



**Black and
Caspian Sea 2023**
PORTS & SHIPPING

EXISTING AND THE FUTURE OF THE RESILIENT PORTS IN TÜRKİYE

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PORT OPERATORS ASSOCIATION OF TÜRKİYE

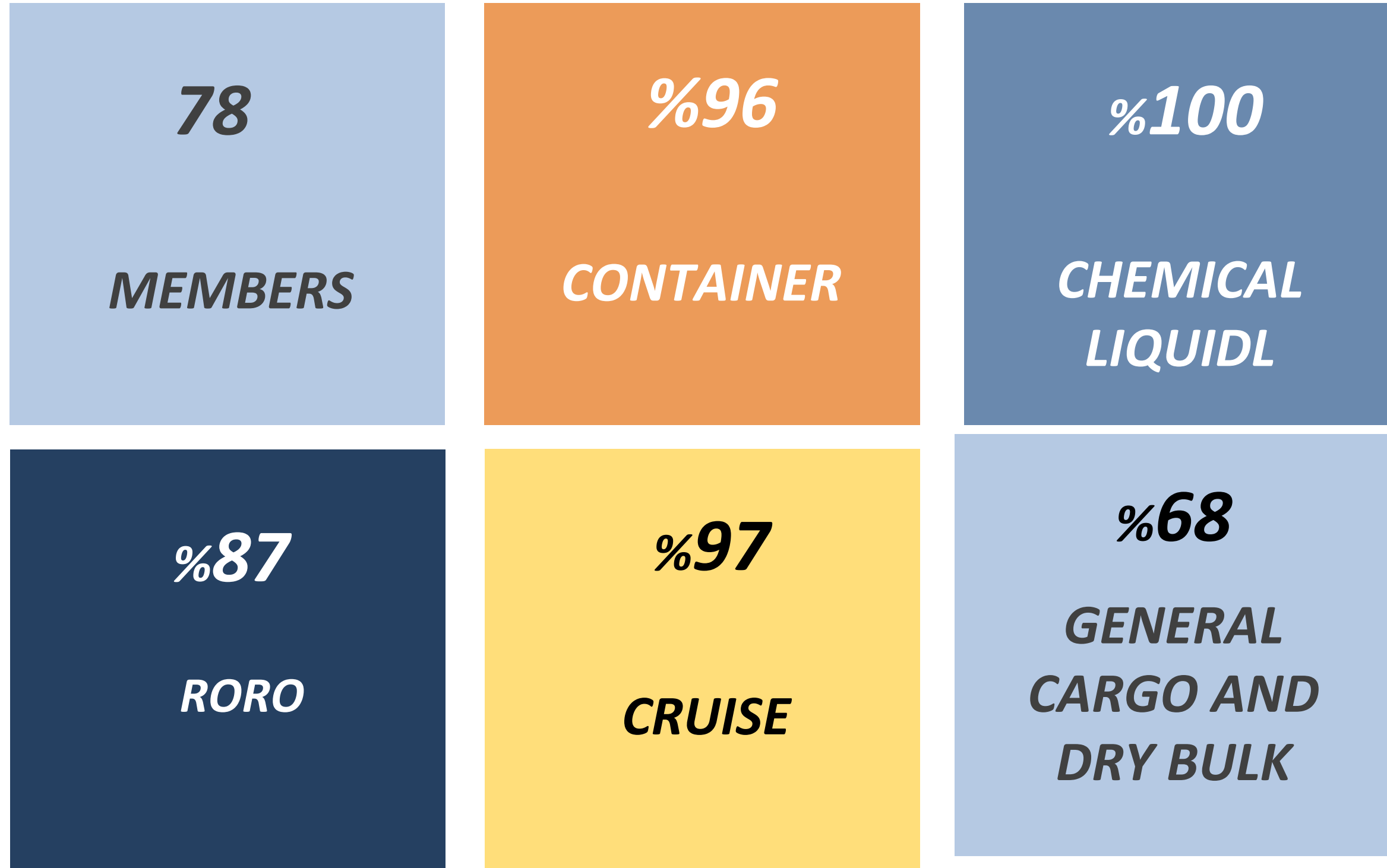


TÜRKLİM - PORT OPERATORS ASSOCIATION OF TÜRKİYE

- Marmara Port Operators Association (MARLİM) was established in 1996.
- In 2002, MARLİM expanded its field of activity to the whole of Türkiye and moved its headquarters to Istanbul.
- Due to the place of the organizations represented by MARLİM in the country's economy and the fact that they operate throughout Türkiye, on 07.02.2006, with the approval of the Ministry of Interior, it changed its title to Turkish Port Operators Association (TÜRKLİM).



TÜRKLİM - PORT OPERATORS ASSOCIATION OF TÜRKİYE



As of 2023 in Türkiye;

- %68 of General and Dry cargo
- %100 of the Liquid Chemical cargo
- %97 of Cruise passengers
- %96 of Containers
- %89 of Automotive (RO-RO)

handled by **TURKLİM** members.



TÜRKLİM - PORT OPERATORS ASSOCIATION OF TURKIYE

OUR VISIONS

Our visions to become a single, strong and reliable sectoral association by gathering all port operators under a single roof, to represent our national Ports and terminals at domestic and international platforms in the best way by becoming an important reference source for the establishment of the right policies for the development of port sector in Türkiye.

OUR MISSIONS

Our missions to take initiatives for the solution of sectoral problems of private port management, to have the characteristics of a reference-accreditation institution, to ensure coordination between sectoral institutions and organizations, to support all kinds of initiatives that will contribute to the sector development and to create public support on this issue, to encourage the sector in environmental protection and to contribute to information flow.



PUBLICATION

In addition to the Turkish Ports Sector Report that it publishes every year, various reports and research on many important issues are also published.

The reports have become national and international reference publications, especially by the public administration and related institutions.

Turkish Ports Sector Report 2022, which also includes the "**Vision 2050**" section forecasting the figures to be handled by the ports until 2050, was published.



STRUCTURAL SITUATION IN THE PORT SECTOR IN TÜRKİYE

- ❖ According to the records of the Ministry of Transport and Infrastructure, there are **217** port facilities (most of them are jetties, quays, wharfs, SPMs etc.) are in Turkey.
- ❖ Today, there are only 2 port facilities (TCDD Haydarpaşa and TCDD İzmir Alsancak) operated by the Public.
- ❖ 22 ports once operated by the public (17 of them were operated by TDI-Türkiye Maritime Company and 5 of them were operated by TCDD-Türkiye State Railways Company) had been privatized at various times since 1997.
- ❖ All of the remaining port facilities were designed and built directly by the private sector. Hence, the port sector in Türkiye has dominantly been built, managed and operated by the private sector since the 1990s.



STRUCTURAL SITUATION IN THE PORT SECTOR IN TÜRKİYE

- ❖ Regarding TURKLİM's «**Vision 2050**» forecasting report, the port sector is expected to be entirely developed, managed and operated by private hands for the future.
- ❖ Today, approximately 15% of the total port capacity (once operated by Public) has already been developed and modernised by the private companies after the privatisation process while more than 85% are ports designed, built and operated entirely by the private sector.
- ❖ There are **2** mega port projects (Çandarlı Port in Aegean and East Mediterranean Container Port in Mersin or Iskenderun Bay) have been planned and promoted by the Public.
- ❖ Other public port project is Filyos Port which has largely been completed and being used by Turkish National Petroleum Company for natural gas projects in the Black Sea.

STRUCTURAL SITUATION IN THE PORT SECTOR IN TÜRKİYE

- ❖ Türkiye has also 2 important **Port Brands (YILPORT and GLOBAL)** on a global scale operating numerous ports in different countries.
- ❖ **YILPORT HOLDING** has been acclaimed as the 11th biggest international terminal operator in the world on Drewry's 2022 ranking and operating 24 ports in 12 countries. The company's growth strategy to become a top 10 global port operator by 2030.
- ❖ **GLOBAL PORTS HOLDING** is the world's largest Cruise Port operator operating 27 cruise ports in 14 countries with its port network in the Mediterranean, Caribbean, Atlantic and Asia-Pacific regions. Also provides services for over 15 million passengers reaching a market share of 29% in the Mediterranean annually.



GLOBAL PORTS



STRUCTURAL SITUATION IN THE PORT SECTOR IN TÜRKİYE

- ❖ There are **2** different port operation types licensed to facilitate as the Ports in Türkiye.
- ❖ The first of these is the ports established and operated by industrial companies (such as iron and steel, fertiliser, chemical, petro chemical, cement etc) mainly for their own loading and unloading (mainly dry bulk, general cargo and dry liquids) activities. They also serve the market once an additional capacity is available. Number of these ports are increasing due to new industrial projects promoted and planned by Ministry of Industry and Technology.
- ❖ The second of these is the port and terminal facilities established and operated only for port activities such as Container, RO-RO, Cruise,

STRUCTURAL SITUATION IN THE PORT SECTOR IN TÜRKİYE

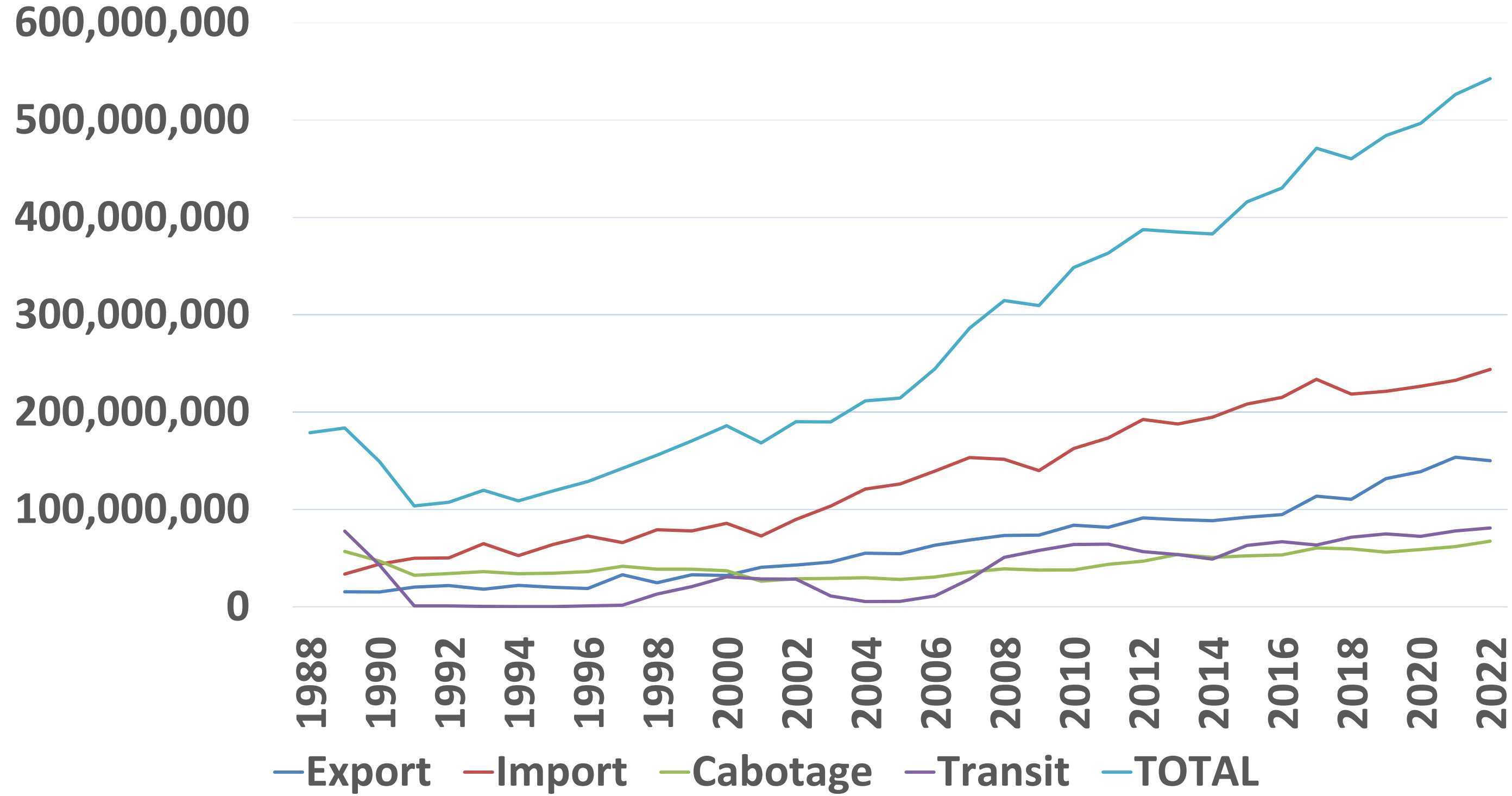
- ❖ Specially, leading and large scale containers ports in Türkiye have already been operated by international companies (MSC, PSA, COSCO, DP World).



- ❖ There will be more interests and the investment are being expected from international port operators to come in Türkiye next 5-10 years according to Vision 2050.



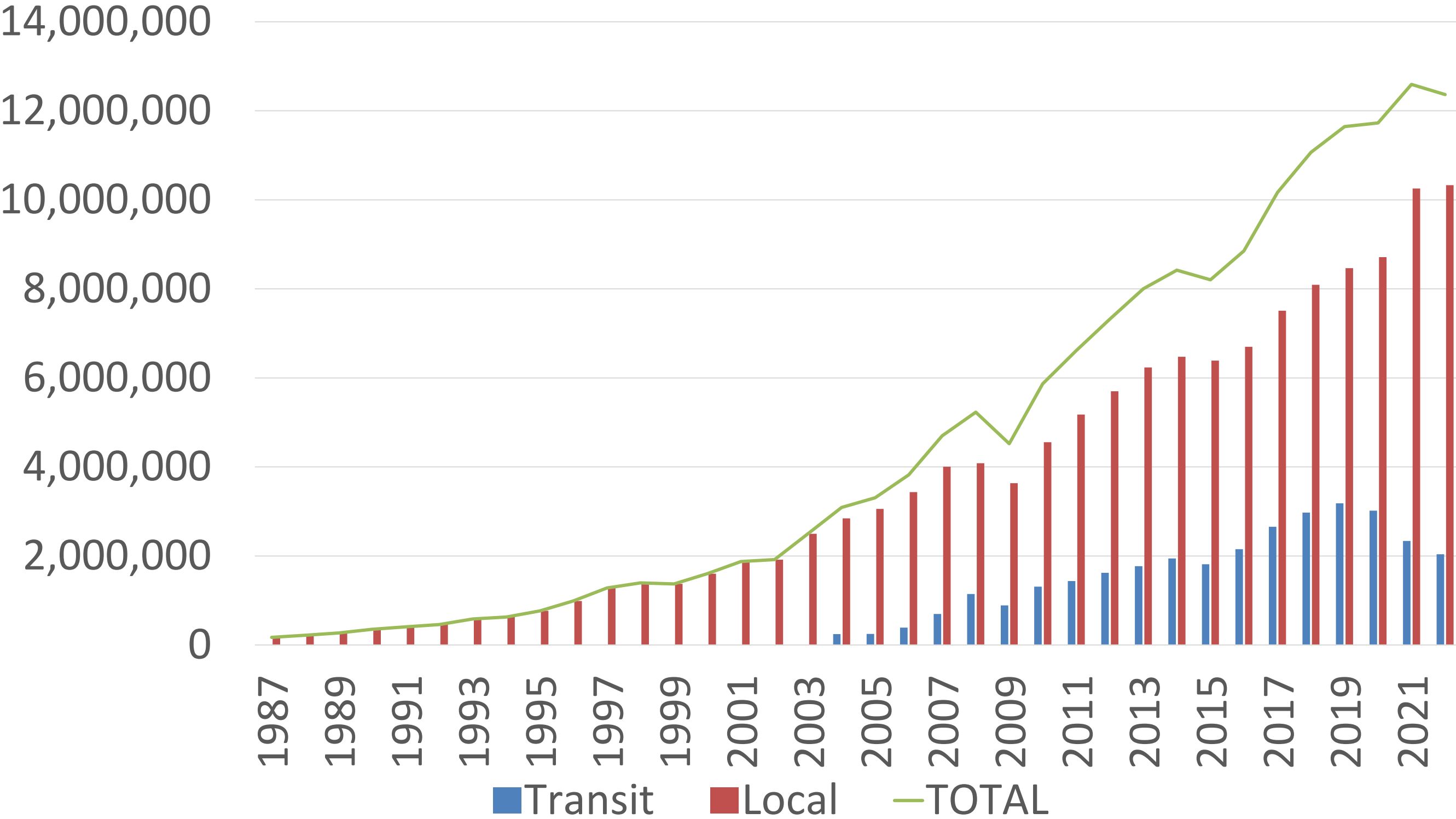
TOTAL CARGO / THROUGHPUT FIGURES IN TURKISH PORTS (TON) / (1987-2022)



Years	Rate of Growth
1990-2022	264%
2000-2022	192%
2010-2022	56%



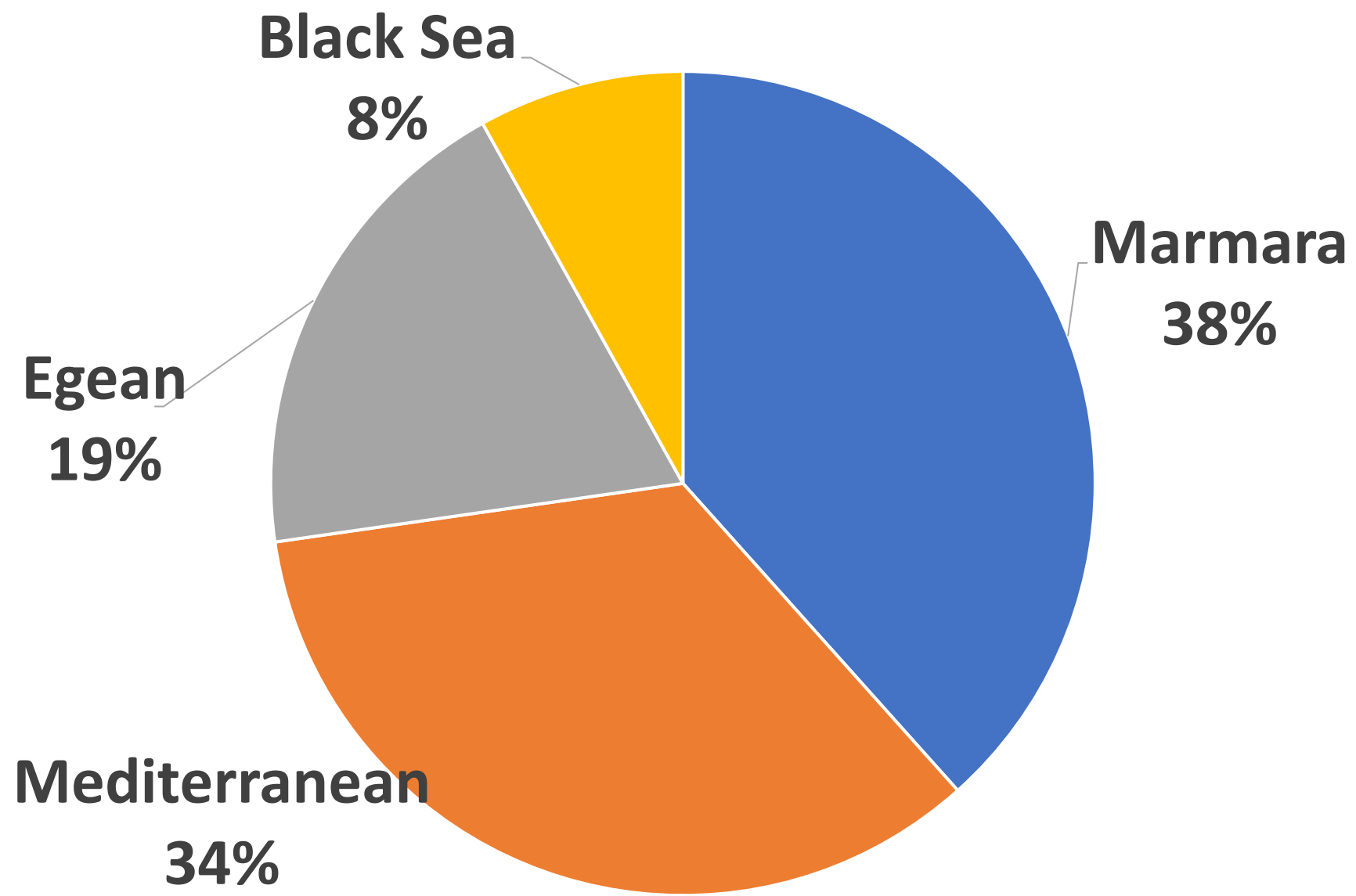
CONTAINER / THROUGHPUT FIGURES IN TURKISH PORTS (TEU) / (1987-2022)



Years	Rate of Growth
1990-2022	3407%
2000-2022	672%
2010-2022	111%



TOTAL CARGO / THROUGHPUT FIGURES IN TURKISH PORTS (2022)



Region	Share in Total Throughput
Marmara	%38
Mediterranean	%34
Egean	%19
Black Sea	%8

COMPARISON OF WORLD AND TURKISH PORTS IN AVERAGE INCREASE (2011-2021)

YEAR	CLARKSON		UNCTAD	
	WORLD Total Cargo (Million Ton)	TURKEY Total Cargo (Million Ton)	WORLD Total Container (Million TEU)	TURKEY Total Container (Million TEU)
2011	9.546	363.3	595.6	6.6
2012	9.959	387.4	630.1	7.3
2013	10.201	384.9	661.3	8.0
2014	10.560	383.1	694.1	8.4
2015	10.788	416.1	705.6	8.2
2016	11.117	430.2	716.4	8.8
2017	11.571	471.1	771.7	10.1
2018	11.889	460.1	810.1	11.1
2019	11.949	484.1	825.2	11.6
2020	11.538	496.6	815.5	11.7
2021	11.951	526.3	868.5	12.4
2011/2021 Increase Rate	20,0%	35,8%	37,9%	70,4%
2011/2021 Average Increase Rate	2,3%	3,8%	3,8%	6,6%

While the average global increase rate in **TOTAL CARGO** was **2.3%**, the increase in ports in Turkey was **3.8%**.

While the average global increase in **CONTAINERS** was **3.8%**, the increase in ports in Turkey was **6.6%**.

TOTAL CARGO HANDLED BETWEEN JANUARY-MAY 2023

JANUARY-MAY	EXPORT	IMPORT	CABOTAGE	TRANSİT	TOTAL
2022	63.843.334	100.520.294	28.588.335	35.282.027	228.233.990
2023	52.296.548	108.469.473	25.886.144	28.934.777	215.586.942
Difference	-11.546.786	7.949.179	-2.702.191	-6.347.250	-12.647.048
Growth Rate	-18,09%	7,91%	-9,45%	-17,99%	-5,54%

January – May 2023			
TON	2022	2023	Growth Rate
DRY BULK	68.157.097	63.930.754	-6,2%
GENERAL CARGO	28.367.523	23.864.078	-15,9%
LIQUID	70.073.231	70.016.305	-0,1%
CONTAINER	56.746.497	53.037.586	-6,5%
CARS	4.823.706	4.738.219	-1,8%
TOTAL	228.233.990	215.586.942	-5,5%
CONTAINER (TEU)	5.325.633	4.993.641	-6,2%

CONTAINERS HANDLED BETWEEN JANUARY-MAY 2023

JANUARY-MAY	EXPORT	IMPORT	CABOTAGE	TRANSİT	TOTAL
2022	1.945.796	2.028.137	340.556	1.011.144	5.325.633
2023	1.917.399	1.978.519	315.136	782.586	4.993.641
Difference	-28.397	-49.618	-25.419	-228.558	-331.992
Growth Rate	-1,46%	-2,45%	-7,46%	-22,60%	-6,23%

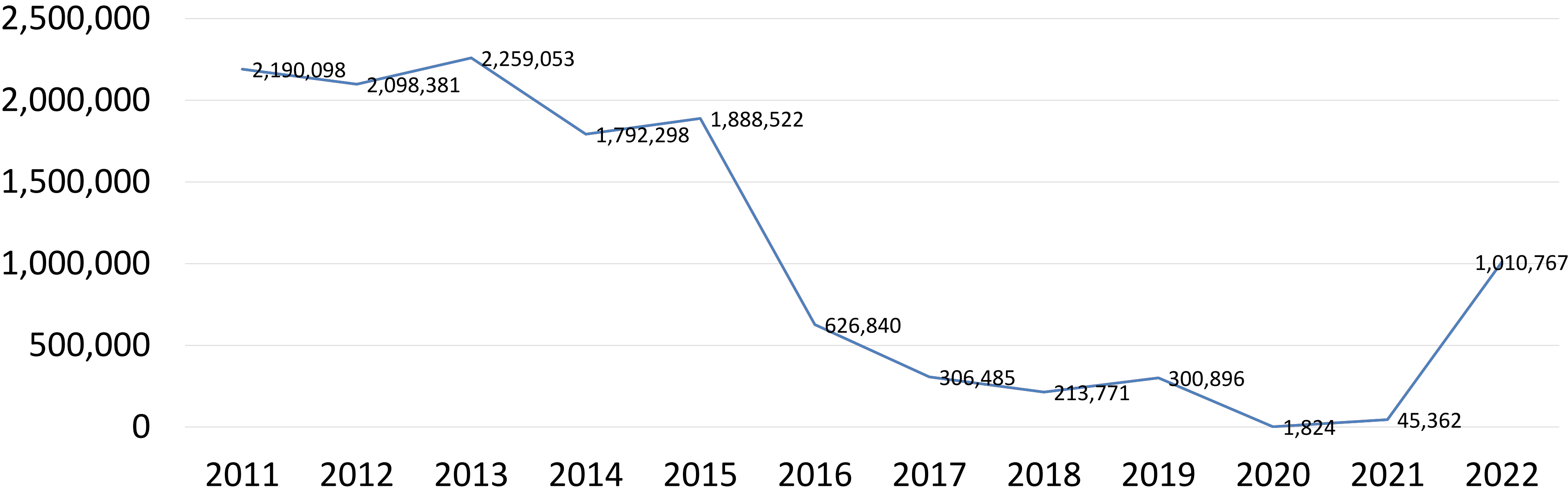


CRUISE / HANDLED BETWEEN 2011 AND 2023 (January-May)

YEARS	VESSEL TYPE	PASSENGER NUMBERS IN CRUISE			
	Number of Cruise Vessel	Passenger Number (Coming)	Passenger Number (Going)	Passenger Number (Transit)	Passenger Number (TOTAL)
2011	1.615	195.405	203.085	1.791.608	2.190.098
2012	1.541	183.019	197.148	1.718.214	2.098.381
2013	1.530	230.521	249.994	1.778.538	2.259.053
2014	1.401	232.037	241.469	1.318.792	1.792.298
2015	1.440	254.362	272.177	1.361.983	1.888.522
2016	578	72.010	77.383	477.447	626.840
2017	307	57.551	60.432	188.502	306.485
2018	247	39.521	46.176	128.074	213.771
2019	344	35.289	44.235	221.372	300.896
2020	5	90	0	1.734	1.824
2021	78	1.920	1.530	41.912	45.362
2022	993	87.722	97.255	825.790	1.010.767
2023	116	8.801	9.981	103.755	122.537
TOTAL	10.195	1.398.248	1.500.865	9.957.721	12.856.834

CRUISE / HANDLED BETWEEN 2011 AND 2023 (January-May)

TOTAL CRUISE PASSANGER NUMBERS (2011-2022)



**Pandemic
2020-2021**



VISION 2050 / FORECASTING REPORT PUBLISHED IN 2022

- Within the scope of TURKLİM's publishing activities; Turkish Port Sector Report which is published every year. The report covers not only Turkish ports, but also important ports in the world and the developments in the ports in Turkey's immediate surroundings.
- The current situation of ports in Turkey is examined regionally with all its details and an issue that concerns the sector is also examined in detail every year.
- TURKLİM's vision is an effective, efficient, flexible, environmentally friendly, sensitive to occupational safety and health, complying with ethical working rules, having international competitive power, supporting our country's foreign trade and facilitating its access to new markets, and playmaker ports in its region.
- The Report published in 2022 had a special Chapter titled «**VISION 2050**» covering the forecasting figures for the port until 2050.



VISION 2050 / TOTAL CARGO FORECASTED FIGURES PUBLISHED BY TURKLİM

REGIONS	2025	2030	2035	2040	2045	2050	Share in 2050
North EGEAN	98.675.539	115.734.727	132.474.792	153.121.686	176.378.824	203.454.089	18%
South EGEAN	9.363.747	11.829.240	15.380.128	20.236.731	26.669.494	35.011.862	
TOTAL EGEAN	108.039.286	127.563.967	147.854.920	173.358.417	203.048.318	238.465.951	
North West MARMARA	82.229.031	99.225.550	119.332.995	143.253.247	171.850.850	206.191.559	40%
North East MARMARA	99.831.071	119.056.153	139.244.841	160.654.651	183.616.298	208.554.753	
South MARMARA	52.468.875	64.841.209	78.541.657	94.155.314	112.479.231	134.595.255	
TOTAL MARMARA	152.299.946	183.897.362	217.786.498	254.809.965	296.095.529	549.341.567	
West Mediterranean	7.908.511	9.611.736	11.695.717	14.248.508	17.379.152	21.222.802	31%
East Mediterranean	203.512.929	240.906.551	278.584.770	317.069.709	357.181.569	400.175.300	
TOTAL MEDITERRANEAN	211.421.440	250.518.287	290.280.487	331.318.217	374.560.721	421.398.102	
West Black Sea	43.787.453	54.031.631	66.612.081	82.071.580	101.080.927	124.469.642	11%
East Black Sea	7.747.825	9.797.106	12.392.784	15.681.534	19.849.624	25.133.658	
TOTAL BLACK SEA	51.535.278	63.828.737	79.004.865	97.753.114	120.930.551	149.603.300	
TOTAL TURKEY	523.295.950	625.808.353	734.926.770	857.239.713	994.635.119	1.358.808.920	

VISION 2050 / TOTAL GOODS FORECASTING FIGURES PUBLISHED BY TURKLİM

- ❖ TOTAL goods handled in 2022; **542,6 milion tons**
- ❖ The figures forecasted to be handled in 2050; **1,3 billion tons**
- ❖ Rate of growth between 2022-2050; **%150**
- ❖ Existing port capacity required to increase in 2050 is appx; **2,5 fold**
- ❖ Additional capacity is expected from ports extension and enlargement projects by existing ports as well as the new projects and investment by the private and Public-Private Partnership (PPPs).

VISION 2050 / CONTAINERS FORECASTING FIGURES PUBLISHED BY TURKLİM

CONTAINERS (TEU)	2025	2030	2035	2040	2045	2050
LOCAL CONTAINER	11,6	14,4	17,3	20,4	23,7	27,4
TRANSIT CONTAINER	4,2	5,3	6,8	8,7	11,1	14,2
TOTAL	15,8	19,8	24,1	29,1	34,8	41,5

VISION 2050 / TOTAL GOODS FORECASTING FIGURES PUBLISHED BY TURKLİM

- ❖ TOTAL CONTAINERS handled in 2022; **12,4 milion TEU**
- ❖ CONTAINERS forecasted to be handled in 2050; **41,5 million TEU**
- ❖ Rate of growth between 2022-2050; **%235**
- ❖ Existing port capacity required to increase in 2050 is appx; **2,5 fold**
- ❖ Additional capacity is expected from ports extension and enlargement projects by existing ports as well as the new projects and investment by the private and Public-Private Partnership (PPPs).

MAIN AGENDA AND THE PENDING ISSUES

- Digitalization and Technological Transformation
- Green Transformation
- Zero Emissions / Decarbonization
- Renewable Energy



MAIN AGENDA AND THE PENDING ISSUES

- Preparation of the legal framework regarding the port management model **(PORT AUTHORITY)** in Turkey.
- Simplifying and updating the port legislation,
- Identification of ports as **«Strategic Investments»**, with incentives and supports specific to port investments by providing tax issues,
- Inclusion of port service in the scope of **“Type of Service Export Status”**,
- Providing incentives and support for green transformation and renewable energy investments,

MAIN AGENDA AND THE PENDING ISSUES

- Especially in Iskenderun, Kocaeli, Aliaga, Gemlik Bay, where the ports are located collectively, designing and expropriating the back areas of the ports in accordance with the growth and development of the ports in the future,
- Establishment of Specialized Customs Services in port areas,
- Developing logistics center, dry ports as well as multimodal intermodal transportation in the backyard of the ports with the railway connections,
- Letting ports to determine the port services and the tariffs within the market mechanism,

MAIN AGENDA AND THE PENDING ISSUES

- In order to pave the way for port investments from today, the duration of the port contracts need to be extended,
- The port being planned by the government, especially the Mega port projects (Çandarlı and Eastern Mediterranean Container Port) need to be developed with the contribution of the industry and the stakeholders within the framework of the coordination of the relevant ministries,
- The new port projects need to be planned in accordance with industrial areas with all transportation connection specially railway, thus planning of the port and developing the industry clustering need to be combined (**Port-Industry Clustering Model**),

THANKS



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