled cargo	Genel General Cargo, Dry Bulk Cargo, Project Cargo, Liquid Bulk

Handling Capacity	
D. bulk and G. cargo (ton/year)	4.608.000
Liquid bulk (ton/year)	3.650.000
Total port area	1.189.000 m^2
Storage area	223.600 m^2 - outdoor warehouse area
Indoor warehouse	96.825 m^3 - chemicals tanks
	40.951 m^2 - indoor dry bulk warehouse
Parking area	3.215 m^2
Equipment parking area	1.000 m^2

Berth-Pier Dimensions	
Length	408 m
Maximum depth	19 m

CONTACT DETAILS	
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ULUSOY ÇEŞME PORT

PORT FEATURES

Operator	Ulusoy Çeşme Liman İşletmesi A.Ş.
Coordinates	38° 19' 30" N - 26° 17' 44" E
Handled cargo	Vehicle, Passenger
Total port area	80.000 m^2

Berth-Pier Dimensions

1-Main pier	322 m x 15 m (1 dolphin) Depth: 8-16 m
2-Ro-Ro pier	213 m x 8,60 m (5 dolphin) Depth: 9-16 m
3-Small pier	50 m x 5 m Maximum draft: 7 m

CONTACT DETAILS

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YEŞİLOVACIK LİMAN İŞLETMELERİ A.Ş.

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PORT FEATURES	
Operator	Yeşilovacık Liman İşletmeleri A.Ş
Coordinates	36° 11′ 03.38″ N – 33° 39′ 27.52″ E
Handled cargo	Bulk Cargo, General Cargo

Handling Capacity	5.370.000 ton/year
Total port area	35.000 m^2
Cement/clinker silo	38.000 t / 5.000 t
Indoor warehouse	4.500 m^2

Berth-Pier Dimensions	
Length / maximum draft	500 m / 17 m

Equipment	Quantity	Capacity
Liebherr LPS 420	1	124 ton
BEDESCHI shiploader	2	1.300 t/h
MASS shiploader	1	500 t/h

CONTACT DETAILS	
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YEŞİLYURT PORT

PORT FEATURES	
Operator	Yeşilyurt Demir Çelik End. ve Liman İşl. A.Ş.
Coordinates	45° 15′ 14″ N - 36° 26′ 66″ E
Handled cargo	General Cargo, Dry Bulk Cargo

Handling Capacity	
Dry bulk cargo (ton/year)	8.000.000
Total port area	210.000 m^2
Storage area	115.000 m^2
Indoor warehouse	33.000 m^2
Bonded area (outdoor)	15.000 m^2
Park area	2.000 m^2
Non-bonded area	100.000 m^2

Berth-Pier Dimensions	
Length	950
Maximum draft	20

Equipment	Quantity	Capacity (ton)
MHC	12	15-180
Forklift	7	5-17
Excavator	5	130-240 HP
Loader	16	80-270 HP
Tracks	19	25-150

CONTACT DETAILS	
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YILPORT GEBZE

PORT FEATURES

Operator	Yılport Konteyner Terminali ve Liman İşletmeleri A.Ş.
Coordinates	40° 46' 3.76 N" - 29° 31' 57.02" E
Handled cargo	Container, General Cargo, Dry Bulk Cargo, Liquid Bulk

Handling Capacity

Container (TEU/ year)	1.000.000
General cargo (ton/year)	6.000.000
Liquid bulk (ton/year)	600.00
Total port area	310.337 m^2
Warehouse (indoor)	1.800 m^2 bonded porch area warehouse 1.800 m^2 porch area 2.000 m^2 non-bonded warehouse
Bonded warehouse	4.400 m^2 Type A bonded warehouse
Bonded area (outdoor)	237.000 m^2
Non-bonded storage area (outdoor)	61.000 m^2

Berth-Pier Dimensions

Length	1.455 m
Maximum depth	30 m

Equipment	Quantity	Capacity (ton)
STS	8	70
RTG	27	41
Reach stacker	5	45
Empty handler	2	8

CONTACT DETAILS

Contact person	Remzi Cem GÖKTAŞ
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YILPORT GEMPORT

PORT FEATURES

Operator	Gemport Gemlik Liman ve Depolama İşletmeleri A.Ş.
Coordinates	40° 24′ 59.28″ N - 29° 6′ 40.13″ E
Handled cargo	Container, Ro-Ro, General Cargo, Bulk Cargo

Handling Capacity

Container (TEU/year)	2.000.000
Bulk cargo (ton/year)	2.500.000
General cargo (ton/year)	6.000.000
Ro-Ro (vehicle/year)	650.000
Total port area	1.250.000 m^2
Total bonded area	563.400 m^2
Bonded area (indoor)	6.000 m^2
Customs warehouse (indoor)	8.077 m^2
Parking area	81.500 m^2
Non-bonded area	304.600 m^2

Berth-Pier Dimensions

Length	2.050 m
Maximum draft	36 m

Equipment	Quantity	Capacity (ton)
STS	8	70
MHC	6	80-104
Reach stacker	7	8-45
Empty handler	3	8
RTG	30	41
TT	39	60

CONTACT DETAILS

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YILPORT ROTAPORT

PORT FEATURES

Operator	Rota Liman Hizmetleri Sanayi Anonim Şirketi
Coordinates	40° 46' 16" N - 29° 43' 23" E
Handled cargo	General Cargo, Dry Bulk Cargo
Handling capacity (ton/year)	6.000.000
Total port area	120.000 m^2
Bonded area (indoor)	24.575 m^2
Bonded area (outdoor)	25.150 m^2
Non-bonded area (outdoor)	25.962 m^2
Non-bonded area (indoor)	8.672 m^2

Berth-Pier Dimensions

Length	745 m
Maximum draft	28 m

Equipment	Quantity	Equipment	Quantity
Linde Forklift (2,3,5,6 ton)	18	Caterpillar 914 loader	1
Clark (13,5 ton)	1	Caterpillar 307 excavator	3
Kalmar (20 ton)	1	Caterpillar D4 dozer	1
Bobcat	6	Siwertell unloader (600 T/Hour)	2
Caterpillar 908	1	Siwertell unloader (300 T/Hour)	1
Volvo L110	1	Liebherr CBG30	1
Volvo L120	1	Caterpillar 930 K loader	2
Telehander	1		

CONTACT DETAILS

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YILPORT SOLVENTAŞ

PORT FEATURES	
Operator	Solventaş Teknik Depolama A.Ş.
Coordinates	40° 46' 0,34" N - 29° 32' 40" E
Handled cargo	Liquid Bulk, Dry Chemicals

Handling Capacity	
Liquid bulk (ton/year)	4.000.000
Total port area	24.000 m^2
Indoor warehouse	1.579 m^2
Bonded area (outdoor)	24.000 m^2

Berth-Pier Dimensions	
Length	Jetty-1: 270 m Jetty-2: 235 m
Maximum draft	11 m

CONTACT DETAILS	
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ZEYPORT ZEYTİNBURNU LİMAN İŞLETMELERİ

PORT FEATURES	
Operator	Zeyport Zeytinburnu Liman İşlt. San. ve Tic. A.Ş
Coordinates	40° 58,8′ N - 028° 53,9′ E
Handled cargo	Ferry/Passenger, Ro-Ro, General Cargo
Handling Capacity	180 TIR/day (Ro-Ro transportation)
Ro-Ro (vehicle/year)	65.700
Total port area	46.000 m^2
Storage area	1.500 m^2
Indoor warehouse	780 m^2
Customs warehouse	1.000 m^2
Bonded area	27.000 m^2

Berth-Pier Dimensions	
	5 finger pier x 112 m
	4 x Ro-Ro ramp
	112 m
Maximum draft	Max. 7,00 m Safe Berth: 6,00 m

Equipment	
	MHC cap. 16 M/T
	Forklift cap. 5 M/T

CONTACT DETAILS	
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