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MAGAZINE FOUNDATION: 1984

JUNE / 2026



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## Türkiye's Maritime Vision: Growth, Innovation, Continuity



**TAMER KIRAN**

*CHAIRMAN OF THE TURKISH CHAMBER OF SHIPPING / İMEAK*

We are delighted to participate in the POSIDONIA 2026 International Shipping Exhibition, one of the most important meeting points of the global maritime industry, and to meet with esteemed representatives of our industry.

Since our last meeting in 2024, global economic fluctuations, geopolitical developments and climate-driven transition processes have continued to directly affect the maritime industry. Despite all these developments, the Turkish maritime sector has sustained its growth thanks to its strong infrastructure, dynamic structure and adaptability.

As we step into the second century of our Republic, we are determined to further advance the achievements we have made in the maritime field. The

national maritime vision, the foundations of which were laid with the establishment of our Republic, has today evolved into a modern, competitive structure with a strong presence on a global scale.

As of today, the Turkish merchant fleet maintains its strong position in global rankings in terms of both tonnage and number of vessels, while the volume of cargo handled at our ports and our logistics capacity continue to increase year by year. With its strategic geographical location and advanced port infrastructure, Türkiye is steadily progressing towards becoming a regional logistics hub.

Our shipbuilding industry continues to enhance its international competitiveness through high value-added and technology-oriented production. In particular,

significant momentum has been achieved in environmentally friendly, low-emission and alternative-fuel vessel projects, and our shipyards have become preferred centres globally in the construction of electric, hybrid and innovative vessel designs.

Green transition and digitalisation stand out as the two most important pillars shaping the future of our industry. In line with the environmental regulations set by the International Maritime Organization (IMO) and the European Union, our sector is taking significant steps to align with sustainability goals. In this context, our efforts towards energy efficiency, the use of alternative fuels and the reduction of carbon emissions continue with determination.

On the other hand, on the occasion of the POSIDONIA International Shipping Exhibition, we aim, again this year, to meet with our counterparts in Greece in order to strengthen dialogue between the maritime sectors of the two countries and to develop opportunities for cooperation. We believe that mutual engagement will contribute not only to our sector but also to regional stability and economic relations.

While we take pride in the level the Turkish maritime sector has reached today, we are also fully aware that there is still a significant path ahead. Our goal is to further strengthen our innovative, sustainable and competitive structure, and to rank among the leading maritime nations of the world.

With these thoughts and sentiments, I hope that the POSIDONIA 2026 International Shipping Exhibition will open new horizons for our industry, and wish all participants a productive and successful event.

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# Istanbul and Marmara, the Aegean, the Mediterranean and the Black Sea Regions (IMEAK) TURKISH CHAMBER OF SHIPPING



**TAMER KIRAN - Chairman of the Board**

The IMEAK Turkish Chamber of Shipping—formally the Chamber of Shipping for the Regions of Istanbul and Marmara, the Aegean, the Mediterranean, and the Black Sea (IMEAK), and hereinafter referred to as the Turkish Chamber of Shipping (TCS)—is the principal umbrella organization representing the Turkish maritime sector. Headquartered in Istanbul, the Chamber operates major branch offices in İzmir, Bodrum, Marmaris, Antalya, İskenderun, Fethiye, Karadeniz Ereğlisi (Western Black Sea Region), Kocaeli, and Aliğa. It also maintains a Liaison Office in Ankara and 15 representative offices across coastal cities and towns throughout Türkiye.

Originally established in 1982 as the Istanbul Chamber of Shipping, the organization has progressively expanded

its jurisdiction to encompass the Sea of Marmara, the Aegean, the Mediterranean, and the Black Sea, as well as Türkiye's inland waterways. The Chairman of the Board of Directors is Mr. Tamer Kiran.

## OBJECTIVES

The primary objectives of the Turkish Chamber of Shipping are to safeguard the interests of its members; address the collective needs of the maritime community; promote the advancement of the maritime profession; facilitate professional activities; establish common professional standards; and provide advisory opinions to relevant public authorities on maritime matters. In fulfilling these functions, the Chamber upholds principles of professional discipline, ethical conduct, and sectoral solidarity.

## ACTIVITIES

The Chamber's core activities include establishing rules and best practices in the shipping sector; conducting research and gathering industry data; supporting the development of maritime transport in alignment with national transportation policies; informing international stakeholders about the capacities and tariffs of Turkish ports; securing membership in international maritime organizations and monitoring their activities; and carrying out other duties as prescribed by applicable legislation.



Chamber of Shipping

## MEMBERSHIP

Pursuant to Law No. 5174 of the The Union of Chambers and Commodity Exchanges of Türkiye (TOBB), all companies engaged in maritime activities are required to become members of the Turkish Chamber of Shipping. Members are organized into 48 Professional Committees according to their respective fields of activity.

The Chamber represents the full spectrum of the Turkish maritime and shipping industry, including shipowners, ship operators, ship agents, shipbrokers, freight forwarders, stevedoring companies, tally and inspection firms, classification societies, marine insurance companies, underwriters, marine surveyors and experts, as well as providers of auxiliary services such as salvage, rescue, pilotage, dredging, and yachting. Its membership further extends to ship chandlers and suppliers, port and marina operators, ship and yacht builders and shipyards, maintenance and repair service providers, maritime

training institutions, sand extraction companies, and fisheries enterprises.

The Turkish Chamber of Shipping is also a member of numerous national and international organizations, including The Union of Chambers and Commodity Exchanges of Türkiye (TOBB), International Chamber of Commerce– Türkiye National Committee (ICC Türkiye), International Chamber of Shipping (ICS), the ICC International Maritime Bureau (IMB), International Association of Dry Cargo Shipowners (INTERCARGO), International Association of Independent Tanker Owners (INTERTANKO), Federation of National Associations of Ship Brokers and Agents (FONASBA), European Community Association of Ship Brokers and Agents (ECASBA), Baltic and International Maritime Council (BIMCO), The Association of Mediterranean Cruise Ports (MedCruise), European Boating Association (EBA), International Bunker Industry Association (IBIA), European Shortsea Network (ESN), and Turkish-

German Chamber of Commerce and Industry (TD-IHK).

## MISSION

To offer our members efficient, productive and affordable services for shipping activities which are compatible with global system with the purpose of developing Turkish Shipping Sector in a free competition environment, increasing international competitive power of Turkish Shipping Sector and contributing to the national economy through our ever-developing service concept.

## VISION

Maritime Nation and Maritime Country.

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Executive Board of the Chamber of Shipping



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# WE ARE PROMOTING EFFICIENT SHIP DESIGNS AND SUPPORTING THE USE OF ALTERNATIVE FUELS



**DURMUŞ ÜNÜVAR**

DEPUTY MINISTER OF TRANSPORT AND INFRASTRUCTURE

“ Highlighting our industry’s stable performance despite global geopolitical tensions, uncertainties in trade routes, and fluctuations in energy prices, Minister of Transport and Infrastructure Durmuş Ünüvar emphasized that the safety of waterways is of critical importance for the maritime industry as well as for the international economy and stability. ”

**Key institutions and organizations of the Turkish maritime industry are participating in major international trade fairs. We are now preparing for the Posidonia Fair to be held in Greece. What are your opinions and suggestions regarding these fairs?**

The participation of our Turkish maritime industry in prestigious fairs like Posidonia is highly valuable. Our presence at international events alongside our institutions and companies represents a significant opportunity to increase exports and strengthen our industry’s brand value.

We should not view trade fairs merely as platforms for showcasing products. I believe we need to establish a systematic

follow-up mechanism through our Non-Governmental Organizations to ensure that the networking made at these events evolve into lasting partnerships. This way, relationships are not lost, and tangible results can be achieved. We must highlight our shipbuilding sector’s expertise—particularly in low-emission ships, hybrid and electric propulsion systems, and digital solutions—more prominently at trade fairs. We can organize special innovation areas to emphasize Türkiye’s success in yacht and boat production. In addition to general maritime events, we should place greater emphasis on niche events focused on the defense industry or green transition, where we can showcase

our supporting industry products and high-tech capabilities.

I believe that regular and effective participation in major trade shows such as Europort Rotterdam, Boot Düsseldorf, SMM Hamburg, Sea-Air-Space, and Miami Seatrade Cruise Global will significantly benefit our industry. With this approach, the Turkish maritime will secure a respected position globally not only through its production capacity but also through its technological and side industry strength. Of course, while saying this, I would like to particularly emphasize that we must support our own trade fairs with the same level of care. I also sincerely



support the organization of a strong maritime fair in our country that attracts international interest.

**As we look back on the first five months of 2026, what are your predictions for the Turkish maritime industry overall?**

Despite global geopolitical tensions, uncertainties in trade routes, and fluctuations in energy prices, I can say that our industry has demonstrated a stable performance in general. Thanks to our strong fleet structure, strategic geographical location, and port infrastructure, we have maintained our resilience during this challenging period. Our advantage as a crossroads of East-West and North-South trade routes is positioning our country as a more critical actor in global supply chains. Through increased handling capacity at our ports, digitalization investments, and logistics integration, we have achieved positive momentum, particularly in container shipping.

We anticipate that the three key factors determining the industry's growth in the coming period will be digitalization, green transformation, and qualified human resources. As the Ministry, the steps we are taking in these three areas will further enhance the international competitiveness of Turkish maritime. Looking at the first-quarter data, despite the challenges in our region, we see a 0.7% decrease in cargo transport and a 0.5% increase in container transport. I believe that once the challenges in the region subside, we will gain much stronger momentum. Overall, I see 2026 as a year with opportunities for the Turkish maritime industry, yet one that requires disciplined and planned steps.

**Considering the recent developments in our region and the situation in the Strait of Hormuz, what challenges might lie ahead for us given the difficulties in shipping routes?**

In global shipping, security risks in critical straits and narrow passages have become increasingly evident in recent times. Tensions in the Strait of Hormuz are directly driving up freight rates, insurance premiums, and lead times in this region, which is the heart of energy

shipments. The continued uncertainty in the Red Sea is also forcing ships onto longer and more costly routes, keeping freight rates high. These are leading to disruptions in supply chains, the search for alternative routes, and an overall increase in transport costs. From Türkiye's perspective, such crises present both risks and opportunities. Thanks to our strategic location, our role in the Middle Corridor, our infrastructure investments, and our constructive approach in diplomacy, we are emerging as a reliable actor on the international stage during this period. At the same time, the importance of projects such as the Development Corridor and the Zengezur Link is becoming increasingly clear.

As our Ministry, we continue to resolutely advocate for maritime safety and security, the principle of harmless and safe passage at sea, the uninterrupted flow of trade, and the application of international law on international platforms. We anticipate that such regional tensions will continue to affect our industry in the coming period; however, I believe Türkiye is in a strong position to turn these challenges to its advantage, thanks to its logistics infrastructure, crisis management capabilities, and reassuring position.

**The safety and efficiency of waterways are of critical importance for global trade. What needs to be done in this regard?**

Given that approximately 85% of global trade is conducted via sea, the safety and efficiency of waterways are of critical importance for the maritime industry as well as for the international economy and stability. By 2026, shipping will face stricter emission regulations, the need for digitalization, and geopolitical risks. Therefore, the following steps should be taken as a priority to enhance safety and efficiency: Strengthening shipping safety and navigation safety, modernizing vessel traffic services (VTS), expanding digital monitoring and data-sharing systems, and deepening international cooperation. Türkiye has made significant progress in this area.

We utilize state-of-the-art traffic management systems in our straits and

within our area of responsibility. We have implemented digital solutions to reduce human error, localized the software for our systems in the Turkish Straits, and are rapidly continuing these efforts. At the same time, we continue to contribute to global maritime safety by fully fulfilling our obligations under international treaties. As a Ministry, we will steadfastly maintain our stance in international forums in support of maritime safety, free and safe passage, and the uninterrupted flow of trade. With this approach, we are continuing our efforts at both the regional and global levels to ensure the resilience of transport and logistics infrastructure—not only in waterways but across all modes of transport—and to guarantee their continuity.

**As someone who is very familiar with the Turkish maritime industry, are you working to find solutions to challenges in collaboration with our umbrella organization, the Chamber of Shipping (DTO)? What are the most important agenda items on your desk?**

As someone who closely follows the Turkish maritime industry, I can summarize the most important agenda items on our desk as follows while working with our stakeholders, led by the DTO. Our priorities for the industry's sustainable growth and enhanced competitiveness include: developing qualified human resources, digital transformation, strengthening port infrastructure, fostering international partnerships, and advancing the green transition. We place particular emphasis on educating seafarers who are fully compliant with STCW standards, well-educated, and competitive. Within the scope of digitalization, we are accelerating processes and increasing transparency by promoting e-maritime applications. We support investments aimed at increasing the capacity of our ports and strengthening hinterland connections. We are prioritizing mutual recognition agreements to enhance the international recognition of our seafarers.

In addition, green shipping is a critical area for us. We are working intensively to ensure that our ships and the industry are minimally affected by this

transformation—and even gain an advantage from it. Our work on the National Emissions Trading System (ETS) has reached its final stage. We continue to take concrete steps in close collaboration with the DTO on issues such as sustainability, digitalization, localization, compliance with new international regulations, and facilitating the industry's access to financing. The successful results we have achieved in inspections by the International Maritime Organization and the European Union Maritime Safety Agency motivate us; however, without considering our efforts sufficient, we continue our work with determination.

**The EU Industrial Maritime Strategy and the EU Ports Strategy have been announced. Given our strong commercial ties with the European Union, what are the key areas we need to address in this context?**

The announcement of the EU Industrial Maritime Strategy and the EU Ports Strategy serves as an important reference point for us as well, given our strong commercial ties with Europe. I can summarize the steps Türkiye needs to take in line with the key focuses of these strategies, which are global competitiveness, decarbonization, and the transformation of ports into sustainable energy hubs, as follows. Our top priority is the green transition and compliance with carbon reporting requirements. Our shipowners must quickly adapt to the EU Emissions Trading System (ETS) and Fuel EU Maritime regulations, reduce their emissions, and streamline their reporting processes. To transform our ports into Green Energy Hubs, we must focus on alternative fuel supply infrastructure (ammonia, hydrogen, green methanol), port electrification (OPS) projects, and strengthening hinterland connections.

It is critically important for Turkish shipbuilding industry to shift toward high-tech and green vessels. Our shipyards must maintain and enhance their regional leadership in new-generation fuel technologies, retrofitting, and green ship recycling. We must accelerate the transition of our ports to the “smart port” concept and strengthen digitalization,

IoT applications, operational efficiency, and cybersecurity infrastructure to meet EU standards. To achieve all this transformation, raising a new generation of maritime workforce is essential. We must update educational curricula in line with green and digital technologies. Additionally, we are actively exploring ways to more effectively utilize EU funding mechanisms such as the European Investment Bank, Horizon Europe, and the Connecting Europe Facility (CEF) for green and digital investments. In summary, our primary objectives are to transform our ports into energy and logistics hubs, adapt our shipyards to high-value-added green production, and ensure compliance with carbon regulations—all to strengthen our commercial ties with the EU. Our aim is to position Türkiye not merely as a country that complies with these standards but as a maritime nation that contributes to and shapes this process.

**The green transition in shipping is also among the key current issues—what steps need to be taken in this regard? What is Türkiye's roadmap?**

The green transition in shipping has become an inevitable necessity for the industry due to the International Maritime Organization's 2050 net-zero emissions targets and the European Union's strict regulations (EU ETS, Fuel EU Maritime). As you know, our Ministry published the “2053 Net-Zero Emissions Strategy for Transportation” in September 2024. In line with the emission reduction targets set by the IMO, reducing the industry's carbon footprint is a critical priority. In this process, the transformation of not only ships but the entire maritime ecosystem—ports, shipyards, and logistics—is targeted. We are continuing our efforts to establish our own ETS. Within the authority granted by the Ports Law, we are working on secondary legislation. We will shape our work in accordance with the decision of the International Maritime Organization.

As Türkiye, we are promoting efficient ship designs and supporting the use of alternative fuels within the scope of the scrap incentive program. In green port projects, we are developing shore power projects at ports and aligning

national legislation with international standards. For the Green Transition in Shipping, the Turkish maritime industry is undergoing a process focused on the use of Alternative Fuels and Energy Sources, Energy Efficiency and Technological Transformation, Shore Power, Digitalization and Optimization, green transformation in shipyards and other coastal facilities, and “Green and Digital Transformation” to ensure compliance in educational issues. We are working to ensure this transformation progresses sustainably through public-private partnerships. We closely monitor international developments regarding the green transition and act in the best interests of our country.

**Finally, what would be your message to the industry?**

Thanks to its long-standing history, strong workforce, and strategic location, the Turkish maritime industry has always been a key player on the global stage. Our most critical priorities at this time are accelerating the green transition, boosting efficiency through digitalization, improving the working and living conditions of our seafarers, and attracting young talent to the industry. To achieve net-zero targets in the combat with climate change, investing in innovative fuels and technologies is essential. Our human resources are the industry's greatest strength; therefore, we must place greater emphasis on education, well-being, and fair working conditions. We must gain a competitive edge in the global market by enhancing operational efficiency through autonomous systems, data analytics, and digital tools. We must move forward by combining the deep-rooted rules and traditions of the sea with the opportunities offered by technology. As the Minister, I would also like to express my gratitude, on behalf of our industry, to our Minister, Mr. Abdulkadir Uraloğlu, who has never withheld his support from us and has closely followed maritime issues. We will continue to take every step necessary to enhance our industry's competitive strength, represent our country most effectively on international platforms, and collaborate with all our stakeholders—led by the Chamber of Shipping (DTO)—through collective wisdom.



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## THE TURKISH-OWNED MERCHANT FLEET

### WORLD AND TURKISH MERCHANT FLEET

2026 (January)  
WORLD FLEET  
2,394,389,000 DWT

The Turkish Merchant Fleet  
is on the 11 th place in the World List

### THE TURKISH MERCHANT FLEET

**TURKISH FLAG FLEET**  
5.3 million DWT (1.000 GT and more)

**FOREIGN FLAG FLEET**  
45.5 million DWT (1000 GT and more)

**TURKISH SHIPOWNERS CONTROL TOTAL OF**  
50.7 million DWT

### BY COUNTRY OF CONTROL AS OF JANUARY 2026

The Turkish-owned merchant fleet has reached a total capacity of 50.7 million DWT. Of this, 5.3 million DWT is registered under the Turkish flag, while 45.4 million DWT operates under foreign flags. On a global scale, Türkiye ranks 11th in terms of fleet ownership.

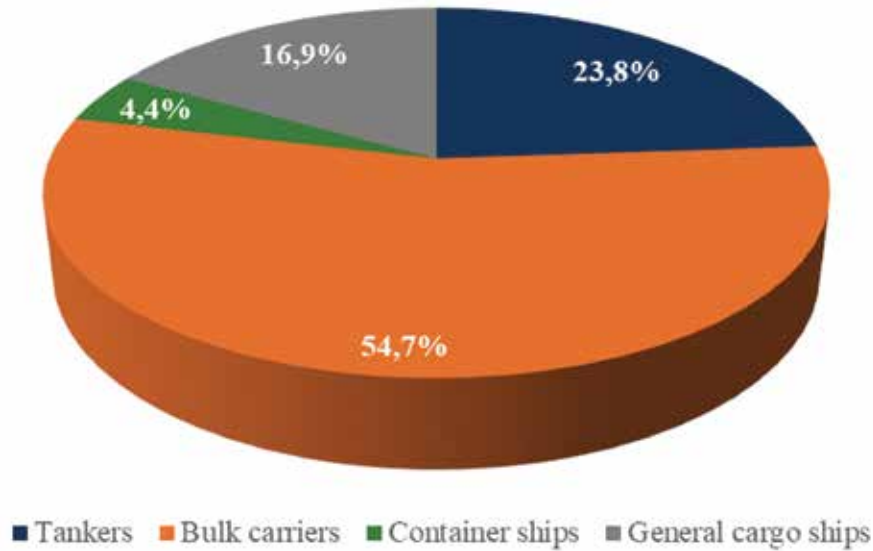
Total Fleet of the 30 Countries by National and Foreign Flags, 01 January 2026 (1000 GT and Over)

Country of Control (DWT-Rank 2026)	National Flag		Foreign Flag		Total Fleet		Foreign Flag DWT Share (%)
	No	1000 DWT	No	1000 DWT	No	1000 DWT	
1 China	6,292	130,048	5,094	351,406	11,386	481,454	73
2 Greece	560	49,840	4,811	377,408	5,371	427,248	88.3
3 Japan	944	43,531	3,526	220,260	4,470	263,792	83.5
4 South Korea	756	21,328	915	81,051	1,671	102,379	79.2
5 Singapore	721	25,787	911	59,047	1,632	84,834	69.6
6 Norway	638	14,529	954	58,333	1,592	72,862	80.1
7 Germany	133	8,354	1,827	61,152	1,960	69,507	88
8 Taiwan	121	5,630	919	61,523	1,040	67,152	91.6
9 Italy	349	5,915	1,050	63,123	1,399	69,038	91.4
10 United Arab Emirates	62	406	1,133	54,638	1,195	55,044	99.3
11 Türkiye	337	5,262	1,836	45,435	2,173	50,697	89.6
12 United States	230	6,224	804	37,588	1,034	43,812	85.8
13 Hong Kong	275	17,509	392	20,606	667	38,115	54.1
14 Denmark	336	21,883	403	22,324	739	44,207	50.1
15 United Kingdom	147	5,787	675	39,929	822	45,716	87.3
16 India	695	15,815	256	14,162	951	29,977	47.2
17 Canada	131	1,306	395	31,990	526	33,296	96.1
18 Indonesia	2,452	27,705	183	6,730	2,635	34,435	19.5
19 France	124	4,621	395	25,863	519	30,485	84.8
20 Iran	220	18,966	9	175	229	19,141	0.9
21 Vietnam	776	8,175	357	11,599	1,133	19,774	58.7
22 Saudi Arabia	143	19,330	22	776	165	20,106	3.9
23 Belgium	95	11,037	146	16,835	241	27,872	60.4
24 Malaysia	202	4,702	165	9,717	367	14,419	67.4
25 Russia	1,273	12,361	112	1,131	1,385	13,492	8.4
26 Netherlands	533	4,610	336	7,157	869	11,767	60.8
27 Thailand	313	4,183	84	3,843	397	8,026	47.9
28 Switzerland	11	731	125	7,279	136	8,011	90.9
29 Oman	3	1	68	8,342	71	8,342	100
30 Cyprus	67	1,707	202	6,724	269	8,431	79.8
<b>Total 30 Countries</b>	<b>18,939</b>	<b>497,284</b>	<b>28,105</b>	<b>1,706,145</b>	<b>47,044</b>	<b>2,203,429</b>	<b>77.4</b>
<b>Other</b>	<b>2,532</b>	<b>35,750</b>	<b>2,654</b>	<b>76,623</b>	<b>5,186</b>	<b>112,373</b>	<b>68.2</b>
<b>Subtotal</b>	<b>21,471</b>	<b>533,034</b>	<b>30,759</b>	<b>1,782,768</b>	<b>52,230</b>	<b>2,315,802</b>	<b>76.6</b>
<b>Unknown</b>					<b>1,702</b>	<b>78,587</b>	
<b>World Total</b>					<b>53,932</b>	<b>2,394,389</b>	

Source: SSMR Issue 1 – 2026

Among the largest fleets operating under open registries, China ranks first, followed by Greece and Japan, with Türkiye positioned eleventh.

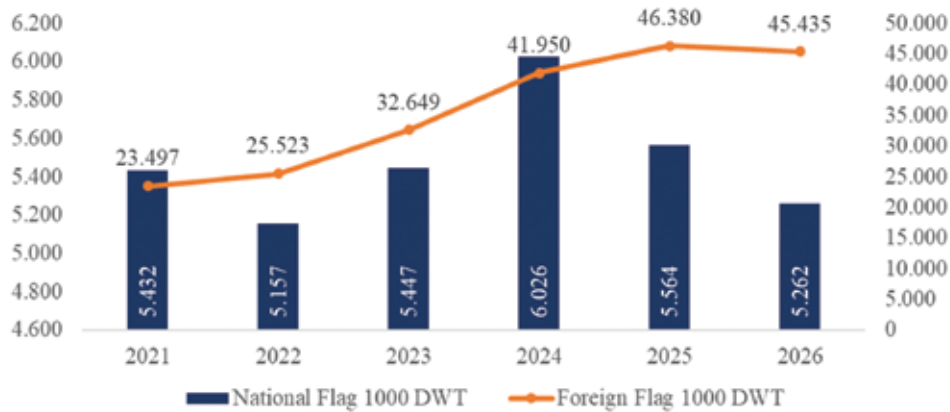
### Distribution of Turkish Owner Ships by Type



Source: SSMR Issue 1 – 2026

In terms of fleet composition by DWT (50.7 million total), bulk carriers account for 55%, tankers 24%, general cargo vessels 17%, and container ships 4%.

### Turkish Merchant Fleet Under the Control of the Turkish Shipowners



Source: SSMR Issue 1 – 2026

## FOREIGN TRADE TRANSPORTATION BY MODE

Situated within the Mediterranean Basin, Türkiye occupies a strategically significant position at the crossroads of major East–West and North–South transportation corridors. This location facilitates trade flows between Europe, the Atlantic region, the Arabian Peninsula, the Middle East, and the Far East. Furthermore, Türkiye’s extensive coastline of approximately 4,500 nautical miles (8,333 km) enhances the effectiveness of maritime transportation across the country.

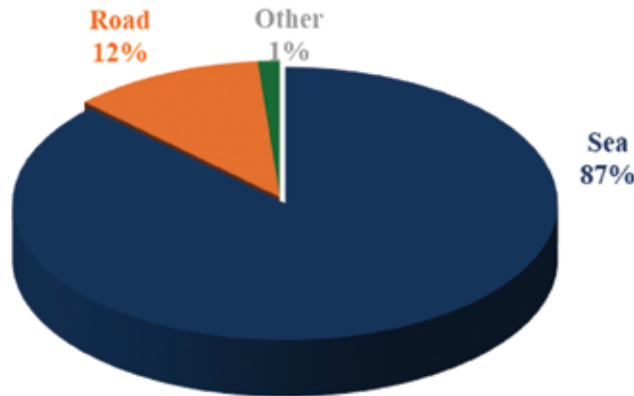
**Turkish Foreign Trade Transportation by Modes (%)**

Year	Sea	Road	Pipeline / Other	Rail	Air
2016	88.0	10.8	0.4	0.5	0.3
2017	88.5	10.3	0.5	0.4	0.3
2018	88.7	10.3	0.2	0.4	0.4
2019	88.6	10.3	0.3	0.4	0.4
2020	88.8	9.4	1.1	0.6	0.2
2021	87.5	10.7	0.9	0.7	0.2
2022	86.8	11.5	0.6	0.7	0.6
2023	87.5	11.3	0.3	0.5	0.4
2024	86.1	12.6	0.2	0.6	0.5
2025	87.2	11.4	0.4	0.5	0.4

Source: Turkish Statistical Institute

Maritime transport accounts for 87.2% of Türkiye's total foreign trade. The progress of transportation between the years of 2016-2025 is shown in the table above by the modes of transportation.

**Seaborn Trade Quantity (Tons %)**



Source: Turkish Statistical Institute

## TURKISH PORT

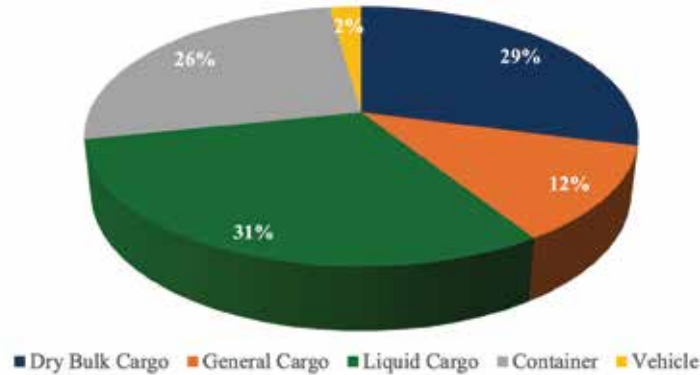
### Current Status of Turkish Ports

Explanation	Dry Bulk Cargo (Million Tons)	Liquid Bulk Cargo (Million Tons)	Container (Million TEU)	Vehicle (Million Pieces)
2025 Cargo Handling	226.8	169.7	14	2.97
Capasite	423.7	354.6	25.9	6.8
Capacity Performance	53.5%	47.9%	54.1%	43.7%
Planned Port Capacities	25.4	46.9	20.4	0
Total Capacity Including Planned	449	401.5	46.3	6.8

Source: Ministry of Transport and Infrastructure

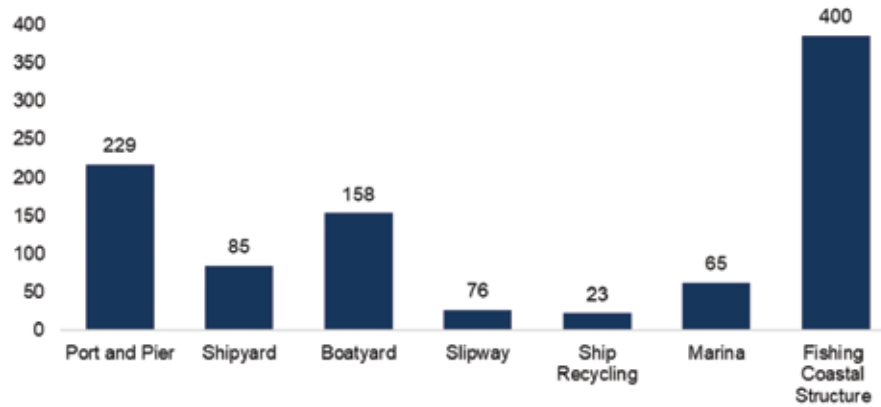
In 2025, approximately 553 million tons of cargo were handled at Turkish ports.

### Cargo Handling Figures According to Year 2025 (%)



Source: Ministry of Transport and Infrastructure

### Existing Coastal Structures in Our Country



Source: Ministry of Transport and Infrastructure

### The Number of Incoming Ships to the Turkish Ports

The number and Gross Tonnage of incoming ships to the Turkish ports between the years 2019-2023.

#### Total Number of Calling Vessel, 2023-2025

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

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

## DEVELOPMENTS IN INTERNATIONAL MARITIME TRANSPORT

In 2025, export shipments declined to 143 million tons, while import shipments increased to 271 million tons compared to the previous year. Turkish-flagged vessels carried, on average, 7% of the country's foreign trade cargo.

### Development of the Seaborne Trade (2012-2021) Tons

Year	Export	Import	Seaborn Trade Total	Turkish Flag Annual Change %	Turkish Flag %	Foreign Flag %
2016	94,805,120	215,132,519	309,937,639	38,623,279	12	88
2017	113,692,068	233,656,024	347,348,092	36,815,820	11	89
2018	110,424,635	218,544,820	328,969,455	35,510,231	11	89
2019	131,676,578	221,404,812	353,081,390	27,895,737	8	92
2020	138,902,823	226,539,473	365,442,296	29,679,160	8	92
2021	153,763,658	232,633,060	386,396,718	29,999,196	8	92
2022	150,172,902	243,917,119	394,090,021	28,443,135	7	93
2023	135,510,681	256,206,627	391,717,308	29,299,350	7	93
2024	142,278,137	257,136,420	399,414,557	30,059,943	8	92
2025	142,769,980	271,659,580	414,429,560	28,831,352	7	93

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

### Seaborne Export/Import and Transit Handling of Türkiye and OECD Countries (Tons)

OECD Country	Export	Import	Foreign Trade	Transit Handling	Cargo Handling
Italy	17,276,832	8,341,684	25,618,516	21,817,246	47,435,762
U.S.	13,518,965	21,729,680	35,248,645	1,872,173	37,120,818
Greece	7,228,329	8,085,781	15,314,110	6,028,286	21,342,396
Belgium	5,495,496	4,916,737	10,412,233	950,953	11,363,186
Netherlands	3,538,934	4,709,011	8,247,945	546,474	8,794,419
United Kingdom	4,130,354	3,021,427	7,151,781	732,636	7,884,417
France	3,320,005	2,795,371	6,115,376	575,334	6,690,710
Korea, South	355,176	4,449,888	4,805,064	969,484	5,774,548
Colombia	174,638	4,161,993	4,336,631	44	4,336,675
Portugal	2,017,561	552,420	2,569,981	991,232	3,561,213
Other	5,458,389	11,203,909	16,662,298	1,248,574	17,910,872
<b>Total</b>	<b>62,514,679</b>	<b>73,967,901</b>	<b>136,482,580</b>	<b>35,732,436</b>	<b>172,215,016</b>

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

Seaborne trade between Türkiye and OECD countries amounted to 172 million metric tons in 2025, of which 136 million tons constituted bilateral trade and 36 million tons consisted of transit cargo.

## CONTAINER SHIPPING

### World Container Fleet by Country of Domicile

An analysis of the global container fleet by country of domicile (including vessels of 1,000 GT and above) indicates that, as of 2025, 30.8 million TEU of capacity is flagged outside the owner's country.

In terms of ownership, Chinese shipowners hold the largest share of the global container fleet with 5.2 million TEU (1,410 vessels), followed by Italy with 3.2 million TEU (560 vessels) and Germany with 3.1 million TEU (760 vessels).

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

TEU-rank	Country	No	1000 DWT	1000 TEU	Av. Age	Foreign Flag %	TEU Annual Change %
1	China, PR of	1,410	62,342	5,241	10.6	78.8	14.0
2	Italy	560	39,148	3,234	18.3	99.5	17.9
3	Germany	760	36,998	3,106	15.1	77.3	-0.6
4	Japan	398	28,338	2,523	8.6	87.5	5.3
5	Denmark	343	29,253	2,522	15.0	46.5	2.8
6	France	299	24,896	2,157	11.7	85.0	21.2
7	Taiwan	393	24,488	2,127	9.6	89.4	16.8
8	Greece	461	24,782	2,054	14.9	98.2	13.2
9	Canada	196	21,822	1,951	8.7	99.9	27.7
10	Korea, Rep. of	252	14,458	1,300	10.6	50.6	25.7
11	Singapore	271	14,447	1,246	12.0	64.3	8.9
12	UK	173	13,445	1,126	15.3	84.6	0.2
13	Norway	62	4,591	387	13.3	100.0	9.4
14	UAE	123	3,266	249	19.4	97.6	12.1
15	Indonesia	235	2,709	187	10.1	37.4	3.2
<b>16</b>	<b>Türkiye</b>	<b>121</b>	<b>2,436</b>	<b>184</b>	<b>20.5</b>	<b>70.1</b>	<b>5.0</b>
17	US	81	2,319	166	17.7	62.7	-4.5
18	Thailand	51	1,723	141	15.1	67.5	45.1
19	Iran	27	1,616	136	15.5	-	-
20	Israel	36	1,688	135	12.3	96.4	3.7
21	Hong Kong	25	814	68	19.8	86.3	-13.5
22	Viet Nam	54	740	54	19.3	21,3	19.2
23	Netherlands	46	606	48	17.4	53.7	-
24	Malaysia	46	614	43	17.6	6.2	37.3
25	Bermuda	4	467	40	8.6	100.0	-
26	Russia	29	335	26	20.6	30.9	-16.6
27	Belgium	8	309	24	11.3	69.4	-24.2
28	Philippines	41	267	20	27.5	2.7	8.9
29	India	9	229	17	21.0	23.3	-
30	Bangladesh	11	190	12	23.0	-	-
<b>Total 30 Countries</b>		<b>6,525</b>	<b>359,337</b>	<b>30,525</b>	<b>13.5</b>	<b>80.5</b>	<b>11,5</b>
<b>Other</b>		<b>219</b>	<b>4,064</b>	<b>314</b>	<b>23.6</b>	<b>60.3</b>	<b>-53.7</b>
<b>WORLD TOTAL</b>		<b>6,744</b>	<b>363,401</b>	<b>30,838</b>	<b>13.8</b>		<b>10,8</b>

Source: ISL 2025

In 2025, container throughput in Türkiye was distributed as follows: exports reached 5.1 million TEU, imports 5.2 million TEU, cabotage 949,360 TEU, and transit cargo 2.7 million TEU.

## Container Handling 2016-2025 (TEU)

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

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

## Seaborne Export and Import, Transit Handling of Türkiye and Country 2025 (TEU)

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

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

The primary countries involved in Türkiye's container trade and transit operations included Egypt, China, and Greece.

## TURKISH STRAITS

The Turkish Straits—comprising the Istanbul, the Sea of Marmara, and the Canakkale—represent one of the most heavily trafficked maritime corridors in the world.

The Istanbul Strait is approximately 17 nautical miles long, the navigational route across the Sea of Marmara extends about 110 nautical miles, and the Canakkale Strait measure 37 nautical miles. The total length of the Turkish Straits system is approximately 164 nautical miles. These waterways are open to international maritime traffic under the sovereignty and control of Türkiye.

In 2025, a total of 40,173 vessels transited the Bosphorus, while 44,468 vessels passed through the Dardanelles.

### Ships Passing Through the Turkish Straits (2016-2025)

Years	Istanbul			Canakkale		
	Number of Vessels	GT	Number of Vessels Change	Number of Vessels	GT	Number of Vessels Change
2016	42,553	565,282,287	-2.30%	44,035	772,922,682	1.90%
2017	42,978	599,324,748	1.00%	44,615	823,460,636	1.30%
2018	41,103	613,088,166	-4.40%	43,999	849,140,218	-1.40%
2019	41,112	638,892,062	0.00%	43,759	872,312,222	-0.50%
2020	38,404	619,758,776	-6.60%	42,036	858,844,972	-3.90%
2021	38,551	631,920,375	0.40%	43,342	898,473,519	3.10%
2022	35,146	541,444,690	-8.80%	42,340	871,621,677	-2.30%
2023	39,000	621,638,378	11.00%	44,892	941,519,970	6.00%
2024	41,363	639,773,180	6.06%	45,549	958,384,821	1.46%
2025	40,173	619,298,004	-2.88%	44,468	966,023,610	-2.37%

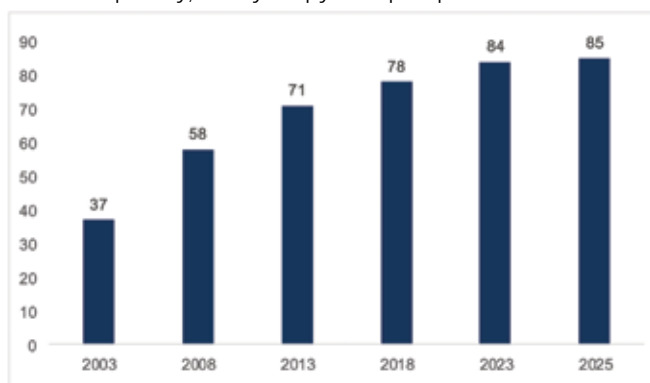
Source: General Directorate for Maritime Affairs -Department of Merchant Trade Development

## SHIPBUILDING INDUSTRY

### General Overview

The Turkish shipbuilding industry has experienced significant growth over the past two decades. The number of operational shipyards increased from 37 in 2002 to 85 as of March 2026. Additionally, 7 shipyards are currently under construction, and 13 areas have been designated for future shipyard investments.

The COVID-19 pandemic, coupled with the global economic downturn, adversely affected the sector, leading to a decline in new orders, employment, and investment. Consequently, many shipyards postponed or cancelled modernization projects.



Source: Ministry of Transport and Infrastructure 03/2026

### 2003 / 2025 Shipyards Under Operation

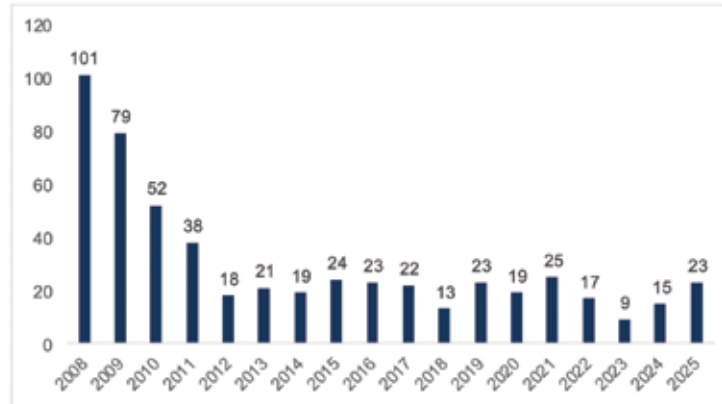
Shipbuilding is a strategic heavy industry that:

- Stimulates the development of related sub-industries
- Generates foreign exchange revenues
- Enhances the availability of skilled labor
- Supports regional economic growth
- Contributes to higher living standards
- Creates substantial employment opportunities

In 2025, a total of 23 vessels with a combined capacity of 101,519 DWT were delivered.

While some shipyards continue modernization efforts, others have suspended or cancelled projects due to financial constraints and banking restrictions.

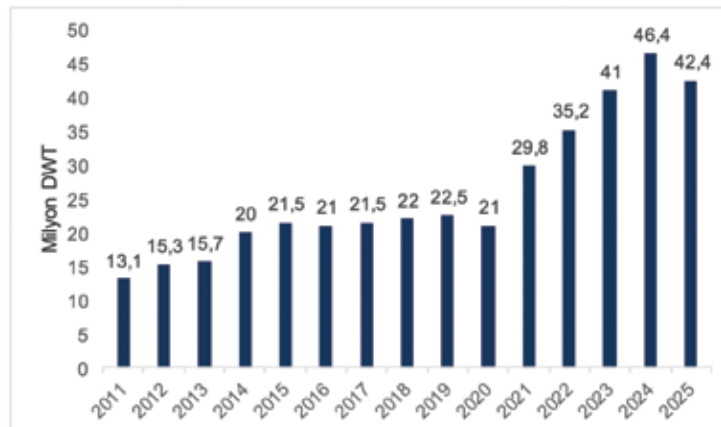
### Number of Ships Delivered Between 2008-2025



Source: Clarkson Research Services 03/2026

Turkish shipyards are predominantly export-oriented. Between 2002 and 2009, the majority of vessels were delivered to EU member states. However, due to declining orders—reaching approximately 0.5 million DWT by 2012—many shipyards have shifted focus toward repair and maintenance activities. Repair volumes increased significantly, reaching 42.4 million DWT in 2025.

### Repair and Maintenance Facilities According to Years 2011-2025



Source: GİSBİR Turkish Shipbuilders Association 03/2026

## YACHT AND BOAT BUILDING INDUSTRY

The yacht and boat building sector is a high value-added industry characterized by strong export performance and employment generation. It integrates multiple disciplines, including metalwork, painting, electronics, textiles, and interior design.

Unlike large-scale shipbuilding, yacht and boat construction requires relatively lower investment, smaller production areas, and shorter completion times, while still offering high added value.

With its extensive coastline and rich cultural and historical assets, Türkiye holds strong potential for yacht and especially mega-yacht tourism. Planned marina projects in areas such as Ataköy and Zeytinburnu in Istanbul are expected to enhance both prestige and revenue in marine tourism.

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

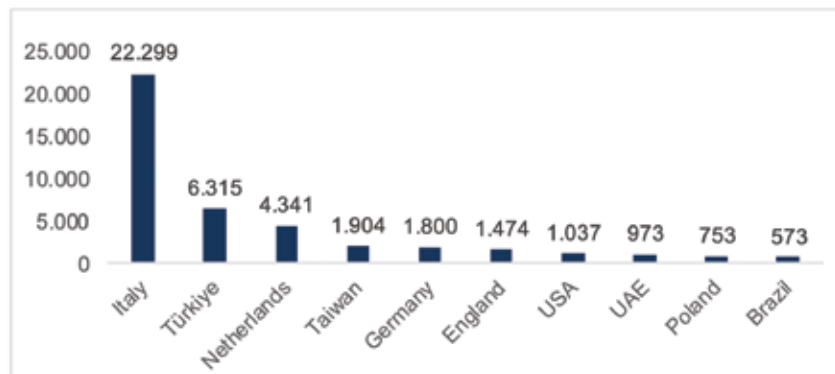
- Skilled and well-educated workforce
- High-quality production aligned with international standards
- Competitive costs
- A well-developed and high-quality supporting (ancillary) industry
- Technology-driven production
- Strategic proximity to global markets
- Favorable climate
- Potential in boat and Yacht building

Key challenges are;

- High taxation (special consumption tax, VAT, motor vehicle taxes)
- Lengthy bureaucratic procedures in registration processes

Türkiye has shown consistent growth in the construction of superyachts (24 meters and above) since 2007, ranking second globally by total length. In 2025, it maintained this position with 141 projects totaling 6,315 meters.

### Global Ranking of Yacht Orders 24 Meters and Above (length -meters)



Source: Boat International (2026 Global Order Book)

## SHIP RECYCLING INDUSTRY

Ship recycling plays a vital role in the maritime lifecycle, enabling the replacement of aging vessels with modern, environmentally efficient ships.

A vessel's economic lifespan typically ranges between 20 and 35 years. Recycling steel from ships offers significant environmental benefits, including:

- 74% energy savings
- 90% conservation of raw materials
- 40% reduction in water usage
- 76% decrease in wastewater pollution
- 86% reduction in air pollution
- 97% decrease in mining waste

The center of Türkiye's ship recycling industry is located in Aliğa, İzmir, where 22 facilities are currently operational.

Key advantages of the sector include:

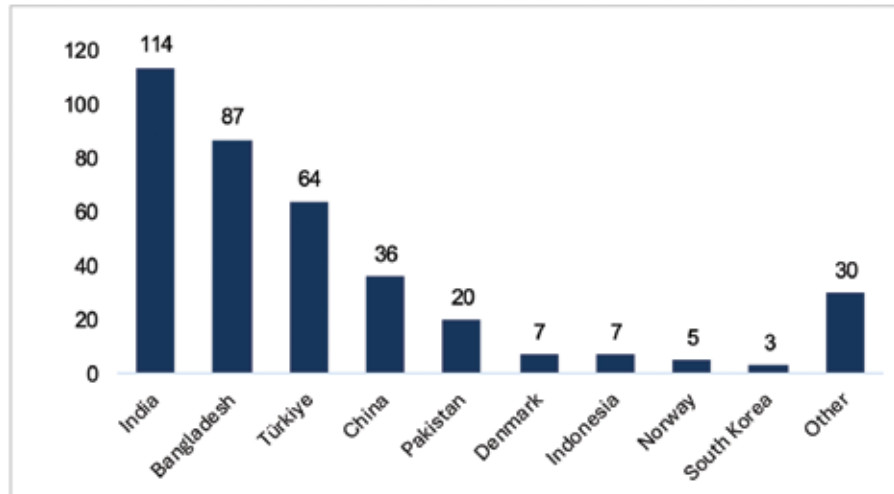
- Skilled workforce and proximity to European markets
- Unique position as the only OECD country in the region with ship recycling capacity
- Strong domestic demand for recycled materials
- Compliance advantages under the Basel Convention
- Leading representation in the EU Ship Recycling Facilities List

The industry contributes positively to maritime economics by balancing fleet capacity, influencing freight markets, and generating demand for new shipbuilding orders. As a labor-intensive sector, it provides direct employment to approximately 1,400 workers, with significantly higher indirect employment.

Under the EU Ship Recycling Regulation (EU SRR), effective since 31 December 2018, EU-flagged vessels may only be recycled at approved facilities listed in the European List. Türkiye initially entered this list with three facilities, increasing to ten by 2025.

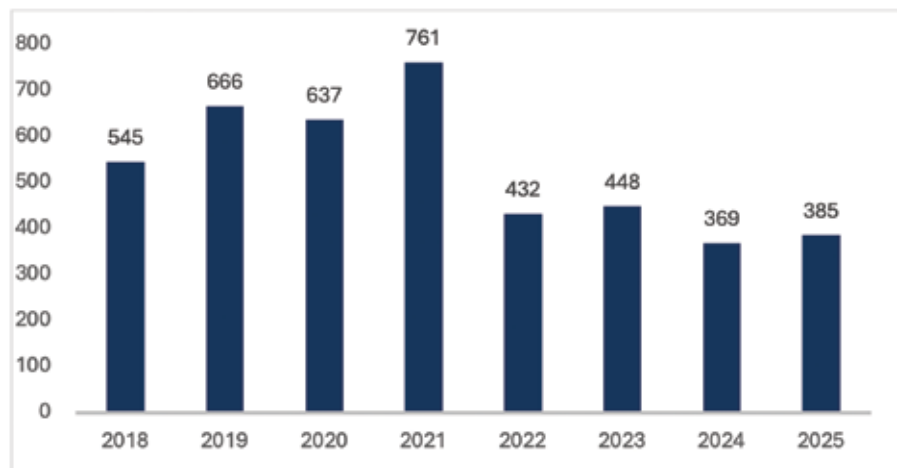
According to global rankings, Türkiye holds third place worldwide in ship recycling capacity as of the end of 2025.

### Global Ship Recycling (Quantity)



Source: Clarksons Research Services Limited 03/2026

### Recycled Ship Numbers by Years



Source: Clarksons Research Services Limited 03/2026

Like many sectors, ship recycling was also affected by the COVID-19 pandemic, leading to reduced workforce levels due to health and safety measures, with employment estimated to have declined by nearly half compared to pre-pandemic levels.

## ALIAĞA

# ALIAĞA IS NOW ONE OF THE KEY LOGISTICS HUBS IN THE EASTERN MEDITERRANEAN



**ADEM ŞİMŞEK**

CHAIRMAN, TURKISH CHAMBER OF SHIPPING, ALIAĞA BRANCH

We are pleased to share Aliğa's strong performance and vision for sustainable growth in the maritime, logistics, and tourism industries on the occasion of the Posidonia Fair, one of the most prestigious events in the maritime industry. With its strategic location, advanced port infrastructure, and dynamic, private-sector-focused structure, Aliğa continues to be one of the most important centers of Türkiye's shipping. Data for 2025 clearly demonstrates that Aliğa ports have maintained their steady growth. The number of ships calling at the ports reached 6,224 during the year, marking a 2.27% increase compared to the previous year. With this performance, Aliğa has maintained to rank second nationwide, following Kocaeli.

In 2025, the Aliğa ports handled 88.7 million tons of net cargo, achieving a

3.80% growth compared to the previous year and finishing the year as the leader in Türkiye. This volume, which has nearly tripled over the past 20 years, is one of the most important indicators of the region's production and trade capacity. Aliğa maintained its leadership in both the loading (export) side with a 4.84% increase with 35.9 million tons, and the unloading (import) side with a 3.10% growth with 52.8 million tons. With a total cargo handling volume exceeding 117 million tons, Aliğa ranked second in Türkiye.

Its ports have also demonstrated a remarkable performance in foreign trade. Over the past 20 years, export loading has increased by 288% to reach 35.9 million tons. The volume of exports processed through the Aliğa Customs Directorate rose to \$21.8 billion by the end of 2025.

A similar trend was observed on the import side; the volume tripled to 52.8 million tons in 2025 from 17.4 million tons in 2004. 8% of Türkiye's total exports, exceeding \$273 billion, were conducted through Aliğa and 5.5% of the total foreign trade volume of \$638 billion also originated from Aliğa.

In 2025, container traffic stood at 1.7 million TEU, marking a 19.72% decrease compared to the previous year. Despite this decline, Aliğa continued to rank among the top 5 ports in Türkiye. In January 2026, traffic reached 119,000 TEU, and the downward trend continued to a limited extent due to fluctuations in global trade.

## Europe's Largest Ship Dismantling Plants in Aliğa

Aliğa is home to one of the most significant ship dismantling regions in Türkiye and the world. As the location of Europe's largest ship dismantling plants, our region produces nearly 1 million tons of scrap steel and other scrap metals and ship parts annually. With 22 licensed plants, we ensure the dismantling of ships that have completed their commercial lifespans in the maritime industry. Regarding the ownership rights issue in the ship dismantling region, which began developing in 2025 and will be resolved this year, we believe that all our plants will obtain EU approval by raising the environmental, occupational health, and green transition standards of our plants.

During the pandemic, the number of ships and the volume of light tonnage, which had risen due to the arrival of cruise ships for dismantling, began to decline in subsequent years. In 2025, we exceeded 500,000 tons in light tonnage. We anticipate an even higher tonnage in 2026. 2025 also witnessed significant developments in our region regarding



tourism and passenger transportation. In line with the continuation of the visa-on-arrival policy and the growing interest in Greek islands, the long-awaited Aliğa Passenger Terminal Project has been implemented. The official opening of the route took place in November with the symbolic first voyage from Aliğa to Lesbos. The high demand for regular



services, which began during the 2026 Ramadan holiday, demonstrated the significant potential of this route. Thanks to this route, Aliğa is becoming not just a departure point, but also a new gateway for tourists arriving from Greece.

In 2025, over 10,000 passengers were transported on the Dikili–Lesbos route; and the Ayvalık–Lesbos route, meanwhile, continued to provide uninterrupted service, contributing to regional tourism.

The marina project planned by the Aliğa Municipality, expected to be completed in 2027, is viewed as a strategic investment that will enhance our region's sea tourism potential. As the Aliğa Branch of the Chamber of Shipping, we believe that this project is not only crucial for yacht tourism but also for the significant added value it will provide to employment, the service sector, and the regional economy. When combined with Aliğa's logistical strength and transportation advantages, it is clear that it will transform the region into an attractive destination on both national and international scales.

We believe that this marina project will be implemented with a focus on sustainability, environmental sensitivity, and modern infrastructure to accelerate the development of sea tourism in the Northern Aegean and we place great importance on supporting this process in

collaboration with all stakeholders in the sector.

### **Water Sports Growing Significantly**

Promoting maritime culture and connecting young people with the sea are viewed as key components of regional development. In this regard, water sports have seen significant growth thanks to initiatives carried out in the region, particularly in Foça. One of the most concrete indicators of this vision is the Techno293 World Championship 2026, held in Foça. This event took place with international participation and has made significant contributions to the region's promotion and brand value. Aliğa is advancing toward becoming one of the key logistics hubs not only for Türkiye but also for the Eastern Mediterranean, thanks to its robust port infrastructure, growing trade volume, developing tourism potential, and capacity to host international events. Together with all stakeholders in the maritime industry, we continue to support projects that contribute to the development of our region and will steadfastly continue our support in line with these needs.

## ANTALYA

## ANTALYA, A TOURISM PARADISE, AIMS TO SET NEW RECORDS



AHMET ÇETİN

CHAIRMAN, TURKISH CHAMBER OF SHIPPING, ANTALYA BRANCH

With its 640-kilometer coastline, sunny weather for most of the year, long beaches, crystal-clear waters, and rich history, Antalya is Türkiye's tourism capital, attracting millions of domestic and international visitors. As the hub for every category of sea tourism—from scuba diving to day-trip boat tours—Antalya is a destination with year-round tourism activities, not just for summer vacation. As the most preferred destination for both domestic and international tourists every year, it hosted 17 million guests last year—setting a historic record - and was designated as the “2025 Tourism City” by the D-8 Economic Cooperation Organization.

As stakeholders in Antalya's maritime industry, we have embarked on 2026 with even greater ambitions. Despite all

the negative geopolitical developments in our region, we believe that Antalya—the safe haven of tourism—will break new records during the peak season of 2026 and once again rank among the world's most important tourism cities.

#### The City with the Most Blue Flag Beaches

Especially following the introduction of the safe tourism certification during the pandemic, we are positioned as a tourism hub where the utmost care is taken in hosting guests. In Antalya, 233 beaches, 13 tourist boats, and 6 marinas have Blue Flag, meeting criteria such as water quality, environmental management, safety, and environmental education, and contributing to sustainable tourism with an environmental consciousness.

Thus, our city holds the top spot in these categories. Coastal and marine cleanups are also conducted periodically throughout the year with the participation of the municipality and NGOs. We, as the Turkish Chamber of Shipping, strive to participate in all cleanup activities. We support and will continue to support initiatives for coastal and marine cleanup.

#### 8 Modern Marinas for Our Guests

As a result of the steps taken to resolve the mooring and docking issues we faced in previous years, we built another marina last year. Demre, which holds particular importance for the western region of our coastline, has added an additional 400 marine and 300 land berths to the seven marinas in our region through the SETUR Marina. Thus, a step has been taken to resolve the most critical issue for our members and all seafarers, and one of our most important sea tourism regions has gained a modern marina.

#### The Easiest Way to Explore the Bays: Boat Tours

With its 640-kilometer coastline, Antalya is the hub of sea tourism, and water sports and boat tours naturally rank among the top tourism activities here. It leads the way in Türkiye with approximately 1,400 recreational boats. Our Antalyan seafarers, having completed all their preparations, are awaiting the peak season of 2026. Day-trip boat tours stand out as the sector with the highest demand across all coastal centers, particularly in Antalya's Kaleiçi. Blue cruises, which are particularly popular in the Kaş-Kekova and Kemer regions, are preferred by guests for their exploration of tranquil coves and historical sites.

#### A World Leader in Water Sports

One of the areas where Antalya is making a difference in the tourism sector, with the goal of extending the tourism season to 12 months, is



underwater and water sports. Our city is the leader in water sports in Europe and has approximately 400 water sports courses. Antalya's water sports activities offer a remarkable variety compared to any other resort region in Türkiye. Among water-based activities,

once again. Additionally, our coastline stretching from Gazipaşa to Kalkan features over 300 diving spots, making it an ideal destination for underwater adventures. Antalya's diving sites cater to both experienced and novice divers, offering a unique marine experience.



parasailing, jet skiing, banana boat rides, ringo, flyboarding, wakeboarding, and diving stand out, while river and canyon-based activities such as rafting, canoeing, and canyoning offer a unique thrill. We expect this year's diverse range of activities to attract significant interest

With crystal-clear waters, rich coral reefs, and stunning shipwrecks, Antalya's diving spots are ideal for underwater photography and historical exploration.

A thousand dives are made daily during the season. The Side Underwater

Museum was opened with the contribution of our branch, and the Kemer Lycia Underwater Museum, which we also support, continue to be the most important points of interest for diving enthusiasts, along with important shipwreck sites. The maintenance and repair costs of the Side Underwater Museum are also covered by our branch.

### **A Breakthrough Year for Cruise Tourism**

Cruise tourism is one of the sectors where Antalya is striving to gain momentum. Although there was some progress last year, intensive efforts are underway to establish Antalya as a major destination in this field and help it reach the position it deserves. Following the recent initiatives by our member Qterminals Antalya Port Operations in the cruise tourism sector, larger cruise ships are now able to dock in Antalya. Thanks to the collaboration between our members Qterminals and ASBAŞ, we have begun hosting large cruise ships. We hope that bookings will continue to grow in the coming period and that Antalya and Alanya will become the hubs of cruise tourism in the near future.

### **The Mediterranean's Most Important Yacht Construction & Repair Center**

Antalya should not be viewed solely as a tourism city. Especially in yacht manufacturing, our Antalya Free Zone boasts a 38-year-old established history and, thanks to its shipbuilding companies, yacht docks, and loading-unloading docks, forms a structure unmatched in Türkiye. With 44 yacht building firms operating there, the Antalya Free Zone is a major hub in this sector. As Türkiye's most important center for luxury yacht building, the Antalya Free Zone has become the Eastern Mediterranean's most capable yacht building and maintenance center, particularly after the completion of infrastructure investments in our region in 2021. We expect the annual transaction volume in the Free Zone, where 59 luxury yachts were delivered last year, to exceed 1 billion dollars and continue to grow in 2026 as well.

## BODRUM

## BODRUM BOAT SHOW OCTOBER 14–18, 2026

### THE MEDITERRANEAN'S RISING MARITIME PLATFORM



**ORHAN DİNÇ**

*CHAIRMAN OF IMEAK TURKISH CHAMBER OF SHIPPING BODRUM BRANCH*

The Bodrum Boat Show, which is preparing to open its doors for the second time on October 14–18, 2026, continues its efforts without interruption with the vision of bringing Türkiye's strength in the maritime industry to the international stage. Organized in collaboration with the Muğla Metropolitan Municipality and the IMEAK Chamber of Shipping, and with contributions from MUTTAŞ Denizcilik A.Ş. and the Bodrum Municipality, the show, now in its second year, is drawing attention with its expanding scope and growing international interest.

To be held in Bodrum, the jewel of Türkiye with its unparalleled natural beauty, deep-rooted maritime culture,

and strategic location, the show brings together all industry stakeholders, from domestic manufacturers to Turkish distributors of global brands, from



brokers to charter companies, and from equipment and accessory suppliers to sub-industry representatives. In this respect, the Bodrum Boat Show is not only an exhibition venue but also a powerful platform for trade and business development.

For the 2026 event, 93 tents will be set up at the Port of Bodrum, offering exhibitors different square meter options (9 m<sup>2</sup>, 16 m<sup>2</sup>, and 25 m<sup>2</sup>), and a total of 195 boats will be displayed at sea and on land. The modern layout has been designed to maximize the visitor experience, and a comprehensive show atmosphere will be created for both professional visitors and maritime enthusiasts.

During the organization of the show, great importance is also placed on digital communication and international promotional activities. The official website, updated under the coordination of ED Fuarçılık, provides visitors with all the details in Turkish and English, while the Bodrum Boat Show's visibility is being rapidly increased through social media campaigns, participation in international boat shows, and promotional activities at global events, particularly in Cannes.



**A MEETING POINT THAT SHAPES THE FUTURE OF THE INDUSTRY**

Going beyond being merely a trade event, the Bodrum Boat Show aims to be a meeting point that shapes the future of the industry. Through B2B meetings, panels, and industry seminars held during the show, information sharing among exhibitors is encouraged, paving the way for new collaborations and investment opportunities. This interactive environment not only strengthens Türkiye’s export potential but also

maritime events in the Mediterranean basin. Aiming to showcase Türkiye’s manufacturing strength, innovation capacity, and global competitive potential in the maritime sector to the world, the show intends to secure an even stronger position on the international calendar in the coming years.

In light of this strong foundation and vision, the Bodrum Boat Show 2026 asserts its position as a hub that shapes not only today’s maritime trends but

as Halicarnassus in antiquity, boasts a deep-rooted maritime heritage, having been home to one of the Seven Wonders of the Ancient World, the Mausoleum of Halicarnassus, and having nurtured important historical figures such as Herodotus.

Held in Bodrum, where this rich historical heritage meets a modern maritime vision, the show will not only serve as a meeting point but will also be remembered as a platform where new



accelerates the integration of domestic manufacturers into international markets.

With its growing number of exhibitors, expanding exhibition area, and increasing international interest from around the world, the Bodrum Boat Show is steadily becoming one of the most prestigious

also those of the future. The show, which will feature topics driving the transformation of the industry—from sustainable maritime technologies to innovative designs, from smart yacht solutions to environmentally friendly manufacturing—will offer its exhibitors an inspiring experience. Bodrum, known

horizons are explored, the foundations of global collaborations are laid, and the future of the industry is built together.

The Bodrum Boat Show 2026 is the most powerful route leading from our ancient bond with the sea into the future.

## FETHİYE

# FETHİYE: WHERE NATURE AND THE BLUE CRUISE MEET



**İLKYAY TUĞAY**

*CHAIRMAN, TURKISH CHAMBER OF SHIPPING, FETHİYE BRANCH*

The responsibility area of the Turkish Chamber of Shipping Fethiye Branch is a coastal region in southwestern Türkiye stretching from the Eşen River to Ekincik Bay, encompassing Butterfly Valley, Ölüdeniz, Fethiye, Çalış, Göcek, Sarıgerme, Dalyan, and Köyceğiz.

### A Natural Paradise

The Fethiye region is filled with indescribable beauty. If you are a nature lover and someone who craves discovering new horizons, Fethiye is the perfect place for you. It is a unique destination created by the convergence of many natural wonders. Some of these include pristine turquoise waters, countless picturesque coves, lush

Mediterranean flora, and a landscape where not a single drop of rain falls from June to September.

Fethiye is located on the Mediterranean coast in southwestern Türkiye. Dalaman International Airport is just 50 km away from the city.

Due to its natural harbor-like function, Fethiye Bay serves as a key stopover for yachters from all over the world. It is also one of the starting points of the famous Blue Cruise.

### Blue Cruise

Exploring the turquoise waters of the Mediterranean, along with its magnificent

historic coves, caves, and islands, does not have to remain just a dream. Who wouldn't want a vacation exploring exquisite coves by yacht or traditional wooden gulet?

Sailing through crystal-clear waters offers great opportunities for those who enjoy an active lifestyle, including swimming, fishing, water skiing, surfing, and diving.

### Traditional Design

Traditional gulets have been used for fishing and transportation along the western and southern coasts of Anatolia for centuries, thanks to their unique designs. They are crafted from pine, chestnut, and mahogany wood. Today, you can find all the comforts you need on board, including comfortable cabins, showers, toilets, kitchens, and areas for relaxation and sunbathing.

Modernly designed boats provide services not only through their traditional designs but also through their modern equipment and amenities.

### Bareboat Yacht Charter

In bareboat yachting, you rent the yacht ready for use and return it at the end of your trip. The captaincy and crew responsibilities are entirely yours. By renting a bareboat, you are free to determine your own itinerary and route.

### Day Trips

Famous boat tours departing from Fethiye, Ölüdeniz, Çalış, and Göcek offer a wonderful day out for families and couples looking for fun. The sun and turquoise waters await you. Take your spot on deck and relax all day amidst stunning natural scenery.

### Diving

With sea water temperatures ranging from 14 to 28 degrees Celsius year-



round, 40-meter visibility, and an extraordinary abundance of marine life and vegetation, Fethiye is an ideal destination for diving enthusiasts.

#### **Turkish Bath**

Located at the foot of rugged mountains with crystal-clear waters and two caves, this is a suitable spot for experienced divers.

#### **Sarıyarlar**

There are three tunnels shaped like a triangle, situated close to one another.

#### **Big Reef**

It offers a suitable environment for diving at depths of 14–42 meters. Among the large, colorful rocks, numerous groupers, sea bream, and a vibrant underwater world attract photographers.

#### **Shipwreck**

A 42-meter-long former Coast Guard boat has been sunk in the Fethiye Dalyan Creek area and is now available for divers to explore.



#### **Water Sports and Rafting**

Enjoy water sports like windsurfing, kitesurfing, water skiing, parasailing, ringo, and banana boat rides to have fun and relieve stress.

Rafting is suitable for those with an adventurous spirit. You'll be filled with positive energy and love the unique views of the Dalaman River and its lush, green valleys.

#### **Rowing and Sailing in Fethiye**

Rowing is an endurance sport that pushes the limits of the human body. Due to the sheltered nature of the Fethiye Bay winds, it offers rowing teams the opportunity to set up camp. In the winter time, when lakes in Central and Northern Europe freeze over, rowing teams prefer Fethiye.

The sailing season spans from April to November 15, a period during which the sun shines an average of 10 hours a day. The speed of the gentle, warm winds rarely exceeds 15 knots.

#### **2026 Sea Tourism Assessments**

In recent years, sea tourism has begun to experience significant growth. The increasing demand, particularly in our bays and coastal areas, is directly affecting both businesses and everyone who uses the sea.

Along with this intensity, questions about whether the current system is sufficient have become more prevalent. 2025 was not a particularly bright year for the sector. The season fell short of expectations, and many businesses navigated this period cautiously. It appears that 2026 will not be much different from 2025. Global economic developments, rising costs, and uncertainties will continue to directly impact sea tourism. Therefore, it is clear that as we enter 2026, we need to take more careful, more planned, and more realistic steps.

Mooring buoy systems have emerged as a response to this need. However, the situation at the site shows that things are not progressing as smoothly as they appear on paper. Usage habits, varying needs across regions, and differences in implementation bring certain challenges along with them.

Many stakeholders in the sector point out that there are still unresolved issues regarding costs, access, ease of use, and oversight. This situation affects both how our members conduct their business and the experience of visitors to the sea. As we enter 2026, we see this clearly: Demand continues to grow, but our available space remains the same. Therefore, every step taken must be planned more carefully. It's not just about establishing a system; we need to carefully consider how that system will function on the site.

Moving forward, it will be crucial to listen more closely to what's happening on the site, shape decisions accordingly, and build a more balanced structure for everyone. The sea belongs to all of us. While protecting it, we must also learn to use it properly.

## İSKENDERUN

## ANCHORED IN HISTORY, SAILING TOWARD TOMORROW

**KEMAL KUTLU**

CHAIRMAN, TURKISH CHAMBER OF SHIPPING, İSKENDERUN BRANCH

İskenderun made its mark in world history as the first city named after Alexander the Great, and gained prominence during the pre-Roman and Roman periods for its docks, which were used to transport agricultural products and olive oil by sea. It is the starting point of the Levantine Sea.

After the region came under Ottoman rule, İskenderun started international shipping with a decree issued by the Sultan Murat III in 1592.

The first customs building was established in 1593. Until it was connected to Türkiye and the Republic, it carried Chinese, Iranian and local cargo to European Ports with its nearly 40 Turkish and foreign-owned piers.

Industrialization began in our region during the Republican era, and together with port operations, agriculture, fishing, and tourism, it has formed the main source of livelihood.

**INDUSTRY:**

In Hatay province; there are a total of 6 organized industrial zones with legal entities, including Antakya, Payas, Erzin, İskenderun 1, İskenderun 2, and Altınözü Enek Agricultural Specialized OIZ.

One-third of Türkiye's iron and steel production—14 million tons—is produced in our region. With an annual output of 30 million units, it is Türkiye's most important region for filter production.

Investments in petrochemical plants are ongoing. Our region also hosts cotton processing and citrus packaging plants.

**PORTS AND PIERS:**

There are 27 Ports, Piers and offshore facilities in our Gulf. We handled 59 million tons in 2022, 56 million tons in 2023 in the İskenderun Port Authority area, 67 million tons in 2022 and 52 million tons in 2023 in the Botaş Port Authority area.

The exit points of 2 Iraq-Türkiye Pipelines and Baku-Ceyhan Pipeline are in our gulf.

**FISHERIES AND AGRICULTURE:**

There are 5 fishing ports in our bay. 125 of the 480 boats registered in the ports are trawlers. The Gulf is a spawning ground for many fish species. İskenderun Gulf is especially rich in Jumbo shrimp species. Aquaculture is also practiced in our Gulf. With a total of 15 fish farms, 11 of which are located in the Yumurtalık region, 40,000 metric tons of fish are produced annually.

The breeding grounds of the endangered Green Sea Turtles (Chelonia Mydos), which lay eggs at an average of 60 different points between Dörtöyl and Samandağ beaches in the Gulf of İskenderun every year, and the Mediterranean Monk Seals, which live in seal caves at the foot of Samandağ Kel Mountain, also attract the attention of local and foreign tourists. All kinds of agricultural products, including cotton, grow in the Amik plain. Kırkhan - Reyhanlı region stands out with carrot



## İZMİR

## NEW COOPERATION OPPORTUNITIES IN THE MARITIME INDUSTRY



**YUSUF ÖZTÜRK**

CHAIRMAN, TURKISH CHAMBER OF SHIPPING, İZMİR BRANCH

İzmir is one of Türkiye's leading industrial and commercial cities with 13 industrial zones and two free zones. As a port city with a 5,000-year history, İzmir connects the Aegean and Western Anatolia to international trade corridors via sea routes. In 2025, it maintained its share of the country's total exports by closing the year with \$43.7 billion in total exports, though the export growth rate remained at 0.6%.

The Aegean Exporters' Associations (EIB) recorded exports of \$18.5 billion, while the Aegean Free Zone set a record with exports exceeding \$3.2 billion. İzmir's inherent aptitude for trade and seafaring has led to the presence of powerful shipowners, port operators, shipping agents, shipbuilders, and suppliers—all with deep-rooted histories

in our region—as well as companies operating in every sector of the maritime industry.

İzmir's inherent aptitude for trade and seafaring has led to the presence of powerful shipowners, port operators, shipping agents, shipbuilders, and suppliers—all with deep-rooted histories in our region—as well as companies operating in every sector of the maritime industry. İzmir is a port city with 16 ports/piers. 10 of the ports serve general cargo and dry bulk cargo ships, 8 serve liquid bulk cargo, and 4 serve container cargo and ships.

İzmir Ports are a natural bridge between Asia and Europe with 220 direct port connections, handling 92 million tons of cargo, having 4.25 million TEU container

handling capacity, around 2 million TEU containers and 71 thousand Ro-ro transportation. Our convenient location on transportation corridors such as the Belt and Road Project also increases the potential of the regional maritime industry.

The TCDD İzmir Port, whose cargo operations were recently transferred to the Albayrak Group by the Turkish Savings Deposit Insurance Fund (TMSF), is the largest port in the Aegean Region and the second-largest in Türkiye in terms of harbor length and site area. In terms of service diversity, it is also the only port in the Aegean Region capable of serving all types of ships and cargo. Once the transfer process is completed, the necessary infrastructure investments are made, and the port resumes operations effectively, it is anticipated that the port will once again become a major operational hub for İzmir and the Aegean Region.

During the period when the capacity of İzmir Port was insufficient, the container ports established in the Aliğa region in the north of İzmir showed rapid development, and in 2025, 88.7 million tons of total cargo and 1.701 million TEU containers were handled in Aliğa Ports. Also in the north of İzmir, the superstructure of the North Aegean Çandarlı Port project is planned to be completed and put into operation. It is expected to operate within the integrated port and the industrial zone and have final capacity of 12 million TEU.

### High Potential In The Shipping and Logistics Industry

Our region's direct Ro-Ro connections to Europe strengthen our logistics performance. Last year, a total of 67,000 vehicles were transported on the Çeşme-Trieste (Çeşme Ulusoy Port) route, while over 3,000 vehicles were transported



on the İzmir-Sète (İzmir Port) route. In order to evaluate the potential of our region in the shipping and logistics sector, our members show great interest in the leading fairs in the shipping sector, especially Posidonia, Breakbulk Europa, Breakbulk Middle East. With the support of our industry to make İzmir the

22,391 domestic attendees—in 2025, the Logistech Fair will be held for the fifth time this year from October 7–9, 2026, and continues to make significant contributions to the maritime industry with its growing profile of international participants and visitors. We aim to direct our fair to cooperate with Posidonia and

companies from 81 countries and 32,527 visitors from 130 countries in 2024. We believe that Posidonia, one of the important shipping fairs of our region, will bring new opportunities for Turkish companies this year as well. We hope that Greek shipping and Turkish shipping companies will evaluate trade



hub of the international transportation industry, İzmir Fuarçılık A.Ş. has been organizing the Logistech-Logistics, Storage and Technologies Fair for four years. Having hosted a total of 23,968 visitors—including 577 international and

similar shipping fairs. When considering vessels over 1,000 GRT, the Posidonia Fair of Greece, which ranks second globally in the world fleet ranking with 426.4 million DWT, successfully brought together 2,038 participating

opportunities and that our companies will make new connections, paving the way for cooperation between Piraeus Port, one of Europe's leading ports, and İzmir Ports.

## KARADENİZ EREĞLİ

## KARADENİZ EREĞLİ: MEETING POINT OF TOURISM AND COMMERCE



OĞUZ ÜNLÜER

CHAIRMAN, TURKISH CHAMBER OF SHIPPING, KARADENİZ EREĞLİ BRANCH

As IMEAK Chamber of Shipping Western Black Sea Region, our area of responsibility covers the cities of Zonguldak, Bartın, Karabük, Düzce and Sakarya with a coastline of 280 km. The Western Black Sea Region has an important potential in terms of nature, culture, plateau and marine tourism with its virgin bays, untouched nature and sea, and many tourist attractions.

Among the most valuable touristic values is Safranbolu, which is given the title of “World Heritage City” by UNESCO, and Amasra Castle, also added to the World Heritage Tentative List. In recent years, our region has increased its significance in tourism through investments in industrial heritage sites and nature-based tourism.

**Current Tourism Activities in the Region  
Summer Tourism**

The Western Black Sea Region holds strategic importance in Türkiye’s coastal tourism potential with its natural resources and historical heritage. In particular, the areas around Zonguldak, Bartın, and Karabük stand out for their clean beaches, coves nestled among forests, and cool waters.

With its natural coastal landscape, cultural values, and growing sea tourism opportunities, the region has emerged as an alternative destination for summer tourism. Coastal settlements in the region, particularly Amasra, Karadeniz Ereğli, and Akçakoca, provide high-quality services to visitors in line with a sustainable tourism approach.

**Cruise Tourism**

In the Western Black Sea, Amasra Port—designated as a permanent maritime border gate open to international traffic—holds significant potential to serve as a key stopover and supply port for cruise ships and yachts flying both domestic and foreign flags. Amasra Port features a 240-meter-long pier, water depths ranging from 6 to 15 meters, and a width of approximately 20 meters. The Astoria Grande cruise, which operates regular voyages from Sochi to Türkiye ports in the Black Sea and makes a significant contribution to regional tourism, particularly in Amasra, completed its 93rd voyage to the district as of August 3, 2022. The cruise made 40 trips to Amasra last year and brought 28,556 passengers. It has transported a total of 78,496 tourists to the district since 2022.

**Diving Tourism**

With a coastline of approximately 80 kilometers, Zonguldak offers opportunities for underwater diving enthusiasts besides its sandy beaches. There are suitable areas for divers at many points between Zonguldak and Karadeniz Ereğli.

Spearfishing Sites: Bababurnu, Filyos – Martıkayaları Area, Limancık – Kdz.Ereğli – Zonguldak Route, Kandilli (Armutçuk Beach), Çavuşağzı Köyaltı Area, Ilıksu

**German U-20 Submarine Wreck**

The U-20, one of six U-boat-class submarines sent to the Black Sea by the German navy during World War II, was scuttled by its own crew on the night of September 10, 1944, to prevent military secrets from falling into enemy hands. For more than half a century after the war, the location of U20—a member of the 30th Fleet and one of the German Navy’s lost U-boats—was discovered in 1994 during a naval exercise conducted



by the Turkish Navy off the coast of Karasu. With the detailed studies carried out after this date, it has become a new center for diving tourism. Since the crew left the submarine before they died, it is not considered a war grave, so diving can be done freely. It is stated that only one of U-20 submarines has survived to the present day, and since it sank without breaking apart and in shallow waters, it is very well preserved and is a good treasure to shed light on the past.

### Sea Sports

Thanks to the Black Sea's unique wave patterns and natural coves, the region's coastline offers a variety of water sports experiences. With the increase in visitor traffic during the summer months, basic water sports such as canoeing, paddleboarding, and swimming can be enjoyed safely. During favorable wind and wave conditions along the Black Sea coast, suitable areas also emerge for more dynamic water sports such as surfing and sailing. It shows that the region can be evaluated not only for traditional sea tourism but also for alternative and sports-oriented tourism types. Sailing and water sports clubs operating in our region strengthen the local water sports culture by organizing training programs, summer camps, and sporting events, particularly for young people.

### Blue Cruise

The western Black Sea coast has been attracting attention in recent years with its developing blue cruise routes. Day

trips by boat, particularly along the Amasra and Cide route, are adding a new dimension to summer tourism. Notable stops include hidden coves and coastal stretches accessible only by sea. During boat tours, Tavşan Island and Boztepe are visible from the coast, and Amasra's coastal silhouette is observed from the sea amidst the natural beauty of the Black Sea. With its close proximity to Istanbul, Karadeniz Ereğli possesses a suitable location and infrastructure for marina operations and services such as refueling, maintenance, and repairs for yachts. Additionally, five day-trip sightseeing boats located within the marina offer tours along the coastal route to both tourists and local residents. The Western Black Sea Region has the potential to become one of the country's leading summer tourism destinations through policies developed in line with sustainability principles.

### Bartın Yacht Marinas

**Amasra Port:** The Amasra Genoese Port, used by the Genoese for trade during the Middle Ages, is one of the most distinctive historical port areas in the Western Black Sea and directly reflects Amasra's maritime history. Comprising two main sections—a large and a small harbor—the port serves as a safe haven against storms thanks to its natural structure. Used by small boats and fishing boats, the harbor is one of the starting points for touristic boat tours.

**Kurucaşile Port:** Located in a unique landscape where mountains meet the

sea, Kurucaşile is known as the place where the world's first wooden boat was launched. This deep-rooted maritime tradition continues today as one of the key centers for the production of Türkiye's high-quality wooden gulets. The ports of Amasra and Kurucaşile are equipped with suitable infrastructure for yacht tourism and are suitable for overnight stays.

### Tios Ancient City

The Tios Ancient City is located in the Hisarönü area of Filyos Township, Çaycuma District, Zonguldak City. In ancient sources, the city is referred to as Tievov, Tiov, Tniov, Tioc in Greek, and Tieium, Tium, Tios, Tieion in Latin. Founded in the 7<sup>th</sup> century BCE as a Miletian colony under the leadership of a priest named Tios, the city remained under the rule of various kingdoms throughout the Classical and Hellenistic periods. Tios-Tieion, which came under Roman rule in 70 BCE, experienced its main period of development during this time. During the Byzantine Empire period, Tios-Tieion attracted attention as a bishopric center. Starting in 1261,



it came under Genoese rule following an agreement with the Byzantine state. In the late 14<sup>th</sup> century and early 15<sup>th</sup> century, it came under the rule of the Ottoman Empire. During this period, it was a small fishing village. Throughout antiquity, Tios served as an important port city on the Black Sea and, thanks to river and sea transportation, became a center for the trade of products such as fish, wine, and grain.

## KOCAELİ

## KOCAELİ: A CITY THAT HAS SHINED THROUGHOUT HISTORY



**ATTY. VEDAT DOĞUSEL**

*CHAIRMAN, TURKISH CHAMBER OF SHIPPING, KOCAELİ BRANCH*

With countless features too numerous to list, Kocaeli is one of our two cities bordering both the Black Sea and the Sea of Marmara. Having served as a home to significant civilizations such as Nicomedia, the Byzantine Empire, and the Ottoman Empire throughout history, Kocaeli has maintained its strategic and economic importance during the Republican era as well. Thanks particularly to industrial advancements and economic activities, it has become one of Türkiye's leading provinces in the fields of industry and port operations.

The inclusion of Kocaeli-based companies in the list of Türkiye's top 500 industrial firms, published annually by the Istanbul Chamber of Industry, highlights the region's industrial diversity

and economic dynamism. Kocaeli possesses a robust structure where small and medium-sized enterprises (SMEs) operate in both the manufacturing and service sectors in various business fields. The presence of 14 Organized Industrial Zones, 5 technology parks, and 2 free zones in the region further underscores the scale and strategic importance of its industrial infrastructure.

On the other hand, as a port city, Kocaeli serves as a key gateway for maritime transportation in Anatolia. Robust distribution networks supported by the Northern Marmara and Osmangazi Bridges reinforce the city's logistics and maritime advantages. With a total of 36 port plants along the 112-kilometer coastline of the Izmit Bay, Kocaeli hosts

Europe's sixth-largest port thanks to its high ship and cargo handling capacities.

Kocaeli's importance to the Türkiye economy is also clearly seen in the statistics: 18% of all incoming ships and 16% of cargo handling nationwide take place in our city. With an 18% share in foreign trade transport, and 16% and 18% shares in maritime transport for exports and imports, respectively, Kocaeli's ports clearly have a critical role. At the same time, our city stands out in terms of Gross Domestic Product (GDP) due to its economic structure that generates high added value. With a per capita national income of \$24,031, Kocaeli ranks second among Türkiye's cities with the highest income levels.

Regional Directorate of Eastern Marmara Customs and Foreign Trade operating in Kocaeli has 5 Customs Departments. Exports in the areas of specialization of these Customs Directorates amounted to \$45.111 billion, while our imports reached \$82.075 billion. In 2025, the tax revenue collected by the Eastern Marmara Customs and Foreign Trade Directorate amounted to 624.291 billion lira.

Recently, the negative impacts of the pandemic on production and supply chains, the disruptions caused by the Russia-Ukraine war in the logistics sector, and the risks to global trade stemming from U.S. and Israeli operations targeting Iran have become increasingly evident. In addition, high inflation and low growth rates in the global economy are further straining economic balances. Economic stagnation, uncertainties stemming from geopolitical tensions, and exchange rates remaining below competitive levels continue to exert negative effects on commercial activities.

To reiterate, Kocaeli is both a major industrial hub and a strategic port city.



Given its hinterland and geographical location, it serves as the gateway to and from Anatolia. Having warehouses and storage facilities, along with the potential to strengthen and develop seaway and railway connections, makes Kocaeli a critical hub for foreign trade—not only for companies operating within the city but also for those in neighboring provinces and across Anatolia. Current data indicates that its potential has not yet been fully realized. On the other hand, certain structural challenges exist that could limit this potential. Inadequate road access to Kocaeli's port sites, traffic congestion, and disorganization stand out as significant obstacles that could negatively impact logistics efficiency.

It is one of the most critical cities in our country in terms of the feasibility of the blue economy. All commercial, sporting, and social responsibility projects related to the sea—including fishing, shipbuilding, maritime transport, and marine tourism—are being carried out in Kocaeli and can be further developed. As the Kocaeli Branch of the Turkish Chamber of Shipping, we closely monitor projects related to the sea. One of these is the “Seabed Sediment Cleaning” project in the Gulf of Izmit. Conducted by the Kocaeli Metropolitan Municipality with the support of the Presidency and the Ministry of Environment, Urban Planning, and Climate Change, and

featuring a budget of 120 million dollars, this project represents one of the largest steps taken toward cleaning the Gulf and is poised to serve as a model for Türkiye in the near future. We also consider the artificial reef project launched by the Metropolitan Municipality—which is conducting significant work to protect the Izmit Bay and improve water quality—to be of great importance. The artificial reef project, launched to protect and enhance marine life in the Izmit Bay, was initiated in Gebze. We believe we will see the results of the project, launched from Eskihisar Beach to increase biodiversity and contribute to the protection of endangered species, in the near future.

Another significant project is the logistics village initiative, implemented under the leadership of the Kocaeli Metropolitan Municipality with the support of the Ministry of Transport and Infrastructure.

It aims to clear city streets of large vehicles, accelerate land transportation, and ensure the orderly storage of import and export goods. The project's ability to increase the cargo handling capacity of the city's ports and ensure that ships can quickly unload their cargo and depart is of critical importance for our country and the maritime industry. Additionally, we support the goal of increasing port handling capacity without landfilling the sea and view the expansion of the rail

network as a positive step.

### **Marine Tourism Thrives Day by Day**

Kocaeli is conducting intensive efforts to revitalize marine tourism and elevate it to the position it deserves. In this context, comprehensive projects are being implemented in the coastal areas of our district through the collaboration of the Kocaeli Metropolitan Municipality, the Kocaeli Provincial Directorate of Culture and Tourism, the Kandira District Governor's Office, and the Kandira Municipality. The presence of shipwrecks occurred in our seas throughout history demonstrates that Kocaeli also offers significant potential for underwater tourism.

We offer visitors rich nature tourism opportunities with its nine Blue Flag beaches and natural beauties such as Kandira, Kefken Island, Pink Rocks, and Kartal Cliffs. Additionally, the “Kerpe Underwater Archaeological Park Project” is among the initiatives set to enhance Kocaeli's tourism sector. Implemented under the coordination and with the approval of the Ministry of Culture and Tourism and the General Directorate of Cultural Assets and Museums, this project holds the distinction of being a first-of-its-kind in Türkiye.

Upon completion, Türkiye will gain an underwater archaeopark showcasing authentic artifacts; such underwater museum-archaeoparks, which currently exist only in Italy and Croatia worldwide, will facilitate the integration of archaeological diving tourism into national and international tourism networks. In summary, Kocaeli has always been a hub that makes a difference both socially and economically, thanks to its historical heritage, geographical location, and strong economic structure.

The city's importance continues to grow over the years and plays a critical role in regional development. As the Kocaeli Branch of the Turkish Chamber of Shipping, we take great pride in being a part of this dynamic process.

## MARMARIS

## MARMARIS: TWO SEAS, ENDLESS ADVENTURES

**HALİL BAĞLI***CHAIRMAN OF IMEAK TURKISH CHAMBER OF SHIPPING (DTO) MARMARIS BRANCH*

Marmaris is a coastal town and port in the province of Muğla in the southwest of Türkiye, where the Aegean Sea meets the Mediterranean. These assets, along with the palm – fringed coastline, stunning beaches, crystal – clear sea, and availability of all kinds of water sports, make Marmaris an ideal destination for a sailing holiday. You can also round out visit with excursions to surrounding areas.

There is a wide variety of day or half-day trips to choose from, including canoe trips, riding, hiking, boat trips, village tours, jeep safaris, and excursions to Ephesus, Pamukkale, Dalyan and Caunos. The region has a wonderfully intricate coastline with many bays and gulfs. Nature presents gorgeous vistas everywhere you look: azure skies over green pine forests that reach the edge of the blue sea. Its beauty isn't evident



only in summer; there is much to enjoy in nature here all year round. Marmaris also has a wealth of impressive archaeological remains which can be visited on a day trip from the center. It was a part of the ancient region of Caria, and numerous ruined cities give us fascinating glimpses into the Carian and other periods in its history.

The Mention of a blue cruise conjures images of experiencing magnificent sunrises and sunsets, eating the tastiest seafood, and lingering over delicious mezes. A blue cruise means enjoying the sun and sea all day from the deck of a Yacht, and forgetting any problems. It offers the ultimate relaxation immersed in the myriad blue and green tones of Aegean and Mediterranean bays, worlds away from city crowds and work stress.

Without a doubt, the most exciting of these is parasailing which offers the chance to see the breathtaking beauty of Marmaris and surrounding area from a height of 60-70 meters. Watersports are also available at beaches outside Marmaris such as Turunç, Kumlubük, Çiftlik, Bozburun, Orhaniye, Hisarönü, Selimiye, and Akyaka.

**SCUBA DIVING**

Diving is a very popular activity in Marmaris due to its perfect climate.

Abdi Ries Bay lies in an area known as Aquarium not far from Marmaris. As you leave Marmaris center and head along the seafront, you can find a whole host of boats offering daily dive trips.

**CRUISE SHIP TOURISM**

During the summer months, huge cruise ships moor up in Marmaris harbor to allow passengers to explore Marmaris itself. While the ships are moored in the harbor, passengers are taken on yours to places of interest in and around Marmaris.



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# TURKISH PORTS FROM PAST TO PRESENT AND FROM PRESENT TO FUTURE



**HAMDİ ERÇELİK<sup>2</sup>**

## The First Arrangements Made in the Transition from the Ottoman Empire to the Republic

The primary objective of the Republic of Türkiye, established in the aftermath of the Ottoman Empire's collapse following years of war and occupation, was to secure sufficient capital for national recovery and development. Mustafa Kemal ATATÜRK recognized that this capital could be generated by effectively utilizing the country's resources and expanding export capacity. In line with this vision, and with the importance he placed on maritime affairs, he prioritized the development of ports and piers as critical gateways for exporting domestic products. Consequently, swift and decisive steps were taken to modernize and expand port infrastructure.

In the final century of the Ottoman Empire, an initial step was taken to regulate the tariffs of ports that had been constructed and operated by foreign companies under capitulations and various concessions. With a regulation enacted in 1925, an effort was made to establish a tariff system that would

support and promote the country's exports. This measure helped bring ports under greater national control and paved the way for the transfer of port facilities and piers to Turkish companies established with domestic capital. Following the proclamation of the Republic, numerous legal arrangements were introduced to enhance maritime trade and stimulate economic recovery. In this early phase, a comprehensive legal framework was gradually developed to incorporate port activities within the scope of public service.

With the adoption of the Cabotage Law No. 815 enacted on 01 July 1926 after the abolition of the capitulations, the process of gaining a national identity for maritime trade began, and the right to transport and trade on all coasts of Türkiye was given to ships carrying the Turkish flag. The adoption of the Cabotage Law did not only start the nationalization process in maritime transportation but also paved the way for the development of Turkish port management with many regulations made one after the other for the ports, which are the main gates of maritime transportation.

In addition to the nationalization of maritime transport and trade, significant institutional reforms were introduced with the adoption of Law No. 3633 in 1939, titled the "Law on the Organization and Duties of the General Directorates of State Seaways and State Ports Operations." Under this framework, the General Directorate of State Maritime Lines and the General Directorate of State Ports Operations were established within the Ministry of Transport, with responsibility for port services assigned to the latter. Subsequently, with the enactment of Law No. 4517 on January 24, 1944, which abolished the General Directorate of State Ports Operations and transferred its duties, the organizational structure was



**Aydın ERDEMİR<sup>1</sup>**

revised, leading to the reorganization of the General Directorate of State Maritime Operations into the General Directorate of State Maritime Lines and State Ports Operations.

Despite limited financial resources in the early Republican period, governments allocated considerable budgetary support to port development. During the 1950-1959 period, external financing sources were secured in addition to domestic funds. In this decade, substantial efforts were undertaken to construct, modernize, and reorganize port infrastructure. As a result, ports became better equipped, their loading and unloading capacities increased significantly, and the country's foreign trade volume expanded accordingly.

Until the 1980s, public ports in Türkiye were primarily operated by the Turkish Maritime Enterprises (TDI) and the Republic of Türkiye State Railways (TCDD), and the country's port requirements were largely met by these state institutions. During this period, port capacity remained broadly

aligned with the scale of the national economy and foreign trade, resulting in minimal congestion or operational bottlenecks. Maritime transportation was predominantly carried out by vessels operated under public ownership, particularly by TDI. At the same time, private shipping activities continued to develop gradually, although they remained limited in scale and tonnage.

### Developments in the Port Sector from the 1980s to 2025

The wave of globalization and liberalization that emerged in the late 1970s began to influence Türkiye with some delay, leading to a significant shift in economic policy. The import-substitution strategies that had dominated until the early 1980s were gradually replaced by export-oriented growth, accompanied by liberalization and privatization reforms. This transformation stimulated both industrial and commercial development, and, as a result of the rapid expansion in foreign trade, cargo volumes handled at ports increased substantially.

Until this transition, port services had been provided almost exclusively by state-owned ports operated by TDI and TCDD under a monopolistic structure, and no major capacity constraints were observed. However, with the acceleration of export-oriented growth, both import and export cargo volumes rose sharply. Consequently, public ports—limited in both number and capacity—began to experience significant congestion, operational bottlenecks, and prolonged vessel waiting times.

In response, from the second half of the 1980s onward, government policies allowed certain private industrial piers—initially constructed to serve only their own facilities, particularly in the İskenderun and İzmit Bays—to provide services to third parties. This marked the beginning of private sector participation in port operations in Türkiye. Over time, numerous new private ports were developed in line with growing demand, and port investments accelerated further in the 2000s, driven by continued expansion in foreign trade. Additionally,

privatization initiatives in the 1990s led to the transfer of operational rights for a large portion of state-owned ports (formerly operated by TDI and TCDD) to the private sector.

Today, approximately 95% of Türkiye's port capacity is operated by private entities, with only a limited number of major ports—such as TCDD Haydarpaşa Port and TCDD İzmir Alsancak Port—remaining under public control. While

and Cruise operations. Türkiye has achieved particularly notable progress in containerization. In operational terms, nearly 65% of container handling capacity is managed by major global port operators such as DP World, PSA, MSC, and COSCO.

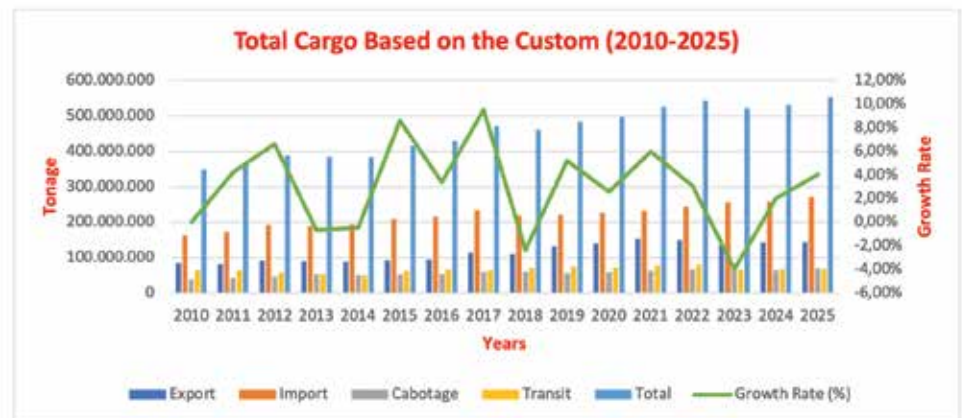
### Improvements in Total Cargo in Türkiye Between 2010-2025

When we look at Table-1 and Graph-1; The development and growth rates of our

**Table-1: Handling Tonnages and Growth Rates in Total Cargo Between 2010-2025**

Total Cargo Based on Customs Regimes (TON)						
Years	Export	Import	Cabotage	Transit	Total	Growth Rate
2010	83.933.388	162.588.728	37.991.041	64.122.710	348.635.867	-
2011	81.776.692	173.546.398	43.644.483	64.379.150	363.346.723	4,22%
2012	91.307.486	192.474.928	46.919.387	56.724.431	387.426.232	6,63%
2013	89.553.990	187.781.615	53.937.938	53.657.215	384.930.758	-0,64%
2014	88.544.792	194.771.428	50.731.578	49.072.821	383.120.619	-0,47%
2015	92.152.622	208.326.308	52.472.668	63.085.097	416.036.695	8,59%
2016	94.805.120	215.132.519	53.300.216	66.963.307	430.201.162	3,40%
2017	113.692.068	233.656.024	60.396.079	63.429.725	471.173.896	9,52%
2018	110.424.635	218.544.820	59.555.845	71.628.260	460.153.560	-2,34%
2019	131.676.578	221.404.812	56.112.724	74.974.298	484.168.412	5,22%
2020	138.902.823	226.539.472	58.797.384	72.402.972	496.642.651	2,58%
2021	153.763.658	232.633.060	61.901.122	78.008.944	526.306.784	5,97%
2022	150.172.902	243.917.119	67.501.276	81.018.986	542.610.283	3,10%
2023	135.510.681	256.206.627	62.627.093	66.735.403	521.079.804	-3,97%
2024	142.278.137	257.136.420	63.258.440	69.064.361	531.737.358	2,05%
2025	142.769.980	271.659.580	69.678.982	69.157.356	553.265.898	4,05%

**Graph-1: Handling Tonnages and Growth Rates in Total Cargo Between 2010-2025**



private ports established by industrial enterprises continue to handle a significant share of dry bulk and general cargo, newly developed private ports have increasingly specialized in container handling, as well as Ro-Ro

ports in Total Cargo in the last 25 years (2010-2025) are seen.<sup>3</sup>

Between 2010 and 2025, our ports grew by 59% in Total Cargo, while the average annual growth rate was 3.79% in the

**Table-2: Container Handling Tonnages and Growth Rates Between 2000-2024**

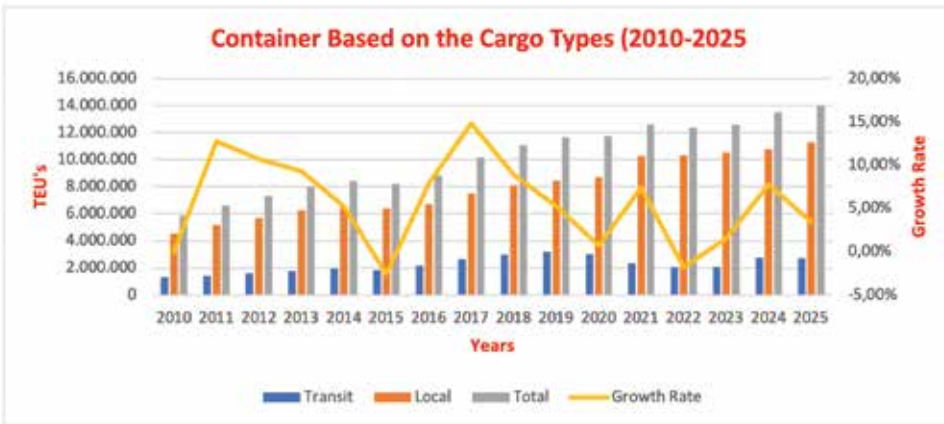
Container Based on Cargo Types (TEU)				
Years	Transit	Local	Total	Growth Rate
2010	1.309.735	4.556.850	5.866.585	-
2011	1.435.339	5.177.696	6.613.035	12,72%
2012	1.621.518	5.698.587	7.320.105	10,69%
2013	1.768.751	6.232.759	8.001.510	9,31%
2014	1.942.898	6.475.882	8.418.780	5,21%
2015	1.815.394	6.388.117	8.203.511	-2,56%
2016	2.153.001	6.700.057	8.853.058	7,92%
2017	2.656.230	7.508.209	10.164.439	14,81%
2018	2.974.343	8.090.893	11.065.236	8,86%
2019	3.180.858	8.464.776	11.645.633	5,25%
2020	3.017.567	8.711.278	11.728.845	0,71%
2021	2.337.843	10.253.627	12.591.470	7,35%
2022	2.035.758	10.330.624	12.366.382	-1,79%
2023	2.055.441	10.500.966	12.556.407	1,54%
2024	2.763.368	10.766.361	13.529.729	7,75%
2025	2.717.699	11.278.879	13.996.578	3,45%

When the data of both CLARKSON and UNCTAD between 2011-2024 are evaluated; while the global average annual growth rate was 2.3% in Total Cargo, it was 3.8% in Containers. When we look at Turkish ports for the same period, the average annual growth rate in Total Cargo was 3.88%, while the average annual growth rate in Container was 7.30%. As can be seen from these data, our port sector in Türkiye has grown at a much higher rate than the global annual averages.

**Developments in Cruise Ports Between 2011-2025**

The best year in terms of the number of incoming ships in cruise tourism was 2011 with 1,615 ships, while the best year in terms of passenger numbers was 2013 with 2.26 million passengers. This shows that the number of voyages with fewer large ships has also increased. Unfortunately, the declines in cruise tourism that started in 2016 which have been extremely dramatic. While 2016 was completed with 578 cruises and 627 thousand passengers for our country, the biggest decreases were experienced in 2017 and 2018. In 2017, the number of cruises decreased to 307 and the number of passengers to 306 thousand. In 2018, it almost bottomed out and decreased to 247 cruises and 214 thousand passengers. While the number of ships increased to 344 and the number of passengers to 301 thousand in 2019, a period of rise started again, 1,824 passengers came with only 5 ships in 2020 with the pandemic, which started to have a global impact in the last months of 2019. While 45,361 passengers arrived with 78 ships in 2021, when the post-pandemic effect continued, the post-pandemic recovery trend started

**Chart-2: Container Handling Tonnages and Growth Rates Between 2010-2025**



**Growth Rates of Turkish Ports Are Well Above Global Growth Figures**

same period. Between 2020 and 2025, our ports grew by 11% in Total Cargo, while the average annual growth rate was 2.30% in the same period.

growth figures in containers have reached an extraordinary level as can be seen from the table.

In Containers, it grew by 139% between 2010 and 2025, with an average annual growth rate of 3.79% over the same period. Containers also grew by 19% between 2020 and 2025, with an average annual growth rate of 3.17% over the same period. Especially with the increase in the transit transfer cargo potential in containers in our country's ports, the

Total Cargo (2010-2025)		
Years	Growth Rates	Average Annual Growth Rate (%)
2010-2025	59%	3,79%
2020-2025	11%	2,30%

Container (2010-2025)		
Years	Growth Rates	Average Annual Growth Rate (%)
2010-2025	139%	7,56%
2020-2025	19%	3,17%

in cruise as of 2022. Since 2022 is also the year when Galataport in Istanbul was put into service, it is predicted that this port will make a significant contribution to cruise tourism. Thus, while 1,010,767 passengers arrived with 993 ships in 2022, 1,542,522 passengers were reached with 1,192 ships in 2023. Although it is expected to exceed 2 million passengers in 2024, 1,889,426 passengers arrived with 1,195 ships.

When we look at Table-3 below; The number of passengers arriving in 2013, the brightest year in cruise tourism, has still not been exceeded in 2025, but this figure is very close. Looking at the positive developments in cruise tourism in 2025 (13.2% growth), it is expected that more than 1.5 million cruise ships and 2.5 million passengers will be hosted in our country in 2026. Status of the Ports in Transports Subject to Foreign Trade

The global logistics sector is served by five main modes of transportation (sea, road, air, rail and pipelines). Maritime transportation has a special place among all other modes of transportation, because more than 90% of the goods subject to world trade are transported by sea. Maritime transportation has an inherently complex and dynamic structure. There are many parties and stakeholders within this structure. The global maritime sector continues its mission successfully today as in the past, with a transportation amount exceeding 12 billion tons, tens of thousands of merchant ships, approximately six thousand ports and millions of employees.

By the end of 2025, the number of ports and related coastal facilities serving maritime trade in Türkiye has reached nearly 220. The number in question includes piers, docks, ports, buoys, dolphins and platforms in different forms and features. Almost 194 of these coastal facilities actively serve maritime transportation. When we look at the existing port facilities in Türkiye; approximately 45% are in the Marmara Region, 25% are in the Mediterranean Region, 17% are in the Black Sea Region

**Table-3: Number of Passenger-Ships and Growth Rates in Cruise Tourism Between 2011-2025**

Years	Number of Cruise Passengers					Growth Rate
	Number of Cruise Ship	Arrival of Cruise Passengers	Departure of Cruise Passengers	Transit Cruise Passengers	Total Cruise Passengers	
2011	6.729	7.172	141.522	155.423	304.117	
2012	6.049	5.401	122.067	133.517	260.985	-14,20%
2013	11.301	10.589	112.999	134.889	258.477	-1,00%
2014	2.169	1.822	74.189	78.180	154.191	-40,30%
2015	6.740	5.945	69.322	82.007	157.274	2,00%
2016	2.639	2.438	12.237	17.314	31.989	-79,70%
2017	2.673	2.469	7.002	12.144	21.615	-32,40%
2018	368	345	2.972	3.685	7.002	-67,60%
2019	653	781	24.420	25.854	51.055	629,10%
2020	0	0	0	0	0	-100,00%
2021	415	398	8.564	9.377	18.339	-
2022	9.624	9.882	58.510	78.016	146.408	698,30%
2023	1.192	98.071	100.661	1.343.790	1.542.522	953,60%
2024	1.195	153.663	159.853	1.575.910	1.889.426	22,50%
2025	1.375	169.253	189.691	1.779.192	2.138.136	13,20%

and 13% are in the Aegean Region. On a provincial basis, a total of 35 of the facilities actively serving maritime trade are in Kocaeli province. Turkish Port Operators Association (TÜRKLİM), the main organization of the sector. TÜRKLİM plays a decisive role in our country's maritime with our ports operating in all regions and cargo types. Table-4 and

Table-5 below show the tables prepared by the Turkish Statistical Institute (TURKSTAT) in the Turkish Port Sector Report-2025 published by TÜRKLİM. In these tables, there are data on both value (USD) and tonnage (TON) of maritime transports subject to foreign trade. As can be seen from the statistics of TURKSTAT on the subject, in 2024, 55.9% of our

**Table-4: Price (USD) Shares by Transportation Types and Regimes in Foreign Trade**

Year	Sea Freight-Ports		Road		Airline		Railway	
	Export	Import	Export	Import	Export	Import	Export	Import
2020	59,5%	52,3%	31,3%	19,1%	7,5%	17,0%	0,8%	1,0%
2021	59,4%	58,0%	30,5%	18,0%	8,3%	9,6%	0,7%	1,1%
2022	59,1%	53,3%	31,6%	17,1%	8,1%	10,6%	1,0%	0,8%
2023	56,0%	53,9%	32,5%	18,5%	9,9%	14,9%	8,0%	0,6%
2024	55,9%	54,6%	32,8%	19,2%	9,9%	13,8%	0,7%	0,8%

Source: TÜRKLİM, Türkiye Port Sector Report-2025

**Table-5: Tonnage (TON) Shares by Transport Types and Regimes in Foreign Trade**

Year	Sea Freight-Ports	Road	Pipeline & Other	Railway	Airline
2020	88,8%	9,4%	1,1%	0,6%	0,2%
2021	87,5%	10,7%	0,9%	0,7%	0,2%
2022	86,8%	11,5%	0,6%	0,7%	0,6%
2023	87,5%	11,3%	0,3%	0,5%	0,4%
2024	87,8%	10,7%	0,7%	0,5%	0,4%

Source: TÜRKLİM, Türkiye Port Sector Report-2025

**Table-6: TÜRKLİM: Vision 2050 – Total Tonnage of Total Cargo Estimates (Million Tons)**

Scenario	2025	2030	2035	2040	2045	2050
Pessimistic	560,2	653,1	749,5	855,9	973,8	1.108,10
Reference	596,2	713,2	838,9	980,3	1.139,80	1.323,80
Optimistic	626,2	766,5	921,8	1.100,40	1.306,40	1.548,20

foreign trade in exports and 54.6% in imports in terms of value (USD) are transported by sea, that is, through our ports. When we look at the amount of cargo transported; In 2024, 87.8% of our foreign trade in terms of quantity (TON) is transported by sea, that is, through our ports.

It is seen that 95% of the cargoes subject to global trade are transported by sea. Like the global situation, as we can see from these tables, seaway or ports are of great importance in terms of both value and quantity in the transportation of cargoes subject to Türkiye's foreign trade. In this respect, our ports, which are the starting and ending points of the maritime route, are the main logistics bases and lifeblood of our country in foreign trade. This situation also shows how strategic the sea route or ports are.

Ports are the most important logistics investments in the region both as a vital part of the supply chain and in terms of regional development and employment initiatives. Ports provide both economic and social benefits to the country and the region where they are located, increase competition by expanding the market areas of companies, and thus enable lower prices for consumers. These cover all sectors of economic activity, including manufacturing firms, heavy industry and retailers. Therefore, the economic benefits of ports differ with the hinterland they serve and the diversity of industry and trade in this hinterland. Ports also play a key role in economic development for countries because they act as a catalyst. They promote economic developments in specific economic sectors and in places or corridors near ports. The economic benefits of ports are classified as direct, indirect and stimulated/triggering.

**The Rising Strategic Importance of Turkish Ports in Global Trade**

The importance of Turkish ports is not limited to the Asia-Europe connection; they also play a strategic role as they are located at the intersection of multi-layered global trade networks. Thanks to its location at the intersection of three

continents, Türkiye is a natural logistics bridge connecting the Black Sea, Mediterranean, Aegean and Marmara seas. This geographical advantage makes ports not only transit points but also important centres for cargo consolidation, distribution, and value-added logistics activities.

The importance of Turkish ports in terms of global trade can be summarized under several headings. Firstly, Turkish ports are one of the main exit gates to world markets for countries bordering the Black Sea (Russia, Ukraine, Romania, Bulgaria, Georgia). Heavy maritime traffic passing through the Turkish Straits ensures that ports are fed by this flow. Secondly, thanks to its location in the Eastern Mediterranean, it is an important stopover and transshipment point of the Asia-Europe trade line coming through the Suez Canal. This situation brings Türkiye closer to its potential to become a regional "hub", especially in container transportation. From the perspective of trade corridors, the importance of Turkish ports becomes even more evident. Within the scope of the Middle Corridor (Trans-Caspian East-West Middle Corridor), Turkish ports play a critical role in the process of transporting cargoes starting from China to Europe via Central Asia, the Caspian crossing, the Caucasus and Türkiye. This line is gaining more and more geopolitical importance as it bypasses Russia in the north and creates an alternative to the Suez Canal in the south. In addition, Turkish ports are also an important connection point in the North-South corridors. It supports trade flows between Eastern Europe and Russia via the Black Sea and between the Middle East and North Africa via the Mediterranean. Thanks to its hinterland extending to Iraq, Iran and the Caucasus, ports play an important role not only in maritime but also in multimodal transportation with road and rail integration.

In this context, the Development Road Project, which has recently come to the fore, has the potential to further increase

the strategic importance of Turkish ports. This project, which is planned to start from the Persian Gulf and extend to Türkiye via Iraq and from there to Europe; It aims to create a new trade corridor by integrating railway and road infrastructure. It draws attention especially in terms of offering an alternative and shorter route to the Suez Canal in Asia-Europe trade. With the introduction of the Development Road, it will be possible to distribute cargoes from the Persian Gulf to Europe through ports in Türkiye; this will make Turkish ports a critical logistics centre not only on the east-west axis but also on the south-north axis. The project will strengthen Türkiye's integration with the Middle Corridor and increase transit transportation volume by expanding the hinterland of ports.

**For the future, the potential of Turkish ports can be evaluated through several basic dynamics:**

- **Potential to become a transit and transfer centre:** In the increasing competition in the Eastern Mediterranean, especially large-scale container ports have a high capacity to become regional hubs.
- **Middle Corridor and Development Road integration:** Located at the intersection of the East-West and South-North axes, Türkiye can be positioned at the centre of multifaceted trade flows.
- **Energy and bulk cargo corridors:** Türkiye is an important starting point for the transportation of energy and raw material flows in the Black Sea and Caspian basins to world markets.
- **Logistics integration and digitalization:** Strengthening the railway connections of ports and smart port applications will increase competitiveness.
- **Geopolitical developments:** Regional crises and trade wars may increase the demand for alternative and safe routes, further highlighting Türkiye's role.

In conclusion, Turkish ports have the potential to be not just a transit point but



a strategic logistics hub on a regional and global scale, located at the intersection

within the framework of the data of the past 25 years. According to this study,

According to the 2050 Reference scenario, it is predicted that the Total Cargo demand to Turkish ports will reach 1.3 billion tons. The Eastern Mediterranean region has the highest cargo in terms of the handling figures followed by the Northwest Marmara, Northeast Marmara and North Aegean regions. In Table-7 below, the estimates of Total Containers for 2025-2050 according to Local and Transit Container breakdowns in the “Vision 2050” report published by TÜRKLİM are included.

**Table-6: TÜRKLİM: Vision 2050 – Total Tonnage of Total Cargo Estimates (Million Tons)**

Scenario	2025	2030	2035	2040	2045	2050
Pessimistic	560,2	653,1	749,5	855,9	973,8	1.108,10
Reference	596,2	713,2	838,9	980,3	1.139,80	1.323,80
Optimistic	626,2	766,5	921,8	1.100,40	1.306,40	1.548,20

of both East-West and South-North trade corridors at a time when global trade is being reshaped.

### The Future of the Turkish Port Industry: TÜRKLİM's Vision 2050 Report

The “Vision 2050” report published by TÜRKLİM in 2023 is the only study in Türkiye that predicts the future of port management. In this study, an important estimation or forecast study has been put forward regarding the cargo tonnages to be handled by Turkish ports in 2050

the total cargo figure handled at the end of 2022, which is 542.6 million tons, is expected to reach an estimated 1.3 billion tons in 2050 with a growth of 150%, and the 12.4 million TEU containers handled at the end of 2022 are expected to reach an estimated 41.5 million TEU in 2050 with a growth of 235%. In the “**Vision 2050**” report published by TÜRKLİM in Table-6 below, the estimates of Total Cargo for 2025-2050 according to port sub-regions are included.

According to estimates, in the 2050 Reference scenario, the number of Local Containers is expected to reach 27 million TEU and the amount of Transit Containers is expected to reach 14 million TEU. With these predictions, it is estimated that the Total Container traded at container terminals in our country will exceed 41.5 million TEU in 2050.

**Table-7: TÜRKLİM: Vision 2050 – Local and Transit Container Forecast (Million TEU)**

	Scenario	2025	2030	2035	2040	2045	2050
Local Container	Pessimistic	10,2	12,6	15,2	18,1	21,3	25,2
	Reference	11,6	14,4	17,3	20,4	23,7	27,4
	Optimistic	13,1	16,3	19,5	22,7	25,9	29
Transit Container	Pessimistic	3,7	4,5	5,5	6,7	8,1	9,9
	Reference	4,2	5,3	6,8	8,7	11,1	14,2
	Optimistic	4,3	5,8	7,8	10,4	13,9	18,6
Total Container	Pessimistic	13,9	17,1	20,7	24,8	29,5	35,1
	Reference	15,8	19,8	24,1	29,1	34,8	41,5
	Optimistic	17,5	22,1	27,3	33,1	39,8	47,7

<sup>1</sup> Executive Consultant, Port&Terminal&OffShore Business

<sup>2</sup> Chairman of the Board of Directors of the Turkish Port Operators Association (TÜRKLİM)

<sup>3</sup> All statistics of ports in Türkiye in this article are prepared by the Ministry of Transport and Infrastructure, General Directorate of Maritime Affairs, Department of Maritime Trade Development and published on the ministry's website. (<https://denizcilikistatistikleri.uab.gov.tr/yuk-istatistikleri>)

# GREEN TRANSFORMATION & STRONG CAPABILITY: THE RISE OF TURKISH SHIPBUILDING



**\*MURAT KIRAN**

Today, the global shipbuilding industry is increasingly focused on environmentally friendly technologies such as zero-emission, battery-powered, hybrid and alternative fuel systems. Continuously evolving international regulations bring significant challenges to newbuilding activities. Both shipowners and engineers face technical and financial difficulties in implementing these new technologies. This not only leads to higher costs, but also makes design processes more complex and extends delivery times. When considered together with the current economic environment, the recent momentum of the Turkish shipbuilding industry in newbuilding clearly reflects the strength of our capabilities.

With a long-standing heritage, strong engineering know-how and a well-developed supply chain, the Turkish shipbuilding industry holds a competitive position in the global market. With over 600 years of experience, our industry stands out particularly in small and medium-sized vessels, naval shipbuilding capabilities, strong repair and maintenance infrastructure, and high-quality workmanship. Today, with 85 active shipyards and a total of 49 docks (38 floating and 11 dry docks), we have a solid capacity for both shipbuilding and

repair activities. In terms of production, Turkish shipyards are mainly engaged in the construction of fishing vessels, Ro-Ro vessels, offshore support vessels, tugboats and naval ships. In addition, maintaining our position among the top five countries in yacht and superyacht construction clearly demonstrates our strong standing in the international market.

## **Innovative and high value-added projects**

In recent years, in response to changing market conditions, our industry has increasingly focused on innovative and high value-added projects. Today, we have successfully delivered many vessels that are considered “first-of-their-kind” globally, including hybrid, fully electric and environmentally friendly ships. Battery-powered and hybrid propulsion systems, LNG and alternative fuel solutions clearly demonstrate our ability to adapt to new technologies. In this context, projects such as zero-emission fully electric tugboats represent important milestones not only for Türkiye but also for the global shipbuilding industry.

Turkish shipyards are not only strong in newbuilding, but also highly competitive in repair and maintenance. Revenues generated from repair and maintenance services, which are classified as service exports, have reached levels comparable to those from newbuilding and yacht construction. This clearly shows the strategic importance of this segment. Thanks to our proximity to Europe, fast service capability and high-quality standards, Türkiye has become a preferred hub for repair and maintenance activities. However, our industry also faces several significant challenges. In particular, supply disruptions and price increases in key raw materials such as flat steel have a direct impact on costs. Global developments, regional conflicts and ongoing geopolitical tensions negatively affect supply chains and complicate production processes. In

addition, government subsidies and support mechanisms in other shipbuilding countries directly influence global competition. Since the Turkish shipbuilding industry is largely driven by the private sector, companies are required to compete under these conditions with their own resources.

## **A Green Horizon for Türkiye's Maritime Future**

At the same time, the green transition brings a considerable need for financing. The shift towards environmentally friendly technologies requires substantial investment, both for shipowners and shipyards. Therefore, improving access to international financing mechanisms and developing supportive policies for the industry are of great importance.

As the Turkish shipbuilding industry, we continue to maintain a high level of capacity utilization and sustain our production and export performance. Our shipyards operate at strong capacity levels and focus on high value-added production. When newbuilding, repair and maintenance activities, as well as naval projects are considered together, the foreign currency contribution of our industry to the national economy reaches a significant level.

At this stage, I can confidently state that our industry holds a strong position in the global market thanks to its accumulated know-how, production capability and flexible structure. In the coming period, we aim to further strengthen this position by focusing on innovative, environmentally friendly and high value-added projects. Continued investments in next-generation ship technologies will remain essential for the future of our industry. In conclusion, the Turkish shipbuilding industry, with its long-standing experience, strong production capabilities and forward-looking vision, will continue to be an important player in the global maritime sector.

**\* GİSBİR CHAIRMAN OF THE BOARD**



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# TURKISH SHIPPING INDUSTRY: FROM REGIONAL STRENGTH TO GLOBAL PLAYER



\*CİHAN ERGENÇ

## A Growing Presence in Global Maritime

In today's world, where approximately 85% of global trade is carried by sea, shipping sector is no longer merely a logistical activity—it is a strategic sector shaping economic strength, geopolitical influence, and sustainable development.

In this context, the Turkish shipping sector has demonstrated a remarkable upward trajectory, gaining increasing recognition at both regional and global levels.

Türkiye's unique geographical position—connecting the Black Sea, Aegean, and Mediterranean—goes beyond being a

maritime crossroads. It functions as a natural logistics bridge between Europe, Asia, and the Middle East. This strategic advantage has enabled the Turkish shipping sector to evolve from a transit player into an active and influential component of the global supply chain.

## A Competitive and Agile Industry Structure

The Turkish shipping sector stands out with its flexible and entrepreneurial structure, securing a strong position in international competition.

Turkish ship owners operate across diverse vessel segments, demonstrate rapid adaptability to market conditions, and possess advanced risk management capabilities. This resilience enables the sector to remain robust even under volatile market conditions.

The steady increase in Turkish-owned and controlled fleet tonnage reflects the sector's expanding share in global maritime trade. At the same time, investments in fleet renewal, environmentally friendly technologies, and operational efficiency continue to enhance its competitiveness.

## Strengthening Capital Structure and Institutionalization

The Turkish shipping sector is transitioning from traditional family-owned structures toward a more institutionalized and financially robust framework. Diversified access to finance, stronger engagement with international financial institutions, and the adoption of alternative investment models are key drivers of this transformation.

This evolution not only supports growth but also contributes to improved sustainability, transparency, and risk governance across the sector.

## Human Capital and Know-how Development

One of the most significant competitive advantages of the Turkish shipping sector is its highly skilled workforce. The increasing capacity of maritime education institutions, alignment with international training standards, and extensive operational experience continuously elevate the sector's know-how.

From ship management and technical operations to port services, maritime law, and finance, the breadth of expertise within the Turkish maritime ecosystem accelerates its global integration.

## Technological Adaptation and Innovation

Global trends such as digitalization, automation, and green transformation are redefining the future of shipping. The Turkish shipping sector not only keeps pace with these developments but also demonstrates a strong commitment to actively contributing to them.

Investments in energy efficiency technologies, alternative fuels, carbon reduction strategies, and smart shipping systems highlight the sector's ambition to move beyond adaptation and play a role in shaping the future of shipping.

With its competitive structure, strengthening capital base, qualified human resources, and proactive approach to technology, the Turkish shipping sector is becoming an increasingly influential player in the global maritime ecosystem. Moving beyond regional prominence, it continues to expand its global footprint and actively contributes to the evolution of international sea trade.

\* CHAIRMAN OF THE BOARD OF THE TURKISH SHIPOWNERS' ASSOCIATION

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# STRONGER IBIA, BROADER REACH, GREATER VALUE



**\*ADRIAN TOLSON**

As I take on the role of Chair of IBIA - The International Bunker Industry Association, I am truly honoured to represent an organisation that has become a respected and influential voice across the global marine energy community. IBIA today stands on a strong foundation, built through the dedication of its members, the leadership of my predecessors and a shared commitment to collaboration, transparency, and progress.

This is a pivotal moment for our industry. The energy transition, evolving regulatory frameworks, and increasing complexity across global markets are reshaping the way we operate. IBIA has been primed to take on a much bigger role in this environment, and I firmly believe that we

are ready to rise to that challenge. Our responsibility is to ensure that we are fully equipped to deliver by strengthening every element of the association and continuing to expand our reach and relevance.

A key priority for me as Chair is ensuring that IBIA delivers more value to its members. As our membership continues to grow, so too must our capabilities. That means investing in the organisation, enhancing the expertise within our secretariat, and ensuring we have the right structures in place to support an increasingly diverse and global membership. Delivering more to our members is not just an objective, it is essential to maintaining IBIA's position as a trusted and effective industry body.

At the same time, we must recognise the changing nature of regulation. We are potentially entering a period where regulatory frameworks may become more fragmented, with regional and national measures developing alongside global efforts. In such a landscape, IBIA has a critical role to play in representing the industry across multiple jurisdictions. We must strengthen our engagement not only at the international level, but also within key regions such as Europe, the United States and Asia, ensuring that the voice of our members is heard wherever decisions are being made.

Another important aspect of our work will be strengthening participation and collaboration within the association. Our working groups are central to this effort, providing platforms for members to share expertise, discuss challenges, and develop practical solutions. Initiatives such as the Bunker Buyers' Working Group highlight the importance of inclusivity, ensuring that all perspectives across the value chain are represented and heard.

Education and knowledge-sharing will also remain at the core of IBIA's mission. While the industry continues to evolve, the need for high-quality training and reliable information has never been greater. We must continue to invest in developing relevant and impactful educational programmes that support our members in navigating both current challenges and future opportunities.

IBIA is often associated with its events, and while these play an important role in bringing the community together, they are not our sole purpose. At our core, we are an organisation dedicated to supporting the industry through advocacy,

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**\* CHAIR OF INTERNATIONAL BUNKER INDUSTRY ASSOCIATION (IBIA)**

# FUELING TOMORROW WITH LEGACY AND VISION



\* **MUSTAFA ASLAN**

Dear Esteemed Colleagues... It is a great pleasure to welcome the global maritime community to the Posidonia Shipping Exhibition in Athens—one of the most prestigious and long-standing gatherings in the international shipping industry. Posidonia continues to serve as a vital platform where industry leaders, stakeholders, and innovators come together to exchange ideas, strengthen partnerships, and shape the future of maritime trade.

At Asmira Group, we are proud to participate once again and to engage with our valued partners from across the global shipping and energy sectors. Our continued presence at Posidonia is not only the result of long-term planning, but also a reflection of our commitment to consistency, sustainability, and meaningful industry collaboration. As many in our sector recognize, securing a place at this exhibition requires foresight and continuity, and we take great pride

in being part of this distinguished event over consecutive editions.

Founded in 1977 by our founder, Mr. Ayhan Aslan, Asmira Group has established a strong and reputable presence in the bunkering industry over nearly five decades. What began as a family-driven initiative has evolved into a dynamic and internationally active organization, grounded in reliability, operational excellence, and long-term relationships.

Today, we operate as a physical supplier across more than 30 ports along Türkiye's Aegean coastline, delivering high-quality marine fuels with a strong focus on efficiency, safety, and service excellence. In parallel, we maintain an active role in international bunker trading, with a particular focus on European markets. Our integrated approach allows us to respond flexibly to the evolving needs of our clients while maintaining

the highest standards of professionalism and trust.

Beyond our core bunkering activities, Asmira Group has strategically expanded into the yachting sector, with operations in Türkiye, Montenegro and Croatia. This diversification reflects our broader vision of serving different segments of the maritime ecosystem while leveraging our operational expertise and regional strength.

As the global maritime industry navigates a period of significant transformation—driven by decarbonization targets, regulatory developments, and the transition toward alternative fuels—we are fully aware of both the challenges and opportunities ahead. As an active member of IBIA and a representative within the Turkish Chamber of Shipping, we closely follow industry developments and actively contribute to the dialogue shaping the future of marine energy.

In this evolving landscape, Asmira Group remains committed to adapting responsibly and proactively. We continue to explore new fuel solutions, enhance our operational capabilities, and invest in sustainable practices that align with the long-term needs of our industry and our partners.

We firmly believe that collaboration, transparency, and innovation will be the key drivers of success in the years ahead. Platforms such as Posidonia play a critical role in fostering these values, bringing together the collective expertise and vision required to navigate the future of global shipping. We look forward to welcoming you at our stand and to engaging in meaningful discussions during this exceptional event.

**\* CHAIRMAN, ASMIRA GROUP, TURKISH CHAMBER OF SHIPPING / MEMBER OF THE ASSEMBLY, IBIA (INTERNATIONAL BUNKER INDUSTRY ASSOCIATION) / HONORARY TREASURER - BOARD MEMBER**

# IBIA: GLOBAL REPRESENTATIVE OF THE BUNKER MARKET



**\*UFUK ERİNÇ**

Since its foundation, the IBIA (International Bunker Industry Association) has been a strong industrial organization that has continuously evolved, closely monitored current market dynamics, and shaped its strategies in response to medium- and long-term changes. Today, it has made significant strides toward becoming an umbrella organization that collaborates with major maritime organizations, chambers of commerce, and international maritime associations, contributing its own expert opinions and leveraging its extensive member network when necessary.

At this stage, through its regional boards, it has become an effective force not only monitoring the industry in the regions where it operates but also representing its members before government agencies and regional bodies. In today's challenging, volatile, and often uncertain shipping

environment, IBIA continues to guide its members and strategic partners, much like a lighthouse guiding a ship navigating open waters. As a member of IBIA for over 20 years and a member of its board for the past two years, I can attest that IBIA is steadfastly continuing its efforts to reach a broader membership base and to create a more transparent, understandable, and accountable bunker market.

### **IBIA's Role and Influence in IMO Regulations**

The role IBIA plays in shaping International Maritime Organization (IMO) regulations is of critical importance in ensuring that site realities are reflected in decision-making processes. By bridging the industry's practical experience with policymakers, IBIA contributes to the development of feasible and balanced regulations. This situation places not only a representative

but also a guiding responsibility on the association.

### **Education, Standards, and Future Vision**

Success in tomorrow's bunker world is directly linked not only to commercial stakeholders but also to the knowledge and competency levels of all site-based operational stakeholders. With this awareness, IBIA develops partnerships with internationally renowned universities to ensure access to up-to-date information for a broad audience—from ship personnel to barge crews, and from surveyors to technical experts—and continuously updates its training programs, delivering them through both physical and digital platforms.

One of the most critical areas of focus today is the establishment of an international licensing system and the end-to-end transparent management of the fuel supply chain. In this context, digitalization, data traceability, and the integration of AI-supported systems will significantly contribute to accelerating the process and standardizing it on a global scale.

### **Energy Transition and Sustainability**

IBIA maintains its firm stance on energy transition in shipping, alternative fuels, and net-zero targets, despite global uncertainties. This approach, which places the environment and people at its core, forms the foundation not only for today's but also for tomorrow's maritime ecosystem.

IBIA is not merely an industrial association; it is a strong organization that shapes the development of the global bunker market, prioritizes trust and transparency, and works toward a sustainable future maritime. Together with you, IBIA will grow even stronger.

**\* CEO, UNERCO / BOARD MEMBER, IBIA**



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# OUR SECTOR STANDS OUT IN EXPORTS WITH ITS HIGH ADDED VALUE, TECHNOLOGICAL CAPABILITIES, AND FLEXIBLE PRODUCTION CAPACITY



**\*MUSTAFA PEPE**

As the Ship, Yacht, and Marine Services Exporters' Association, we view the export performance of our sector in recent years not merely as numerical growth, but as a transformation process characterized by increasingly higher quality. Türkiye has secured a strong position in the global market by focusing on specialized, high-value-added projects requiring advanced engineering rather than standard production in ship and yacht construction. In 2025, our sector achieved exports totaling \$2.244 billion, reaching the highest export value since the Association's establishment, increasing annual exports by 17%, and raising its share in Türkiye's total exports to the highest level to date.

The transformation taking place in the global maritime industry—particularly driven by environmental regulations, energy efficiency requirements, and the rapid proliferation of alternative fuel technologies—is bringing countries with high production capabilities to the

forefront. At this point, Türkiye is further strengthening its competitive edge year after year thanks to its shipyard infrastructure, engineering expertise, and project-based production flexibility. On the other hand, we believe it is essential not to overlook some of the fundamental challenges our sector faces. In particular, we are currently navigating a period where our price competitiveness has weakened due to global developments and rising domestic cost factors over the past few years. Nevertheless, thanks to our high engineering capabilities, flexible production structure, project-based solution development expertise, and strong supporting industry infrastructure, our sector is making every effort to maintain its position in international markets.

However, reinforcing price competitiveness is of great importance for the sustainability of our current advantages. In this context, taking structural steps to support our sector's global competitive strength will be one of the key factors determining our success in the coming period. Our sector has climbed up to the top ranks in global rankings, particularly in recent years, thanks to its export success in niche areas such as fishing vessels, tugs, tugboats, and mega yachts. This success is no accident; it is the result of years of accumulated knowledge, a skilled workforce, and a customer-focused production approach. Today, Turkish shipyards are transforming into places that not only produce but also develop solutions, design, and engineer projects.

## **We Have the Capacity to Generate High Added Value**

We have long held the position of the world's leading exporter of fishing vessels. We rank among the world's top countries

in mega-yacht order books, we are among the top five countries globally in tugboat exports every year, and we hold significant rankings in many types of specialty vessels.

One of the most important strengths of our exports is our capacity to generate high added value. While the average unit value per kilogram in Türkiye's overall exports remains at limited levels, it is much higher in the ship and yacht sector, clearly demonstrating the strategic importance of our sector. The export value per kilogram for all products exported nationwide stands at 1.50 U.S. dollars, while in the ships and yachts produced and exported by our sector, these figures can range from 20 to 100 dollars per kilogram. In particular, the unit values achieved in specialized vessels and mega-yacht projects serve as a concrete indicator of our country's capability for technology-intensive production.

Moreover, our sector is growing not only through production but also through a robust supporting industrial ecosystem. Together with our equipment manufacturers, engineering firms, solution partners in the supply chain, and service providers, we form a comprehensive structure. This ensures the sustainability of exports and increases the preference rate for Turkish companies in international projects.

Growing global environmental awareness and regulatory pressure have ushered in a new era in the shipbuilding sector. Rules established by international authorities, particularly the International Maritime Organization (IMO) and the European Union, are making the renewal of existing fleets mandatory while prioritizing eco-friendly and innovative solutions in new-built ships. Türkiye stands out as one of



the countries that has adapted quickly to this transformation. Today, our shipyards are successfully building vessels powered by LNG, electric, hybrid, methanol, and dual-fuel systems. The projects developed in this field demonstrate not only our technical expertise but also our capacity for innovation. In particular, solutions focused on reducing the carbon footprint, energy efficiency, and sustainability are among the key factors enhancing our industry's competitiveness.

Our geographical location also offers a significant advantage for our industry. Proximity to the European, Middle Eastern, and North African markets enables us to provide fast and efficient logistics solutions. Furthermore, the flexibility of our shipyards to undertake project-based production allows us to respond quickly to customers' specific requests. This makes Türkiye a preferred destination, particularly for projects requiring bespoke production.

Another strength of our sector is its resilience and adaptability in the face of crises. Our exports have continued to grow sustainably despite global economic fluctuations, the pandemic, and regional developments, demonstrating the solid

foundations of our sector. Even during periods of shrinking demand, balanced growth can be achieved thanks to the ability to focus on niche markets and increase product diversity. We expect the transformation in the global maritime industry to continue accelerating in the coming period. In particular, the green transition, digitalization, and smart ship technologies present new opportunities for our sector. Türkiye's infrastructure and human resources in these areas constitute a significant advantage in capitalizing on these opportunities.

### **Trade Shows Play a Key Role in Our Export Performance**

On the other hand, international trade shows and commercial events also play a key role in our sector's export performance. Participation in fairs held abroad enables our companies to enter new markets and strengthen their positions in existing ones. Through these events, we have the opportunity to share not only our products but also our engineering capabilities, quality standards, and solution-oriented approach with the world. Under the umbrella of the Ship, Yacht, and Marine Services Exporters' Association, we organize national participations at leading global trade fairs

such as Posidonia, SMM, Norshipping, Europort, and Neva, and promote our sector at yacht festivals in Monaco and Cannes. Every year, we strive to create new markets and promotional opportunities through various trade fair and delegation initiatives.

As the Ship, Yacht, and Marine Services Exporters' Association, our goal is to build on our current successes, continue to increase our exports, and elevate our country to higher ranks in high-value-added production. In this regard, strengthening public-private sector collaboration, diversifying financing options, and increasing international partnerships are of great importance. On the other hand, it is evident that the robust support mechanisms provided by our competitor countries for ship and yacht construction have significantly enhanced the competitiveness of their sectors. In this context, we are sharing our views on the implementation of similar or complementary support measures in specific areas with relevant institutions and organizations, in line with the needs of our sector.

Especially in the current climate where our price competitiveness has weakened, we believe that implementing such supportive measures would be highly beneficial for our sector. We are convinced that structural steps to support our competitiveness are crucial for us to further advance our position in the global market while preserving our current strengths. In conclusion, our sector continues to play a strategic role in Türkiye's export vision through its high-value-added production structure, robust engineering infrastructure, flexible production capabilities, and sustainability-focused approach. We are confident that, by maintaining this strong foundation in the coming period, we will continue to act as a more effective and influential player in global markets.

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**\* CHAIRMAN, TURKISH SHIP, YACHT & MARINE SERVICES EXPORTERS' ASSOCIATION**

## TURKISH-CONTROLLED COASTER FLEET: A STRONG FUTURE ON THE THRESHOLD OF TRANSFORMATION



\* NESLIHAN TORLAK GÖNENÇER

Short sea shipping within the EU framework has been reshaped in recent years by both geopolitical developments and regulatory transformations. In particular, policies under the “Fit for 55” framework that encourage a shift from land to sea transport are bringing the coaster segment to the center of regional trade. One of the key players in this transformation is the Turkish-controlled coaster fleet... Thanks to its geographical location, operational flexibility, and strong experience in regional trade, Türkiye serves as the primary carrier ensuring the continuity of trade in the Black Sea and the Mediterranean.

With the second-largest coaster vessel fleet in the world after China, the Turkish maritime stands out as a strategic force that ensures the continuity of the supply chain even during crises. Although their carrying capacity is lower than that of large-tonnage vessels, coaster vessels not only enhance the sector’s prestige by

“carrying the region’s cargo” in the Black Sea, Mediterranean, and Europe but also provide significant economic revenue to countries. With a long-standing history, coaster vessels serve as the starting point for shipowners and operators in shipping while also paving the way for their growth.

### A Strong Yet Evolving Structure

The Turkish coaster vessel fleet is primarily concentrated in the 3,000–5,500 DWT segment, but the average age exceeding 25 years stands out as the fleet’s most critical structural issue. Although conventional vessels added to the fleet in recent years have supported numerical growth, they have also made the need for improvement in efficiency and quality more apparent. Nevertheless, the sector has a significant advantage: The structure composed of small and medium-sized enterprises grants Turkish shipowners a high degree of flexibility and the ability to adapt quickly. This is one of the key factors enabling the Turkish

coaster fleet to maintain its leadership in the region, particularly during times of crisis.

In line with its founding vision, KOSDER has consistently taken proactive steps to implement projects aimed at renewing the Turkish coaster vessel fleet and has sought to capitalize on emerging opportunities. At this stage, securing financing under favorable terms from public institutions, banks, and relevant funds is of critical importance for the full implementation of the project. To advance this process, as the Association of Coaster Shipowners and Operators, we continue to emphasize the strategic importance of this project for our country’s maritime on every platform and we are pursuing all necessary initiatives to ensure it remains a top priority on the agenda. Our new Board of Directors is also addressing this matter with great sensitivity, maintaining uninterrupted dialogue with relevant institutions and organizations, and resolutely continuing its efforts to bring this project—which will mark a turning point for Turkish shipping—to fruition. However, structural transformation has now become inevitable for this momentum to be sustainable.

### Dynamics of the New Era: Flexibility Is Necessary, Strategy Is a Must

Three key dynamics are emerging in the post-pandemic era:

- **Regionalized trade:** Supply chains are shifting toward closer geographical regions
- **Cost pressure:** Fuel and insurance costs are dictating operations
- **Regulations:** Environmental rules are redefining competition

Today, shipping is not merely about carrying cargo; it also involves managing costs, risks, and uncertainties

simultaneously. The Turkish coaster fleet is one of the few structures capable of adapting quickly to this transformation thanks to its operational flexibility. However, maintaining this advantage now requires a more planned and holistic approach.

### **Green Transition: More than Just a Necessity**

The green transition is now an inescapable reality. While short-term investment needs and financing challenges may take center stage, in the medium and long term, this process offers significant advantages such as:

- Lower fuel costs
- Regulatory compliance
- Access to new markets.

The fact that the EU ETS will be fully implemented by 2026 indicates that costs will rise significantly, particularly for smaller-tonnage vessels with low fuel efficiency. At the same time, this demonstrates that global fleets will rapidly transition toward energy efficiency by 2026.

These developments have two key implications for coaster vessel operators:

- The competitiveness of old tonnage will decline,
- The importance of modern and efficient vessels will increase further.

Therefore, when managed correctly, the green transition is not a burden for the sector; rather, it serves as a leverage to enhance competitiveness.

### **Fleet Renewal: No Longer a Choice**

Fleet renewal is today's most critical issue. The current age structure of the fleet and increasing regulatory pressure has brought this process to a point where it can no longer be postponed. However, there is an important reality that must be emphasized here: This transformation is not a process that shipowners can

undertake solely with their own resources. The coaster fleet is the cornerstone of Türkiye's strength in regional trade. Therefore:

- Suitable financing models
- Incentive mechanisms
- Public support

must be an integral part of this process. Fleet renewal is not merely an investment; but a strategic step that will shape Türkiye's future in shipping.

### **The Era of Strengthening Together**

As KOSDER, our core approach in this new era is: "Strengthening by acting together"

The strong communication we have established with our members, our collective intelligence approach, and feedback from the field form the foundation of every step we take.

In this context, we are:

- increasing our training and awareness activities,
- developing partnerships with sector stakeholders, and
- actively working on financing and incentive mechanisms.

Our goal is to make this transformation manageable and sustainable for the sector, ultimately achieving a radical yet modern leap forward for our fleet and the maritime industry as a whole.

### **From Istanbul to the World: The SHIPROUTE Vision**

One of the strongest reflections of this approach is our Shipping Route Istanbul 2026 (SHIPROUTE 26) event. Held every two years, SHIPROUTE is transforming Istanbul into one of the maritime world's key meeting points with its growing international participation. Attracting participants from over 40 countries, this platform is not merely an event but is evolving into a platform

where new partnerships and commercial opportunities emerge, steering the industry's route toward Istanbul as a historically significant location that is growing in strength. Furthermore, SHIPROUTE serves as a platform where critical maritime industry issues—such as the climate transition, carbon reduction, and sustainability—are addressed with great emphasis.

We see SHIPROUTE not merely as an organization, but as a strategic platform that strengthens the global integration of Turkish shipping while supporting the green transition. The experience we gained from the events we held initially in Greece and the Netherlands made a significant contribution to strengthening our maritime network and tangibly advancing our international relations. Through these events, we have had the opportunity to establish closer contact with stakeholders in various markets and have observed that these collaborations have become sustainable. The positive feedback we have received has provided us with strong motivation to take SHIPROUTE's vision even further. As a reflection of our ongoing collaboration with the Union of Greek Shipowners and the Royal Association of Netherlands Shipowners (KVNOR), these events brought together industry professionals from diverse cultures, providing a productive platform for generating joint solutions to global maritime challenges.

As the next step in this development, Germany's participation as the guest country at SHIPROUTE-26 aims to further strengthen the long-standing, strong partnerships between Türkiye and Germany, particularly in the fields of financing, shipbuilding, and ship operation. In particular, ship financing has become one of the most critical levers of the climate transition today. The construction of low-carbon and environmentally-friendly fleets is only possible through the right financing models, green loans, and sustainable investment tools. Given Germany's leading role in maritime finance, green finance,



and sustainable ship technologies, this collaboration is not merely economic; it also constitutes a strategic partnership that will accelerate the sector's decarbonization process.

In this context, joint projects to be developed in the areas of alternative fuels, energy efficiency, and low-carbon transport will ensure that the climate transition between Türkiye and Germany yields tangible results. Germany's participation represents a strategic step that strengthens SHIPROUTE's integration with Europe. The event is not merely a conference but also offers an excellent networking opportunity to meet leading figures in the sector and establish business partnerships. Participants are laying the groundwork for new projects by coming together with partners; in particular, the participation of major players in the global maritime industry strengthens Türkiye's and Turkish shipping's position on the global stage. At the same time, it reinforces

the importance of collective action in combating climate change.

When we evaluate all these events as a whole, it becomes clear that our goal is not merely to organize successful events. Our aim is to ensure the continuity of these events, thereby transforming Istanbul into a geopolitically stronger, more visible, and more influential hub in the maritime industry.

In this regard, we position SHIPROUTE as a strategic platform that supports the global integration of Turkish shipping, guides the climate transition, and makes international collaborations permanent. In the coming years, we plan to organize SHIPROUTE events biennially, each time with a different guest country. In this way, by bringing together all stakeholders of the industry in Istanbul, we aim to create a strong ecosystem that shapes not only the global maritime agenda but also the industry's sustainable and low-carbon future. As KOSDER, we will continue to

create such platforms to shape the future of the maritime industry and support the climate transition.

### **Conclusion: Emerging Stronger from Transformation**

I believe the Turkish coaster vessel fleet is at a significant turning point today. This process—which holds short-term challenges, mid-term restructuring, and long-term opportunities—can become a major gain for the sector if managed correctly.

Just as it has in the past, Turkish shipping possesses the knowledge, experience, and capability to turn challenges into opportunities. And most importantly: As long as we act together, this transformation will not be a burden; it will be one of the strongest opportunities opening the door to the future.

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**\* CHAIR OF COASTER SHIPOWNERS AND OPERATORS ASSOCIATION (KOSDER)**



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# THE MARITIME INDUSTRY GATHERS AT THE “MEMORIAL FOREST” TO PLANT 22,000 SAPPLINGS

The “Maritime Memorial Forest” tree planting ceremony, organized by the Turkish Chamber of Shipping, was held on Sunday, April 19, 2026, at the site located on the Istanbul-Şile Road in Çekmeköy. As part of the event, 22,000 saplings were planted across a 120-acre area.



The ceremony was attended by Tamer Kiran, Chairman of the Board of Directors of the Turkish Chamber of Shipping; members of the Board and the General Assembly; Branch Chairs; Presidents of supporting civil society organizations; representatives of the maritime industry and their families.

as an economic activity but also as a vital living space that must be protected. He said, “With this understanding, we act with the responsibility to protect not only today but also tomorrow, and closely monitor all national and international developments and work resolutely to protect our seas and coasts.”



In his speech at the ceremony, Tamer Kiran stated that as representatives of a community that earns its livelihood from the seas, they see the seas not merely



Noting that the Chamber of Shipping is not only the umbrella organization of the industry but also the strongest representative of unity, solidarity, and



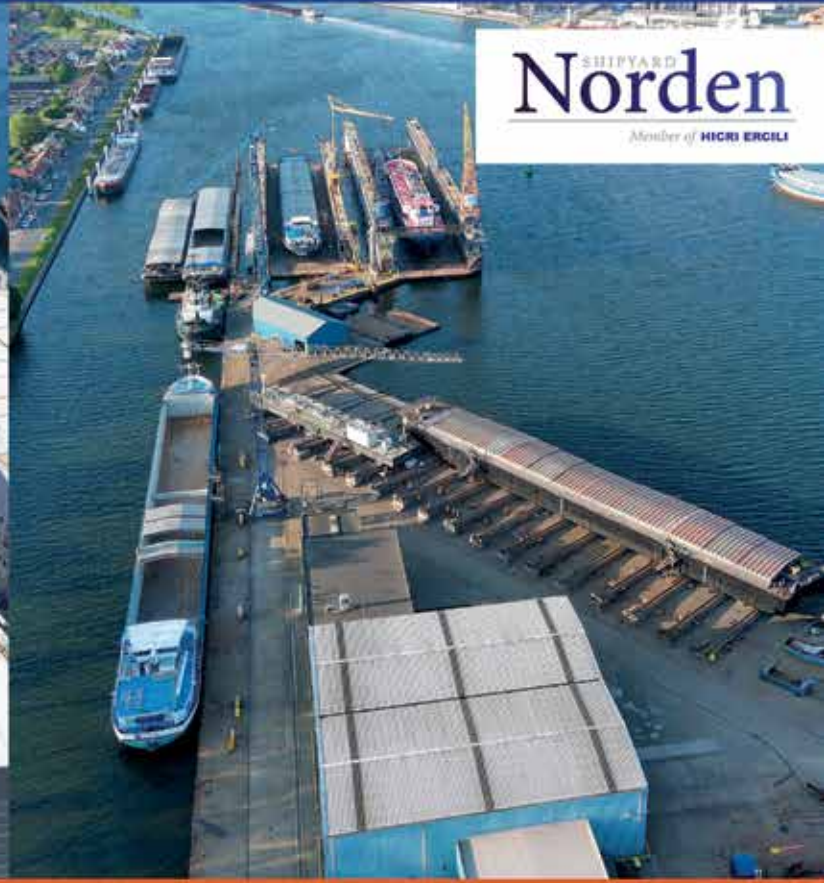
collective wisdom, Tamer Kiran added: “What makes this meaningful day even more valuable is undoubtedly the strong solidarity of our industry. The symbolic saplings planted on behalf of our 43 affiliated organizations are the most concrete expression of the fact that we are a large family marching toward the same goal with unity and shared values. The names of our industry’s distinguished organizations written in front of each sapling will serve as the enduring markers of this solidarity etched into the earth. We are not merely planting a forest here today. We are building a memory, a legacy, and a breath of fresh air for future generations. We believe that every act of kindness toward nature multiplies and reaches the future. I hope that the step we are taking today will make a strong contribution toward greener, cleaner, and more livable tomorrows.”

Tamer Kiran thanked all the sponsors and participant organizations, as well as everyone who contributed their efforts. During the ceremony, a symbolic tree was planted on behalf of the supporting civil society organizations, and participants attended the breakfast organized following the program.



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Hicri Ercili is a well-established company operating in chemical transportation, production, and maritime sectors since 1962. Since entering the maritime industry in 2009, the company has become an active global player with its modern shipyard and international operational strength.

With its 45,000 m<sup>2</sup> modern shipyard infrastructure, Hicri Ercili provides services in shipbuilding, maintenance and repair, modernization, and special projects. The facility includes a newbuilding slipway equipped with portal cranes and two floating docks with capacities of 10,000 tons / 180 x 42 m and 4,800 tons / 116 x 25 m. It also features extensive production and maintenance areas, including steel, hull construction, outfitting, CNC, prefabrication, and multipurpose workshops.

Hicri Ercili Shipyard also operates in mega yacht projects and sustainable ship projects, offering critical services such as steel processing, hatch cover repair, piping systems, blasting and painting, engine maintenance, electrical-electronic systems, ventilation, and insulation works. With the acquisition of Norden Shipyard in the Netherlands, with its 100-year history, Hicri Ercili has strengthened its operational capacity in Europe.

Embracing quality, occupational safety, and environmental sustainability, Hicri Ercili continues to add value to the maritime industry with its advanced technology infrastructure and expert team.



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# ALPORT'S MOVE INTO AFRICA

Alport takes over the operation of the ports of Malabo and Bata—Equatorial Guinea's two main shipping gateways—effective April 1.



Türkiye's presence in Africa's shipping and logistics infrastructure is expanding with this new step. Alport, the global port operations brand of Türkiye-based Albayrak Group, has officially taken over the operation of the ports of Malabo and Bata, Equatorial Guinea's two main maritime gateways. Following approximately two years of negotiations and mutual visits, the transition process carried out under the concession agreement signed on November 13, 2024, was completed, and port operations were officially taken over by Alport Equatorial Guinea as of April 1, 2026.

A ceremony marking the handover of operations was held in the capital, Malabo. Following the official reception at the Presidential Palace, a special ceremony was held at the Prime Minister's Office, bringing together high-ranking government officials, the Turkish diplomatic mission, and representatives of the Albayrak Group. The ceremony was attended by Equatorial Guinea's Prime Minister Manuel Osa Nsue Nsua, Minister of Transport Honorato Évita Oma, and Holding GE General Manager Patricia Mbasogo Obiang Lima; representing Türkiye, Equatorial Guinea Ambassador Ahmet Ergin, Deputy Ambassador Ayşe Ece Bıçakçı, Consul Başak Dalgın, and staff members of the Turkish Embassy in Malabo were present at the ceremony. The Albayrak Group was represented by Deputy Chairman of the Board Nuri



Albayrak, Board Member Faruk Albayrak, General Coordinator of Alport Ports Mustafa Levent Adalı, and Equatorial Guinea Country Manager Ali Fuat



Ustahaliloğlu. Under the concession agreement, Alport will be responsible for the operation, modernization, and development of the ports of Malabo and Bata for a period of 25 years.

## A STRATEGIC LOGISTICS GATEWAY IN THE GULF OF GUINEA

Located on the coast of the Gulf of Guinea, the ports of Bata and Malabo

are among the critical shipping gateways for Central Africa. Alport's goal is to strengthen access to landlocked countries such as Chad and the Central African Republic via these two ports, while also developing trade routes extending to the northern regions of the Democratic Republic of the Congo.

In this context, these ports are expected to contribute to the development of new logistics and trade corridors in Central Africa. The acquisition of the Malabo and Bata ports is viewed as a new step of Türkiye to increase its influence in global port operations through private sector investments.

According to experts, Türkiye's growing port investments in Africa play a significant role both in commercial terms and also in strengthening strategic logistics networks and establishing new trade corridors.

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# GLOBAL PORTS HOLDING ADDS MEXICO TO ITS PORTFOLIO

Securing a 24-year operating concession for the Acapulco Cruise Port in Mexico, Global Ports Holding aims to expand cruise operations at the port.



Global Ports Holding (GPH), a subsidiary of Global Investment Holding and the world's largest cruise port operator serving over 22 million passengers annually across 35 cruise ports in 20 countries across four continents, has now expanded into Mexico. GPH was selected as the preferred bidder in the tender for a 24-year operating concession for the Acapulco Cruise Port, which stands out as the country's first such port. The tender was conducted by the Administration of the National Port System Acapulco (ASIPONA).

GPH plans to operate and develop the cruise terminal located within the concession area, which spans a total of 17,199 square meters. As part of the project, phased investments will be made to enhance cruise operations, improve passenger flow, and elevate the visitor experience to the highest level. Global Ports Holding aims to support the growth of cruise tourism in Acapulco and contribute to the destination's long-term development by leveraging its global port network, commercial expertise,

and strong relationships with leading cruise lines. Following the signing of the concession agreement, GPH is expected to begin operations in the second quarter of the year.

Under the concession agreement, planned developments include the modernization of port plants and the creation of new commercial and social spaces for cruise passengers. Additionally, GPH plans to work in close collaboration with cruise lines and local stakeholders to develop new destination experiences and shore activities, thereby enhancing Acapulco's appeal on Pacific/Mexican Riviera cruise routes.

In parallel with Global Ports Holding's planned investments, ASIPONA is also expected to construct a new 350-meter-long pier using public funds. Upon completion, this pier will become part of the concession area. The new pier is scheduled to be completed in the first quarter of 2027. Thanks to these investments by Global Ports Holding and ASIPONA, Acapulco is expected to

strengthen its position as a key transit destination along the cruise routes stretching along the western coast of the Americas. Acapulco holds a significant place in maritime history as Mexico's first port, in addition to being one of the country's most iconic cruise destinations.

## "A MAJOR MILESTONE"

Mehmet Kutman, Chair of the Board and CEO of Global Ports Holding, emphasized that entering Mexico through the Acapulco Cruise Port represents a major milestone for the company. "This port holds great significance as our first port in Mexico", Kutman said. "Acapulco is a destination with a rich history and strong potential in the regional cruise market. We believe that by working in close collaboration with ASIPONA and local stakeholders, we can unlock this potential and contribute to the development of cruise tourism in the region. We look forward to working with our partners and the local community to develop the port infrastructure and provide a high-quality experience for cruise passengers visiting Acapulco," he said.

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# IBIA ASSESSES THE TRANSFORMATION IN THE BUNKER INDUSTRY

Adrian Tolson, Chair of the International Bunker Industry Association (IBIA), points a necessary structural transformation in the Persian Gulf in his press release.



Adrian Tolson, Chair of the Board of Directors of the International Bunker Industry Association (IBIA), authored a press release regarding the sectoral transformation in the bunker industry.

Beginning his statement by noting that geopolitical shocks over the past twenty years have had far-reaching effects on maritime transport, energy markets, and the bunker supply chain, Tolson stated that the current situation represents a more structural transformation in the Persian Gulf.

Tolson continued his statement as follows: “The possibility of a prolonged disruption and the vulnerability of the Strait of Hormuz signal that the landscape has changed. This conflict has exposed weaknesses in the global energy structure and, in particular, within our own supply chain. Even if the situation is resolved quickly, the consequences will not disappear. Concerns about energy



security will persist, and there will be a greater focus on diversification, including alternative fuels. For the bunker supply chain, this signifies not just a temporary disruption but also long-term shifts in how supply and demand are structured.

“Today, the industry is once again demonstrating its resilience. For those operating in regions closest to the conflict, this period is extremely concerning—first and foremost from a security perspective, but also due to the financial risks posed by potential damage to assets and prolonged instability.

Nevertheless, on a global scale, bunker operations continued largely with calm operational professionalism and limited disruptions, much like during previous crises. Supply points in Asia, in particular, remained stable despite the initial wave of panic. In the early stages of the conflict, uncertainty triggered sharp price increases and short-term availability constraints. However, as the situation evolved, alternative cargo flows emerged, ensuring the continued supply of key bunker hubs.

“This does not mean conditions have returned to normal. Prices remain high and volatile. Crude oil and refined product

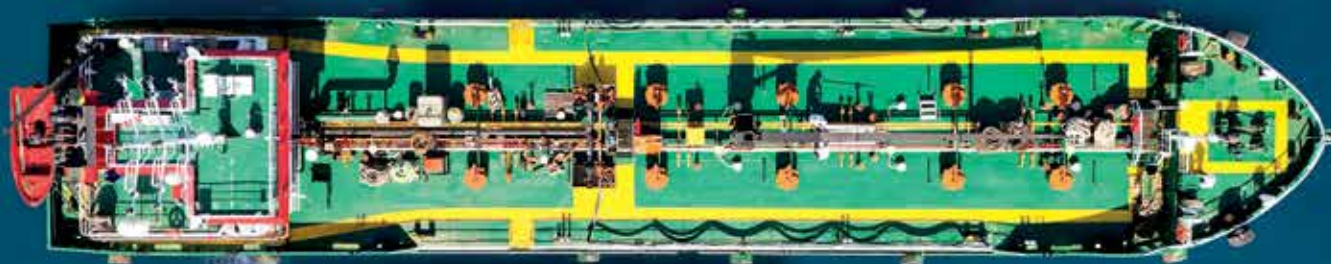
markets continue to move unpredictably, and bunker pricing reflects this reality. Suppliers have had to manage pricing risk at an extraordinary level; buyers, meanwhile, are questioning the pricing and margins seen particularly during the initial stages of the disruption. In some cases, it’s difficult to justify these increases.”

From an industry perspective, Tolson emphasized the importance of all parties acknowledging the pressures experienced throughout the value chain. He also underscored that the relationships sustaining the market are long-term.

“Maintaining trust and balance will be critical, especially as geopolitical tensions begin to ease... As short-term fluctuations begin to subside, it becomes clear that many of the changes we’ve seen are not temporary. Today, the bunker value chain is different even compared to just a few months ago. This moment represents not just a disruption, but also a transition,” he said. Tolson concluded his remarks by stating, “IBIA and its members are in a strong position to navigate this evolving environment. The industry will adapt as always, and IBIA will continue to support this process by focusing on collaboration, stability, and practical insights”.



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# THE AQUACULTURE SECTOR INCREASES ITS EXPORTS BY 24 PERCENT IN THE FIRST QUARTER

The Turkish aquaculture sector, which recorded \$445 million in exports during the first quarter of 2025, increased its exports by 24 percent to \$552 million during the same period in 2026.



Ufuk Atakan Demir, Chair of the Aegean Fisheries and Animal Products Exporters' Association, stated that the Turkish fishery products sector achieved export growth across all categories, including sea bass, sea bream, Turkish salmon, tuna, trout, rock bass, and other seafood products.

Demir provided some figures about the sector: "Our sea bass exports maintained their top position with a 29% increase and a value of \$185 million and. Our sea bream exports rose by 18% to \$140 million. Turkish salmon, a staple on global tables over the past decade, saw an 8% increase in exports, rising from \$84 million to \$91 million. Our tuna exports surged by a record 155%, jumping from \$18.5 million to \$47 million. We generated 29.3 million dollars in foreign exchange revenue from trout exports and 7 million dollars from rockfish exports. Our exports of other seafood products rose from 45 million dollars to 52 million dollars".

## AEGEAN FISHERMEN TAKE THE LION'S SHARE IN SEAFOOD EXPORTS

Demir emphasized that in the first quarter of 2026, Aegean exporters—members



of the Aegean Fisheries and Animal Products Exporters' Association—accounted for the lion's share of Türkiye's \$552 million in seafood exports, totaling \$370 million. Demir continued: "Aegean exporters accounted for 67% of Türkiye's seafood exports. In other words, Aegean exporters were behind two out of every three fish exports. They wrote an even more impressive success story in sea bass and sea bream exports. Aegean exporters' share of Türkiye's sea bass exports reached 90 percent. In sea bream exports, Aegean exporters accounted for 84 percent.

"We showcased the strength and potential of Türkiye's seafood sector to buyers from around the world at Seafood Expo Global—one of the world's largest seafood trade fairs—held in Barcelona from April 21–23, 2026. The Turkish pavilion stood out throughout the fair with its promotional and tasting events,

special menus prepared by renowned chefs using Turkish seafood drew significant interest from participants. Held concurrently with the fair on April 21, 2026, at the Velissima Restaurant in Barcelona Marina, the tasting event themed 'Mediterranean Taste of Turkish Seafood' was organized under the Turkish Seafood Turquality Project, jointly carried out by the Aegean, Istanbul, and Mediterranean fisheries and Animal Products Exporters' Associations. The event was attended by representatives of Turkish seafood export companies, local and international media representatives, potential foreign buyers and distributors, leading institutions and organizations in the sector, and international social media influencers. Through these comprehensive promotional activities, the aim was to further solidify the strong position of Turkish seafood, particularly within Mediterranean gastronomy, on the international stage," said Demir.

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The Magnets are specially designed to provide a removable fixing point on the ship's side for a safer use of the cross by pilots and crew. Each unit provides a gripping force of approximately 350kg. It is lightweight and easy to use.



## OIL SPILL KITS

Oil Spill Kits are supplied for ships of all types/sizes, including oil spill kits to meet the requirements of IMO A.535 (13) and OPA 1990 Section 4202. These comprehensive emergency response kits are ideal for the removal and containment of all types of chemical and oil derived pollutants.



## RESCUE NETS

Rescue nets and personnel transfer baskets of all types and sizes are supplied in order to rescue personnel who fall into the sea (lifeboat) and to secure them against the danger of falling from the ladders on the ship's board.

## IMO SYMBOL AND FLAGS

IMO guidance and identification labels are manufactured from high quality self-luminescent materials in accordance with IMO standards. Production is available in all sizes and dimensions according to customer demands. Also all country flags and sign pennants are manufactured in all sizes.



300 mm  
360 mm  
450 mm

## MISCELLANEOUS ROPE WORKS

# OPERATIONAL FLEXIBILITY AND RAPID RESPONSE HAVE BECOME KEY

Victoria River & Sea Transport Ltd. delivers fast and effective solutions to its clients through accurate tonnage planning, efficient port operations, and a proactive approach to risk management in chartering.



Victoria River & Sea Transport Ltd. stands out in the dry bulk sector with strong operational expertise and a well-established client portfolio, particularly in grain, steel, raw materials, and scrap cargoes. These cargoes require not only operational precision but also accurate tonnage planning and timing. Victoria Kiran, General Manager of the company, comments: “Our long-standing experience in handling cargoes such as grain, steel, raw materials, and scrap has given us three key strengths: accurate tonnage planning, speed in port operations, and the ability to proactively manage risks in chartering.

What truly sets us apart is our ability to deliver end-to-end solutions. We take an active role at every stage of the process—from cargo planning and vessel selection to operational follow-up and port coordination. In addition, leveraging Türkiye’s strategic location, we provide comprehensive agency services throughout the Turkish Straits and all Turkish ports, ensuring seamless support in transit operations and every phase of vessel handling.”

Kiran continues: “The Black Sea and its surrounding region represent one of our strongest strategic areas. Our operational strength here is built on both our deep knowledge of local ports and our strong network of regional shipowners and charterers. What gives us a competitive edge in this geography is our ability to make fast decisions, our command of local operations, and our hands-on approach to problem-solving. In a high-traffic region like the Black Sea, these qualities make a critical difference.

Our regional expertise translates directly into time and cost advantages for our clients. We are able to secure faster fixtures, run more efficient operations, and maintain a lower risk profile. Beyond the Black Sea, our strong relationships with shipowners, charterers, and brokers across the Mediterranean and Europe enable us to offer not only regional but also a broader, integrated trading network. This allows us to provide flexible solutions across different cargo types and tonnage sizes, while ensuring operational continuity through alternative routing and loading options.”

With an agile and integrated operational structure, the company manages its chartering and operations processes in close coordination.

“While most of our operations are managed from the office,” Kiran explains, “port activities are closely monitored on-site through our trusted agency network and local partners. A strong line of communication between the office and the field is essential in port operations and vessel coordination. We remain in constant contact with agents, masters, and shippers/receivers to ensure that each operation runs smoothly. This approach not only minimizes operational risks but also enhances efficiency in both time and cost management.”

Emphasizing that the company’s vision is built on “sustainable growth and controlled globalization,” Kiran concludes by noting that their goal is not aggressive expansion, but rather to build a long-term, reliable, and professional network with the right partners.

The dry bulk market remains highly dynamic and volatile. The slowdown in global economic growth, coupled with regional geopolitical developments, continues to exert periodic pressure on freight levels.

That said, short-haul trade routes present a relatively more stable and opportunity-driven environment. In recent times, operational flexibility and the ability to respond quickly have become increasingly critical in short sea trade. Port congestion, fluctuating cargo flows, and regional demand shifts are bringing agile and solution-oriented companies to the forefront. Looking ahead, we expect the market to become more selective and increasingly segment-driven. While overall volatility is likely to persist, opportunities—particularly in regional trades and niche cargo segments—will continue to emerge.



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# TURKISH SEAFARERS: A POTENTIAL GAME-CHANGER IN GLOBAL MARITIME

Ebru Kasap, Founding Partner and Managing Director of QSM Global, emphasized that they view Turkish seafarers not merely as human resources, but as a strategic asset that will shape the future of the industry.



As the global maritime industry continues its transformation, the need for competent, adaptable, and globally-minded seafarers has become more critical than ever. In this process of change, Turkish seafarers are emerging not only as a reliable workforce but also as a potential game-changer in addressing the industry's evolving crew requirements. Türkiye's maritime strength is rooted in a robust and continuously evolving educational infrastructure. The maritime education network, comprising over 100 training centers nationwide, includes 14 maritime faculties, 15 vocational colleges, 44 maritime high schools, and more than 30 private educational institutions, all dedicated to training qualified seafarers in accordance with STCW standards. This structure enables officers and crew to adapt quickly and effectively to operations by combining theoretical knowledge with practical experience. This robust educational infrastructure is supported by over 140,000 active seafarers at the officer and crew levels, thereby ensuring

the capacity, continuity, and flexibility required by the global maritime industry.

Ebru Kasap, Founding Partner and General Manager of QSM Global, said, "Today, Turkish seafarers—particularly senior and junior officers—possess high-level English communication skills. Thanks to modern education systems and experience gained in multinational crew environments, Turkish officers are confidently serving in global fleets, directly contributing to operational efficiency, safety, and effective communication," she said. Kasap continued: "Beyond this, Turkish seafarers demonstrate a strong ability to adapt to working within multinational crew environments. Their skills in working harmoniously with different cultures, maintaining professional balance, and fostering team synergy make the onboard work environment more efficient and sustainable. These characteristics have become an increasingly decisive factor for shipowners and ship management companies today."

From an operational perspective, Türkiye's strategic location offers a significant advantage. Thanks to a globally significant aviation hub like Istanbul Airport, crew changes can be carried out quickly, effectively, and in a planned manner.

This strong connectivity infrastructure directly supports operational continuity by enabling faster mobilization, reducing the risk of operational delays, and providing greater flexibility in planning. Turkish seafarers have demonstrated their versatility through their performance across a wide range of vessel types, including tankers, bulk carriers, container ships, and offshore vessels. Combined with a disciplined work ethic and a strong sense of responsibility, this consistent performance makes them a reliable solution for companies seeking quality and continuity.

"We view Turkish seafarers not merely as a human resource, but as a strategic asset that will shape the future of the industry" said Kasap. In this regard, we aim to effectively align this potential with the expectations of global shipowners and ship management companies and to generate sustainable solutions."

As the industry faces increasing pressures regarding crew recruitment, retention, and performance management, Turkish seafarers offer a strong alternative in terms of competence, adaptability, and accessibility. With the right positioning and strong international partnerships, it appears inevitable that Turkish seafarers will play a transformative role in shaping the future of the global maritime workforce.



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# REDEFINING LUXURY YACHTING EXCELLENCE

With three decades of expertise, Begüm Group positions Türkiye at the forefront of global yachting.



Founded in 1997, Begüm Group of Companies has become one of Türkiye's most established and influential forces in the global yachting industry. With nearly three decades of expertise, the Group has evolved into a fully integrated ecosystem, delivering seamless end-to-end solutions across every layer of the luxury yachting experience. From superyacht agency and technical management to shipyard operations, provisioning, bunkering,

aviation, hospitality, and consultancy, Begüm Group operates with a singular vision: to set the standard for excellence in every service it provides.

At the heart of the Group, Begüm Yachting leads operations with elite agency and support services for superyachts navigating Türkiye and the Mediterranean. With a strong presence in Istanbul, Bodrum, Marmaris, Göcek,

and Antalya, and international reach extending to Mallorca and Sarandë, the company has earned recognition for precision, discretion, and operational excellence. Barka Shipyard, strategically located in Altınova, Yalova, forms the Group's technical backbone. Equipped with advanced infrastructure and a highly skilled workforce, it delivers world-class refit, repair, and maintenance solutions for yachts of all scales.

Begüm Group's strength lies in its ability to unify complementary services under one structure, creating a seamless and elevated experience. Turkey Provisioning Services offers premium, tailor-made provisioning for superyachts. Begüm Limousine Service provides luxury ground transportation with comfort and discretion. Begüm Aviation introduces exclusive seaplane transfers that redefine coastal accessibility. Markiz Konakları Boutique Hotel delivers refined hospitality rooted in heritage and authenticity.

In 2025, Begüm Group reinforced its leadership with two strategic investments. Begüm Maritime Consultancy now delivers high-level legal and advisory expertise in yacht operations, compliance, and investment structuring. Be Bunker, a next-generation physical supplier, sets new benchmarks in transparency, reliability, and operational strength across Türkiye's bunkering sector.

Begüm Group of Companies is more than a service provider; it is a strategic partner, a trusted operator, and a driving force shaping the future of yachting in Türkiye and beyond. With an uncompromising commitment to quality, operational excellence, and innovation, the Group continues to build a legacy defined by trust, precision, and leadership.





# TERSAN DELIVERS FOURTH VESSEL TO THE NETHERLANDS

Tersan Shipyard has successfully delivered the pelagic factory trawler Annie Hillina to the Netherlands-based Parlevliet & Van der Plas (P&P).



Registered at the port of Katwijk, the 111.5 meter Annie Hillina was designed by Tersan's long-term partner Skipsteknisk. Equipped with a Wartsila 32 main engine—one of the most efficient in its class—the vessel's design is optimized for reduced fuel consumption, emissions, and noise. Environmentally friendly refrigerants are used for cooling, freezing, and storing the catch. With accommodation for up to 60 people, including sauna and fitness facilities, Annie Hillina offers extensive onboard comfort. The vessel will operate worldwide, including European, South Pacific, and West African waters. All pelagic species caught—such as herring, sardines, mackerel, and blue whiting—will be frozen onboard and dedicated entirely to human consumption.

## SUSTAINABLE DESIGN AND GLOBAL REACH

Tersan Shipyard General Manager Mehmet Gazioğlu emphasized the pride in collaborating once again with P&P, a visionary company in innovative and

sustainable fishing: “Annie Hillina, the fourth vessel we have delivered to the P&P Group, clearly demonstrates the strength and continuity of our partnership. Delivered in 2026, during P&P's 75th anniversary, this project highlights our shared values shaping the future of maritime. Each new vessel reflects our principles of excellence, innovation, and responsibility toward the future.”

P&P Group CEO Dirk-Jan Parlevliet added: “We are very pleased with our long-standing relationship with Tersan Shipyard. Once again, they have delivered a fishing vessel that meets the highest standards of sustainability, efficiency, and crew welfare. Our teams have worked together for many years, and this collaboration has once again resulted in an outstanding vessel.”

P&P previously received two 82 meter factory trawlers, M/V Kirkella and M/V Mark, in 2015, followed by the 88 meter NB1108 M/V Jan Maria in early 2024. Annie Hillina is the fourth and largest

vessel delivered to the group, marking a new milestone in this strong partnership. Departing Tersan on May 3, the vessel has set sail for its home port of Katwijk, the Netherlands.

## TERSAN SHIPYARD

Tersan Shipyard is one of Turkey's largest newbuild shipyards, employing more than 4.500 people across three facilities, located in Istanbul and Yalova, Turkey and Leirvik, Norway. With a proven track record of delivering over 150 vessels, Tersan specializes in the construction of technologically advanced offshore, fishing and various other types of vessels for international clients, predominantly in Northern Europe.

Tersan has extensive experience in building of alternative-fueled and battery-powered vessels as well as a wide range of high value-added niche vessels of diverse types and sizes. Tersan has been recognized as the export leader of Turkey in new shipbuilding sector for ten of the past twelve years.



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# Your Trusted Partner for Complete Maritime Operations

## Chartering. Agency. Complete Maritime Support.

Victoria River & Sea Transport Ltd. based in Istanbul, brings together over two decades of maritime expertise with a proactive and solution-oriented approach.

We support ship owners, operators and charterers with a full spectrum of services designed to ensure efficiency, safety and operational continuity at every stage.

### Our core services include:

- Worldwide chartering and brokerage solutions tailored to your cargo and vessel requirements
- Comprehensive agency services across all Turkish ports, including Bosphorus and Dardanelles transit coordination
- Seamless crew change operations and logistical support
- Supply of bunkers, lubricants, fresh water and full ship chandlery services
- Technical assistance, repairs, maintenance and dry-docking coordination
- Legal, technical and environmental consultancy, fully compliant with international maritime regulations including MARPOL

