

Dogus DURHAN

Port & Terminal Management Professional For
Container & Ro-Ro Division

Presentation

***“Existing market outlook and future OEM’s
investment projects in Turkey & its impact on the
global market”***

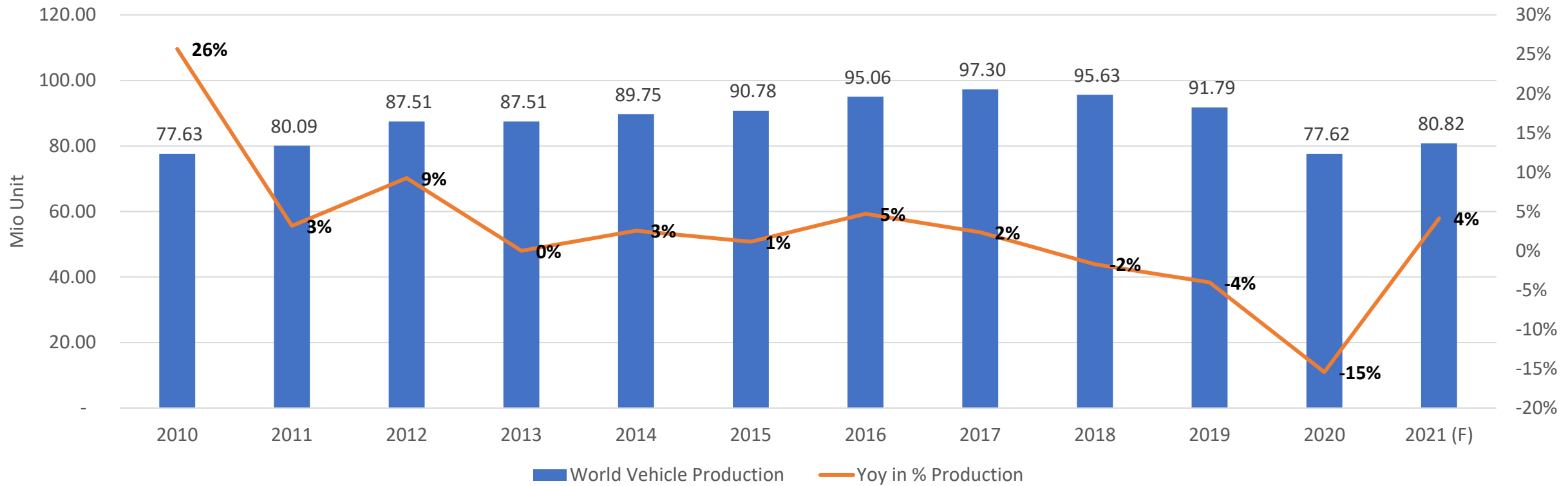


BLACK SEA PORTS AND
SHIPPING
2021

Content

- **Global Vehicle Production**
- **Turkey Automotive Market**
- **Ro-Ro Market in Turkey (Port Throughputs)**
- **YTD May 2021 Ro-Ro Market in Turkey**
- **Production Export Ratio %**
- **Key Player in the Market**
- **Investment Projects in Turkey**
- **Conclusion**
- **Q&A**

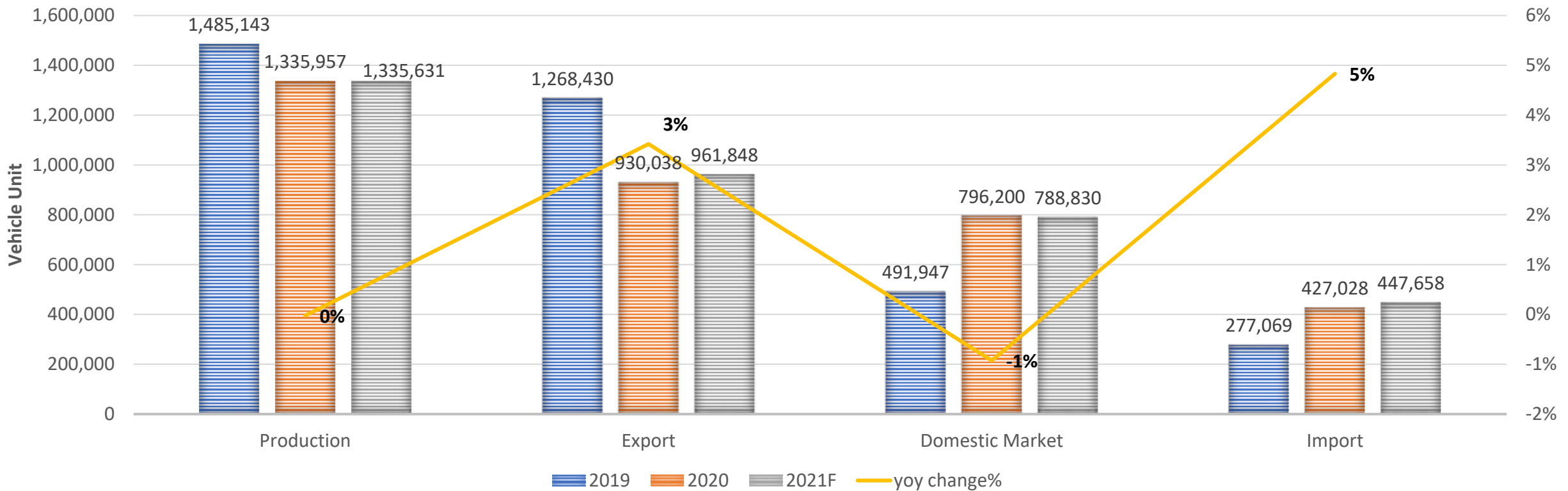
WORLD VEHICLE PRODUCTION



- A new era for an automotive industry...

Turkey Automotive Market In eyes of OEMs

AUTOMOTIVE MARKET OF TURKEY

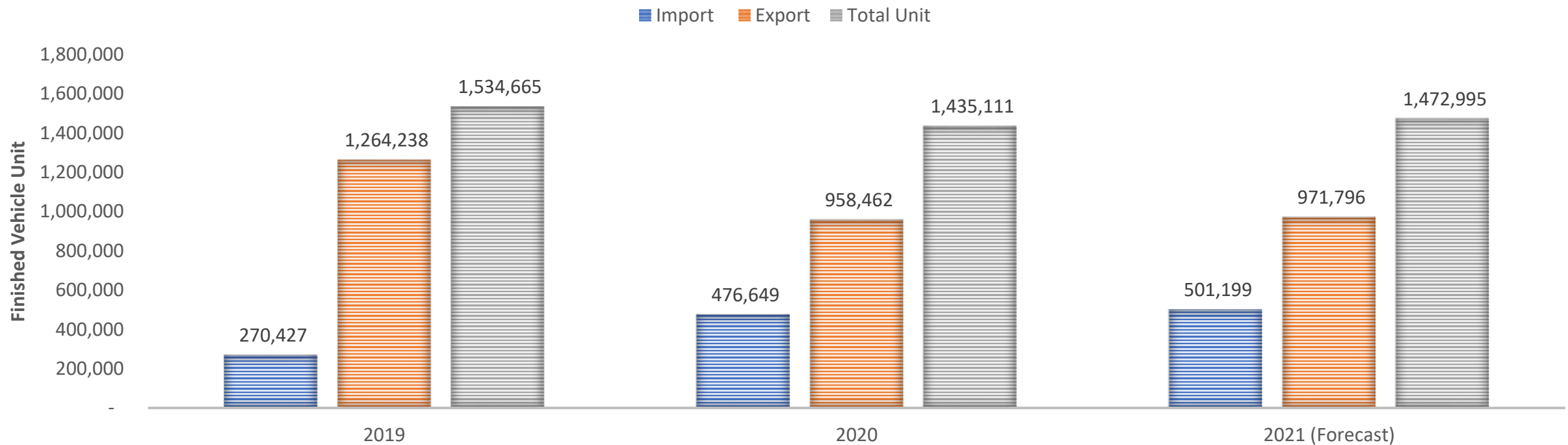


- Strong growth in domestic market of Turkey & vehicle import

Ro-Ro Market in Turkey

Port Throughputs

RO-RO PORTS MARKET IN TURKEY 2019-2020

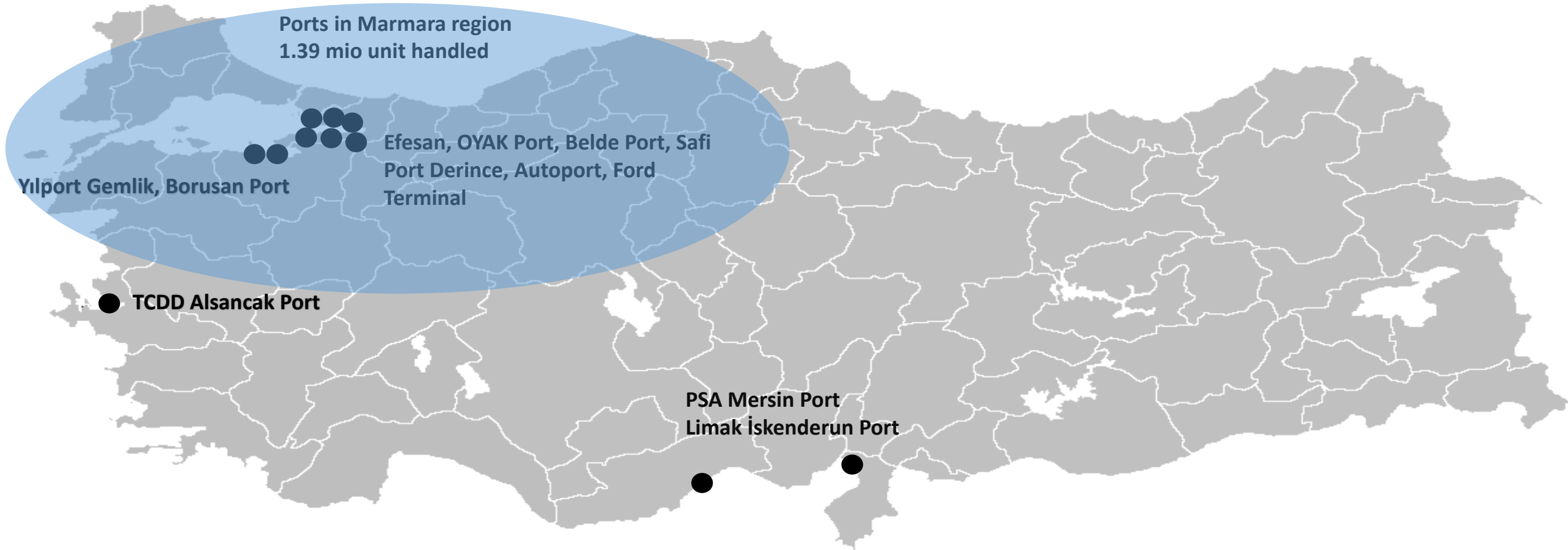


- EU and UK markets are important for vehicle-import export of Turkey

• Reflecting throughput includes Military vehicle, Harvester, Jeep, Lorry, Tanker truck, Light truck, Caravan, Locomotive, Van, Motorcycles, Bus, Tractor, Crane vehicles (Rescuers, etc.), Passenger coaches, Other transport

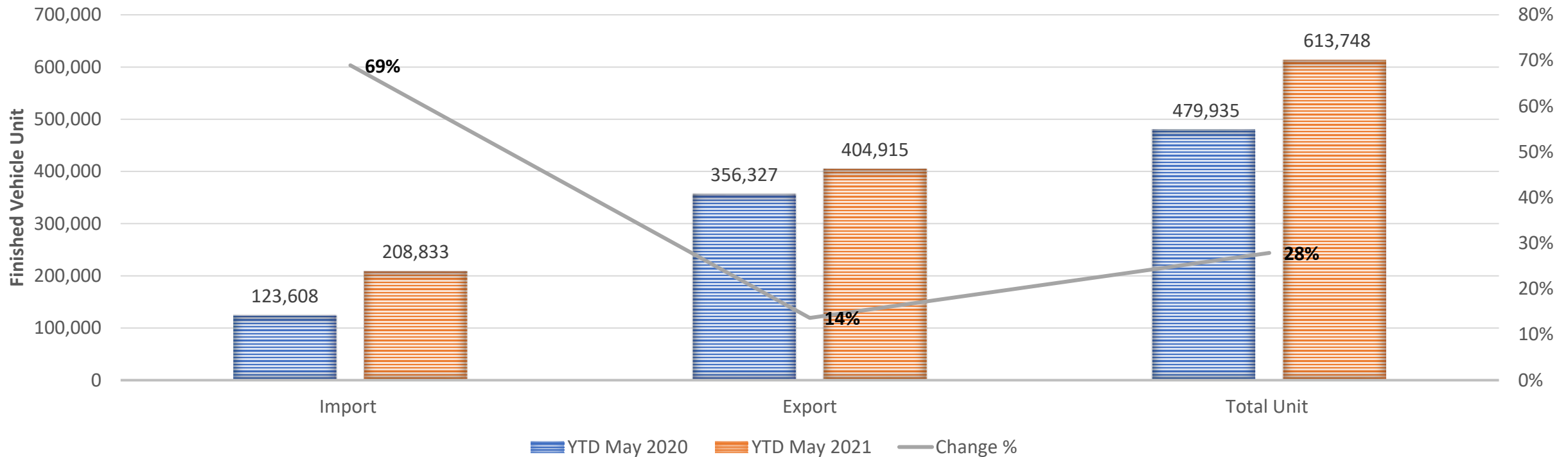
Ports (serving for finished vehicles)

Total Market 1.44 mio unit vehicles for PCC Liners and Ports



Ro-Ro Market in Turkey YTD May'20-21 By Sea Transportation

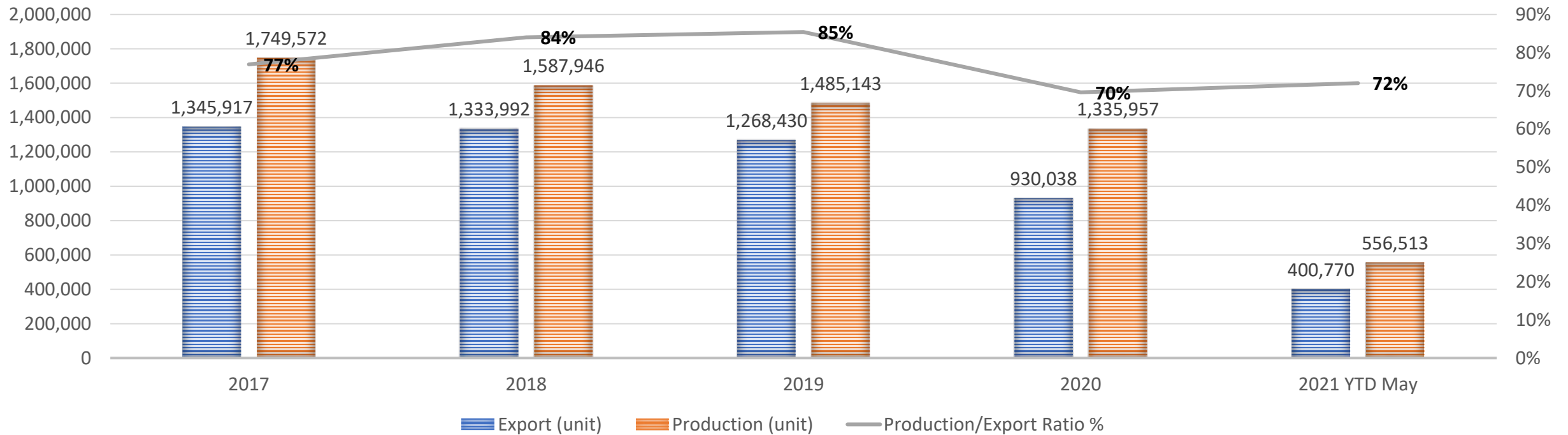
RO-RO PORTS MARKET IN TURKEY YTD MAY 2020-2021



- Strong performance for PCC liners / Ports during first five month of 2021

Production-Export Ratio %

VEHICLE PRODUCTION-EXPORT RATIO % OF TURKEY



- Recovery period is in on-going for EU market

Key Players in Automotive Market of Turkey

- Exporter/Car Maker

77%

Ford Otosan, Toyota, Hyundai-Assan,
OYAK-Renault, TOFAS-Fiat

- Port

97%

Autoport, Yilport-Gemlik, Borusanport, Ford
Terminal, Safiport Derince, Efesanport, **Belde
Port, OYAK NYK PORT**

- Importer

65%

VW Group, PSA Group - FCA, Renault-Nissan-
Mitsubishi Alliance,

- Shipping Line

85%

UECC-NYK, Grimaldi, WWO, EUKOR, MOL, K-LINE

Automotive Industry Recent Projects in Turkey

Projects



Ro-Ro Port



Port



JV Production in Bursa



JV Production in Kocaeli



Plant in Manisa



Factory Closure

Impact on Global Automotive Industry

+ 780.000 unit port handling capacity

+ 300.000 unit port handling capacity

+175.000 unit/year production

+ 320.000 unit/year production

(-) 350.000 unit/year production

(-) 50.000 unit/year production



In consequences;

- New projects have added 1.080.000 unit port handling capacity per year within 2021 in Turkey.
- New investment projects: 495.000 vehicle production capacity/year adding by 2024 with FORD-VW common production line and TOGG factory.
- Lost 400.000 unit/year production capacity...

On impact to global ro-ro market;

- Turkish automotive market can be positioned within top 10 vehicle production countries.
- Turkey will remain as 4th largest car maker country in EU by reaching 2.5 million unit production capacity.
- Ro-Ro Port handling capacity can reach to 4 million unit per annum.



 Izmit & Sakarya			Otokar			ANADOLU ISUZU
 Bursa			 KARSAN			
 Ankara & Aksaray		DAIMLER	 bozankaya			
 Izmir				 Adana		

Thank You!
Dogus DURHAN
durhandogus@gmail.com

