

Maritime and Intermodal Transportation in Turkey



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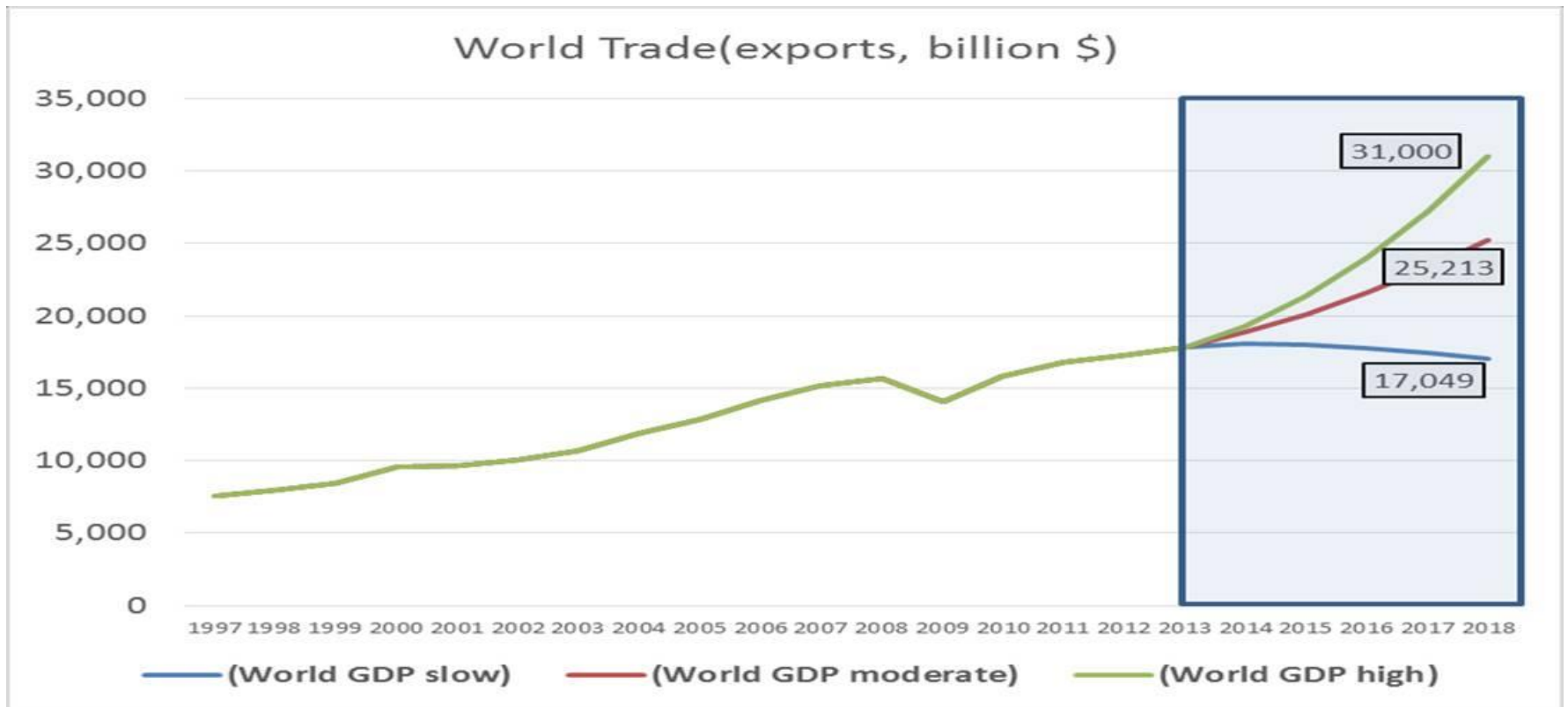
Chairman, Turkish Chamber of Shipping



World Trade Development and Expectations

The world trade recovers after the collapse in 2009.

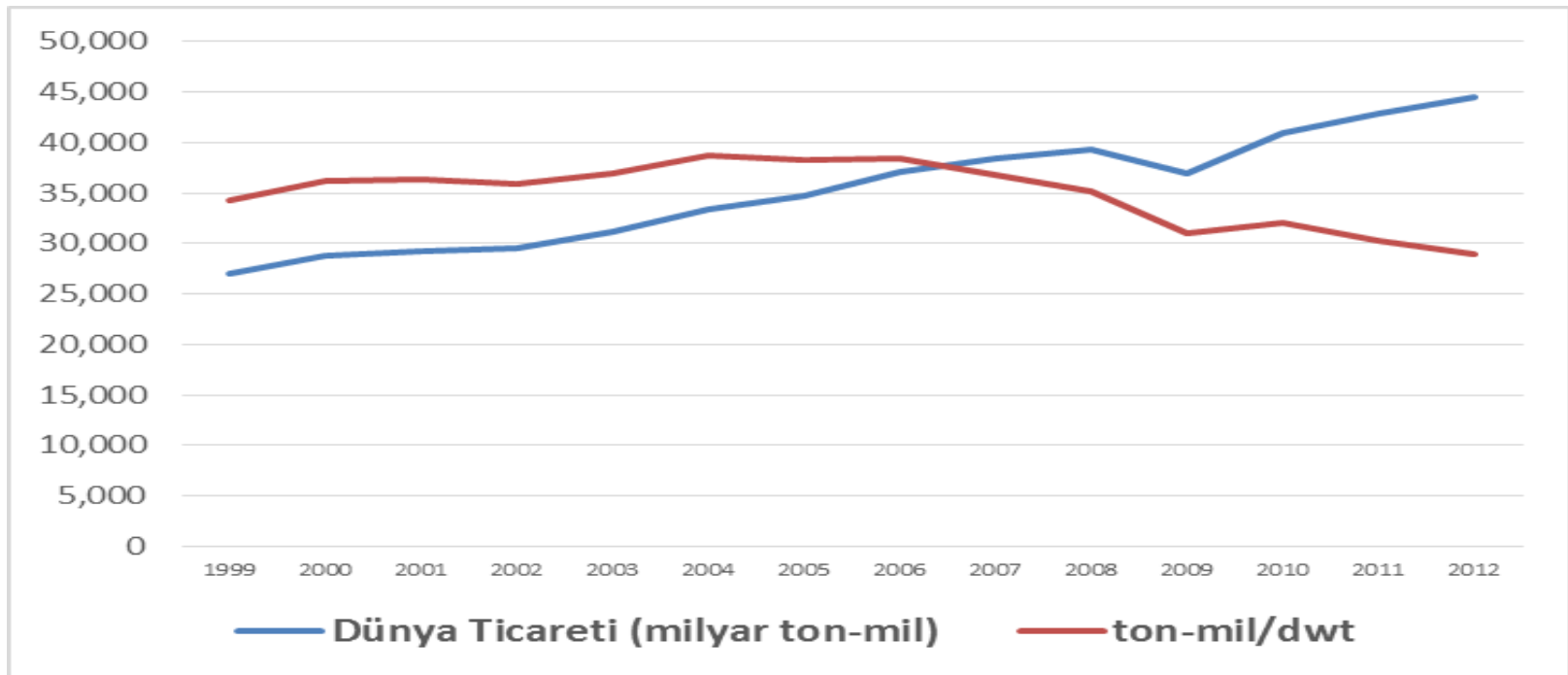
Optimistic Scenario: The world trade will reach to 25 trillion US dollars in 2018.



WORLD vs SEABORNE TRADE

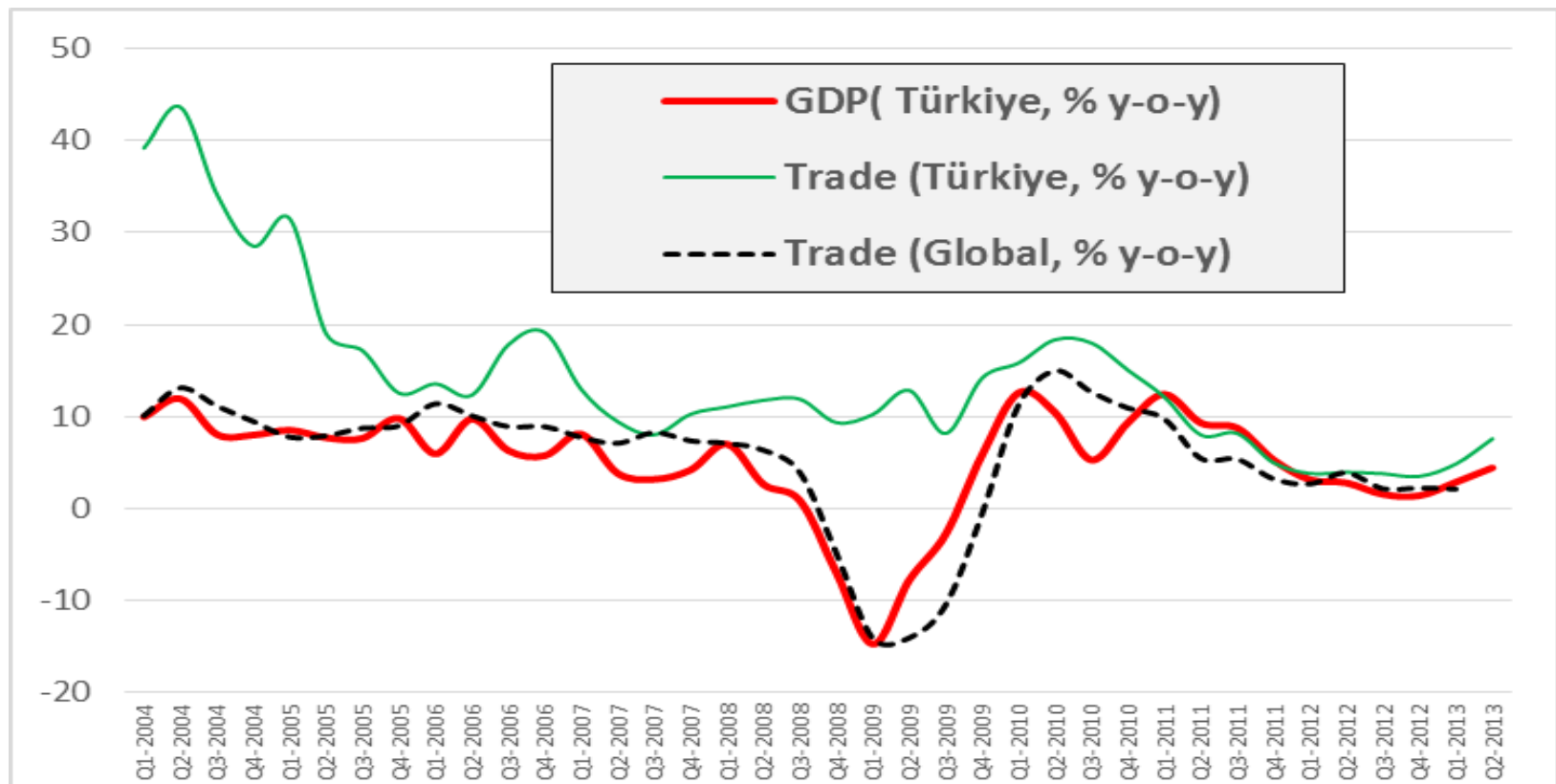
World trade has been recovering; while the fleet utilisation (ton-miles/DWT) is heading downwards.

The world seaborne trade reached to 45 trillion tonnes-miles; while the tonnes-miles per DWT capacity dropped to 30000.



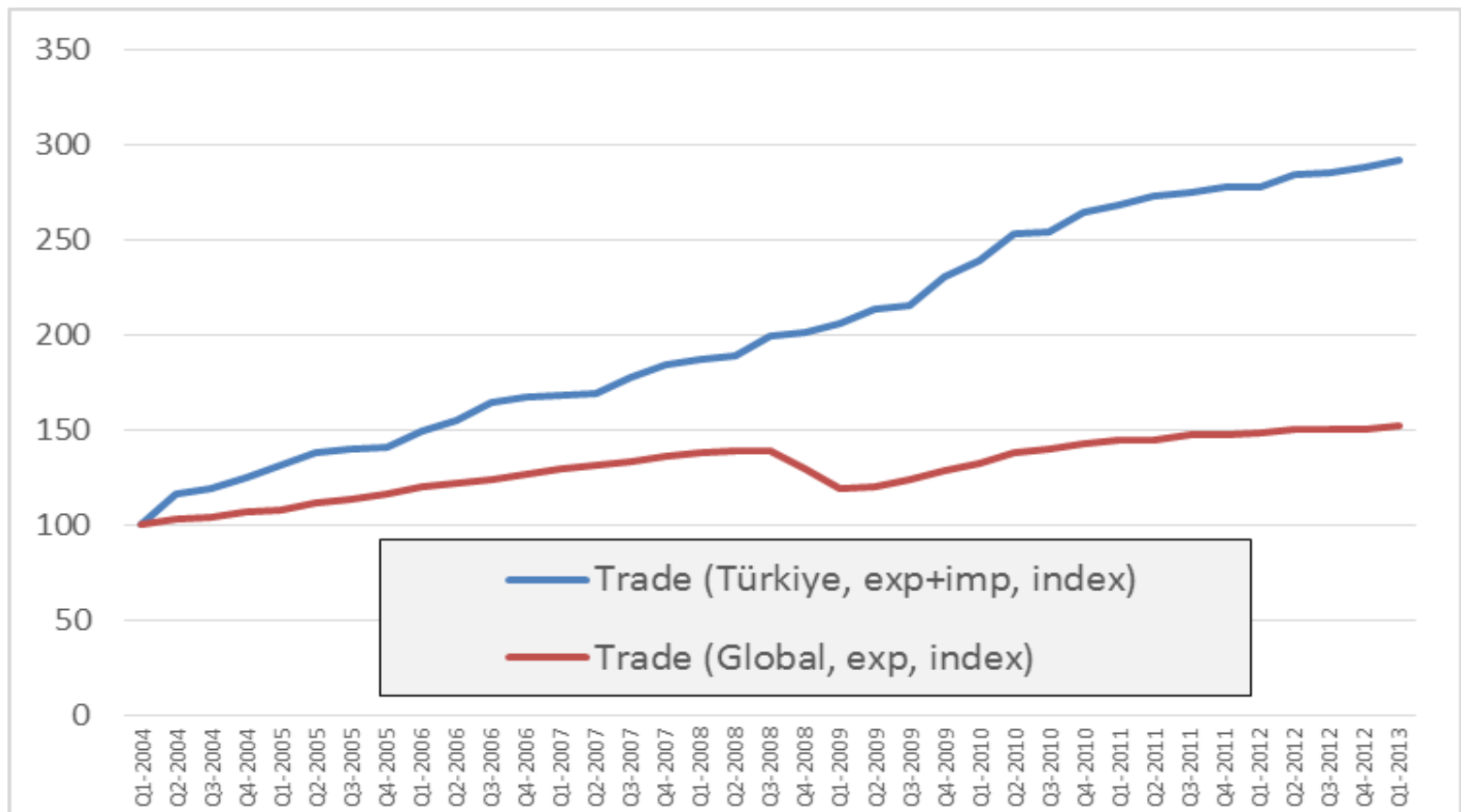
TURKISH ECONOMY ALMOST INTACT WITH THE WORLD TRADE

Turkish economy almost intact with the world trade. As we expect an increase of 5 % growth in world trade; Turkish economy could grow at around 5 % too.

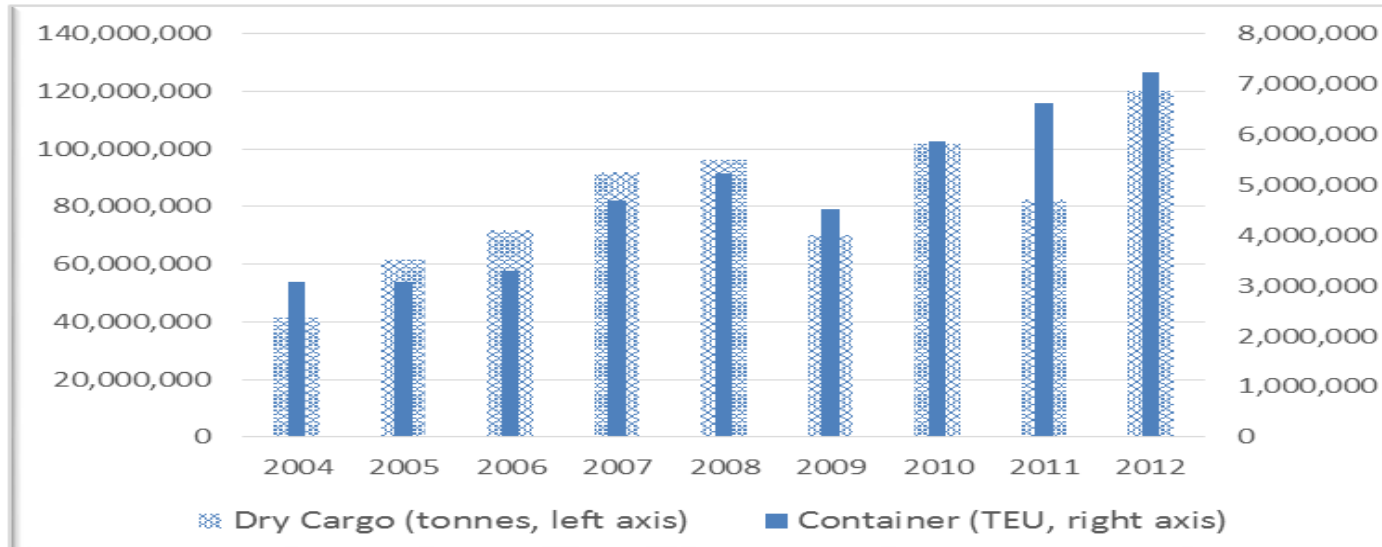


WORLD TRADE (EXP) & TURKEY'S TRADE (EXP+IMP)

Turkey's trade volume proves higher growth than world trade. We estimate Turkey can reach 500 billions dollar of export in 2023.



HANDLING in TURKISH SEA

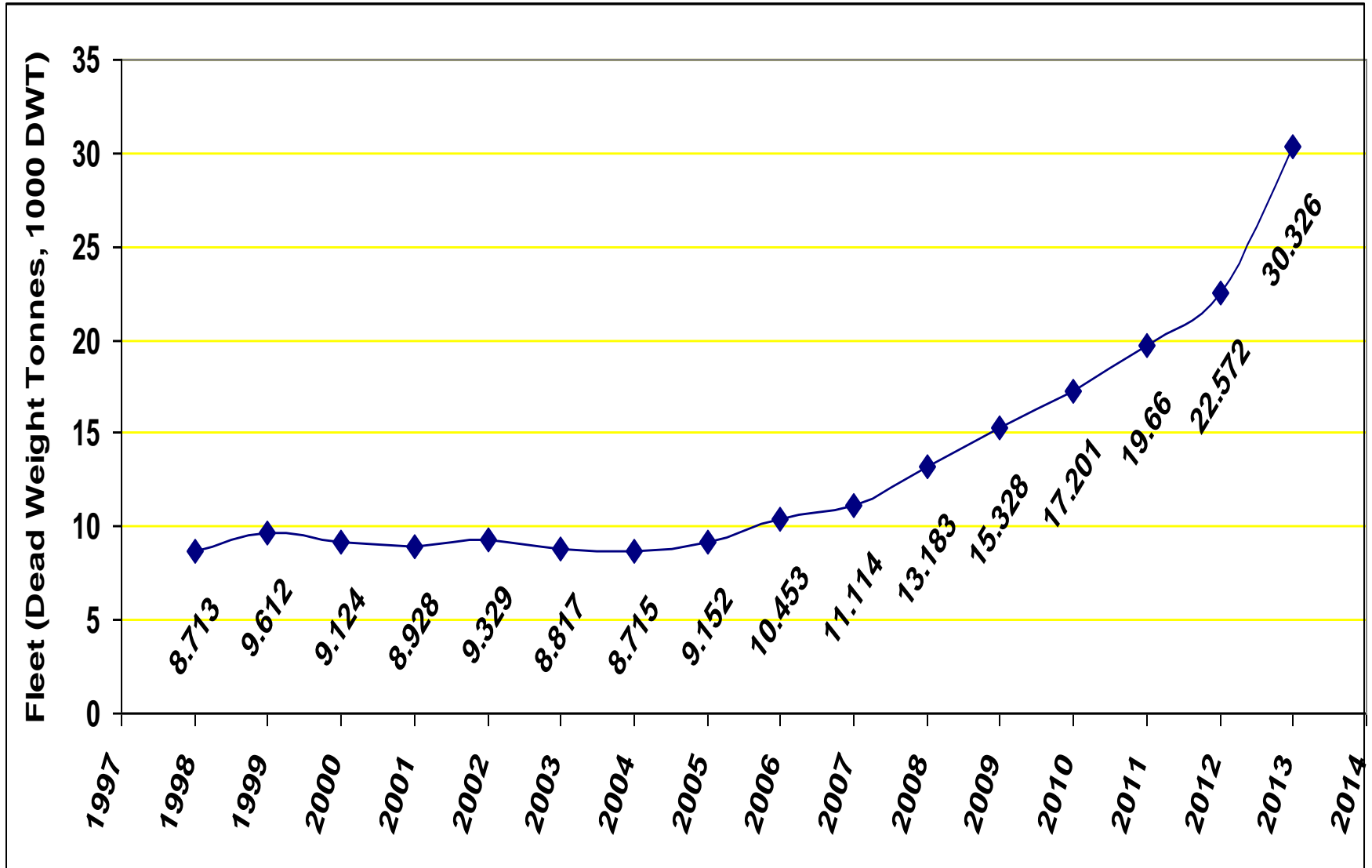


Turkish shipowners represent 1.9% of the world fleet.

Growth: Türkiye 243%; Global 94% (for the last ten 10 years)

(ISL: ≥1.000 GT)

Turkish Seaborne Fleet

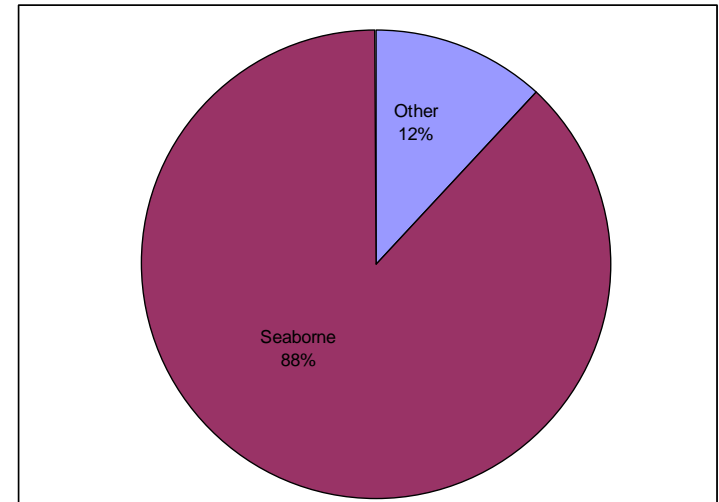


Share of Seaborne Trade in Turkey

- Domestic

	% (Ton-Km , Cargo)	% (Yolcu-Km, Passenger)
Road	% 80,63	% 89,59
Railway	% 4,76	% 2,22
Airway	% 0,44	% 7,82
Seaborne	% 2,66	% 0,37
Pipeline	% 11,51	

- Foreign Trade



Turkey needs to change the composition of the transport modes for cargo and passenger.

Public Investment in Transport Infrastructure

(1000 TL)

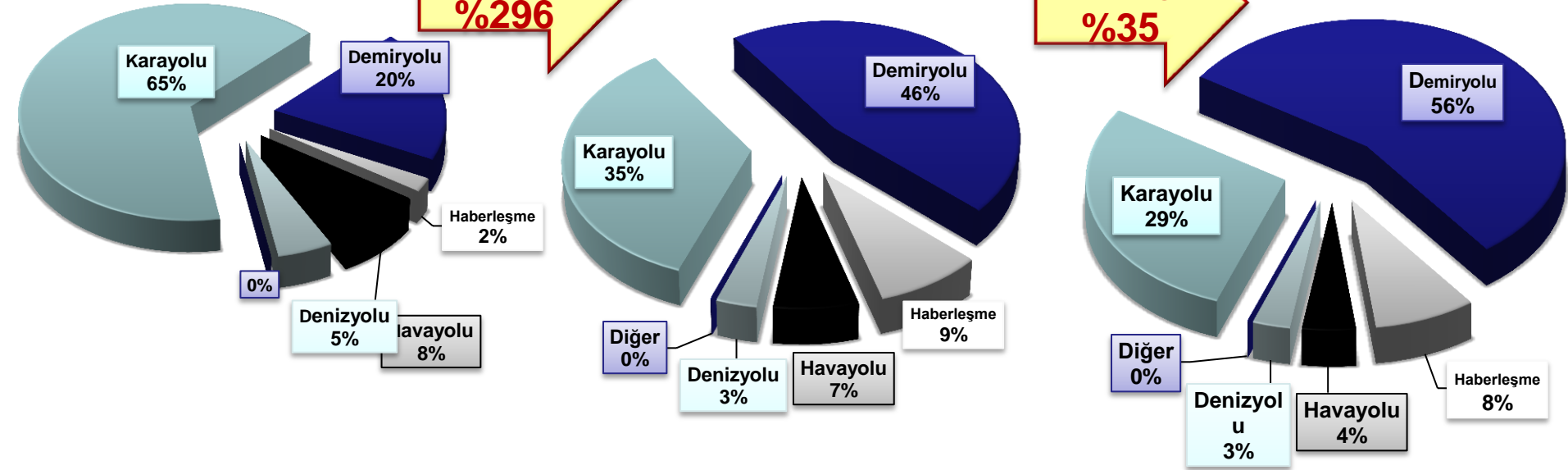
2003 YILI

ARTIŞ
%296

2011 YILI

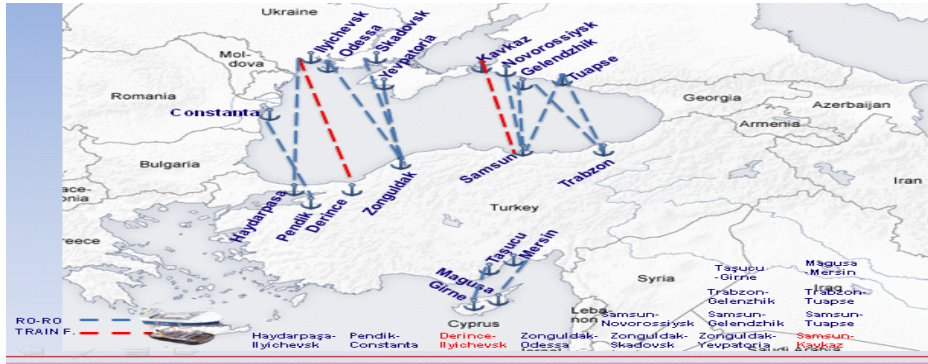
ARTIŞ
%35

2012 YILI



Sektör	2003	2011	2012
Road	1.551.945	3.300.000	3.631.499
Railway	470.445	4.359.040	7.046.900
Communication	48.397	811.922	1.050.571
Airways	188.300	635.020	557.400
Maritime	117.680	302.500	387.000
Other	31	7.390	8.620
TOTAL	2.376.798	9.415.872	12.681.990

SEA HIGH WAYS ARE EXPANDING...



FOREIGN FLIGHTS of TURKISH AIRLINE COMPANIES in 2012



TURKEY'S INTERNATIONAL ROAD TRANSPORTATION



2023 TARGETS OF TURKISH RAILWAY INC.



Hedef2023

Target: 25.000 km railway in 2023 (current: 12000 km).

EAST-WEST AND NORTH-SOUTH CORRIDORS

D010 : Karasu-Zonguldak-Sinop-Samsun-Ordu-Giresun-Trabzon-Rize-Sarp Hudut Kapısı

D100 : Kapıkule Sınır Kapısı-Edirne-İstanbul-Gerede-Amasya-Erzincan-Erzurum-Gürbulak S.K.

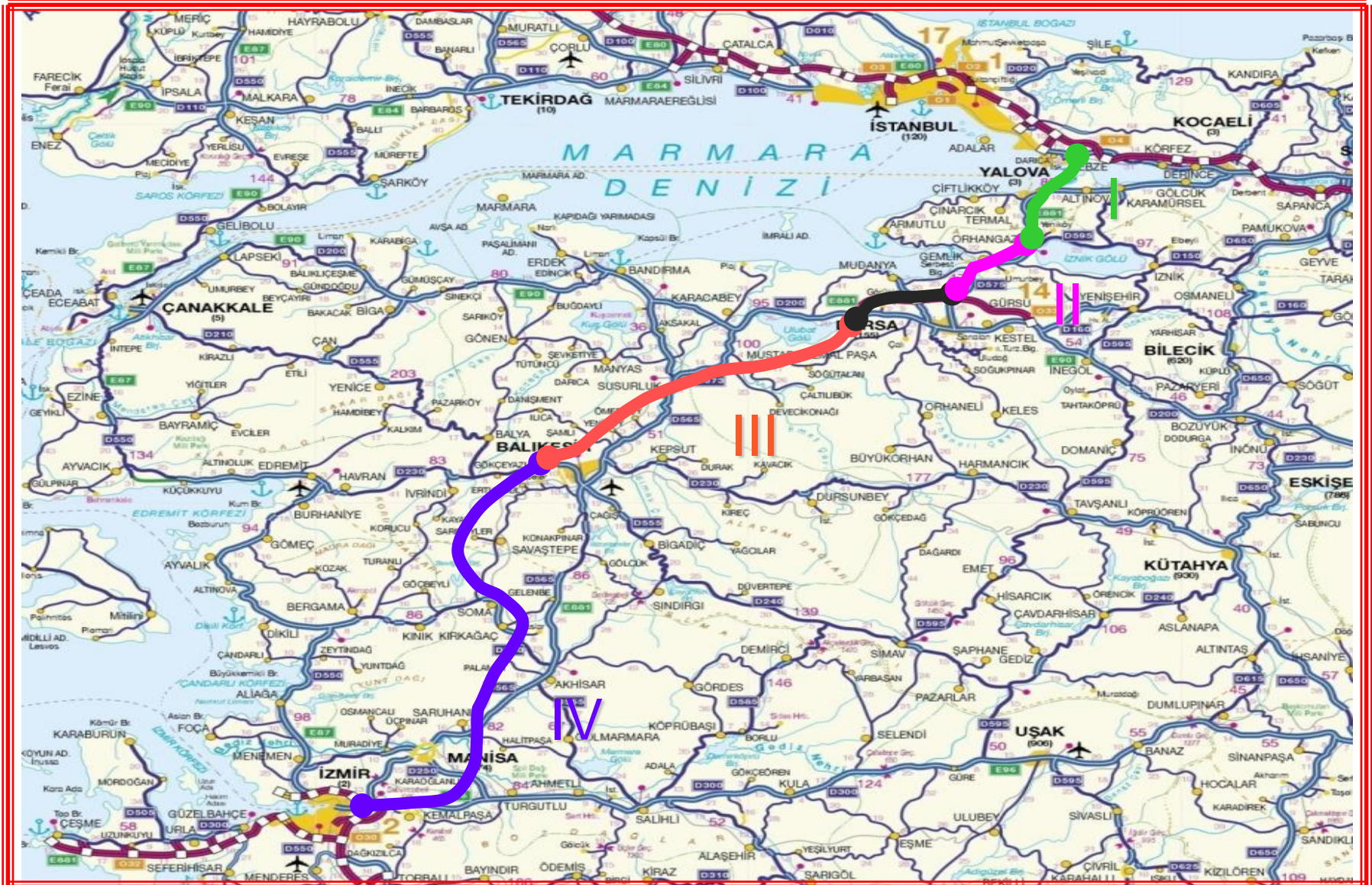


D200: Çanakkale-Bursa-Eskişehir-Ankara-Kırıkkale-Yozgat-Yıldızeli-Refahiye

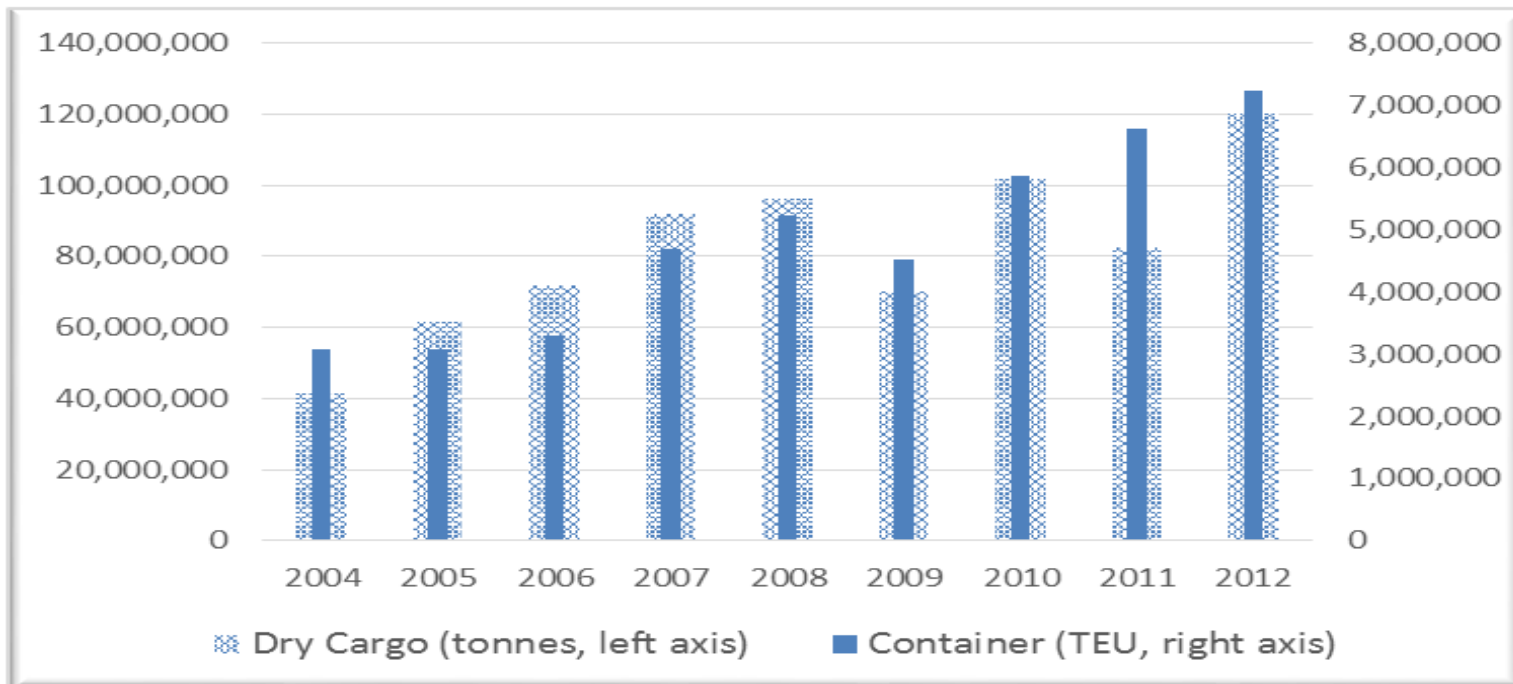
D300 : Çeşme-İzmir-Afyon-Nevşehir-Kayseri-Malatya-Elazığ-Muş-Bitlis-Van-Kapıköy S.K.

D400: Datça-Fethiye-Antalya-Mersin-Adana-Şanlıurfa-Cizre-Yüksekova-Esendere Hudut Kap.

GEBZE - ORHANGAZI - İZMİR (İzmit Körfez Passage and Connections) HIGHWAY PROJECT(377 Km Highway + 44 Km Connection) Project Investment Amount: \$ 6,3 billions

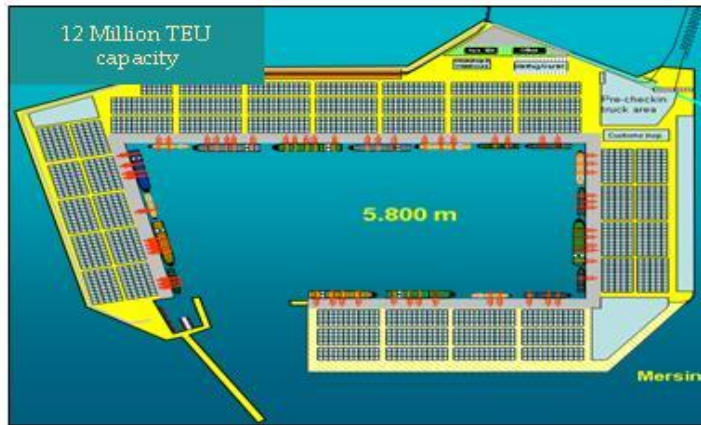


HANDLING in TURKISH SEA PORTS



PORT INVESTMENTS ACCELERATE

MERSİN CONTAINER PORT in the MEDITERRANIAN SEA



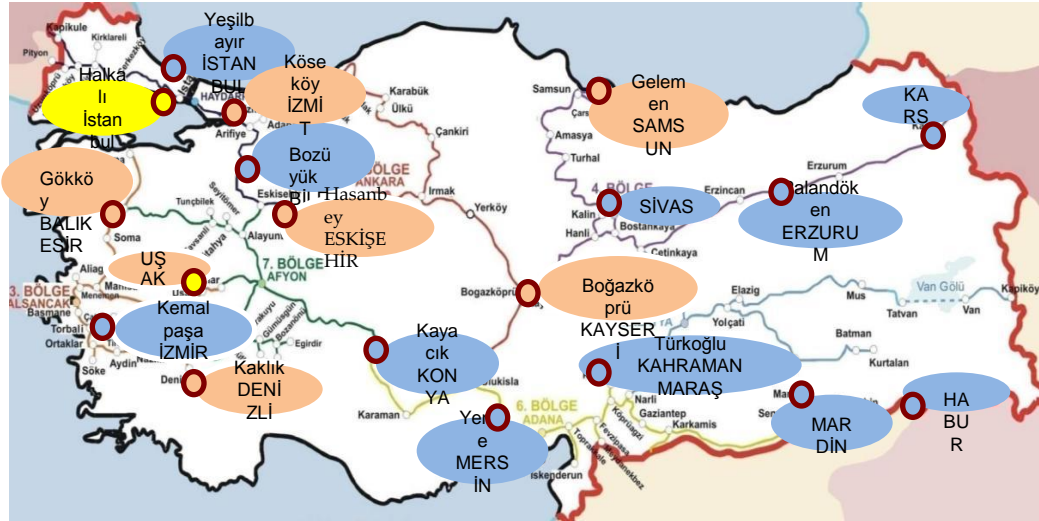
NORTH AEGEAN PORT INVESTMENT (WILL BE ONE OF THE 10 BIGGEST PORTS in THE WORLD)



FİLYOS PORT in the WEST BLACK SEA REGION



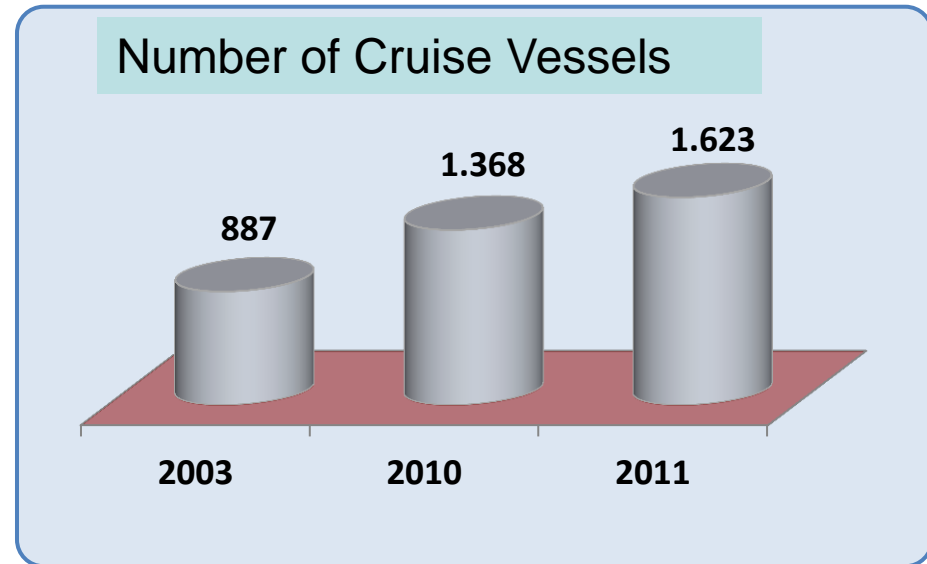
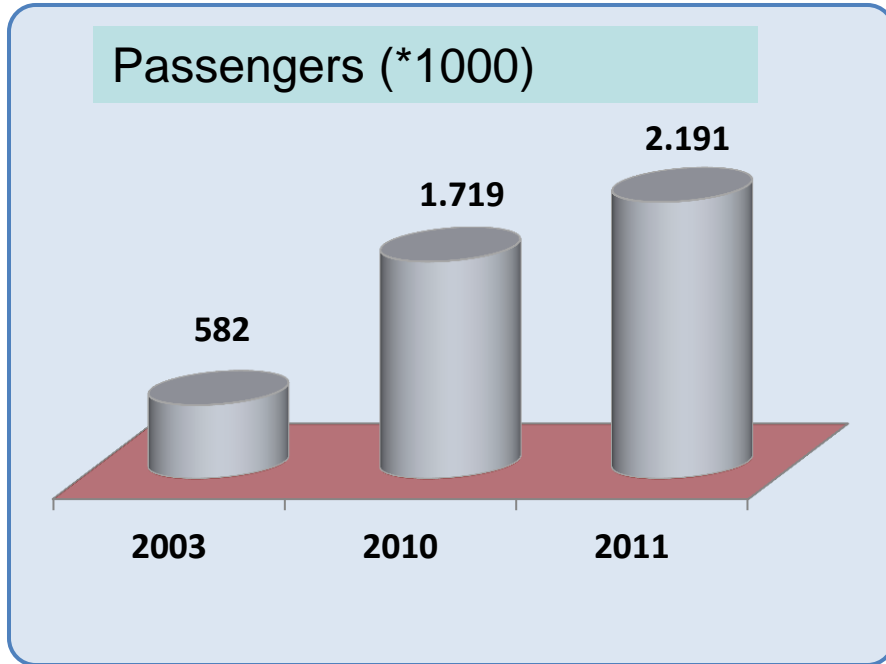
LOGISTIC CENTERS



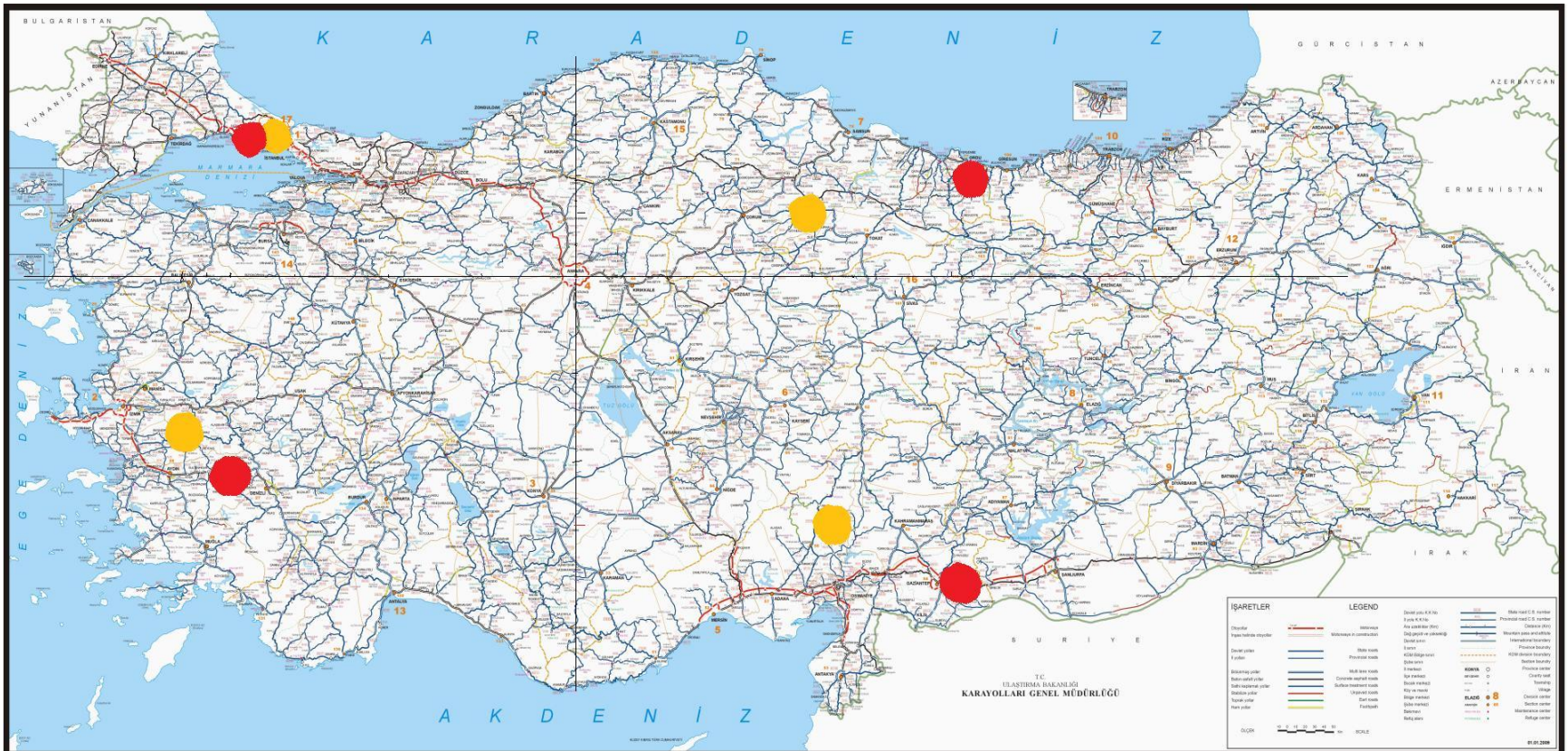
A Logistic Center in the Black Sea Region



CRUISE TOURISM in TURKISH PORTS...






ECONOMIC GRAVITY CENTERS OF TURKEY



Accepting Ankara as the origin of the economic surface; we notice that the sub gravity centers for Turkish economy are very separated. Different modes of transportation should be evaluated with a rational intermodal system between seaports and land transport modes such as railways and roads.

REQUIRED INVESTMENTS

	<p>INTERMODAL</p>
	<p>LOGISTICS</p>
	<p>TRANSPORT INFRASTRUCTURE</p>
	<p>MARITIME EDUCATION</p>

Thank you...

