

TURKISH PORT SECTOR 2026 REPORT

Economic Geography of the Port Sector in Türkiye



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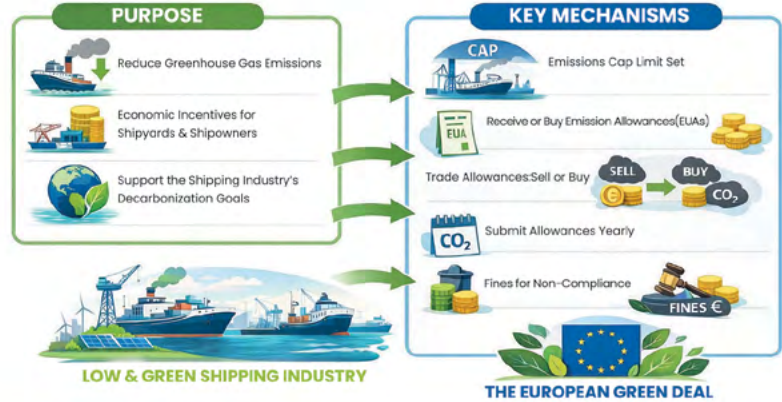
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INTRODUCTION

Global maritime transport is on the brink of a transformation that transcends its traditional boundaries. Houthi attacks in the Red Sea have disrupted routes that had been considered safe for decades and large-tonnage ships had to sail around the Cape of Good Hope instead of passing through the Suez Canal. The tensions escalated by the Iran war have transformed the Strait of Hormuz, a critical chokepoint for global oil and energy trade, into a new area of fragility. Meanwhile, the maritime repercussions of the ongoing Russia-Ukraine war in the Black Sea are no longer an abstract threat. Attacks by unmanned vehicles on commercial ships close to Turkish waters are taking place, and the security of energy corridors in the region is being questioned more every day.



Hamdi ERÇELİK
Turkish Port Operators
Association (TÜRKLİM)
Chairman of the Board of Directors

As a result of all this, freight rates are fluctuating unpredictably, supply chains are being redesigned, and distance is now becoming a function not only of geography but also of geo-economics.

This situation is a clear indication that ports have risen to a more strategic position than ever before in history. In this era of deepening geopolitical uncertainty and the redrawing of trade routes, another powerful trend shaping the sector is sustainability and digital transformation. The IMO's net-zero targets, alternative fuel technologies and shore-side power supply infrastructure are now at the heart of the global port industry's agenda. The reflections of this transformation are also being felt in our country. With the latest amendment to the Green Port Regulation, environmental standards have become mandatory for new and expanding facilities rather than being solely voluntary. Strong, efficient and competitive ports are no longer a mere advantage but a necessity, and the environmental and digital dimensions of this necessity are becoming increasingly decisive.

Recognising this reality, TÜRKLİM has made it as its mission to test the port sector not only with

today's conditions but also with tomorrow's needs and to offer a perspective to our sector in this direction. Within this framework, this year's edition of the TÜRKLİM Port Sector Report—published regularly since 2006—takes the economic geography of our ports as its main theme. Since 2016, Türkiye's foreign trade volume, economic scale and port handling capacity have undergone fundamental changes. The main purpose of this year's report is to systematically document this change, reassess our hinterland and foreland structures from an updated perspective, and make a tangible contribution to our sector's competitiveness. I would like to express my gratitude to our consultants, members and TÜRKLİM staff who contributed to the preparation of this report.

TÜRKLİM, mindful of the historical roots of Turkish shipping and the great responsibility these roots entail, will resolutely continue its efforts to contribute to the sector's sustainable development, to play a leading role in shaping policies that will enhance its competitiveness, and to develop more environmentally friendly, efficient and safe port services.

FOREWORD

The Turkish Port Sector 2026 Report is the product of a period in which geopolitical turmoil and structural transformations have challenged the maritime industry on all fronts. The main purpose of this report is to understand where the sector is going, to be prepared for the future and to take the right policy steps despite regional political and military tensions, route changes, freight fluctuations and increasing security risks.



The report is shaped on four main axes. In the first two chapters, the developments in the global economy and world maritime trade are discussed with data, and Türkiye's place in this table is revealed. In the third part, current developments, capacity and cargo data in Turkish ports are comprehensively evaluated. In the fourth part, the economic geography of our ports, which is the main theme of this year, was examined, and the hinterland and foreland structures, port selection dynamics according to cargo groups and regional trade patterns, which have changed radically since 2016, when this theme was discussed before, were systematically discussed. In the

last part, the priority problems of the sector and solution suggestions were shared.

We would like to thank the Ministry of Transport and Infrastructure of the Republic of Türkiye, the İMEAK Turkish Chamber of Shipping and our valued members for their support in the preparation of this report. We extend our sincere thanks to Dr. Ersel Zafer ORAL and Prof. Dr. Soner ESMER, who authored the report, to Mr. Faruk DOĞAN, Secretary-General of TÜRKLİM, for his contributions, and to all TÜRKLİM staff who contributed to this work.

We hope this report will contribute to our sector.

**The Port Operators
Association of Türkiye
2026**

OUR MEMBER PORTS

PORT NAME

1. AKÇANSA AMBARLI
2. AKÇANSA ÇANAKKALE
3. AKSA AKRİLİK
4. AK-TAŞ
5. ALTAŞ AMBARLI
6. ALTINTEL
7. ANADOLU PORT
8. ASBAŞ
9. ASSAN
10. ASYAPORT
11. ATAKAŞ
12. AUTO PORT
13. AVES (SAVKA)
14. BATILİMAN
15. BELDEPORT
16. BODRUM CRUISE PORT
17. BORUSAN PORT
18. ÇANAKKALE LİMANI
19. ÇELEBİ BANDIRMA
20. CEYPORT TAŞUCU
21. CEYPORT TEKİRDAĞ
22. ÇOLAKOĞLU METALURJİ
23. DFDS
24. DİLER
25. DP WORLD EVYAP
26. EFESANPORT
27. EGE GÜBRE
28. EKİNCİLER
29. EMBA
30. ERDEMİR
31. EREN PORT
32. FORD OTOSAN
33. GEMPORT
34. GİRESUNPORT
35. GLOBAL TERMİNAL
36. HOPAPORT
37. İC KARASU PORT
38. İÇDAŞ-1
39. İÇDAŞ-2

PORT NAME

40. İDÇ
41. İGSAŞ
42. İSDEMİR
43. KORUMA KLOR
44. KROMAN ÇELİK
45. KUMPORT
46. KUŞADASI YOLCU LİMANI - TRKUS
47. LİKİT PORT
48. LİMAKPORT
49. LİMAŞ
50. MARDAŞ
51. MARPORT
52. MARTAŞ
53. MESBAŞ
54. MIP
55. MMK METALURJİ
56. NEMPORT
57. PETKİM
58. POLİPORT
59. PORT YARIMCA
60. Q TERMINALS ANTALYA
61. RİPORT
62. RODAPORT
63. SAMSUNPORT
64. SOCAR TERMİNAL
65. SOLVENTAŞ
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69. TOROSPORT SAMSUN
70. ULUSOY
71. YALOVA RO-RO
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UNIT 1

DEVELOPMENTS IN THE WORLD AND TURKISH ECONOMY AND TRADE

1.1. General Economic Assessment

1.2. Expectations, Forecasts and Trends in Global Trade

1.2.1. Trade in Goods

1.2.2. Trade in Services

1.3. Outlook by Country

1.4. Developments and Expectations in the Turkish Economy and Trade

1. DEVELOPMENTS IN THE WORLD AND TURKISH ECONOMY AND TRADE

1.1. General Economic Assessment¹

The global economy, although influenced by different and at times opposing dynamics, generally presents a stable outlook. After global real growth reached approximately 3.3% in 2025, it is expected to remain around 3.3% in 2026 and 3.2% in 2027.

This outlook indicates a limited upward revision compared to previous projections and suggests that the global economy remains resilient.

Naturally, not all economies are growing in a balanced manner. This relatively stable growth performance is emerging through the offsetting of opposing effects. While uncertainties in trade policies and protectionist tendencies are exerting pressure on economic activity, the rapid increase in technology-driven investment, especially investment associated with artificial intelligence, has become an important factor supporting growth in North America and Asia. In addition, relatively loose financial conditions, fiscal and monetary supports, and the private sector's capacity to adapt are among the main factors sustaining global growth.

However, the escalating military tensions in the Middle East and the Gulf region towards the end of the first quarter of 2026 and the associated geopolitical risks have put this relatively stable outlook outlined above under serious pressure. Institutions such as Oxford Economics and Dow Jones Business Intelligence have revised their global real growth forecasts for 2026 downwards to the 2.0% - 2.2% band due to the negative effects of the war on global energy supply security and critical trade routes (Strait of Hormuz, etc.). This represents a clear deviation from the 3.3% growth target envisaged at the beginning of the year. Nevertheless, given the high level

of uncertainty surrounding the duration and scope of the conflict and the degree of volatility in energy prices, it should be borne in mind that these revised figures are not final and remain a "moving target"^{2,3,4}

Real growth expectations

According to IMF projections, growth rates in the group of advanced economies remain distinctly below the global average. Total growth in this group is estimated at 1.7% in 2025, 1.8% in 2026 and 1.7% in 2027. The United States is expected to perform above the group average with growth of 2.4% in 2026, while growth is projected to decline to 2.0% in 2027. In the euro area, growth rates fluctuate within the 1.3%-1.4% band; in Germany, although growth is expected to remain very weak in 2025 at 0.2%, it is projected to rise towards 1.5% by 2027. In France, Italy and Spain, growth is expected to follow a relatively low but positive path. In Japan, the gradual slowdown in growth to 0.6% by 2027 is noteworthy.

In emerging market and developing economies, growth rates are higher, although they show a limited tendency to slow over time. Total growth in this group declines from 4.4% in 2025 to 4.2% in 2026 and 4.1% in 2027. Emerging Asia continues to be the main driver of this group; however, the decline in China's growth from 5.0% in 2025 to 4.0% in 2027 is a determining factor in the downward movement of the regional average. By contrast, India continues to be one of the fastest-

¹ The data under this heading are mainly compiled from OECD, IMF, World Trade Organization and UNCTAD news bulletins. Since this section was written in the period of February 2026, the data for 2025 are generally estimates.

² Dow Jones Business Intelligence. (2026, 31 March). *Iran war will hit global growth unevenly*. Dow Jones.

³ Oxford Economics. (2026, 1 April). *World economic prospects: Global risk survey - April 2026*. Oxford Economics.

⁴ World Economic Forum. (2026, January). *The global risks report 2026*

growing major economies globally, with growth rates above 7%.

In other regions, the picture is more balanced but heterogeneous. Growth in the Middle East and Central Asia is expected to rise from 3.7% to 4.0%, while growth rates in Sub-Saharan Africa are seen stabilising within the 4.4%-4.6% band.

In Latin America and the Caribbean, growth, which is expected to fall to 2.2% in 2026, is projected to recover to 2.7% in 2027. Growth in the group of low-income developing countries remaining above 5% indicates that these economies are performing markedly above the global average (Figure 1.1).

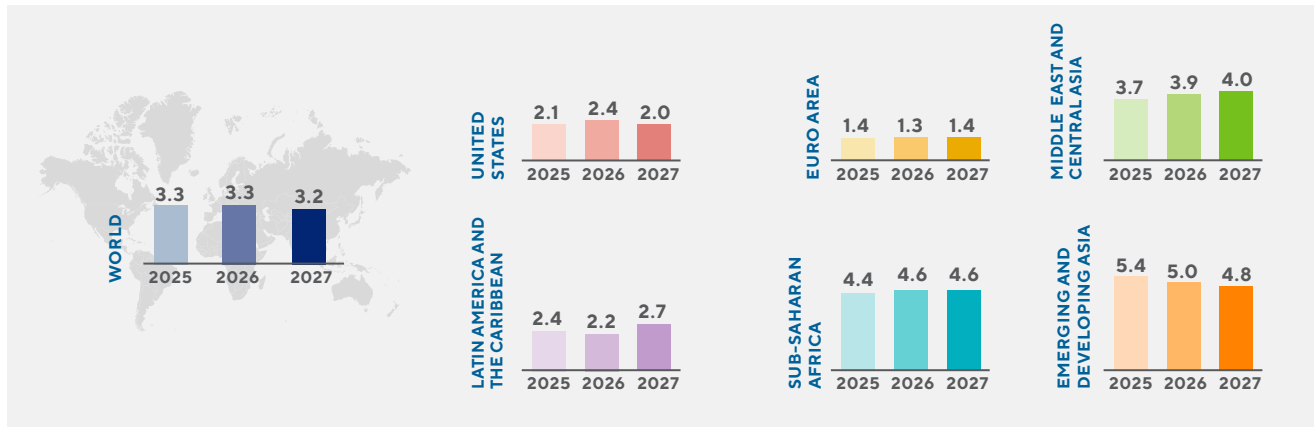


Figure 1.1. IMF's global economic development projections (%)⁵

Table 1.1. IMF's Global Growth Forecasts for the 2025-2027 Period (%)⁶

	Real	Forecast	
	2025	2026	2027
WORLD	3,3	3,3	3,2
Developed Countries	1,7	1,8	1,7
United States	2,1	2,4	2,0
Eurozone	1,4	1,3	1,4
Germany	0,2	1,1	1,5
France	0,8	1,0	1,2
Italy	0,5	0,7	0,7
Spain	2,9	2,3	1,9
Japan	1,1	0,7	0,6
United Kingdom	1,4	1,3	1,5
Canada	1,6	1,6	1,9
Other Developed Countries	1,8	2,0	2,1
Developing Countries	4,4	4,2	4,1
Developing Asia	5,4	5,0	4,8
China	5,0	4,5	4,0
India	7,3	6,4	6,4
Emerging Europe	2,0	2,3	2,4
Russia	0,6	0,8	1,0
Türkiye	4,1	4,2	4,1
Latin America and the Caribbean	2,4	2,2	2,7
Brazil	2,5	1,6	2,3
Mexico	0,6	1,5	2,1
Middle East and Central Asia	3,7	3,9	4,0
Saudi Arabia	4,3	4,5	3,6
Sub-Saharan Africa	4,4	4,6	4,6
Nigeria	4,2	4,4	4,1
South Africa	1,3	1,4	1,5

⁵ IMF, World Economic Outlook Update, January 2026

⁶ IMF, World Economic Outlook Update, January 2026

Overall, this picture shows that growth at the global level is stable but limited, while at regional level a clear growth gap persists between advanced economies and emerging and developing economies.

Inflation and other risks

On the inflation front, a gradual decline is forecast. Global headline inflation is expected to fall from approximately 4.1% in 2025 to 3.8% in 2026 and 3.4% in 2027⁷. The return of inflation to target levels is expected to be slower in the United States in particular than in other major economies.

Nevertheless, the risks to the global economic outlook are predominantly tilted to the downside. A renewed escalation in trade tensions, increasing geopolitical and domestic political risks, or the pressure created by high public debt and budget deficits on long-term interest rates all constitute vulnerabilities for global growth.

On the other hand, if artificial intelligence investments translate into sustained productivity gains and trade tensions ease, economic activity may move onto a stronger and more sustainable growth path. In this context, the priorities for policymakers are to strengthen fiscal resilience, maintain price and financial stability, reduce uncertainty, improve predictability and implement structural reforms without delay.

Risks to growth in the near future

The recovery trend observed in the global economy from the autumn of 2025 onwards displayed an uneven pattern as 2026 began. Although trade tensions generally eased, they occasionally flared up again, while policy uncertainty remained above its January 2025 levels. Tensions between China and the United States over export controls on semiconductors and rare earth elements subsided through a temporary understanding; the removal of tariffs on some agricultural products partially offset the impact of previously announced high tariffs. Nevertheless, country-specific regulatory divergence and ongoing legal processes increased the complexity of the global trade environment.

Financial conditions, despite increased volatility and rising government bond yields, generally remained supportive. In particular, the stock performance of major technology companies diverged markedly from that of other sectors, deepening inter-sectoral differences in capital markets. In foreign exchange markets, the US dollar showed a partial recovery, although financial conditions overall remained limited.

In this environment, the global economy preserved its resilience, but growth momentum differed substantially across countries and sectors. In the third quarter of 2025, global growth declined to 2.4% on an annualised basis; positive surprises in some countries were offset by weak performance in others. In France, increased aerospace exports supported growth, while in Germany weakening export performance caused economic activity to stagnate. The Japanese economy contracted, while growth in China fell to 2.4%; weak domestic demand, particularly in the housing sector, became more pronounced, although the relative resilience of exports partly limited this effect. In the United States, by contrast, the increase in technology investment accelerated growth and contributed approximately 0.3 percentage points to average annual growth in the first three quarters of 2025.

Global financial conditions remained generally supportive; in equity markets, the performance of technology companies diverged clearly from other sectors. The increase in technology investment supported growth particularly in the United States, while its impact in Europe and Japan was more limited.

The outlook for global economic growth has a fragile structure because it relies on a limited number of driving forces. The recent resilience observed was largely made possible by activity concentrated in certain sectors and by the support provided by monetary and fiscal policies. However, this structure is sensitive to shocks that may arise both from sector-specific developments and from broader and more persistent risk factors.

The fact that a significant share of growth depends on investment focused on artificial intelligence and high technology increases downside risks if expectations are not realised. If productivity gains driven by artificial intelligence remain limited, investment in the high-technology sector may decline and equity valuations may undergo corrections. Such a correction could lead to a costly reallocation of capital and labour, a weakening of business dynamism, and downward pressure on consumption and investment expenditure through wealth effects. These effects are expected to spread into global trade channels through export economies specialised in technology products and to limit global growth through tighter financial conditions. According to scenario analyses dated October 2025, a medium-sized correction in artificial intelligence-related equities could reduce global growth in 2026 by approximately 0.4 percentage points compared with the baseline scenario.

⁷ Headline inflation is the inflation rate that reflects the overall increase in prices faced by consumers, covering all goods and services.

The current balance in relation to trade policies has also appeared fragile. The introduction of new customs duties, particularly on intermediate and final production stages, has emerged as a factor capable of creating bottlenecks in supply chains and generating disproportionate effects on economic activity and prices. Non-tariff measures on critical inputs and rising protectionist tendencies have placed pressure on global supply networks through trade diversion and the rerouting of shipments. In this process, the squeeze on profit margins has contributed to inflationary pressures persisting for longer.

The possibility of a pronounced escalation in geopolitical tensions has strengthened downside risks to growth. Developments in various regions, especially the Middle East and Ukraine, may cause disruptions on main maritime transport routes, delays in supply chains and cost increases. If critical infrastructure or major corridors are damaged, upward pressure on commodity prices is likely. Indeed, the Iran crisis, which has escalated since the beginning of March into a hot war, has caused this risk scenario to materialise in practice and has directly increased pressure on global energy supply security and supply chains.

Continuing vulnerabilities in financial markets and high levels of public debt in many major economies have created additional risks for fiscal and financial stability. The increase in public borrowing costs has had a tightening effect on wider financial conditions and has made private sector financing more difficult. Greater dependence on price-sensitive investor groups has raised the risk of market volatility and increased liquidity requirements.

By contrast, the rapid adoption of artificial intelligence technologies and the spread of investment in this field stand out as factors supporting global productivity growth over the medium term. Depending on the pace of adoption, this process is assessed as potentially contributing approximately 0.3 percentage points to global growth in 2026 and, in the medium term, an additional 0.1 to 0.8 percentage points annually. Technological transformation is seen as supporting global economic dynamism by accelerating restructuring across sectors.

The continuity of growth has remained largely dependent on the course of trade policies, geopolitical developments and technology-driven investment.

The Iran war that broke out in the Middle East has clearly demonstrated the potential for geopolitical shocks to suddenly interrupt global growth momentum.

1.2. Expectations, Forecasts and Trends in Global Trade

Global trade volume: USD 35 trillion

According to UNCTAD data, global trade in 2025 increased by 7% in rate terms and by USD 2.2 trillion in value compared with the previous year, reaching a new record of USD 35 trillion. Approximately USD 25 trillion of this amount consisted of trade in goods, while the remaining USD 10 trillion was made up of trade in services. Of the USD 2.2 trillion increase, approximately USD 1.5 trillion originated from goods trade, representing growth of 6.3%, while trade in services increased by around USD 750 billion, growing by nearly 9%. This distribution shows that the weight of services trade within global trade is gradually increasing.

In the first quarter of 2025, trade in goods grew by 1.8%, while trade in services contracted by 1.0%. In the second quarter, both categories recovered; trade in goods rose by 3.6% and trade in services by 4.9%. By contrast, growth momentum weakened in the third and fourth quarters. In the third quarter, increases were limited to 1.8% in goods trade and 4.0% in services trade; in the fourth quarter, the respective rates fell to 0.6% and 2.2%. This picture shows that global trade volume continued to grow in 2025 overall, but that growth slowed in the later parts of the year. **(Figure 1.2.)**

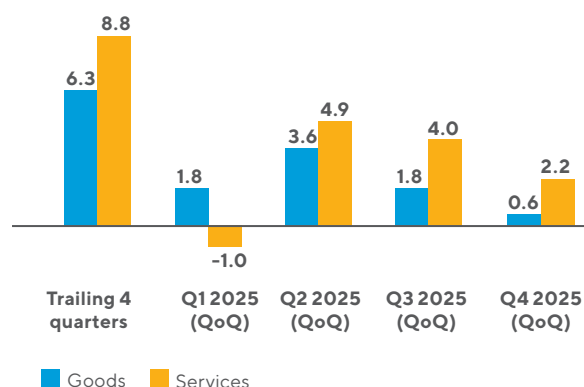


Figure 1.2. Quarterly development rates in trade in goods and services⁸

During 2025, the source of growth in global trade changed. In the early months of the year, the increase in trade was largely driven by higher prices; later in the year, this effect weakened, and trade growth increasingly began to depend on the purchase and sale of greater volumes of goods and services, in other words on growth in trade volumes. Indeed, in earlier periods of the year, the increase in trade value was partly supported by price increases. When the last four quarters are considered together, the overall price level of traded goods increased by 1.6%.

On a quarterly basis, however, a more volatile pattern stands out. In the first quarter of 2025, prices of traded goods fell by 0.8%; in the second quarter, they recorded a strong increase of 1.8%; and in the third quarter, the pace of increase slowed to 1.1%. By the fourth quarter, prices fell again by 0.8%. These data indicate that in the second half of 2025 the main factor determining the direction of global trade was actual trade volumes rather than inflationary price effects. (Figure 1.3).

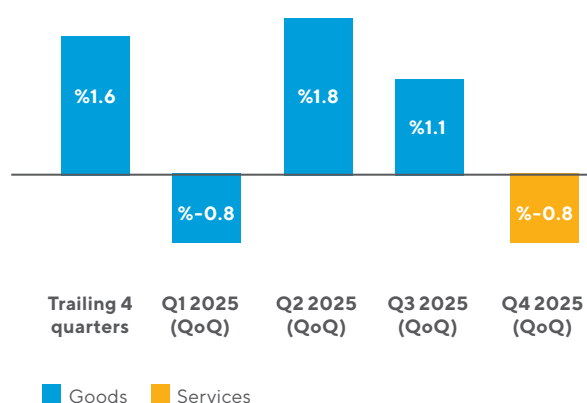


Figure 1.3. Quarterly proportional change in the total price of traded goods⁹

Compared with the strong increase recorded in 2025, the outlook for 2026 is more cautious. Slower global economic growth, deepening geoeconomic fragmentation, ongoing policy uncertainties and increasing vulnerabilities are exerting pressure on trade. Rising trade costs reinforce these pressures and make the overall outlook more volatile. Although import demand may continue in some consumer-oriented markets and areas such as digital technologies and environmental sectors may provide partial support, these factors are not expected to fully offset weakening economic momentum and growing trade restrictions.

The factors supporting and limiting global trade in the coming period may be summarised as follows.

Positive factors supporting the global trade outlook

- South-South trade refers to trade in goods and services among developing and least developed countries. Expansion in South-South trade continues to be one of the important supports for global trade. Increased trade among developing economies supports the diversification of trade networks, the strengthening of resilience, and the development of both intra-regional and inter-regional trade.

- The increase in demand in developing economies is another positive factor for global trade. Stronger consumer demand in these countries has the potential to keep global trade flows buoyant by increasing imports of goods and services.

- Rapid growth in technology, digitalization, artificial intelligence and environmental sectors is giving additional momentum to trade in high-value-added and knowledge-intensive goods and services. These areas are among the principal dynamics transforming the sectoral composition of global trade.

- In addition, the expected easing of interest rates and the corresponding decline in borrowing costs are considered factors supporting economic activity and global trade from 2026 onwards.

Negative factors limiting the global trade outlook

- Crises that directly threaten global energy supply and key maritime transport routes, such as the Iran war that has turned into a hot conflict and the Strait of Hormuz, continue to disrupt bilateral and regional trade flows and increase uncertainty in global trade. This has an adverse effect on commercial decisions by causing sudden jumps in freight through additional charges such as War Risk Surcharge and Emergency Conflict Surcharge.

- Rising trade costs are another factor weakening the trade outlook. Customs tariffs, complex regulations, the restructuring of global value chains and logistics bottlenecks increase the cost and unpredictability of cross-border trade.

- Uncertainty surrounding the trade policies of the United States also continues to have a global impact. The continuation of negotiations between the United States and its main trading partners keeps uncertainty over policy direction alive and affects business confidence and investment decisions.

- In an environment of weakening global demand, the strengthening of industrial policies and the increasing risk of overcapacity stand out as factors that could

⁹ UNCTAD, Global Trade Update, Dec. 2025.

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trigger protectionist trade measures in some sectors. This may limit trade flows, particularly in strategic sectors.

- Finally, rising public and private sector debt, especially in developing countries, narrows fiscal room for maneuvers and constrains trade growth by suppressing investment and import demand.

Regional trends: East Asia and Africa show the strongest growth

In 2025, global trade growth displayed a markedly divergent regional pattern. East Asia recorded the strongest performance, with exports increasing by approximately 9% over the last four quarters; growth of 10% in intra-regional trade formed the main pillar of this momentum. Africa also stood out among the regions driving global trade growth; imports rose by 10% over the last four quarters and by 3% in the third quarter, while exports increased by 6% on an annual basis. In South America, intra-regional trade dynamics similarly strengthened; trade volume increased by 3% in the third quarter and by 7% over the last four quarters. By contrast, a more complex picture emerged in North America; although exports declined by 3% in the third quarter, they rose by 2% over the last four quarters as a whole, while imports increased by 6% over the same period and remained more resilient.

In Europe, trade continued to grow but lost momentum; exports rose by 2% in the third quarter and by 6% over the last four quarters, while imports increased by 1% and 8% respectively. Taken together, these data show that global trade growth in 2025 was driven mainly by East Asia and Africa, while in advanced economies trade growth followed a more limited, volatile and asymmetric path. The foreign trade outlook by country is examined in detail under Section 1.1.3, “Outlook by Country” in this report.

Changes in global trade dynamics

Since the second half of 2022, there has been a significant shift towards trade relations that are more politically aligned. These changes indicate that bilateral trade increasingly favours countries with similar geopolitical positions, a tendency generally referred to as “friend-shoring”. This tendency, which may be defined as the strengthening of trade partnerships with politically aligned countries, began to stabilise in the second half of 2023; at the same time, global trade became more concentrated around major trading partners.

However, in 2024 the friend-shoring trend lost the aggressive pace of increase observed during the initial shock period and moved onto a more stable path. For example, although the pace of increase in Russia’s trade dependence on China slowed by 3.7% in 2024, the fact that China’s total share in Russia’s foreign trade remained at a record level of 34% confirms that global trade flows have permanently shifted direction. The structural transformation is based on Russia redirecting its trade towards China as a result of Western sanctions, thereby making its dependence on China structural, and on the European Union almost completely severing trade relations with Russia. In addition, the EU’s decision to review and begin limiting trade support measures for Ukraine shows that this process is not merely crisis management but an indication of a new and lasting geoeconomic separation. In light of these data, the current picture proves not a return to former balances, but rather the consolidation of trade routes around this new bloc formation^{10,11,12}.

Data for the final quarter of 2025 show that the redirection of global trade flows has become a persistent trend. First, the friend-shoring tendency gained strength again. Trade growth among politically close countries rose to approximately 3% above the 2021 average and continued to increase by year-end. This confirms that trade is concentrating around “reliable partners” and that geopolitical proximity has become a primary factor in determining trade routes¹³.

On the other hand, trade between geographically close countries, or nearshoring, although it remains below historical averages, gave gradual signs of recovery in the fourth quarter. This rate, which stood at around -1.5% in the third quarter of 2025, improved towards -1%. This development shows that transport costs and regional logistics advantages are again gaining weight in trade¹⁴.

In addition, the tendency for trade to concentrate in large economies rose again in the fourth quarter of 2025. This reflects the fact that the increase in global trade is dominated by the largest economies and that trade is expanding faster among this limited number of actors.

In particular, despite a contraction of approximately USD 170 billion, or 25%, in bilateral trade between the United States and China in 2025, the fact that global trade reached a record level of USD 35 trillion

¹⁰ China Daily. (2024, 15 November). For Russia, China has become the main supplier: Bilateral trade reaches new heights in 2024. China Daily.

¹¹ European Commission. (2026, 12 March). Review of autonomous trade measures for Ukraine and restrictive measures against Russia: Strategic update. European Union.

¹² TASS. (2025, 12 January). Russia–China trade turnover hits record \$244.8 billion in 2024, customs data shows. Russian News Agency TASS.

¹³ UN Trade & Development. (2026, April). Global trade update: Facts and figures (Report No. UNCTAD/DITC/INF/2026/4)

¹⁴ UN Trade & Development. (2026, April). Global trade update: Facts and figures (Report No. UNCTAD/DITC/INF/2026/4)

overall shows that flows are being redirected through “connector economies”¹⁵.

In general terms, the data as of the end of 2025 show that friend-shoring and concentration in global

trade have gained momentum, while nearshoring has entered a slow recovery process from low levels. The trajectory of these dynamics since the beginning of 2022 and the new balance reached by the end of 2025 can be seen in **Figure 1.4**¹⁶.

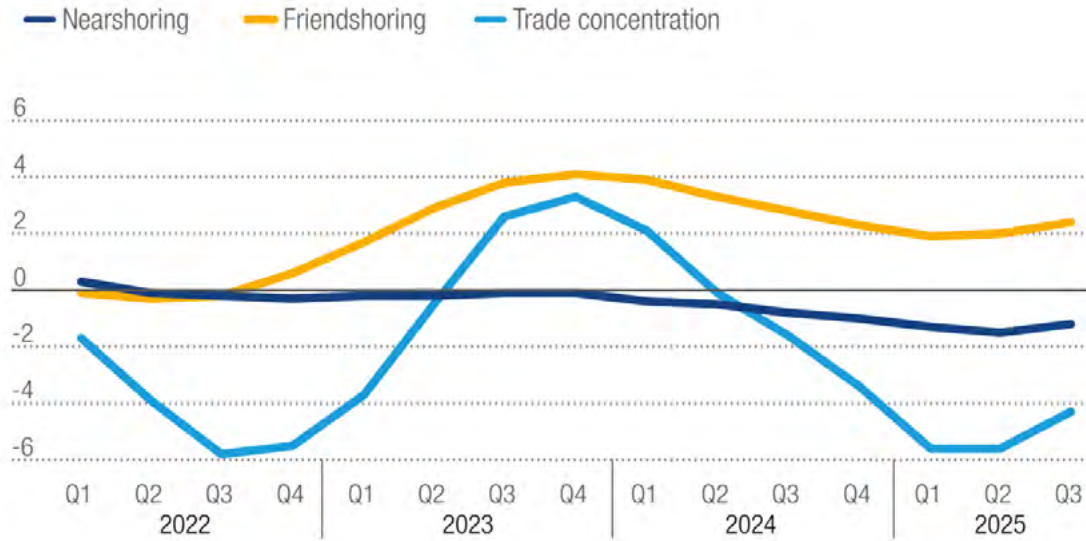


Figure 1.4. The changing face of global trade¹⁷

Goeconomic and geopolitical factors continue to be the fundamental forces shaping global trade routes. However, the latest data reveal a clear process of decoupling rather than stabilisation in direct trade among major powers. The sharp decline in bilateral trade between the United States and China in 2025 created a gap; this gap has been partly offset by direct trade being replaced by indirect flows and by the rise of “connector economies” such as Egypt, Vietnam, Cambodia and Thailand. The fact that very few countries’ trade flows are focused on a single pole shows that global trade fragmentation is differentiated by sector and by country rather than having yet turned into full polarisation¹⁸.

This transformation process also rearranges the dependency structures of countries in foreign trade. According to April 2026 data, Indonesia’s dependence on China increased by 2.0%, Vietnam’s dependence on the USA increased by 1.5%, and India’s dependence on the USA and

China increased by 1.2% points each. Türkiye’s trade dependence on the European Union remained high with a limited increase of 0.5%. On the other hand, a strategic market diversification or regional breakout is observed in some economies. For example, Switzerland’s dependence on the EU decreased by 4.0%, Canada’s dependence on the USA by 3.9% and the United Kingdom’s dependence on the EU by 2.9%. The direct dependence of the United States and China on each other also continues to decrease by 3.5% and 2.3%, respectively¹⁹.

This outlook, which is generally mentioned, reveals that there is a process of change of direction and rebalancing in global trade rather than a complete rupture, and that while the relations between the major centers remain relatively stable, the trade ties of the peripheral countries are reshaped.

In the next section, the developments in the trade of goods and services, which are the two main locomotives of trade, are examined separately.

¹⁵ UN Trade & Development. (2026, April). Global trade update: Facts and figures (Report No. UNCTAD/DITC/INF/2026/4)

¹⁶ UN Trade & Development. (2026, April). Global trade update: Facts and figures (Report No. UNCTAD/DITC/INF/2026/4)

¹⁷ UN Trade & Development. (2026, April). Global trade update: Facts and figures (Report No. UNCTAD/DITC/INF/2026/4)

¹⁸ UN Trade & Development. (2026, April). Global trade update: Facts and figures (Report No. UNCTAD/DITC/INF/2026/4)

¹⁹ UN Trade & Development. (2026, April). Global trade update: Facts and figures (Report No. UNCTAD/DITC/INF/2026/4)

1.2.1. Trade in Goods

Trade in goods refers to the purchase and sale between countries of products that are physically produced and can be transported across borders. In this context, agricultural products, energy and mining products, industrial goods, intermediate goods, consumer goods and capital goods constitute the main elements of trade in goods.

With the fragmentation of production processes on an international scale and the spread of value chains across different countries, global trade in goods has become the main carrier of economic integration between countries. While logistics infrastructure, energy and commodity prices, trade policies and global demand conditions directly affect the course of goods trade, technology-intensive products and intermediate goods have recently emerged as the determining components of growth in trade in goods.

Global trade in goods, with a volume of approximately USD 25 trillion, contracted by 0.9% in 2023, then showed a strong recovery of 2.8% in

2024, and the growth estimate for 2025 was revised upwards to 2.4%. By contrast, the growth rate projected for 2026 falls to 0.5%, indicating that the momentum seen in 2025 was largely temporary.

When regional export performances are examined, Asia at 5.3% and Africa at 5.3% stand out in 2025 as the main sources of global trade growth. Export growth in Europe remained limited at 0.7%, while the contraction in exports in North America at -3.1% is noteworthy. On the import side, Africa at 11.8%, South America at 8.8% and Asia at 5.7% stand out with strong increases; by contrast, the marked decline in imports in North America at -4.9% points to a change in the composition of global demand.

Overall, this picture shows that global trade in goods followed a regionally uneven but relatively lively course in 2025, while in 2026 a pronounced slowdown is expected on both the export and import sides, particularly in regions such as North America and the Middle East. This outlook reveals that global trade growth is becoming increasingly centred on Asia and Africa, and that global trade momentum is weakening towards 2026 (**Table 1.2.**).

Table 1.2. Annual proportional change in the volume of world trade in goods (2023-2026)²⁰

	2023	2024	2025	2026
World Trade in Goods	-0,9	2,8	2,4	0,5
Exports				
North America	3,6	2,3	-3,1	-1,0
South America	2,4	6,2	2,4	-1,9
Europe	-2,9	-1,7	0,7	2,0
CIS	-4,3	2,3	-0,7	3,5
Africa	5,7	1,3	5,3	0,0
Middle East	8,1	3,7	2,0	-0,9
Asia	0,2	8,0	5,3	0,0
Imports				
North America	-2,2	4,7	-4,9	-5,8
South America	-4,0	6,0	8,8	-0,6
Europe	-4,9	-2,3	2,4	0,8
CIS	18,0	4,8	2,7	2,6
Africa	2,6	2,6	11,8	5,4
Middle East	8,6	11,8	3,7	1,8
Asia	-0,7	5,1	5,7	2,7

²⁰ WTO, Global Trade Outlook and Statistics Update, October 2025.

Global trade trends at sectoral level

Growth in total trade in goods was driven primarily by manufacturing products. In particular, office and telecommunications equipment at 18% and electronic components at 10% recorded the strongest increases, raising the weight of technology-driven demand in global trade. Chemicals at 10%, other machinery at 9% and general manufactured goods at 9% were also among the main items supporting growth.

By contrast, trade in fuels and mining products continued to contract; fuel trade fell by 11%, becoming the main factor pulling total growth down. Iron and steel products also showed negative performance. Trade in agricultural products and food made a stable but limited contribution with a 7% increase. Overall, the data show that the recovery in global trade in goods in 2025 acquired a structure based on industrial and technology-intensive products rather than energy and raw materials.

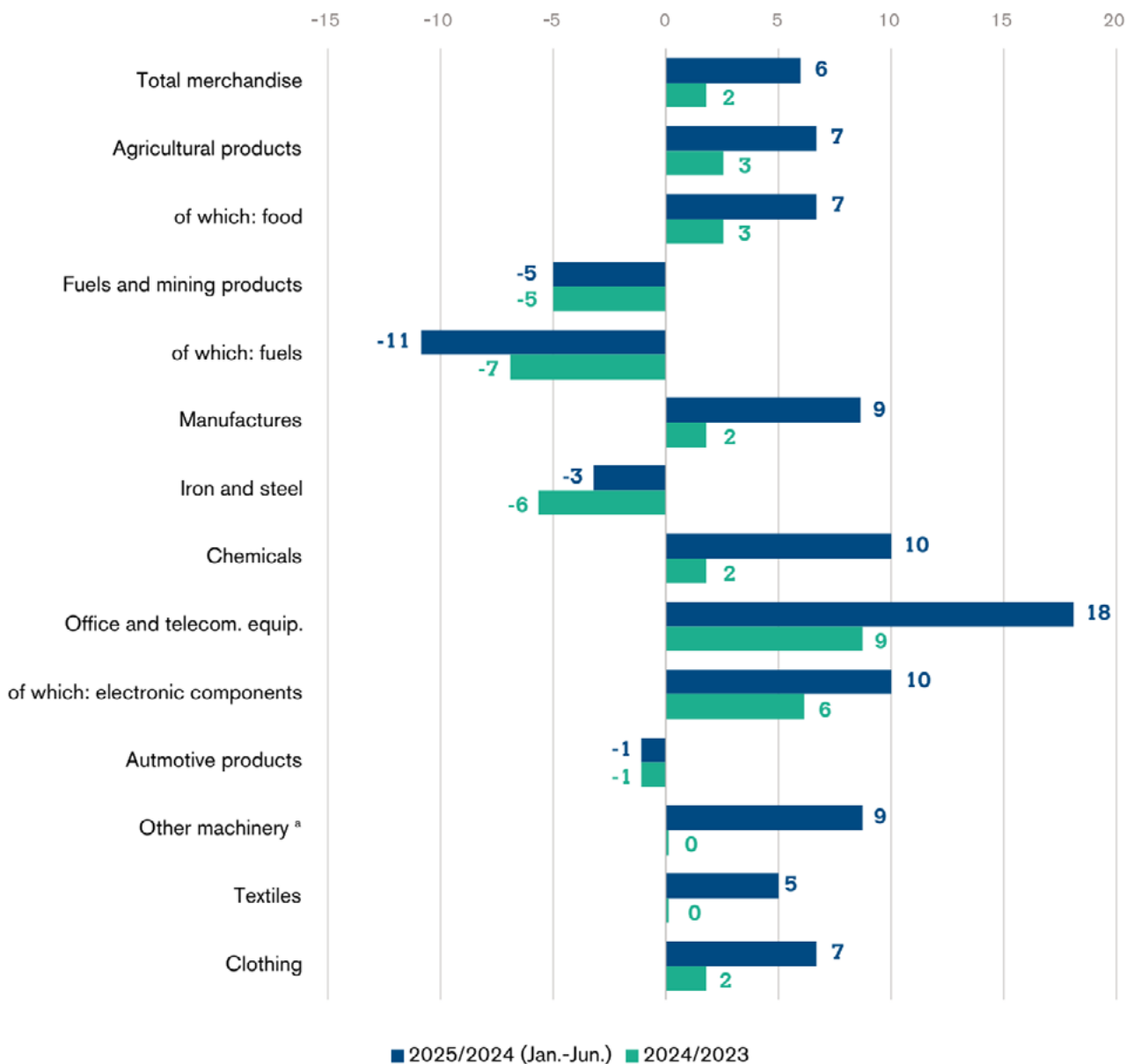


Figure 1.5. Annual goods trade growth rates by product²¹

In the first half of 2025, the main driving force behind global trade growth was products related to artificial intelligence. In approximately 100 product items including semiconductors, processors, servers, computers and telecommunications equipment, trade volume increased by more than 20% year on year, rising from USD 1.61 trillion in the first half of 2024 to USD 1.92 trillion in the first half of 2025. By contrast, trade growth in non-AI products remained below 4%.

While AI-related products account for approximately 15% of global trade in goods, their effect on the increase in total trade was proportionately greater. This outlook indicates that the structure of global production and trade is being reshaped around digitalisation and artificial intelligence. Growth has not been limited to final technology products, but has spread to all stages of the digital value chain, including silicon, special gases, semiconductor manufacturing machinery and hardware that powers data centres. In the United States, companies bringing imports forward ahead of expected customs duty increases temporarily accelerated trade in the first quarter; in the second quarter, this effect weakened as inventories were drawn down.

The regional distribution of AI-related trade in the first half of 2025 showed a clear asymmetry. Approximately one fifth of the global increase originated from North America. In the United States in particular, the strong increase in semiconductor imports at 36.2% and more moderate growth in servers and data processing equipment at 10% pointed both to companies building inventories before expected tariffs and to investment in cloud and data-centre capacity. Mexico stood out further within the region with import growth approaching 30%, led by semiconductors and telecommunications equipment, while Canada made a more limited contribution but remained part of the same integration process. The European Union contributed around one tenth of global AI trade growth; increases were concentrated mainly in servers and telecommunications equipment, but this expansion was not as rapid as in North America and instead reflected a gradual renewal of digital infrastructure under weak macroeconomic conditions and a limited investment cycle.

The Far East region played an important role in the increase in AI trade. The region accounted for around two thirds of global AI trade growth, and East Asia maintained its position as the main production and export centre of the global supply chain through semiconductors and advanced technology equipment.

East Asia continued to be at the centre of the AI-related global supply chain in the first half of 2025. While Korea, Japan and Chinese Taipei retained their positions as major suppliers of high-value-added semiconductors and advanced telecommunications equipment, Southeast Asian economies such as Viet Nam and Thailand significantly strengthened their regional roles thanks to increasing investment and supply-chain diversification. Although China's total increase in AI-related exports remained limited, the strong rise in shipments to intra-regional markets and Mexico shows that China remains deeply integrated into global AI supply chains.

In other regions, AI-related trade also accelerated from a lower starting point. In the Middle East, led by Saudi Arabia and the United Arab Emirates, imports of servers and telecommunications hardware increased as part of publicly supported digital transformation programmes. In South America, particularly in Brazil and Chile, there was a marked increase in equipment imports for IT and cloud infrastructure in parallel with the expansion of regional centres by cloud service providers. These developments show that AI-oriented trade, while spreading geographically over a wider area, still retains an Asia-centred structure.

1.2.2. Trade in Services

Commercial services refer to service activities provided between countries without the physical movement of goods and generating cross-border economic value. In this context, transport, travel or tourism, financial services, insurance, telecommunications, IT, consultancy, engineering, licence and royalty income, and digitally delivered services fall under the heading of commercial services. Today, commercial services constitute an increasing share of global trade and play a strategic role in countries' foreign trade structures, particularly through digitalisation, remote service delivery and the service intensification of global value chains.

As of 2025, global commercial services reduced their growth rate but preserved their structural direction. While the increase in total services trade slowed compared with previous years, this slowdown is especially evident in transport and travel. Transport followed a more limited path in parallel with the weakening of goods trade, while travel services entered a more balanced growth path following the strong post-pandemic recovery. By contrast, “other commercial services”, and

particularly digitally delivered services, display a more stable and relatively strong performance. The chart shows that digital services continue to be the fastest-growing service category over the long term and that this trend is maintained in the 2025–2026 projections. This outlook shows that growth in global services trade is now driven mainly by digitalisation and knowledge-intensive activities, while traditional service categories make a more limited contribution (**Figure 1.6**).

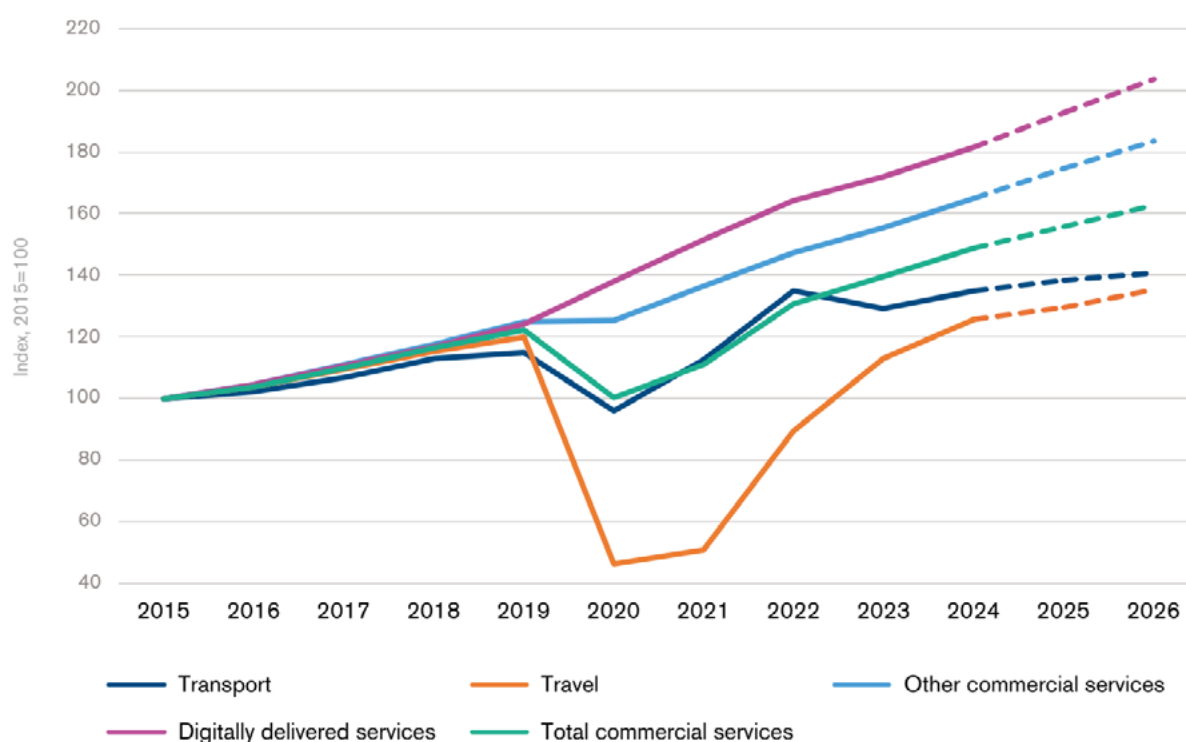


Figure 1.6. Proportional change in exports of commercial services (Index, 2015=100)²²

A decline in trade volume reduces demand for transport and logistics. Lower consumer spending weakens international tourism and retail, while slower business activity places pressure on finance and professional services.

Global services exports increased at high rates of 6.8% in both 2023 and 2024; however, the growth rate is expected to fall to 4.6% in 2025 and 4.4% in 2026. This outlook indicates that, although services trade is more resilient than trade in goods, it too has entered a process of normalisation.

From a regional perspective, Asia continues to be the main supporter of growth in services trade. However, the region’s growth rate also declined from 11.1% in 2024 to 4.6% in 2025. In Europe, services exports follow a relatively stable course, growing by 5.4% in 2025 and 4.6% in 2026. By contrast, services trade growth in North and South America remains more limited, becoming confined to the 2%–2.5% band in 2025–2026. In Africa and the Middle East, growth is seen to have weakened markedly after the high increases recorded in 2023 (**Table 1.3**).

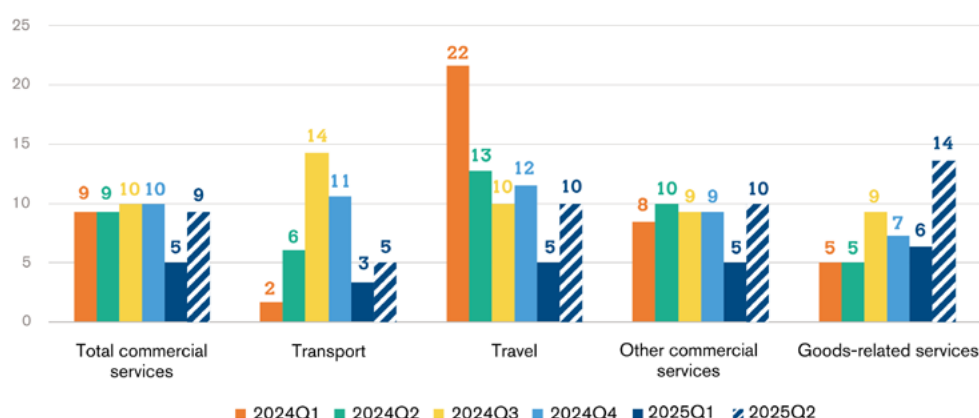
Table 1.3. Increase rates in commercial services by regions and sectors (%)²³

CATEGORY / REGION	2023	2024	2025	2026
Global Exports	6,80	6,80	4,60	4,40
By Region				
North America	5,10	4,10	2,40	2,40
South America	7,10	7,00	1,60	1,60
Europe	2,60	5,50	5,40	4,60
CIS (Commonwealth of Independent States)	7,20	8,10	3,50	3,00
Africa	15,90	4,90	1,30	2,10
Middle East	9,90	4,10	4,40	3,90
Asia	15,40	11,10	4,60	5,50
By Sector				
Transportation	-4,40	4,50	2,50	1,80
Travel	26,40	11,00	3,10	4,40
Other Commercial Services	5,40	6,30	5,80	5,10
Digital Services Delivered	4,70	5,70	6,10	5,60

The sectoral distribution reveals the structural transformation of services trade more clearly. After the recovery in 2024, transport services move to low growth in 2025 and 2026, at 2.5% and 1.8% respectively. Growth in travel services slows markedly after the strong post-pandemic momentum, though it recovers relatively to 4.4% in 2026. By contrast, other commercial services and especially digitally delivered services continue to be the most dynamic components of global services trade, with growth rates within the 5%-6% band in 2025-2026. This picture once again clearly demonstrates that the weight of global trade is gradually shifting towards digital and knowledge-intensive services.

In the first quarter of 2025, growth in global commercial services trade slowed significantly and fell to approximately 5% year on year, about

half the pace recorded in 2023 and 2024. The appreciation of the US dollar against the euro and other currencies, together with rising economic uncertainties, was influential in this slowdown. Regionally, services export growth in Europe and North America remained limited to 3%, while Asia stood apart with a growth rate of 9%. Sectoral distribution data show that travel services in particular maintained a strong course throughout 2024, but that this momentum weakened in the first half of 2025. Growth in transport services remained volatile and relatively low, while other commercial services showed a more stable increase. By contrast, services linked to goods trade came to the fore with an increase reaching 14% in the second quarter of 2025, showing that growth in services trade shifted more towards areas connected with goods trade (**Figure 1.7**).

**Figure 1.7.** Growth in trade in business services by major sectors, 2024Q1-2025Q2²⁴²³ WTO, Global Trade Outlook and Statistics Update, October 2025.²⁴ WTO, Global Trade Outlook and Statistics Update, October 2025.

Holistic Logistic Approach in Port Management



Project and Heavy Transportation



Project Transportation and Chartering



General Cargo



Project Cargo



Container



Vehicle Handling

In the first half of 2025, the outlook for commercial services trade in selected economies diverged significantly across countries and sectors. Growth in total commercial services reached double digits particularly in the United Kingdom, the Netherlands, China and India, while it remained more limited in the United States, Germany and France. The picture in transport services was weaker, with low growth or contraction in many advanced economies; by contrast, China and the Netherlands recorded strong increases in transport. Travel services continued to be one of the main drivers of growth. Export growth in

China reached exceptionally high levels, while strong increases were also observed in Japan, the Netherlands and the United Kingdom. In the “other commercial services” category, the United Kingdom, India and Ireland came to the fore, demonstrating the increasing importance of digital, professional and business services. Overall, the data show that in the first half of 2025 growth in commercial services trade was concentrated in a few countries and sectors; transport remained weak, while travel and knowledge-intensive services became the main driving forces of global services trade (**Figure 1.8.**).

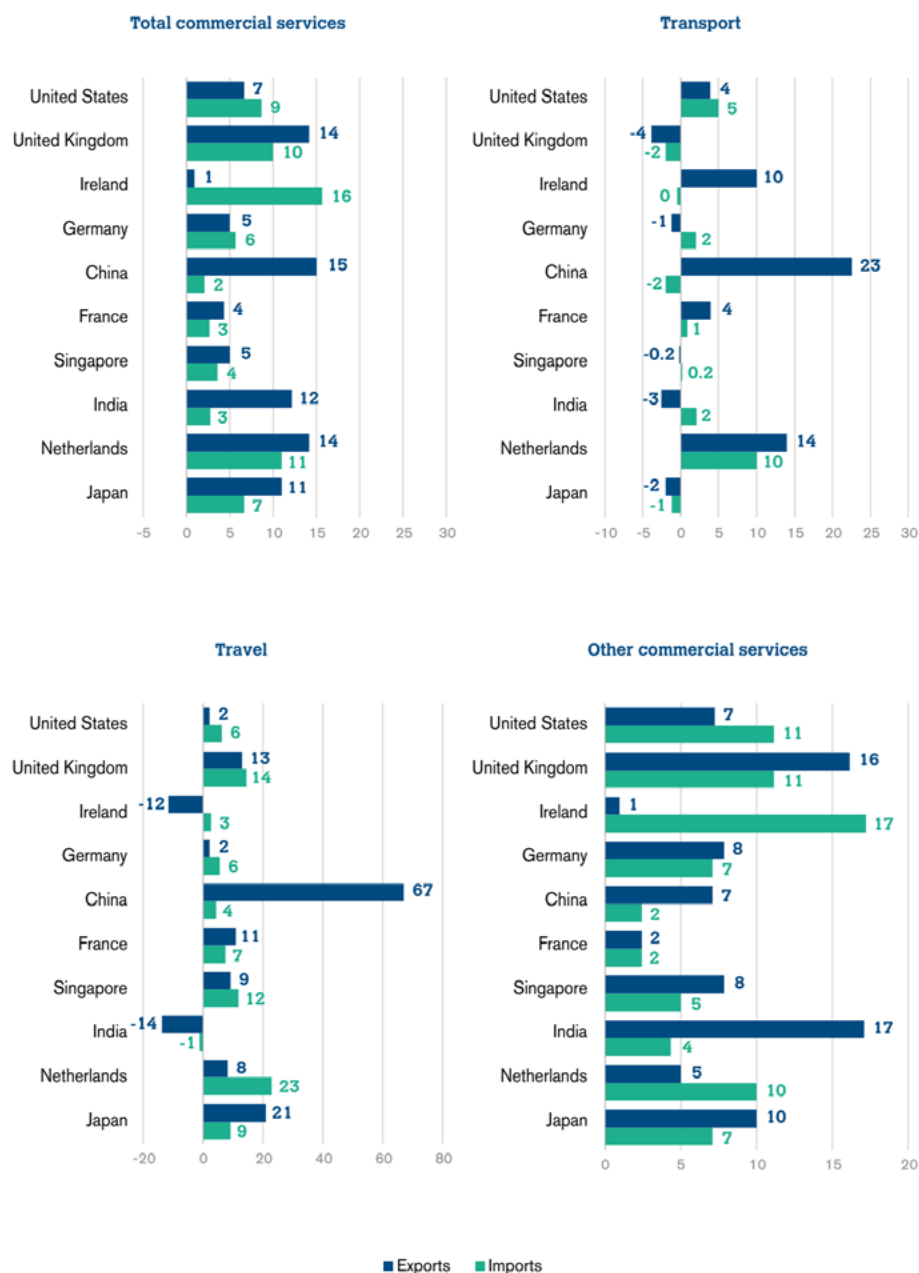


Figure 1.8. Development in important countries and sectors in trade in commercial services²⁵

²⁵ WTO, Global Trade Outlook and Statistics Update, October 2025.



1.3. Outlook by Country

Advanced economies constitute the centre of gravity of global economic balances. However, the trade structures of these countries differ from one another in fundamental ways:

- **China:** With exports of USD 3.57 trillion and a 14.6% share of the world market, China has opened a gap of approximately USD 1.5 trillion over its nearest competitor, the United States, in trade in goods. Although it rose to fifth place in services exports with aggressive growth of 17%, it is the world's second largest services importer at USD 608 billion. This shows that China is seeking to support its production strength with logistics and technological services.
- **United States:** Despite recording a massive deficit of USD 1.3 trillion in trade in goods, its USD 307 billion surplus in services trade symbolizes the consumption- and technology-oriented structure of the US economy.

On the other hand, with services exports of USD 1.12 trillion, it is the unrivalled leader in services trade, with a 12.8% share. It sets global standards in high-value-added areas such as finance, software and royalties.

- **Germany:** Germany, the world's third largest exporter with exports of USD 1.68 trillion, is Europe's largest exporter. However, the 1% contraction in 2024 data reflects the industrial slowdown across Europe. In services trade, Germany ranks fourth globally on both the export side, at USD 466 billion, and the import side, at USD 550 billion. With its USD 260 billion surplus in goods trade, it has the strongest external trade balance on the continent.

These three leading actors in global trade alone control approximately 30% of total goods exports and around 25% of services exports. This concentration clearly shows how sensitive global supply chains are to the growth projections of these three economies (**Table 1.4. and 1.5.**).

Table 1.4. Leading Exporters and Importers in World Trade in Goods (Billion dollars, 2024)²⁶

#	Exporting Countries	Value	Share (%)	#	Importing Countries	Value	Share (%)
1	China	3.577	14,6	1	United States	3.359	13,6
2	United States	2.065	8,4	2	China	2.585	10,4
3	Germany	1.682	6,9	3	Germany	1.422	5,7
4	Netherlands	921	3,8	4	United Kingdom	816	3,3
5	Japan	707	2,9	5	Netherlands	814	3,3
6	South Korea	684	2,8	6	France	750	3,0
7	Italy	674	2,8	7	Japan	743	3,0
8	Hong Kong (China)	646	2,6	8	India	718	2,9
9	France	639	2,6	9	Hong Kong (China)	704	2,8
10	Mexico	617	2,5	10	Mexico	644	2,6
11	United Arab Emirates	604	2,5	11	South Korea	632	2,5
12	Canada	569	2,3	12	Italy	615	2,5
13	Belgium	536	2,2	13	Canada	574	2,3
14	United Kingdom	513	2,1	14	United Arab Emirates	544	2,2
15	Singapore	506	2,1	15	Belgium	514	2,1
16	Taiwan	474	1,9	16	Spain	472	1,9
17	Switzerland	447	1,8	17	Singapore	459	1,9
18	India	443	1,8	18	Taiwan	401	1,6
19	Russian Federation	433	1,8	19	Vietnam	381	1,5
20	Spain	424	1,7	20	Poland	379	1,5
21	Vietnam	405	1,7	21	Switzerland	369	1,5
22	Poland	380	1,6	22	Türkiye	344	1,4
23	Australia	341	1,4	23	Thailand	307	1,2
24	Brazil	337	1,4	24	Malaysia	300	1,2
25	Malaysia	330	1,4	25	Russian Federation	300	1,2
26	Saudi Arabia	305	1,2	26	Australia	296	1,2
27	Thailand	301	1,2	27	Brazil	278	1,1
28	Indonesia	265	1,1	28	Indonesia	234	0,9
29	Czech Republic	263	1,1	29	Czech Republic	233	0,9
30	Türkiye	262	1,1	30	Saudi Arabia	233	0,9
	Top 30 Total	20.348	83		Top 30 Total	20.422	82
	World	24.456	100		World	24.783	100

²⁶ WTO, Global Trade Outlook and Statistics Update, October 2025.

Table 1.5. Leading Exporters and Importers in Business Services (USD Billion, 2024)²⁷

#	Exporting Countries	Value	Share (%)	#	Importing Countries	Value	Share (%)
1	United States	1.122	13	1	United States	815	10,2
2	United Kingdom	645	7,4	2	China	608	7,6
3	Ireland	519	5,9	3	Germany	550	6,9
4	Germany	466	5,3	4	Ireland	467	5,8
5	China	444	5,1	5	United Kingdom	399	5,0
6	France	398	4,5	6	Singapore	351	4,4
7	Singapore	395	4,5	7	France	340	4,3
8	India	374	4,3	8	Netherlands	304	3,8
9	Netherlands	333	3,8	9	India	268	3,4
10	Japan	225	2,6	10	Japan	243	3,0
11	Spain	220	2,5	11	Switzerland	214	2,7
12	Switzerland	177	2,0	12	Italy	162	2,0
13	UAE	176	2,0	13	South Korea	161	2,0
14	Luxembourg	170	1,9	14	Belgium	159	2,0
15	Canada	158	1,8	15	Canada	159	2,0
16	Italy	154	1,8	16	Luxembourg	130	1,6
17	Belgium	145	1,7	17	Sweden	125	1,6
18	South Korea	138	1,6	18	Denmark	121	1,5
19	Denmark	127	1,4	19	Spain	111	1,4
20	Poland	118	1,3	20	Australia	107	1,3
21	Sweden	116	1,3	21	UAE	106	1,3
22	Türkiye	115	1,3	22	Brazil	101	1,3
23	Hong Kong, China	109	1,2	23	Saudi Arabia	94	1,2
24	Austria	93	1,1	24	Hong Kong, China	90	1,1
25	Israel	84	1,0	25	Austria	88	1,1
26	Australia	83	0,9	26	Russian Federation	80	1,0
27	Thailand	71	0,8	27	Poland	75	0,9
28	Portugal	62	0,7	28	Thailand	73	0,9
29	Taiwan	58	0,7	29	Taiwan	71	0,9
30	Mexico	57	0,7	30	Mexico	67	0,8
				34	Türkiye	52	0,8
Top 30 Total		7.355	84	Top 30 Total		6.640	83
World		8.762	100	World		7.988	100

From the perspective of trade balances, during 2024 and 2025 China continued to be the main economy with a high and persistent surplus in goods trade. Although the surplus fluctuated periodically, the overall trend was maintained. By contrast, the United States displayed a large and structural trade deficit throughout the period, with the deficit becoming especially pronounced in the first quarter of 2025. While the European Union generated a limited but stable trade surplus, the United Kingdom and India recorded smaller deficits. Japan and the Russian Federation, despite periodic fluctuations, stood apart with positions generally close to balance or with limited surpluses or deficits.

On the other hand, trade imbalances between advanced economies and developing economies are not widening sharply, but they do indicate that the structural asymmetries of global trade persist. In particular, the high deficit of the United States and the position of East Asian surplus economies show that the balance in the global trading system has not fully normalised in the short term. At this point, bilateral trade between countries can be considered.

Trends in bilateral trade balances

- In 2025, global bilateral goods-trade imbalances remain at high levels. However, the picture shows contraction in some trade relationships and expansion in others.
- The United States' trade deficits stand at USD 202 billion with China and USD 190 billion with the European Union. By contrast, US deficits with China, the EU and Canada narrowed in the third quarter; for example, the deficit with China fell by USD 28 billion²⁸. Conversely, deficits with Mexico, at USD 197 billion, and Viet Nam, at USD 178 billion, widened²⁹.
- China's trade surpluses increased markedly with certain countries. China's surplus with Vietnam reached USD 100.1 billion, while its surplus with the EU reached USD 190 billion. On the other hand, China's deficits with Australia, at USD 11 billion, and Chinese Taipei, at USD 21 billion, narrowed³⁰.
- The European Union continues to record a large deficit of USD 190 billion with China, and this deficit increased by USD 22 billion in the third

quarter. By contrast, the EU's deficit with the United States narrowed by USD 15 billion.

- The overall picture shows that global trade imbalances are not decreasing, but are being redistributed by changing direction between countries. The countries recording deficits and surpluses remain largely the same, while the change is seen mainly in the composition of trading partners.

Data for the 2024-2025 period show that global trade is experiencing a structural divergence between goods and services. In global trade volume approaching USD 35 trillion, trade in goods preserves its dominance in volume terms, but growth momentum is shifting towards the services sector.

If the state of global trade and the general situation in Türkiye are summarised, the following main points emerge:

- **Global leadership and balance:** With its enormous foreign trade surplus of USD 1.19 trillion in goods trade, China has reinforced its role as the "production centre" in the global supply chain. By contrast, the United States maintains its identity as an exporter of services and technology by compensating for its goods-trade deficit with a strong services surplus of USD 307 billion³¹.
- **Resilience of the services sector:** While goods-trade growth is expected to change by 1.9% in the baseline scenario of the 2026 projections, services trade maintaining growth momentum of 4.8% proves the increasing strategic importance of digitalisation and tourism in the global economy^{32, 33}.
- **Türkiye's strategic position:** Although Türkiye records a foreign trade deficit in goods trade, in services trade it achieved exports of USD 117.2 billion and imports of USD 55.8 billion, including primarily USD 56 billion from tourism and USD 41 billion from transport, thereby recording a services-trade surplus of USD 61.4 billion. With these figures, Türkiye maintains its 22nd place among global services exporters, and services trade serves as a critical buffer for the current account balance³⁴.

In the following sections, economic and trade developments in Türkiye are examined in detail.

²⁸ <https://www.washingtonpost.com/ripple/2026/01/12/trump-trade-europe-eu-dollar-depreciation-finance-exchange-rate/>

²⁹ <https://www.fool.com/research/us-trade-balance/>

³⁰ <https://www.visualcapitalist.com/cp/china-massive-trade-surplus/>

³¹ <https://www.dw.com/en/china-logs-record-trade-surplus-in-2025-amid-trump-tariffs/a-75497456?maca=en-rss-en-top-1022-rdf>

³² <https://www.cnbc.tv/18.com/world/west-asia-crisis-impact-wto-sees-global-merchandise-trade-growth-slowing-to-1-9-pc-in-2026-strait-of-hozmuz-ws-l-19871959.htm/amp>

³³ <https://ceomorningbrief.theedgemalaysia.com/article/2026/1123/World/16/796931>

³⁴ <https://veriportal.tuik.gov.tr/tr/press/54191>

1.4. Developments and Expectations in the Turkish Economy and Trade³⁵

According to TURKSTAT data, annual GDP calculated as the sum of four quarters by the production method increased by 3.6% in 2025 compared with the previous year (Table 1.6). GDP at current prices by the production method increased by 41.3% compared with the previous year and reached TL 63 trillion. GDP per capita was calculated at TL 712,000 at current prices and USD 18,000 in US dollar terms.

When the activities composing GDP are examined on the basis of the chained volume index in 2025

compared with the previous year, total value added increased by 10.8% in construction, 8.0% in information and communication activities, 6.9% in taxes less subsidies on products, 4.6% in trade, transport, accommodation and food services, 4.3% in other service activities, 4.0% in professional, administrative and support service activities, 3.8% in financial and insurance activities, 2.9% in industry, 2.7% in real estate activities, and 1.0% in public administration, education, human health and social work activities. The agricultural sector, however, decreased by 8.8%. The quarterly and annual totals for GDP can be seen in **Table 1.6**³⁶.

Table 1.6. Türkiye's GDP Development (In current prices)³⁷

Year	Quarter	GDP		Change (%)
		Million TL	Million \$	
2024	I	9 075 604	293 781	5,3
	II	10 142 412	314 092	2,3
	III	12 307 887	370 600	2,8
	IV	13 061 323	379 781	3,2
	Annual	44 587 225	1 358 255	3,3
2025	I	12 524 736	346 561	2,5
	II	14 556 835	377 011	4,7
	III	17 472 040	434 143	3,8
	IV	18 467 295	438 605	3,4
	Annual	63 020 906	1 596 320	3,6

Türkiye's foreign trade

Türkiye's foreign trade increased by 5.4% in US dollar value terms in 2025 compared with the previous year and reached USD 639 billion. Exports increased by

4.4% to USD 273 billion, while imports rose by 6.2% to USD 366 billion. In 2025, the export-import coverage ratio was 74.8%, which means a foreign trade deficit of USD 92 billion (**Table 1.7.**).

Table 1.7. Foreign Trade Data Between 2016-2025 (\$ Million)³⁸

Year	Export		Import		Total		Foreign Trade Balance	Exp./Imp. (%)
	Value	Change (%)	Value	Change (%)	Value	Change (%)		
2016	149.247	-1,1	202.189	-5,4	351.436	-3,6%	-52.942	73,8
2017	164.495	10,2	238.715	18,1	403.210	14,7%	-74.221	68,9
2018	177.169	7,7	231.152	-3,2	408.321	1,3%	-53.984	76,6
2019	180.833	2,1	210.345	-9,0	391.178	-4,2%	-29.512	86,0
2020	169.637	-6,2	219.516	4,4	389.154	-0,5%	-49.840	77,3
2021	225.214	32,8	271.425	23,6	496.640	27,6%	-46.133	83,0
2022	254.169	12,9	363.710	34,0	617.880	24,4%	-109.540	69,9
2023	255.627	0,6	361.967	-0,5	617.594	0,0%	-106.339	70,6
2024	261.778	2,4	344.010	-5,0	605.788	-1,9%	-82.165	76,1
2025	273.361	4,4	365.370	6,2	638.731	5,4%	-92.009	74,8

³⁶ <http://www.tuik.gov.tr/>

³⁷ <http://www.tuik.gov.tr/>

³⁸ <http://www.tuik.gov.tr/>

As of 2025, the top three markets for Türkiye's exports were Germany, the United Kingdom and the United States, respectively. Exports to Germany increased by 8.5% in the 2024-2025 period to reach USD 22.2 billion, consolidating Germany's position as Türkiye's largest export market. Exports to the United Kingdom rose by 9.7% over the same period, reaching USD 16.8 billion. By contrast, exports to the United States remained broadly flat, with a limited decline of 0.1% to USD 16.3 billion.

This outlook shows that European markets continue to show a strong growth trend in Türkiye's exports, while the US market remains stagnant. In 2025, notable increases in exports to Germany, the United Kingdom and France stood out; declines in some markets such as the Russian Federation, Iraq and the Netherlands reveal the sensitivity of exports to geopolitical and regional risks. By contrast, high growth rates in markets such as Belgium, Morocco, Syria and Ukraine show that Türkiye is attempting to balance its exports through both product and market diversification. The fact that the top 20 countries account for 73% of total exports

confirms that exports remain concentrated around a relatively limited number of major markets.

In imports, the top three countries are China, the Russian Federation and Germany. Imports from China increased by 10.3% in 2025 to USD 49.6 billion, strengthening China's position as Türkiye's largest supplier. Imports from the Russian Federation fell by 3.7% over the same period to USD 42.4 billion; this decline is largely associated with changes in energy prices and volumes. Imports from Germany increased by 11.2% to USD 30.1 billion, confirming the importance of industrial intermediate goods and capital goods in imports. These data show that supply chains centred on Asia and Europe continue to play a determining role in Türkiye's import structure. By contrast, high increases in imports from countries such as Switzerland, the UAE, Kazakhstan and Romania point to shifts in gold, energy and intermediate-goods items. The top 20 countries accounting for around 65% of imports shows that imports have a slightly more dispersed geographical structure than exports, while still remaining strongly connected to Asia- and Europe-centred supply chains (**Table 1.8.**).

Table 1.8. Top 20 Foreign Trade Countries (*000 \$)³⁹

EXPORT				IMPORT			
COUNTRY NAME	2024	2025	24/25 (%)	COUNTRY NAME	2024	2025	24/25 (%)
Germany	20.430.837	22.167.230	8,5	China	44.928.378	49.575.937	10,3
UK	15.288.584	16.772.905	9,7	Russia	44.018.357	42.373.069	-3,7
USA	16.351.106	16.327.645	-0,1	Germany	27.084.054	30.109.548	11,2
Italy	12.947.403	13.231.836	2,2	United States	16.226.248	18.079.618	11,4
Iraq	13.001.359	12.379.754	-4,8	Switzerland	11.173.800	15.738.062	40,8
France	10.043.494	11.196.257	11,5	Italy	19.310.662	15.735.723	-18,5
Spain	9.781.479	10.422.061	6,5	France	12.499.802	12.855.946	2,8
UAE	8.295.812	9.281.488	11,9	South Korea	9.245.625	10.260.773	11,0
Romania	7.779.940	8.567.536	10,1	Spain	9.362.739	10.166.730	8,6
Netherlands	8.567.464	8.148.752	-4,9	UAE	7.363.388	9.673.711	31,4
Russia	8.561.686	6.725.001	-21,5	UK	6.845.513	7.255.095	6,0
Poland	6.262.363	6.481.868	3,5	India	7.021.135	6.081.685	-13,4
Bulgaria	5.150.370	5.575.889	8,3	Poland	5.574.868	6.030.027	8,2
Greece	4.817.377	5.360.693	11,3	Netherlands	5.021.340	5.159.157	2,7
Belgium	4.361.711	5.026.870	15,2	Japan	4.737.223	5.029.507	6,2
Morocco	3.440.903	4.333.259	25,9	Malaysia	4.667.018	5.028.981	7,8
Egypt	4.175.858	4.078.965	-2,3	Romania	3.984.494	4.817.786	20,9
Ukraine	3.537.514	3.973.041	12,3	Kazakhstan	3.385.644	4.664.076	37,8
Saudi Arabia	3.985.352	3.809.033	-4,4	Brazil	3.864.457	4.547.267	17,7
Syria	2.182.787	3.493.628	60,1	Belgium	3.874.260	4.236.520	9,4
Top 20 Total	250.189.004	267.419.219	6,9	Top 20 Total	168.963.397	177.353.712	5,0
Türkiye	261.778.131	273.361.210	4,4	Türkiye	344.010.273	365.369.913	6,2
Top 20 Share	72,73%	73,19%	0,5	Top 20 Share	64,54%	64,88%	0,5

³⁹ <http://www.tuik.gov.tr/>

As noted above, Türkiye's foreign trade deficit in 2025 was USD 92 billion, with the largest deficits recorded with China, Russia, Switzerland and South Korea. The trade deficit with China and Russia alone was USD 46 billion and USD 35 billion respectively. More balanced trade with these countries could contribute to closing the foreign trade deficit and even generating an export surplus (**Table 1.8**).

As of 2025, the top three provinces in exports are Istanbul, Ankara and Izmir. Istanbul's exports increased by 4.2% in the 2024-2025 period to

USD 131.3 billion, maintaining its leading position in Türkiye's total exports. Ankara achieved a high growth rate of 23.7% over the same period, raising its exports to USD 18.5 billion and displaying a noteworthy performance. Izmir's exports recorded only a limited increase of 0.9%, reaching USD 17.0 billion. While total exports of the top 10 provinces increased by 5.0%, their share in Türkiye's exports rose to 83.25%, showing that exports continue to be concentrated largely in certain centres (**Table 1.9**).

Table 1.9. Top 10 Provinces in Our Foreign Trade (*000, \$)⁴⁰

EXPORT				IMPORT			
PROVINCES	2024	2025	24/25	PROVINCES	2024	2025	24/25
Istanbul	126.035.409	131.325.120	4,2%	Istanbul	194.410.948	206.373.018	6,2%
Ankara	14.987.918	18.533.886	23,7%	Ankara	17.222.561	20.863.084	21,1%
Izmir	16.886.422	17.039.409	0,9%	Kocaeli	16.309.215	15.328.979	-6,0%
Bursa	12.357.466	13.520.470	9,4%	Izmir	12.526.014	12.864.695	2,7%
Kocaeli	13.186.678	13.285.265	0,7%	Bursa	9.584.125	11.787.456	23,0%
Gaziantep	10.310.473	10.720.331	4,0%	Mersin	8.095.936	8.540.494	5,5%
Mersin	8.292.363	8.407.275	1,4%	Gaziantep	6.814.718	7.154.222	5,0%
Sakarya	6.592.677	6.228.394	-5,5%	Hatay	6.548.085	6.776.463	3,5%
Denizli	4.417.235	4.675.687	5,9%	Sakarya	4.333.086	4.361.278	0,7%
Kayseri	3.751.929	3.847.095	2,5%	Manisa	3.536.456	4.174.910	18,1%
Top 10	216.818.569	227.582.933	5,0%	Top 10	279.381.144	298.224.600	6,7%
Türkiye	261.778.131	273.361.210	4,4%	Türkiye	344.010.273	365.369.913	6,2%
Top 10 Share	82,83%	83,25%	0,5%	Top 10 Share	81,21%	81,62%	0,5%

In imports, the top three provinces are Istanbul, Ankara and Kocaeli. Istanbul's imports increased by 6.2% in 2025 to USD 206.4 billion, maintaining its position as the main centre of the country's imports. Ankara's imports rose by 21.1% over the same period to USD 20.9 billion, significantly increasing the capital's share in imports. Kocaeli's imports declined

by 6.0% to USD 15.3 billion; this may be associated with demand and price developments in industrial inputs. While the total imports of the top 10 provinces increased by 6.7%, their share in Türkiye's imports rose to 81.62%, showing that imports are also highly concentrated in major industrial and commercial centres (**Table 1.10**).

Table 1.10. Top 10 Chapters in Our Foreign Trade (*000, \$)⁴¹

EXPORT			
Product Chapters	2024	2025	24/25
Motor vehicles, etc.	32.437.400	36.727.817	13,2%
Boilers, machinery, mechanical appliances, etc.	25.552.948	25.919.279	1,4%
Electrical machinery and equipment, etc.	16.447.574	17.754.549	7,9%
Mineral fuels, mineral oils, etc.	16.551.435	15.253.783	-7,8%
Precious or semi-precious stones, precious metals, etc.	13.030.114	13.367.042	2,6%
Plastics and plastic products	10.920.365	11.215.700	2,7%
Iron and steel	10.182.170	10.738.054	5,5%
Articles of iron or steel	9.811.652	9.703.899	-1,1%
Knitted apparel and accessories	10.105.657	9.618.849	-4,8%
Non-knitted apparel and accessories	7.384.158	6.775.489	-8,2%
Top 10 Total	152.423.474	157.074.461	3,1%
Türkiye Total	261.778.131	273.361.210	4,4%
Top 10 Share	58,23%	57,46%	-1,3%
IMPORT			
Product Chapters	2024	2025	24/25
Mineral fuels, mineral oils, etc.	65.589.736	62.465.580	-4,8%
Boilers, machinery, mechanical appliances, etc.	39.557.553	41.644.032	5,3%
Motor vehicles, etc.	31.670.057	36.866.979	16,4%
Electrical machinery and equipment, etc.	27.223.055	29.970.360	10,1%
Precious or semi-precious stones, precious metals, etc.	24.872.874	28.110.541	13,0%
Iron and steel	23.658.704	22.205.564	-6,1%
Plastics and plastic products	15.626.410	15.626.857	0,0%
Organic chemical products	9.453.217	8.934.530	-5,5%
Optical, photographic, cinematographic, measuring, control, calibration, medical, and surgical instruments, etc.	6.788.672	7.733.776	13,9%
Copper and copper articles	6.013.008	7.493.886	24,6%
Top 10 Total	250.453.286	261.052.105	4,2%
Türkiye Total	344.010.273	365.369.913	6,2%
Top 10 Share	72,80%	71,45%	-1,9%

When the top 10 chapters in foreign trade are examined, motor vehicles ranked first in exports in 2025 with a growth rate of 13.2% and a volume of USD 36.7 billion, followed by boilers and machinery with USD 26 billion and electrical machinery and equipment with USD 18 billion. In the same year, the three most traded import chapters were mineral fuels, with a 5% decrease to USD 62 billion; boilers and machinery, with a 5.3% increase to USD 42 billion; and motor vehicles, with a 16% increase to USD 37 billion (**Table 1.10.**).

In 2025, export goods worth USD 134 billion were transported by sea, an increase of 5.2% compared with 2024, followed by road transport with USD 87 billion

and air transport with USD 28 billion. The value of export goods carried by rail increased by 3.3% to USD 1.9 billion.

On the other hand, in parallel with the balances in Türkiye's foreign trade, imports are dominant in maritime transport. In 2025, imported goods worth USD 196 billion were transported by sea, followed by road transport with USD 69 billion and pipelines with USD 54 billion. The value of goods imported by rail increased by 25% to USD 3.4 billion. In 2025, 56% of exports by value were conducted by sea, while this ratio was 54% for imports. The value data can be seen in **Tables 1.11 and 1.12**, while proportional data are presented in **Table 1.13**.

⁴⁰ <http://www.tuik.gov.tr/>

Table 1.11. Exports by Modes of Transport (Million \$)⁴²

	2021	2022	2023	2024	2025	24/25
Seaways	133.714	150.294	143.323	146.219	153.816	5,2%
Roadways	68.749	78.838	83.127	85.819	87.246	1,7%
Airways	18.736	20.688	25.507	25.981	28.277	8,8%
Pipeline	2.367	1.892	1.711	1.925	2.128	10,5%
Railways	1.648	2.457	1.960	1.834	1.894	3,3%
Grand Total	225.214	254.170	255.627	261.778	273.361	4,4%

Table 1.12. Imports by Modes of Transport (Million \$)⁴³

	2021	2022	2023	2024	2025	24/25
Seaways	157.391	193.796	195.353	187.718	196.026	4,4%
Roadways	48.897	59.447	66.955	66.010	69.463	5,2%
Airways	26.057	38.582	53.841	47.442	53.584	12,9%
Pipeline	36.190	68.917	43.821	40.143	42.933	7,0%
Railways	2.891	2.968	1.997	2.697	3.364	24,7%
Grand Total	271.426	363.711	361.967	344.010	365.370	6,2%

Table 1.13. Value Shares by Transport Types and Regimes in Foreign Trade (%)

	Seaways		Roadways		Airways		Railways		Pipeline	
	Export	Import	Export	Import	Export	Import	Export	Import	Export	Import
2021	59,5	52,3	31,3	19,1	7,5	17,0	0,8	1,0	1,1	13,3
2022	59,4	58,0	30,5	18,0	8,3	9,6	0,7	1,1	0,7	18,9
2023	59,1	53,3	31,6	17,1	8,1	10,6	1,0	0,8	0,7	12,1
2024	55,9	54,6	32,8	19,2	9,9	13,8	0,7	0,8	0,7	11,7
2025	56,3	53,7	31,9	19,0	10,3	14,7	0,7	0,9	0,8	11,8

Tonnage shares in foreign trade according to transportation types are also **Table 1.14**. It can be seen in . As can be seen from the table, the share of maritime transportation has been over 87% for the last 10 years.

Table 1.14. Tonnage Shares by Transport Types and Regimes in Foreign Trade (%)

Years	Seaways	Roadways	Airways	Railways	Pipeline
2016	88,0	10,8	0,3	0,5	0,4
2017	88,5	10,3	0,3	0,4	0,5
2018	88,7	10,3	0,4	0,4	0,2
2019	88,6	10,3	0,4	0,4	0,3
2020	88,8	9,4	0,2	0,6	1,1
2021	87,5	10,7	0,2	0,7	0,9
2022	86,8	11,5	0,6	0,7	0,6
2023	87,5	11,3	0,4	0,5	0,3
2024	86,1	12,6	0,5	0,6	0,2
2025	86,5	11,9	0,5	0,7	0,5

In the next section, the current situation of maritime trade in the world and nearby regions is examined.

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MARITIME AND PORT SECTOR IN THE WORLD

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2. MARITIME AND PORT SECTOR IN THE WORLD

2.1. Developments in World Maritime Trade⁴⁴

Throughout 2025, global seaborne trade took shape in an environment defined by high volatility and uncertainty. Continuing geopolitical tensions, changes in trade policies and the effects of climate change substantially transformed global transport patterns; many shipping routes were observed to have been diverted away from traditional corridors such as Suez and Panama towards alternative routes.

By contrast, the main East-West trade lanes maintained their dominant position within the global logistics system, supported by Asia-centred production and distribution structures. In response to rising uncertainty, supply chains evolved towards a more diversified structure, and more complex networks emerged in terms of origins and destinations. In the 2024-2025 period, trade items based on energy, critical minerals and rare earth elements underwent a transformation whose pace and strategic importance increased under the influence of the clean energy transition. Trade in minerals that are critical for the clean energy transition is conducted by a limited number of exporters. This increases vulnerability to strategic and logistical bottlenecks.

From a broader macroeconomic perspective, it is necessary to examine the relationship between seaborne trade and global economic growth (GDP), because the two indicators have an organic link. After the stable course observed between 2014 and 2019, the sharp contraction in both trade (-3.3%) and the global economy (-2.8%) in 2020 due to the pandemic represented one of the most pronounced turning points in recent trade history. Following the strong recovery in 2021, the 2025-2027 projections show more moderate growth rates of around 1%, indicating that the market is moving towards a new equilibrium. In particular, the slight contraction in trade volume in 2022 (-0.1%) despite continuing economic growth shows that supply-chain dynamics may, at times, diverge from macroeconomic data (Figure 2.1).

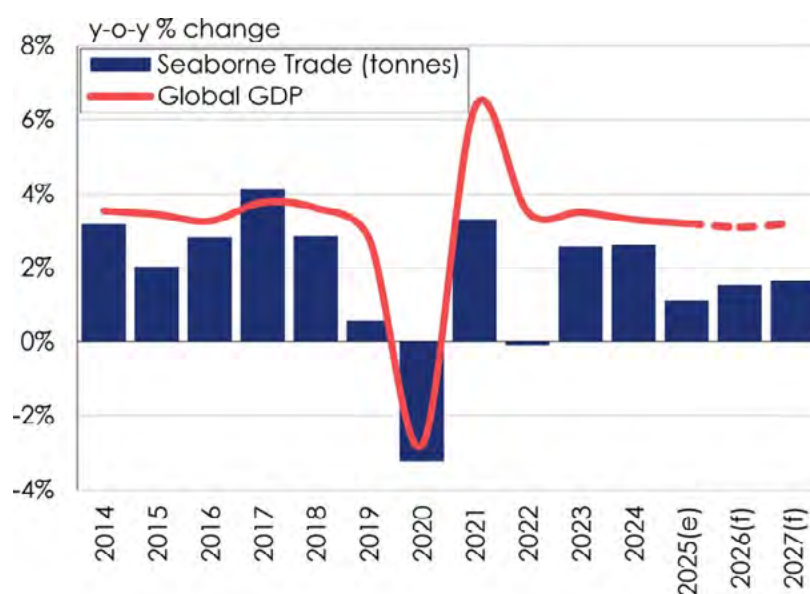


Figure 2.1. The Relationship Between Global GDP and Maritime Trade⁴⁵

⁴⁴ The data under this heading were compiled from UNCTAD, IMF, Clarkson Research, <https://porteconomicsmanagement.org/>, Drewry sources.

⁴⁵ Clarkson Research. (2026, January). Seaborne Trade Monitor (Vol. 13, No. 1). Clarkson Research Services Limited.

Key recent developments in maritime trade are summarised below.

- Route changes in maritime trade throughout 2025 lengthened transport times and increased costs. These developments affected countries with weak infrastructure and small island states in particular. Strengthening transport corridors and investing in transport infrastructure played an important role in mitigating these adverse effects.
- During the same period, global trade moved towards a more fragmented structure, while changes in industrial policies reshaped seaborne trade flows. This process increased the risk of exclusion for countries located outside the main trade corridors. Maritime transport policies that support regional co-operation, strengthen links between ports and inland areas, and increase logistics capacity have helped reduce these risks.
- Geographical shifts in container transport made competition between ports more visible. Ports that can efficiently manage cargoes from different countries and diversify their supply sources have gained a more advantageous position within reconfigured supply chains.
- Transport distances in energy-related trade increased, while the share of low-carbon products rose. These developments also transformed the infrastructure needs of ports. Deeper berths, adequate storage areas, strong road and rail connections, and rapid cargo-handling capacity came to the fore.
- The increase in critical minerals trade created new economic opportunities but also raised supply-chain risks. Developing processing capacity, using different modes of transport in combination and establishing a logistics structure aligned with industrial policies have been decisive in managing these risks.

Cargo growth in seaborne trade was normal, but tonne-mile ratios broke records

In 2024, seaborne trade volume reached 12.88 billion tonnes and increased by 1.1% year on year. Although this increase was below the average for the 2013–2024 period and below the long-term average, it indicated that growth in global trade volume was slowing.

The weakening link between trade and economic growth, the slower expansion of global value chains, repeated economic shocks, increasing trade barriers and geopolitical fragmentation were among the factors behind this slowdown. These structural, cyclical and policy-related factors limited growth in seaborne trade.

Nevertheless, the pace of growth remained below the momentum observed in the post-pandemic period, confirming the sector's long-term tendency to decelerate. Demand in the container and bulk cargo segments, resilient consumption in the United States and expanding trade flows from Asia towards emerging markets supported volume growth in 2025.

The global economy displayed moderate growth in 2024. Strong commodity demand in China supported seaborne trade volumes. Growth in container and bulk cargo transport, robust industrial demand, constraints in mine production and high commodity prices increased China's imports of iron ore, coal and bauxite. Steel exports also rose during the same period. Strong consumer demand in the United States and trade flows from Asia towards developing countries were other factors supporting growth in seaborne trade.

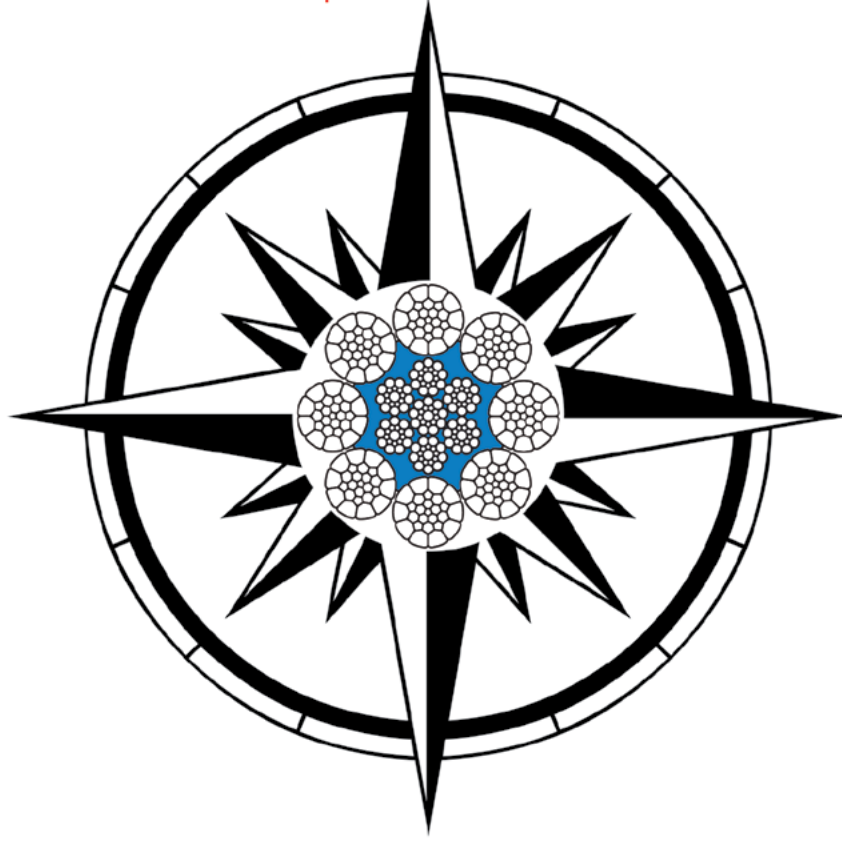
The diversification of supply chains and the emergence of new consumption centres have made maritime trade routes more complex. Trade flows have expanded both within and across regions, while shipping networks have become more widespread and multi-centred.

Changes in tonne-mile ratios in seaborne transport

To understand recent developments in maritime trade more accurately, it is necessary to follow changes in tonne-mile values.

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What is Ton-Mile? How Does It Affect Freight Dynamics?

Ton-mile is the measure of transportation work that occurs when one tonne of cargo is transported one nautical mile. It is used to understand the real workload of transportation as it takes into account not only the amount of cargo transported but also the distance this cargo is transported. For example, when a 1-ton load is transported 100 nautical miles, 100 ton-miles are formed, and when the same load is transported 200 miles, 200 ton-miles are formed. Although the amount of cargo remains the same, the extension of the distance increases the ton-mile. Ton-mile increase can occur for two reasons: (1) The distance the cargo is transported increases (such as diversion to the Cape of Good Hope due to the Suez crisis), (2) The volume of cargo carried increases. Although the transportation volume seems to increase with the increase in ton-miles during periods of longer routes, the effective capacity of the fleet actually decreases; because ships need to spend more time to carry the same amount of cargo. This can create a temporary capacity squeeze, leading to higher freight rates. On the other hand, a decrease in ton-miles indicates either a shortening of routes or a decline in trade volume. In both cases, there is downward pressure on freight rates as effective capacity increases. In short, the ton-mile concept allows us to understand capacity utilization and the basic dynamics of freight movements more accurately by considering not only the amount of cargo transported but also the distance over which this cargo is transported.

In 2024, the tonne-mile ratio reached 5.9%, while the quantity of cargo carried in tonnes grew by only 2.2% (**Figure 2.2.**). This was the fastest increase in tonne-miles recorded since 2011 and almost three times the increase in cargo volume. It was mainly caused by longer transport distances. Security risks in the Red Sea and capacity limitations caused by

water shortages in the Panama Canal led many services to be rerouted via more distant points such as the Cape of Good Hope, significantly increasing average voyage lengths. This meant higher cost per tonne carried, longer transit times and higher carbon emissions.

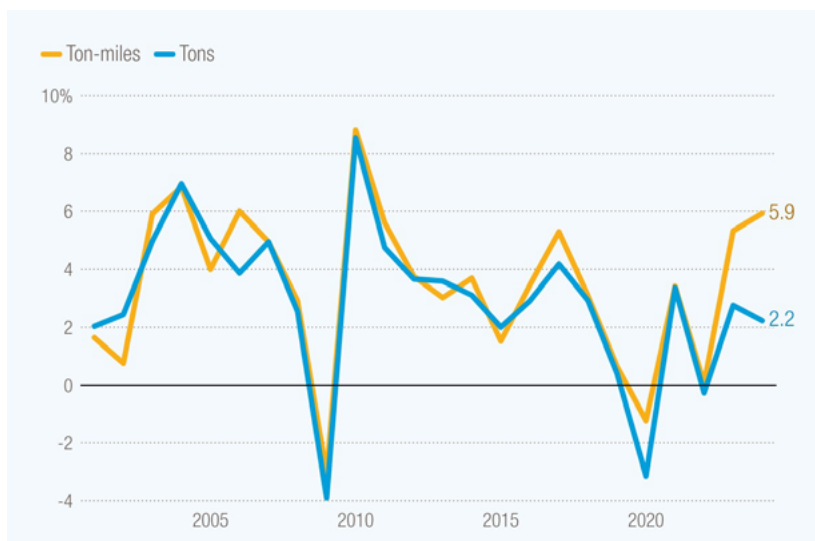


Figure 2.2. Tonnage and ton-mile development of Maritime Trade between 2001-2024⁴⁶

However, current assessments for 2026 suggest that this trend may not be permanent. As geopolitical tensions have recently eased, safe passages have reopened and supply chains have been reconfigured, the distance-driven swelling in tonne-miles is expected to begin normalising. Indeed, in 2025, although the quantity of cargo carried by sea increased only moderately by 1.1%, the tonne-mile ratio also fell considerably, to 1.5%.

This indicates that the supply tightness that characterised freight markets in the 2021-2024 period is also gradually easing. In other words, in 2026, the direction of change tends to be towards a softening in route distances rather than a rise in tonnage. If this normalisation continues, the gap between tonne-miles and tonnes may narrow after 2026, freight-rate pressure may ease, and market conditions may move towards a more predictable balance.

In 2024, the TEU-mile ratio also increased markedly in container transport. The rise in TEU-miles accelerated particularly as ships avoiding the Red Sea shifted to longer routes on the East Asia-Europe

trade lane. These diversions via the Cape of Good Hope increased transport distances by around 30% and are estimated to have caused an 11% increase in total container TEU-mile demand (**Figure 2.3**).

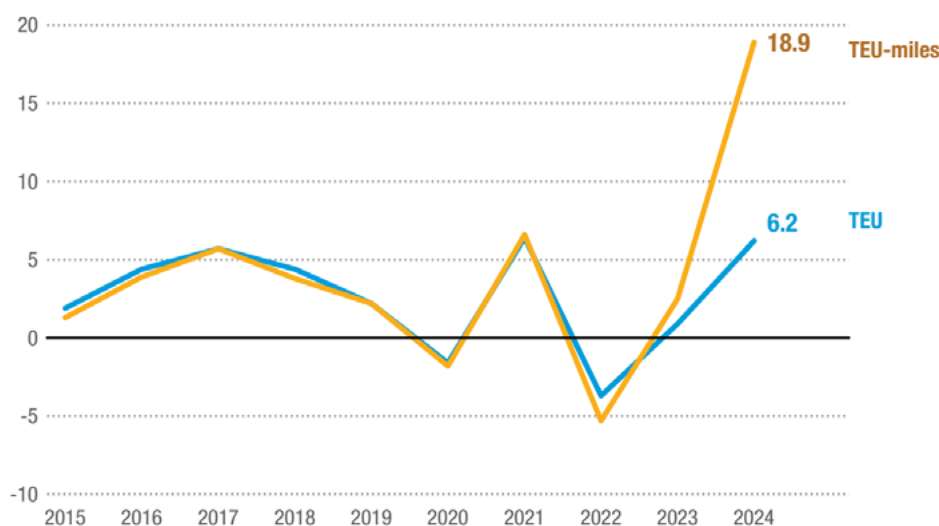


Figure 2.3. Volume and Distance Effect on Container Trade (2015–2024, annual proportional change)⁴⁷

Longer transport distances increased the distance travelled per unit of cargo. While this raised tonne-mile indicators, it also increased transport costs, delays and greenhouse gas emissions. Rather than reflecting a strong expansion in trade, this development made global supply chains more fragile and inefficient, with pronounced divergence by commodity.

According to UNCTAD data, the strongest growth in tonnage terms was observed in LPG at 7.6%, followed by container transport at 6.2%, steel products at 6.2%, iron ore at 3.5% and coal at 3.5%. In tonne-mile terms, the increase was even more pronounced: container transport grew by 18.9%, LPG by 11.2% and LNG by 11.2%. Iron ore and petroleum products also recorded tonne-mile increases of 6.4% and 6.5%, respectively.

By contrast, some product groups displayed weak performance. Tonne-mile ratios declined in crude oil, forest products and grain shipments, showing that shorter-distance trade came to the fore in these products. Chemicals and steel products recorded increases in tonne-mile terms but more limited growth in tonnage terms. This outlook shows that maritime trade performance in 2024 differed by product group and that demand structure, production conditions and trade policies directly affected transport patterns.

Clarkson Research data indicate that similar divergences continued in 2025. For example, coal trade fell by 4%, while its tonne-mile value rose by 5%. Similarly, petroleum products trade increased by 1%, while tonne-miles declined by 2.2%. This was influenced by the redirection of energy trade largely from Brazil, Guyana and the United States towards Asia. US exports of liquefied natural gas, LPG and ethane shifted substantially towards Asian markets, with China and India accounting for a significant portion of this demand. In Africa, Guinea increased bauxite shipments to China, while coal exports from Colombia and Russia shifted towards longer-distance Asian markets. Europe, meanwhile, reduced its dependence on Russia and increased its imports of crude oil and refined products from the United States and the Middle East.

Changes in the geography of global trade

These changes in trade structures stemmed from geopolitical and economic developments in major economic regions. They affected not only individual trade lanes but also the geographical structure of global trade. Intraregional and extraregional trade continued to grow steadily during the 2000–2024 period, but various economic and political periods changed the rhythm of that growth.

Critical turning points played an important role in these developments. China's accession to the WTO in 2001–2002 initiated a period of rapid expansion;

⁴⁷ UNCTAD (2025). Review of maritime transport 2025: Staying the course in turbulent waters. United Nations.

the 2008–2009 global financial crisis created a temporary contraction; and the 2016–2019 US–China tensions and the Brexit process weakened flows. After the sharp shock caused by the pandemic in 2020, the recovery and e-commerce boom in 2021–2022 supported exports and transport.

The 2022–2023 energy crisis and the 2023–2024 Red Sea crisis led to reconfigurations in regional and global trade networks.

These and similar effects and their consequences **Figure 2.4**. It can be examined in.

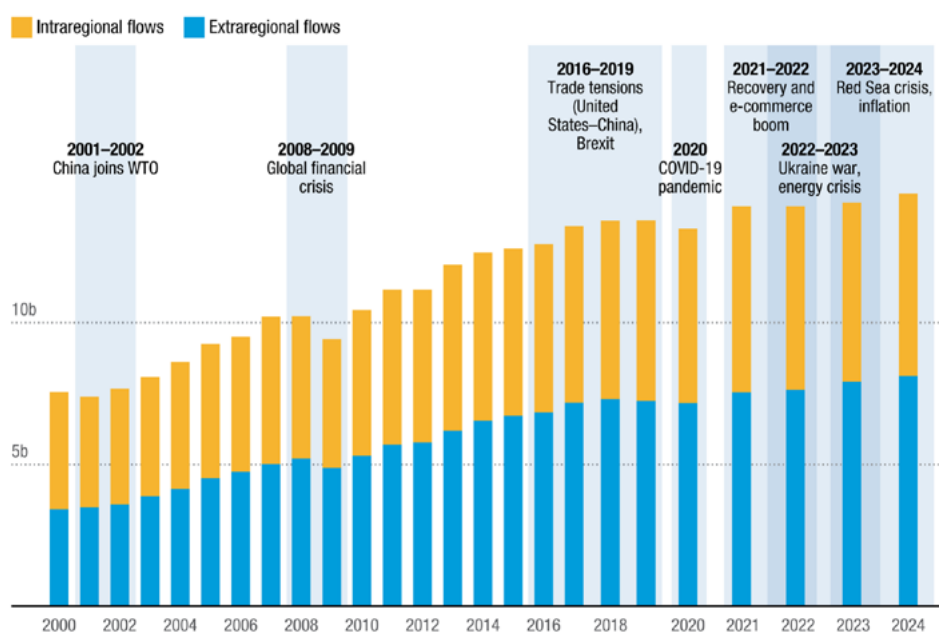


Figure 2.4. Intraregional and Extraregional Trade in the 2000–2024 Period⁴⁸

The growing importance of the distance effect in global seaborne transport is particularly associated with the shift of energy products such as oil, LNG and coal onto longer routes. New supply lines between Latin America, Africa and Asia have caused trade flows to spread over a wider geographical area. This trend increases the vulnerability of global value chains, but also shows that trade is evolving towards a more multi-centred and geographically diversified structure.

As a result, 2024 was a year in which strong tonne-mile growth came to the fore despite moderate volume growth in seaborne trade, while geopolitical risks, logistical bottlenecks and supply-chain restructuring substantially transformed the geography of trade. In 2025, this complexity continued, with route changes and trade barriers shaping the structure of trade more than trade volumes themselves.

Sector expectations in the near future

The global trade-policy environment remained volatile and unpredictable throughout 2025. High energy costs, combined with uncertainties in the transport and logistics sectors, complicated trade

and investment decisions. Temporary ceasefires and limited negotiations provided short-term relief, but structural problems remained unresolved.

The increase in tonne-mile indicators discussed above does not point to a strong expansion in trade; rather, it indicates rising fragility and inefficiency in supply chains. Longer transport distances, rerouted services and constrained capacity increased the distance carried per unit and raised costs, delays and environmental burdens.

Forecasts for maritime trade in 2026 were revised downwards. Expectations that had been more optimistic at the start of 2025 weakened because of rising uncertainties. In the medium term (2026–2030), seaborne trade is expected to move onto a more moderate growth path, although this growth is projected to be more limited and volatile than in previous periods.

Weak macroeconomic conditions, volatility in energy and raw-material markets and changes in trade-policy direction made the recovery process in global trade more difficult. At the same time, diversification of supply chains and new trade orientations made the structure of global trade more complex and

multi-directional. This caused the recovery process to proceed on a more uneven and fragile basis.

According to UNCTAD estimates, total seaborne trade is expected to grow by an annual average of around 2% in the medium term, between 2026 and

2030, while container transport is expected to follow a stronger course and increase by 2.3%. However, this outlook may remain fragile owing to weak global macroeconomic conditions, uncertainties in trade policies and shipping capacity exceeding demand (**Table 2.1.**).

Table 2.1. International maritime trade development forecast, 2024-2030 (%)⁴⁹

YEARS	SEABORNE TRADE (TONS)	CONTAINER TRADE (TEU)
2026	1,0	1,0
2027	2,2	2,5
2028	2,3	2,7
2029	2,2	2,7
2030	2,3	2,7

Clarkson Research forecasts are somewhat lower than UNCTAD's estimates. According to Clarkson, total seaborne trade is expected to increase by 1.5% and 1.7% in 2026 and 2027 respectively, while the estimated increase in container trade in TEU terms is 2% and 3% for the same years. A continued decline is expected in coal trade, while high growth rates of 7.8% and 11% are expected in gas trade.

Current situation in the Strait of Hormuz

In the first quarter of 2026, direct armed clashes between the United States and Israel on the one hand and Iran on the other created an unprecedented crisis in the Strait of Hormuz, one of the most critical chokepoints in global seaborne trade. Iran's effective closure of the strait to commercial shipping as part of its military retaliation strategy, and data suggesting that naval mines had been laid in the region, eliminated navigational safety. By March 2026, commercial ship traffic through the strait had virtually come to a standstill, with hundreds of oil and LNG tankers stranded in the area or forced to change their routes.

The most visible effect of this geopolitical crisis on the maritime sector was the largest disruption to the global energy supply chain since the 1970s, together with an extraordinary rise in freight rates and war-risk insurance premiums. The paralysis in which ships waited for military escort not only increased transport costs, but also again exposed the structural vulnerability of global logistics networks to external shocks.

In addition to disruptions on the Suez Canal and Red Sea routes, security weaknesses and potential closure risks in the Strait of Hormuz triggered tonne-mile increases in energy trade and caused logistics costs to rise unpredictably. The current tension environment forces supply-chain actors to seek alternative energy corridors and to reconfigure logistics networks in a more fragmented structure, thereby deepening uncertainty in global trade patterns.

Current situation in the Suez Canal

Geopolitical risks continue to weigh on the market outlook. Recent tensions in the Middle East, attacks on commercial vessels in the Red Sea and the conflict in Ukraine have created additional uncertainty for transport routes and costs. These developments have emerged as structural risks limiting predictability in the container market.

Security risks in the Red Sea appear to have decreased, and the disruption to Suez Canal passages therefore has the potential to reverse from the beginning of 2026. A gradual improvement in the political environment in the Middle East, particularly the start of a ceasefire process in Gaza in autumn 2025 and signals from the Houthis in Yemen that they could halt attacks in the Red Sea, reduced the perception of risk for maritime transport.

In parallel, the decline in war-risk insurance premiums from 0.7%-1.0% of vessel value to the 0.2%-0.4% range made the Suez route economically attractive again. Indeed, the fact that some major liner operators, especially on the Mediterranean-Asia

⁴⁹ UNCTAD (2025). Review of maritime transport 2025: Staying the course in turbulent waters. United Nations.

and Mediterranean-India services, have gradually resumed passages via Suez shows that the sector regards the diversion around the Cape of Good Hope as a temporary solution and is preparing to return to the main trade route. This tendency shows that the structural importance of the Suez Canal in global container transport does not disappear even in periods of crisis; it is only temporarily suspended.

Nevertheless, in a scenario in which tensions between Iran and the United States/Israel escalate, the risk remains that Houthi elements in Yemen, which have openly declared their support for Iran, could again create a second front on the Bab el-Mandeb Strait and Red Sea route, disrupting maritime traffic.

Use of Northern Sea Routes^{50,51}

One of the most closely watched subjects in the maritime sector in 2025 was the potential use of the Northern Sea Route (NSR) as an alternative to the Far East-Europe main trade route. Ongoing geopolitical uncertainties in the Suez Canal and the preference of container lines for the Cape of Good Hope increased interest in this issue. However, compared with the cargo volumes carried on main trade routes, both the number of voyages and the amount of cargo carried remain at a very small scale. NSR voyages are therefore examined in detail to clarify the issue.

Because of ice conditions, voyages on the NSR can be conducted only during the summer months. During the 2025 NSR summer-autumn transit navigation season, the first transit vessel entered the route on 30 June and the last left it on 17 November. The favourable navigation period therefore lasted approximately four and a half months. By 30 November 2025, 103 transit voyages had been recorded by 88 different vessels. Some of these vessels completed two voyages. This number includes all voyages that crossed both boundaries of the Northern Sea Route and did not call at a port in NSR waters. Of these, 52 were eastbound and 51 were westbound.

In 2025, total transit cargo volume on the NSR reached 3.2 million tonnes. As in 2024, tanker shipments accounted for the main share of transit cargo traffic. Tankers made a total of 34 passages, 23 eastbound and 11 westbound. The second-largest group was bulk carriers, which made 23 voyages. Of these, 16 were westbound, probably in ballast for repositioning, and seven were eastbound. Ice conditions on these voyages were assessed as unfavourable, and open-water voyages lasted only two weeks. Details about ship types and voyages can be seen in Table 2.2.

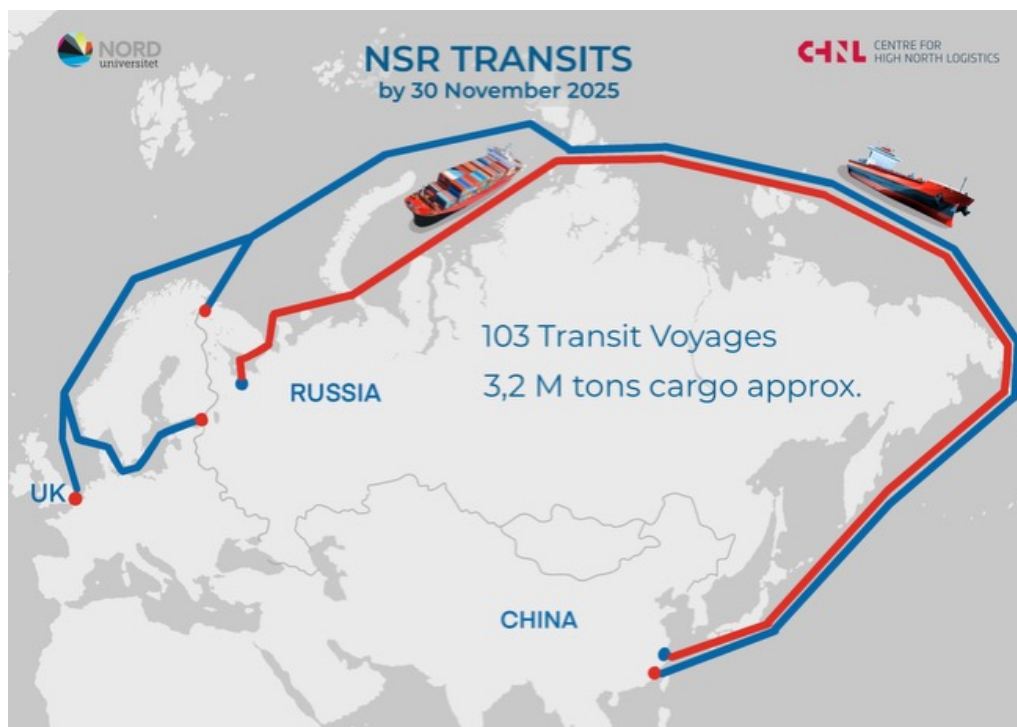


Figure 2.5. Northern Sea Routes⁵²

⁵⁰ <https://chnl.no/news/main-results-of-nsr-transit-navigation-in-2025/>

⁵¹ <https://www.linkedin.com/feed/update/urn:li:activity:7405871692553818113/>

⁵² <https://chnl.no/news/main-results-of-nsr-transit-navigation-in-2025/>

Table 2.2. NSR Navigational Information⁵³

Ship Type	Voyage (2024)	Voyage (2025)	Voyage Change	Total DWT 2024	Total DWT 2025	24/25 Change
Tanker	36	34	-2	3.563.015	3.130.351	-12%
Bulk Cargo	15	23	8	1.507.335	1.922.820	28%
Container	11	15	4	400.726	558.088	39%
General Cargo	12	12	0	214.290	233.462	9%
Fishing Vessel	4	7	3	2.328	5.325	129%
LNG Carrier	4	5	1	368.739	355.369	-4%
Reefer	2	3	1	4.033	15.255	278%
Research	1	1	0	1.469	1.319	-10%
Ro-Ro	-	1	1	-	5.795	-
SAR	-	1	1	-	1.150	-
Supply	2	1	-1	5.749	1.123	-80%
Heavy Load	2	-	-2	57.715	-	-
Icebreaker	4	-	-4	20.005	-	-
Tugboat (Tug)	1	-	-1	3.949	-	-
Other	3	-	-3	6.000	-	-
GRAND TOTAL	97	103	6	6.155.353	6.230.057	1%

In 2025, the number of transit voyages increased by approximately 6.2% compared with 2024, while cargo volume rose by approximately 3.2%. Total DWT increased by 1%, from 6,155,353 tonnes in 2024 to 6,230,057 tonnes.

The largest contribution to growth in 2025 came from bulk carriers, whose voyages increased by eight (from 15 to 23) and whose carrying capacity rose by 415,485 tonnes (+28%). General cargo vessels maintained the same number of voyages (12) but increased their tonnage by 19,172 tonnes (+9%). Container vessels also recorded notable growth, with four additional voyages (from 11 to 15) and a 157,362-tonne (+39%) increase in deadweight. Looking at all 15 container-vessel voyages, six passages were made by vessels without ice-class notation during a period when open seas were not fully clear. This clearly reveals the level of risk taken by operators.

The assessments made so far relate to transit passages on the Northern Sea Route. Compared with annual data, billions of tonnes of cargo are carried on Far

East-Europe routes, whereas the current cargo volume on the NSR remains very low. Even when compared only with transit traffic through the Suez Canal, the transit cargo ratio on the NSR remains around two per thousand. These data show that, for the time being, the route is only a specific and regional corridor. More than transit transport, the route is used for shipments related to Russia's oil and, especially, natural gas exports, whose total volume is around 38 million tonnes.

In the following headings, the concrete transportation amounts realized in the recent period are examined.

2.1.1. Seaborne Transport: Macro Data

When world seaborne transport is examined by cargo group for the 2023-2025 period, the total volume of cargo carried is seen to have followed a stable upward trend, albeit at low rates. Total seaborne cargo volume, which was 12.411 billion tonnes in 2023, rose to 12.733 billion tonnes in 2024 and 12.875 billion tonnes in 2025. The increase in the 2024-2025 period was 1.1% (Table 2.3).

Table 2.3. World maritime transport development on the basis of freight groups (million tons)⁵⁴

Total Cargo (Tons)	2023	2024	2025	24/25
Dry Bulk Cargo	5.628	5.837	5.891	0,9%
Crude Oil and Products	3.036	3.010	2.990	-0,7%
Containers	1.852	1.956	2.031	3,8%
Other	1.335	1.355	1.362	0,5%
Gas	560	575	601	4,5%
Total	12.411	12.733	12.875	1,1%

⁵³ <https://chnl.no/news/main-results-of-nsr-transit-navigation-in-2025/>

⁵⁴ Clarkson Research. (2026, January). Seaborne Trade Monitor (Vol. 13, No. 1). Clarkson Research Services Limited.

In 2025, 88% of the approximately 14.6 billion tonnes of cargo carried worldwide by all modes of transport – road, air, sea, rail and pipeline – was transported by sea, corresponding to around 12.8 billion tonnes.

By cargo group, dry bulk cargoes continued to have the largest share. In 2025, dry bulk cargoes accounted for approximately 46% of total seaborne transport with 5.891 billion tonnes, showing limited but continuous growth compared with previous years. Crude oil and petroleum-product transport, by contrast, tended to decline during the 2023–2025 period; this cargo group fell to 2.990 billion tonnes in 2025, a year-on-year decrease of 0.7%. Container transport rose from 1.852 billion tonnes in 2023 to 2.031 billion tonnes in 2025, increasing by 3.8% between 2024 and 2025. Container transport in TEU terms is examined in the subsections below.

Gas transport, as in previous years, showed a strong upward trend and reached 601 million tonnes in 2025, growing by 4.5% year on year. Of this volume, 433 million tonnes consisted of LNG, with the remainder being LPG transport. In the “other cargoes” group, a more limited increase was observed, reaching 1.362 billion tonnes in 2025.

Looking at the share distribution of cargo groups in 2025, dry bulk cargoes accounted for 46%, crude oil and products for 23%, container cargoes for 16%, other cargoes for 10% and gas for 5%. This distribution shows that traditional cargo types remain decisive in world seaborne transport, while container and gas transport stand out as relatively faster-growing segments (**Figure 2.6.**).

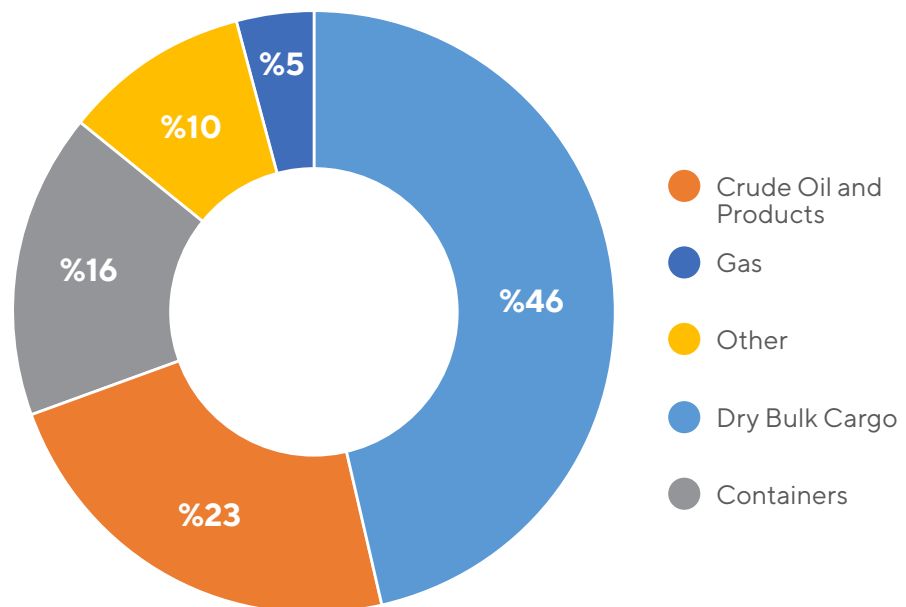


Figure 2.6. Share distribution of cargo groups transported by sea in the world in 2025

Energy transport

Since 1990, the structure of seaborne energy trade has changed significantly in terms of both volumes carried and distances travelled. After 2010, crude oil retained its position as the largest energy product despite slowing volume growth. Coal trade grew steadily in volume terms, overtook petroleum products in the early 2010s and, by 2024, reached a volume more than twice its 1990 level.

The most pronounced transformation occurred in gas trade. LNG trade increased approximately fourfold in volume compared with 1990, while its tonne-mile value rose almost tenfold. This growth was supported by rising demand in China, Japan and Korea, as well as new sources of supply entering service in African countries such as Mozambique and Nigeria and in North America. LPG trade also grew approximately threefold in volume and recorded a more than fivefold increase in tonne-mile terms.

These developments showed that seaborne energy trade has expanded not only in volume, but also across increasingly longer distances. Supply networks have diversified, and the geographical structure of energy trade has become more complex. At the same time, the tension between short-term demand for fossil fuels and long-term climate objectives has

become more visible; current seaborne trade trends do not present an outlook fully aligned with global greenhouse gas reduction commitments.

Changes in the volume carried of the mentioned energy products between 1990 and 2025 can be examined in **Figure 2.7**.

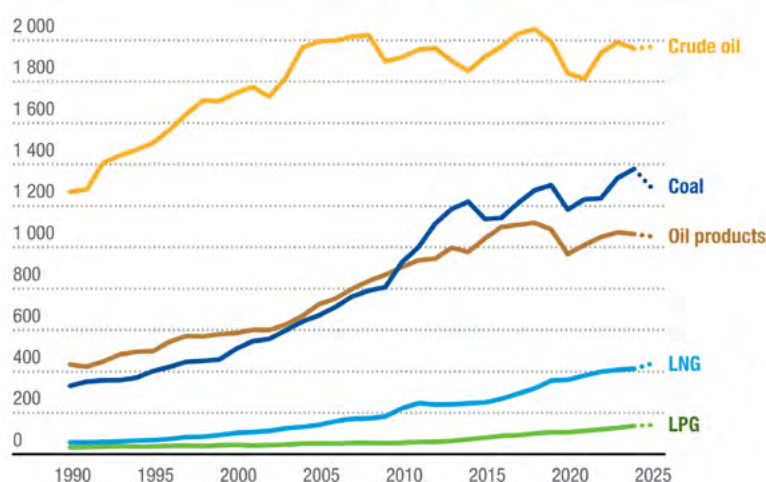


Figure 2.7. Transportation of energy products in maritime trade (Million tons)⁵⁵

Carbon emissions from maritime transport

Carbon emissions from maritime transport increased by approximately 5% in 2024 compared with the previous year, exceeding the threshold of 900 million tonnes on a monthly basis (**Figure 2.8**). Continuing route diversions due to security risks and speed increases observed on many services were decisive in this rise. By contrast, in the first half of 2025 emissions fell markedly. This decline was associated with lower sailing speeds, operational optimisation and the effect of newer and more efficient vessels joining the fleet.

Vessel speeds followed different courses across segments. In container ships, especially the highest-tonnage vessels, speeds were increased in order to maintain service schedules. LNG carrier speeds also rose during 2024 because of disruptions at critical straits. In other vessel segments, by contrast, speeds largely remained stable or declined. At the beginning of 2025, sailing speeds across the fleet softened, although newer and more efficient vessels continued to operate at relatively higher speeds.

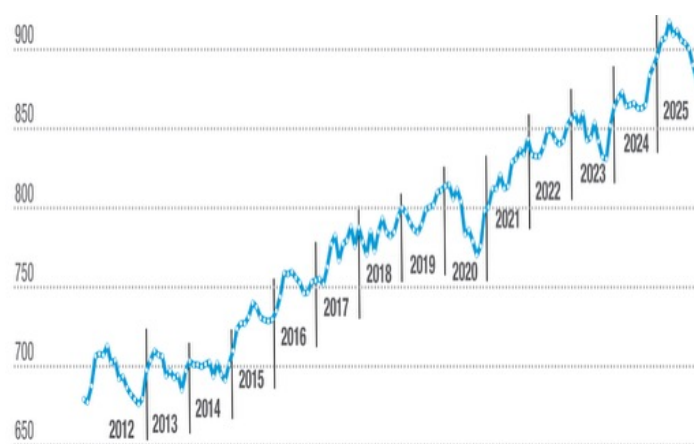


Figure 2.8. Monthly annualized carbon dioxide emissions (All ship types, million tons)⁵⁶

⁵⁵ UNCTAD (2025). Review of maritime transport 2025: Staying the course in turbulent waters. United Nations.

⁵⁶ UNCTAD (2025). Review of maritime transport 2025: Staying the course in turbulent waters. United Nations.

Regulatory pressure increased during the same period. In April 2025, the Marine Environment Protection Committee (MEPC) of the International Maritime Organization agreed on medium-term greenhouse gas reduction measures. This regulatory package offered a two-component approach combining mandatory fuel-intensity limits with a greenhouse gas pricing mechanism. These measures were formally adopted at the extraordinary session held in October 2025, and it was confirmed that the regulations would enter into force in March 2027 and begin to apply from 1 January 2028^{57,58}.

Although the effects of the new regulations have not yet reached a measurable level, the supply of alternative fuels is expected to increase. The two elements – mandatory fuel-intensity limits and the greenhouse gas pricing mechanism – are set to play a decisive role in overcoming the main barriers to the

sector's transition to low- or zero-emission energy sources. Revenues generated under the system are planned to be returned to ships as incentives for avoided emissions arising from the use of zero- or near-zero-emission energy. This creates a two-way mechanism intended both to increase the cost of carbon-intensive fuels and to accelerate the adoption of clean fuels⁵⁹.

2.1.2. Merchant Fleet

New vessel deliveries are the main driver of capacity growth in the merchant fleet. In 2024, global fleet capacity increased by 3.4%, bringing total capacity to approximately 2.44 billion DWT. This growth rate was the same as in 2023; although below the 20-year average of 5.1%, it remained above the growth in seaborne trade volume (**Figure 2.9**).

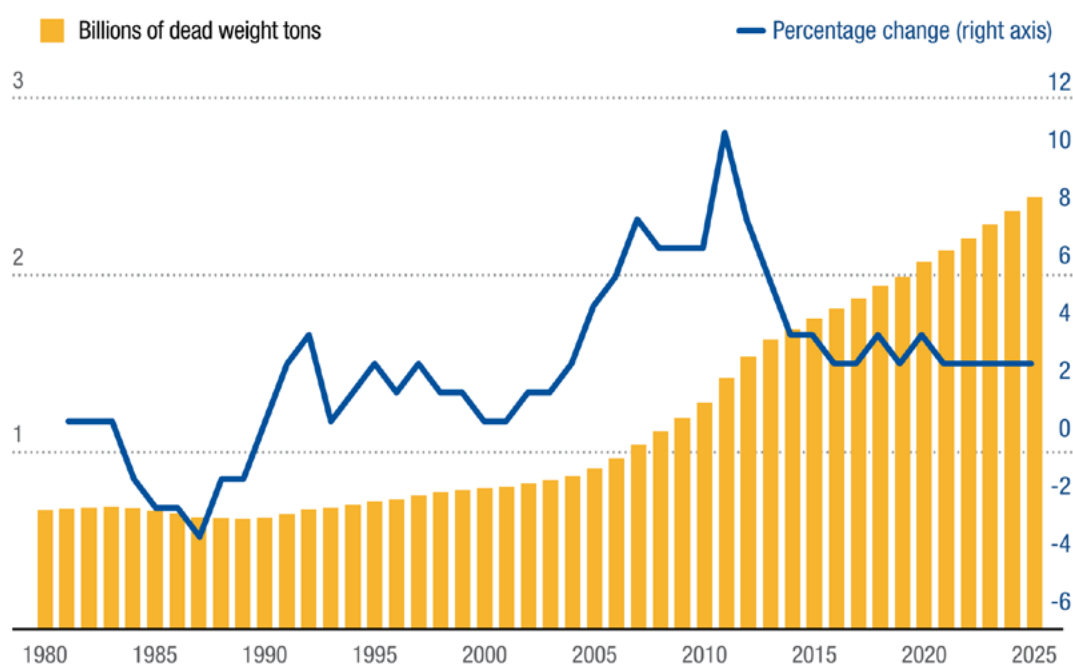


Figure 2.9. Development of the global merchant fleet⁶⁰

In line with seaborne cargo volumes, bulk carriers retained the largest share in the merchant fleet by segment, at 42.5%, while tankers accounted for 27.5%. The distribution of fleet growth by vessel type varied significantly: container ships grew by 9.7%, liquefied gas carriers by 7%, with the LNG segment supported particularly by the Qatar Energy LNG project.

By contrast, bulk carrier capacity increased by 3%, general cargo ship capacity by 1.9% and tanker capacity by only 0.7%. As a result of the shift towards smart and environmentally friendly ships and changes in second-hand vessel prices, the total value of the global fleet rose to USD 1.52 trillion as of June 2025 (**Table 2.4**).

48 ⁵⁷ International Maritime Organization. (2025). Mid-term measures for reduction of GHG emissions from ships: Adoption of amendments to MARPOL Annex VI.

⁵⁸ <https://www.imo.org/en/mediacentre/meetingsummaries/pages/mepc-83rd-session.aspx>

⁵⁹ International Maritime Organization. (2025). Report of the Marine Environment Protection Committee on its eighty-third session (MEPC 83). IMO Publishing.

⁶⁰ UNCTAD (2025). Review of maritime transport 2025: Staying the course in turbulent waters. United Nations.

Table 2.4. World fleet by ship type (*000 DWT and share)⁶¹

Main Ship Types	2024		2025		24/25 (%)
	DWT	Share (%)	DWT	Share (%)	
Dry bulk carriers	1.006.329	42,6	1.036.158	42,5	3,0
Oil tankers	665.472	28,2	669.842	27,5	0,7
Container ships	3.315.674	14,0	3.637.591	14,9	9,7
Other ship types	271.141	11,5	282.651	11,6	4,2
Offshore vessels	89.507	3,8	91.334	3,7	2,0
Gas carriers	93.907	4,0	100.462	4,1	7,0
Chemical tankers	52.584	2,2	54.333	2,2	3,3
Other	26.326	1,1	27.576	1,1	4,7
Ferries and passenger ships	8.818	0,4	8.947	0,4	1,5
General cargo ships	85.809	3,6	87.421	3,6	1,9
World Total	2.360.319	100,0	2.439.832	100,0	3,4

Country and flag distribution of the merchant fleet

Open registry structures, commonly referred to as flags of convenience, low administrative burdens and the flexibility provided to foreign-owned vessels were decisive in maintaining the attractiveness of these flag states. Overall, as of the beginning of 2025, the country and flag distribution of the global maritime fleet largely preserved its stability, although limited changes occurred in the relative positions of some countries. As of 1 January 2025, Liberia, Panama and the Marshall Islands continued to be the three largest flag states, accounting for 45.1% of world DWT and 36.1% of the number of vessels. The top 10 flag states accounted for 76.7% of total capacity and 72.5% of the number of vessels.

Liberia ranked first with a capacity share of 17.4%, followed by Panama with 15.2% and the Marshall Islands with 12.5%. Türkiye ranked 34th in the flag registry ranking, with 1,220 registered vessels (**Table 2.5**).

Some flags recorded notable growth in 2024. Barbados, Antigua and Barbuda, Saudi Arabia, Russia and Madeira recorded rapid increases, while capacity growth in the Bahamas, China, Greece, the Marshall Islands and Panama remained more limited. African and Latin American countries still held low shares in global ship ownership. A significant portion of the fleet continued to be operated under foreign flags, with certain exceptions such as Saudi Arabia, Iran and Bangladesh, where national flags were predominantly preferred (**Table 2.5**).



⁶¹ UNCTAD (2025). Review of maritime transport 2025: Staying the course in turbulent waters. United Nations.

Table 2.5. World fleet flag register (100 GT and above, 2025)⁶²

Flag State		Number of Ships	Share (%)	DWT *000	DWT Share (%)	Average Vessel Size (DWT)	DWT Change 24/25 (%)
1	Liberia	5.562	4,9	424.063	17,4	76.243	3,8
2	Panama	8.572	7,6	371.301	15,2	43.316	-2,5
3	Marshall Islands	4.254	3,8	305.471	12,5	71.808	-1,0
4	Hong Kong, China	2.513	2,2	203.048	8,3	80.799	1,4
5	Singapore	3.098	2,8	152.344	6,2	49.175	8,2
6	China	10.288	9,1	137.064	5,6	13.323	-1,9
7	Malta	1.949	1,7	113.194	4,6	58.078	10,4
8	The Bahamas	1.251	1,1	70.463	2,9	56.325	-2,7
9	Greece	1.203	1,1	53.459	2,2	44.438	-4,8
10	Japan	5.200	4,6	43.828	1,8	8.428	2,8
11	Madeira UGS	973	0,9	35.838	1,5	36.832	21,8
12	Cyprus	1.032	0,9	34.297	1,4	33.233	11,7
13	Indonesia	13.218	11,7	34.251	1,4	2.591	4,7
14	Denmark UGS	553	0,5	25.236	1	45.635	1,3
15	South Korea	2.157	1,9	21.461	0,9	9.949	1,3
16	Iran	1.021	0,9	21.080	0,9	20.646	-0,2
17	Isle of Man	257	0,2	19.935	0,8	77.569	2,3
18	Norway UGS.	687	0,6	18.929	0,8	27.552	-6,2
19	Barbados	491	0,4	18.719	0,8	38.123	200,9
20	India	1.928	1,7	18.021	0,7	9.347	-2,2
21	Saudi Arabia	482	0,4	17.445	0,7	36.192	23,4
22	Russian Federation	3.007	2,7	14.786	0,6	4.917	22,3
23	United States	3.519	3,1	13.244	0,5	3.764	-0,2
24	Vietnam	1.919	1,7	11.666	0,5	6.079	-11,8
25	United Kingdom	794	0,7	10.327	0,4	13.007	-2,9
26	Malaysia	1.813	1,6	9.773	0,4	5.391	4,1
27	Antigua and Barbuda	676	0,6	9.414	0,4	13.926	44,7
28	France	509	0,5	8.890	0,4	17.466	18,0
29	Germany	602	0,5	8.711	0,4	14.470	8,3
30	Palau	565	0,5	7.732	0,3	13.686	-2,2
31	Italy	1.212	1,1	7.226	0,3	5.962	-6,1
32	Nigeria	1.005	0,9	7.156	0,3	7.121	4,9
33	Belgium	184	0,2	6.874	0,3	37.357	-14,3
34	Türkiye	1.220	1,1	6.842	0,3	5.608	-4,9
35	Netherlands	1.200	1,1	6.777	0,3	5.648	1,0
Top 35		84.914	75,5	2.268.863	93	27	2,4
World		112.501	100	2.439.831	100	22	3,4

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From the perspective of ship ownership, Greece, China and Japan constituted the three largest countries in the global fleet by capacity. These three countries controlled more than 40% of world capacity in DWT terms and approximately one-third of fleet value. The combined share of the top 10 shipowning countries reached 67.3% by capacity and 65.6% by value. Greece ranked first by capacity, while China

stood out with a 12.4% share in fleet value; when assessed together with Hong Kong, China's share in global ship ownership rose to 20.2%. Japan and Singapore were among the other leading countries, with shares of 9.9% and 6.3%, respectively. Türkiye ranked 13th in the world in 2024, with 2,159 vessels and capacity exceeding 50 million DWT (**Table 2.6**).

Table 2.6. Top 25 countries fleet statistics (2025, 1000 GT and above)⁶³

Country or Region		Number of Ships			DWT				
		National Flag	Foreign Flag	Total	National Flag	Foreign Flag	Total	Foreign Flag Share (%)	World Share (%)
1	Greece	562	4.555	5.124	47.554.402	350.065.296	397.649.662	88	16,4
2	China	7.103	3.282	10.440	134.110.270	210.763.710	347.215.014	61	14,4
3	Japan	958	3.123	4.083	39.524.134	201.146.629	240.678.389	84	9,9
4	Singapore	1.358	1.527	2.922	71.301.599	81.844.936	153.428.741	53	6,3
5	Hong Kong	919	1.122	2.081	82.621.846	56.608.620	139.502.591	41	5,8
6	South Korea	824	855	1.700	20.359.786	77.885.773	98.532.659	79	4,1
7	Germany	177	1.838	2.016	8.146.887	63.368.913	71.529.560	89	3,0
8	Taiwan	141	910	1.063	5.746.261	58.052.148	63.875.855	91	2,6
9	UAE	142	1.434	1.598	648.895	55.699.303	57.431.043	97	2,4
10	United K	328	941	1.275	8.352.748	48.054.580	56.990.614	84	2,4
11	Bermuda	-	425	426	-	53.683.102	53.743.656	100	2,2
12	Norway	938	837	1.777	16.435.489	35.609.247	52.175.429	68	2,2
13	Türkiye	404	1.743	2.159	6.209.585	43.920.400	50.184.717	88	2,1
14	Switzerland	12	737	749	767.211	46.467.757	47.234.968	98	2,0
15	United States	777	912	1.702	10.057.558	35.034.228	45.796.064	77	1,9
16	Denmark	385	412	797	20.983.825	21.314.142	42.297.967	50	1,7
17	India	915	318	1.244	17.201.926	19.639.071	37.066.599	53	1,5
18	Indonesia	2.450	155	2.617	29.335.545	3.889.225	33.276.506	12	1,4
19	Monaco	-	337	337	-	31.527.261	31.527.261	100	1,3
20	Cyprus	109	305	415	4.523.426	25.234.101	29.862.694	85	1,2
21	France	149	362	512	4.715.091	18.838.917	23.563.389	80	1,0
22	Vietnam	905	295	1.211	10.818.902	8.736.861	19.589.404	45	0,8
23	Belgium	80	192	272	6.099.980	12.917.644	19.017.624	68	0,8
24	Iran	242	11	254	18.462.502	360.649	18.824.703	2	0,8
25	Saudi Arabia	197	109	309	17.308.289	1.207.828	18.521.234	7	0,8
World		27.264	31.135	60.275	665.352.417	1.692.281.019	2.419.546.107	70	100

The relevant tables are based on UNCTAD sources compiled as of January 2025. According to more recent announcements by the Ministry of Transport and Infrastructure, however, the Turkish-owned merchant fleet of 1,000 gross tonnes and above reached 53.1 million deadweight tonnes and rose to 10th place in the world ranking. With the Turkish fleet reaching 2,203 vessels in the first half of 2025, this recent capacity increase confirmed Türkiye's place among the leading 10 countries in world maritime trade. This development shows that Türkiye has increased its share in the global ship-ownership market and strengthened its position among the top 10 countries⁶⁴.

During the same period, flag changes aimed at avoiding sanctions accelerated, and the "shadow fleet", consisting particularly of older tankers with low maintenance standards, expanded. New sanctions introduced by the European Union, the United Kingdom and the United States in the first months of 2025 affected approximately 3% of world oil-carrying capacity. These developments increased the tendency to seek new supply sources in oil trade. Refineries, particularly in Asia, turned to alternative regions such as Brazil, the United States and West Africa. As a result, longer-distance voyages came to the fore in tanker transport and demand for tanker capacity increased.

2.1.3. Container Liner Operators⁶⁵

Although container transport began in 1956 with the voyage of the converted oil tanker IDEAL X between Newark and Houston, the sector experienced its real,

rapid and unprecedented growth over the last 25 years. During this period, roughly equivalent to the economic life of a vessel, the global container fleet rose from 4.5 million TEU to 33.8 million TEU.

In addition to organic growth, mergers and acquisitions, especially those that gained pace in the 2010s, resulted in 84% of global vessel capacity being controlled today by the top 10 liner carriers. This ratio stood at 61% in the early 2000s.

During the same period, the number of ships rose from 2,622 to approximately 7,500, while average vessel size increased from around 1,700 TEU to 4,500 TEU. Taking current newbuilding orders into account, the order book of approximately 11 million TEU points to a volume more than twice the total world container fleet in 2000.

Alphaliner data show that the global container fleet grew largely linearly during 2003-2025, expanding by a total of 20 million TEU with an average annual net capacity increase of 1 million TEU. However, this trend accelerated significantly in the last two years, with annual net capacity additions exceeding 2 million TEU.

As of March 2026, MSC operated 985 vessels with a capacity of 7.2 million TEU and retained its leading position among global liner operators. Maersk ranked second with 4.6 million TEU, followed by CMA CGM with 4.2 million TEU. As of March 2026, the top 10 container carriers controlled 86% of global container carrying capacity and appeared set to increase this share with orders approaching 9 million TEU (**Table 2.7**).



⁶⁴ <https://www.trthaber.com/haber/ekonomi/bakan-uraloglu-denizcilikte-turkiye-ilk-10da-920891.html>

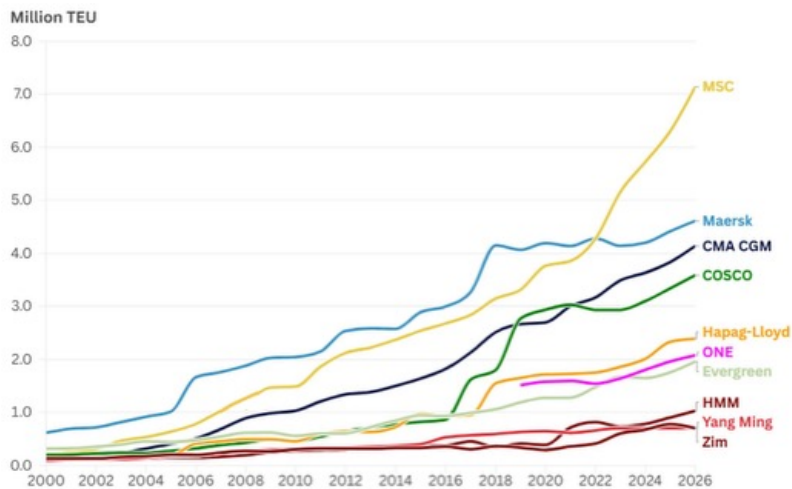
⁶⁵ The data presented under this heading is predominantly sourced from Alphaliner

Table 2.7. Turkish and foreign container line operators top 10 (March 2026)⁶⁶

#	Operator	Vessels in Operation	Vessels Owned	Operating Capacity (TEU)	Order Book (TEU)	Order Book (Number)	Average Capacity of Orders (TEU)
1	MSC	985	730	7.226.315	2.186.192	129	16.947
2	Maersk	732	347	4.635.622	1.197.241	89	13.452
3	CMA CGM	720	359	4.209.206	1.856.452	152	12.214
4	COSCO	557	208	3.601.152	1.397.244	111	12.588
5	Hapag-Lloyd	286	133	2.383.590	476.856	58	8.222
6	ONE	270	105	2.103.586	590.128	50	11.803
7	Evergreen	239	164	1.973.231	908.528	75	12.114
8	HMM	96	72	1.017.405	184.988	16	11.562
9	Yang Ming	96	59	722.779	221.560	17	13.033
10	ZIM	117	15	704.450	189.328	24	7.889
30	ARKAS	34	32	56.345	44.892	12	3.741
50	AKKON	34	2	49.223			
60	TURKON	7	4	15.396	8.024	2	4.012
Top 10 Total		4.173	2.226	29.133.681	9.253.409	733	
Top 10 Share		55,52%	29,62%	85,98%			

As shown in the table, Arkas was Türkiye's leading carrier, with 34 operated vessels and 56,000 TEU of capacity, followed by Akkon with 34 vessels and 49,000 TEU and Turkon with seven vessels and 15,000 TEU. With the addition of HMM, the number of carriers operating more than 1 million TEU reached eight.

The number of shipowners, which exceeded 1 million TEU in the number of ships operated, reached 8 with the addition of HMM. The development of the top 10 shipowners in their operating capacities can be seen in **Figure 2.10**.

**Figure 2.10.** Capacity development of Container Lines (Million TEU)⁶⁷⁶⁶ <https://alphaliner.axsmarine.com/PublicTop100/>.⁶⁷ <https://www.linkedin.com/in/luukdegruijter/O/>.

Hapag-Lloyd's acquisition of ZIM⁶⁸

In line with its Strategy 2030 targets, Hapag-Lloyd announced that it had signed a definitive merger agreement with ZIM Integrated Shipping Services Ltd. for a cash payment of USD 35.00 per share, representing a total equity value of USD 4.2 billion. Through this strategic move, Hapag-Lloyd aims to consolidate its position as the world's fifth-largest container shipping company and reach a fleet of more than 400 vessels and capacity exceeding 3 million TEU.

As a result of the merger, the company is expected to increase its market share on critical trade routes such as the Trans-Pacific, intra-Asia and Latin America. During the transaction process, continuity of Israeli operations under the "New ZIM" brand will be

preserved, and Hapag-Lloyd's Gemini Cooperation partnership with Maersk will continue. The acquisition is expected to be completed by the end of 2026, subject to the approval of the relevant regulatory authorities.

Global maritime alliances

A major restructuring of alliances has begun in the global maritime transport market. Existing ocean alliances have been reshaped, some major carriers have left alliances or established new forms of co-operation. MSC, for example, chose to operate independently, while Hapag-Lloyd and Maersk began to work together under a new structure, the Gemini Cooperation; as a result, THE Alliance was restructured and renamed the Premier Alliance. The existing Ocean Alliance has maintained its structure.



Figure 2.11. New alliances of container shipping⁶⁹

The reshaping of alliance structures in container transport directly affects not only co-operation models between carriers, but also the global liner network, port hierarchy and capacity allocation mechanisms. The hub-focused network approach that stands out with the Gemini Cooperation increases concentration at main ports while redefining the role of secondary ports. By contrast, MSC's alliance-free and independent strategy strengthens a new form of competition based on economies of scale; Ocean Alliance, meanwhile, seeks to preserve network stability through high capacity and a strong order book.

These developments point to a structure in which fewer actors control more capacity in container transport and market concentration deepens. They also show that fundamental dynamics such as freight formation, service frequency and port selection are increasingly determined by strategic decisions.

Consolidation in the global port sector is advancing along three main axes: the expansion of global portfolios by major terminal operators such as PSA International, DP World, APM Terminals and Hutchison Ports; the move towards vertical integration by liner operators such as Mediterranean Shipping Company (TIL), CMA CGM and Maersk through terminal investments; and the concentration of cargo flows in a more limited number of major hub ports. This process is supported by larger vessel sizes, the transformation of alliance structures and the need for operational efficiency, and strengthened by the financial stability provided by terminal investments.

As a result, while mega hub ports grow, medium-sized ports face increasing competitive pressure and dependence risks. This brings to the agenda a stronger need for regulation in the areas of port access, competition law and transparency.

⁶⁸ <https://www.hapag-lloyd.com/en/company/press/releases/2026/02/hapag-lloyd-signs-merger-agreement-with-zim.html>

⁶⁹ <https://www.shippeo.com/resources/explore/blog-newsletter/what-new-ocean-alliances-mean-for-shipping>

Service reliability

According to data from Sea-Intelligence's Global Liner Performance report, global schedule reliability fell by 1.2 percentage points month on month in December 2025, to 62.8% (**Figure 2.12**). Although this was the second-lowest monthly ratio recorded since May, the reliability level in 2025 generally remained within a higher band than in previous years (2020-2024).

The sector recorded an annual improvement of 9.0 percentage points in schedule reliability. By contrast, the average delay of late vessels, another indicator of operational efficiency, increased by 0.04 days month on month to 5.04 days, reaching its second-highest level since April⁷⁰.

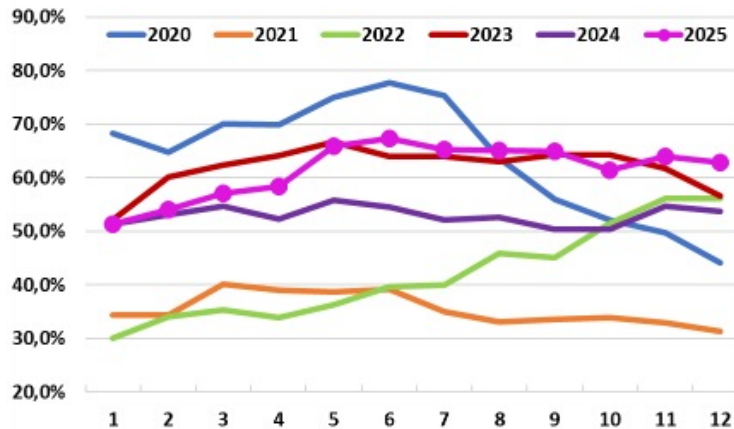


Figure 2.12. Global reliability rate of voyage plans by years and months⁷¹

December 2025 data also show pronounced differences in schedule reliability between carriers and alliances. Maersk had the highest schedule reliability among the top 13 carriers, at 76.7%, followed by Hapag-Lloyd at 75.2%. MSC and HMM were in the 60-70% range, while eight of the remaining nine carriers remained in the 50-60% range. Wan Hai recorded the lowest performance, at 47.8%. Only four carriers improved month on month, while all 13 carriers improved year on year.

At alliance level, in the November/December 2025 period, Gemini Cooperation provided by far the highest reliability, with 92.3% for all arrivals and 90.8% for trade-lane arrivals. MSC alone reached 73.5% for all arrivals and 71.9% for trade-lane arrivals. Premier Alliance delivered a lower performance, at 56.9% for all arrivals and 56.6% for trade-lane arrivals. In the former alliance structures, "all arrivals" and "trade arrivals" were at the same level, with Ocean Alliance remaining at 58.8%.

2.1.4. Shipbuilding Industry

Global shipbuilding capacity is concentrated in terms of the number of shipyards and production structure. In 2024, approximately 348 active shipyards worldwide received new orders or made deliveries; this number corresponds to around half of the 2007 peak. In some vessel types, a mismatch emerged between shipyard capacity and demand, while rising labour costs, input prices and newbuilding prices made capacity constraints in the sector more visible.

During this period, China consolidated its clear leadership in global shipbuilding. China, which accounted for half of world shipbuilding output for the first time in 2023, increased its share to approximately 55% in 2024. In the same year, 74.4% of contracted global gross tonnage was concentrated in Chinese yards, and as of the beginning of 2025, 63.7% of the global order book belonged to China. As of May 2025, six of the world's 10 largest shipyard groups were located in China. Targeted industrial policies, cost advantages, large capacity and strong domestic shipowner demand supported this position. China entered a new phase of expansion in 2024; once this process is complete, global shipbuilding capacity is expected to increase by around 200 vessels per year to reach 1,700 vessels.

⁷⁰ <https://www.sea-intelligence.com/press-room/368-global-schedule-reliability-drops-to-62-8-in-december-2025>

⁷¹ <https://www.sea-intelligence.com/press-room/368-global-schedule-reliability-drops-to-62-8-in-december-2025>

Japan and South Korea maintained strong positions in high-value-added and advanced-technology segments, especially gas carriers, tankers and container ships, although China narrowed the gap with these countries. The gas segment was the only area in which China did not take the lead in 2024 orders. European countries specialised mainly in cruise, niche and high-technology vessel types, with Finland, France and Italy standing out in this area.

In Asia, a clear mismatch emerged between capacity distribution and the order book. Around 120 active Chinese yards accounted for 45% of global shipyard capacity while holding around 60% of orders. Labour shortages limited production in South Korea, leading to a relaxation of migration policies and a move towards overseas investment. Korean shipyards shifted part of their production to China, the Philippines and Vietnam in order to expand capacity.

Japan continued to lose market share to China and Korea, while European yards operated with a more limited global share. By contrast, the Philippines, Vietnam and Taiwan strengthened their roles in the production network by taking new orders. In the short term, the outlook for the shipbuilding sector became more uncertain, and trade policies and geopolitical developments directly affected sectoral decisions. Nevertheless, the need for younger, more energy-efficient vessels capable of using alternative fuels remained the main factor supporting new orders.

A total of 54.6% of vessel deliveries were made by Chinese shipyards; the shares of Japanese and South Korean yards were 12.6% and 28%, respectively. The country shares in deliveries and the areas in which particular countries stand out are shown in the original **Table 2.8**.

Table 2.8. Gross Tonnage Shares of Leading Global Shipbuilding Countries (2024)

Country	(%)	Basic Features
China	54,6	It is the leader in all commercial cargo ship segments except for gas carriers; South Korea leads in the gas carrier segment.
South Korea	28,0	It builds high-value, green, and smart ships in the gas carrier, container, and tanker segments. It is the leader in the gas carrier segment.
Japan	12,6	It was a global leader for many years but has lost market share over time. It focuses on smart and eco-friendly ships in the bulk carrier segment; it also maintains a presence in the tanker and container segments.
Vietnam	1,0	It builds bulk carriers, container ships, and oil tankers.
Philippines	0,9	It builds medium-sized commercial ships.
Italy	0,6	It specializes in passenger ships, superyachts, and high-quality passenger vessels.
Germany	0,3	It offers advanced engineering for luxury cruise ships, naval vessels, and high-tech commercial ships.
Türkiye	0,1	It produces various types of ships, including military and commercial vessels, as well as special-purpose ships.
India	0,1	The shipbuilding sector is growing with government support.
United States	0,04	It is a smaller player in commercial shipbuilding but a global leader in naval and defence shipbuilding.
Norway	0,04	It is a leader in sustainable maritime practices and initiatives.

⁷⁰ <https://www.sea-intelligence.com/press-room/368-global-schedule-reliability-drops-to-62-8-in-december-2025>

⁷¹ <https://www.sea-intelligence.com/press-room/368-global-schedule-reliability-drops-to-62-8-in-december-2025>

In 2024, newly ordered newbuilding tonnage increased by more than 50% compared with 2023, while the global order book grew by 10.2%. The ratio of the order book to the active global fleet rose from 11.1% at the beginning of 2023 to 12.3% at the beginning of 2024 and reached 15% by the beginning of 2025. Although still below historical peaks, this ratio shows that ordering activity has accelerated again.

Order intensity differed by vessel type. LNG carriers and container ships stood out with high order ratios equivalent to 51.3% and 24.6% of the active fleet, respectively. By contrast, order ratios for bulk carriers and oil tankers remained more limited, at 10% and 7.5%. In new orders, dual-fuel and alternative-fuel-ready vessels were decisive, particularly in container shipping (**Figure 2.13.**).

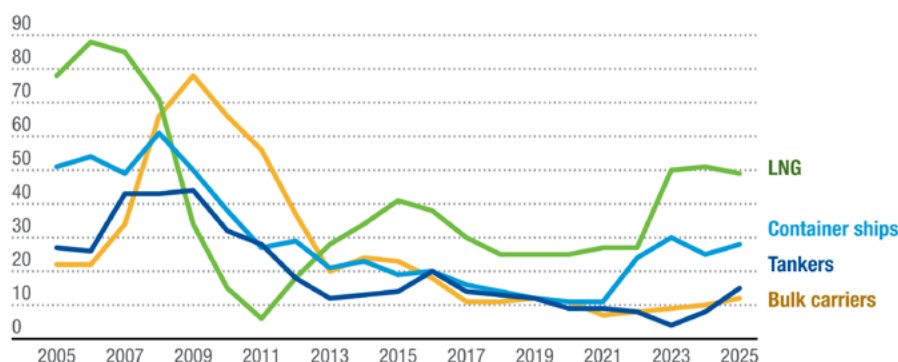


Figure 2.13. Ship types ordered (Share in global active fleet tonnage-%)⁷²

In 2024, a total of 71.7 million gross tonnes was added to the active fleet. The number of delivered vessels increased by 8.8% compared with the previous year, while total delivered tonnage rose by approximately 10%. By vessel type, container ships accounted for

the largest share of delivered tonnage, at 41.3%. Bulk carriers accounted for 26.6% and liquefied gas carriers for 12.2%, while oil tankers accounted for 5.1% and general cargo vessels only 2.7% (**Table 2.9.**).

Table 2.9. New shipbuilding deliveries by vessel types & countries of construction, 2024 (*'000 GR)⁷³

Vessel Type	China	South Korea	Japan	Vietnam	Philippines	Europe	Others	Total	Share (%)
Bulk Cargo	12.510.129	N/A	5.729.387	148.469	666.846	N/A	17.654	19.072.485	26,6
Container	16.577.611	11.325.793	1.735.128	N/A	N/A	N/A	N/A	29.638.532	41,3
Offshore Vessel	1.674.069	257.004	7.795	25.969	NA	358.042	83.236	2.406.115	3,4
Crude Oil Tanker	1.498.699	1.310.389	205.573	519.656	1.361	40.723	53.561	3.629.962	5,1
Gas Carrier	1.710.487	6.817.843	220.425	N/A	N/A	N/A	N/A	8.748.755	12,2
General Cargo	1.132.642	229.469	304.773	14.068	N/A	141.729	142.995	1.965.676	2,7
Ferry/ Passenger	247.937	N/A	19.773	3.170	N/A	39.194	1.123.739	1.433.813	2,0
Chemical Tanker	860.205	70.206	234.581	8.593	N/A	18.842	9.678	1.202.105	1,7
Other	2.906.579	80.168	545.007	959	N/A	26.142	34.685	3.593.540	5,0
Total	39.118.358	20.090.872	9.002.442	720.884	668.207	624.672	1.465.548	71.690.983	100,0
Share (%)	54,6	28	12,6	1	0,9	0,9	2	100	0,0

⁷² UNCTAD (2025). Review of maritime transport 2025: Staying the course in turbulent waters. United Nations.

⁷³ UNCTAD (2025). Review of maritime transport 2025: Staying the course in turbulent waters. United Nations.

The increase in vessel deliveries in 2024 largely reflected the intensive newbuilding orders supported by strong cash flows in the post-COVID-19 period. In container shipping in particular, orders placed over the previous two years were clearly reflected in 2024 deliveries. The structure of the order book highlighted the need for fleet renewal, decarbonisation targets and compliance with tighter environmental regulations. At the same time, limited early delivery capacity in the newbuilding market and high shipbuilding prices constituted major constraints; to increase production, some idle Chinese yards were reactivated.

2.1.5. Ship Recycling Sector

In 2024, ship recycling (demolition) activity remained at historically low levels. Globally, the tonnage sent for recycling was around 6.3 million gross tonnes, corresponding to only 0.25% of the active fleet. Strong market earnings, high freight revenues and rising newbuilding prices encouraged shipowners to keep their vessels in operation, limiting recycling activity. The largest share in recycling was observed in bulk carriers, at 32.4%, followed by container ships (15.2%), offshore support vessels (12.8%), oil tankers (12.1%) and liquefied gas carriers (11%) (**Table 2.10.**).

Table 2.10. Ships sold for scrapping and countries of dismantling, 2024 (1000, GT)⁷⁴

Vessel Type	Bangladesh	India	Türkiye	Pakistan	Denmark	Others	Total	Share (%)
Bulk Cargo	1.376	203	NA	401	NA	753	2.055	32,4
Container	204	585	114	15	NA	497	966	15,2
Offshore	187	290	15	1	311	91	813	12,8
Crude Oil	324	438	3	NA	NA	37	768	12,1
Liquefied Gas	401	290	NA	NA	NA	49	695	11,0
General Cargo	214	129	135	39	6	438	566	8,9
Ferry and Passenger	19	57	180	NA	1	107	267	4,2
Chemical Tanker	2	47	NA	NA	NA	33	52	0,8
Other	12	110	23	0	1	142	160	2,5
Total	2.738	2.147	470	455	318	2.146	6.341	100,0
Share (%)	43,2	33,9	7,4	7,2	5	3,4		

The global ship recycling market is largely concentrated in South Asia and Türkiye. In 2024, Bangladesh, India, Pakistan and Türkiye together accounted for 91.7% of global recycling capacity. Bangladesh and India stood out with shares exceeding 77%, while Pakistan and Türkiye played more limited but still important roles. However, in the face of high delivery volumes and the rapid ageing of the global fleet, existing recycling capacity proved insufficient, creating significant pressure on supply-demand balance and timely fleet renewal.

Capacity limitations became more visible particularly in countries with large recycling capacities. Facilities in Bangladesh, India and Pakistan came under operational pressure together with rising environmental and safety requirements. The Hong Kong Convention, which entered into force on 26 June 2025, made safe and environmentally

sound recycling of ships mandatory. This regulation increased compliance costs in the recycling sector. While most facilities in Bangladesh and India appeared capable of complying with the convention, progress in Pakistan was slower.

European Union ship recycling legislation has further increased pressure on capacity. Globally, only 43 facilities have been approved by the European Union, most of which are located in Türkiye. Most South Asian yards remain outside this approval system, limiting recycling options for EU-flagged vessels. Restrictions imposed by China since 2019 on the recycling of foreign-flagged vessels have also increased pressure on South Asia.

In the medium term, demand for ship recycling is expected to increase in line with decarbonisation targets and the need for fleet renewal. However, full

⁷⁴ UNCTAD (2025). Review of maritime transport 2025: Staying the course in turbulent waters. United Nations.

implementation of the new regulations carries the risk of creating bottlenecks in recycling capacity in the short term. In this environment, it has become important for countries involved in recycling activities to move not only towards ship dismantling, but also towards complementary fields such as ship repair, modernisation, conversion and, to a limited extent, shipbuilding. Adapting existing infrastructure to these areas through appropriate investment and regulatory support would contribute to the formation of a more integrated and sustainable industrial structure in the maritime sector.

The following sections present developments in the main cargo groups under separate headings.

2.2. Dry Bulk Cargoes⁷⁵

An examination of major and minor bulk cargoes shows that dry bulk transport displayed a limited but

stable upward trend overall. Total dry bulk transport increased by 0.9% in the 2024-2025 period. Total dry bulk volume rose from 5.628 billion tonnes in 2023 to 5.837 billion tonnes in 2024 and 5.891 billion tonnes in 2025.

In sub-segments, major bulk cargoes – main commodities such as iron ore, coal and grain – followed a fluctuating course during 2023-2025. Major bulk transport rose to 3.525 billion tonnes in 2024, then declined to 3.494 billion tonnes in 2025, a 0.9% decrease year on year. Minor bulk cargoes, by contrast, presented a more dynamic picture, rising from 2.236 billion tonnes in 2023 to 2.397 billion tonnes in 2025, an increase of 3.7%.

These developments show that growth in dry bulk transport was driven mainly by minor bulk cargoes, while major bulk cargoes were more sensitive to demand and trade conditions (**Table 2.11.**).

Table 2.11. Improvement in Major and Minor bulk cargoes (million tons)⁷⁶

Years	2023	2024	2025	24/25
Major bulks	3.392	3.525	3.494	-0,9%
Minor bulks	2.236	2.312	2.397	3,7%
Total dry bulk cargo	5.628	5.837	5.891	0,9%

When major bulk cargoes are assessed in their own right, different trends between cargo groups are notable in the 2023-2025 period. Iron ore transport displayed stable growth: volume increased from 1.540 billion tonnes in 2023 to 1.593 billion tonnes in 2024 and 1.617 billion tonnes in 2025. The 1.5% increase in the 2024-2025 period shows that demand related to global steel production continued to support iron ore transport.

Australia remained by far the largest exporter, increasing its shipments by 1.3% to 944.8 million tonnes, while Brazil ranked second with 390.6 million tonnes, up 1.7%. Canada and South Africa also recorded modest increases, reinforcing the generally stable growth in iron ore supply. On the demand side, China maintained its dominance by importing 1.28 billion tonnes, up 1.5% year on year, while Japan and South Korea recorded slight declines, reflecting divergent steel-production trends in Northeast Asia.

Coal transport, by contrast, followed a more volatile and downward course. Coal shipments rose to 1.387

billion tonnes in 2024 but fell to 1.332 billion tonnes in 2025, a decrease of 4.0% year on year. This decline is associated with energy-transition policies, the increasing share of renewables and weakening coal demand in some major economies. Australia increased exports by 3.9% to 198.8 million tonnes, while Russia and South Africa recorded moderate growth. On the import side, China sharply cut coal purchases by 12.8% to around 330.0 million metric tonnes, while India also imported less, at 159.5 million tonnes. Japan remained broadly stable, indicating that demand adjustments were most pronounced in the largest emerging markets.

Grain transport displayed a relatively stable outlook in the 2023-2025 period, remaining unchanged at 545 million tonnes in both 2024 and 2025. Overall, this picture shows that iron ore was the main driver of growth among major bulk cargoes, coal lost share and volume, and grain transport followed a stable path in line with the balances of global food trade (**Table 2.12.**).

⁷⁵ <https://public.axsmarine.com/blog/another-record-year-for-dry-bulk-flows-in-2025>

⁷⁶ Clarkson Research

Table 2.12. Improvement in major bulk cargoes (million tons)⁷⁷

Years	2023	2024	2025	24/25
Iron Ore	1.540	1.593	1.617	1,5%
Coal	1.332	1.387	1.332	-4,0%
Grain	520	545	545	0,0%

When minor bulk cargoes are examined, clear differences emerge between sub-cargo groups during the 2023-2025 period. In aggregate, minor bulk transport rose from 2.236 billion tonnes in 2023 to 2.397 billion tonnes in 2025, recording growth of 3.7% in the 2024-2025 period. This confirms that growth in dry bulk transport was supported by minor bulk cargoes rather than major commodities (**Table 2.13.**).

In the agricultural bulk group, total volume rose from 196 million tonnes to 212 million tonnes during 2023-2025, an increase of 2.9%. However, this increase was not evenly distributed across sub-items. A clear decline was observed in sugar shipments, with total sugar transport falling by 8.6%. By contrast, increases were observed in soymeal and rice shipments, with rice transport growing by 3.3% in the 2024-2025 period.

Fertiliser transport followed a relatively stable and positive course among minor bulk cargoes. Increases were observed in inputs such as urea, potash and sulphur, while phosphate rock and processed phosphate shipments remained stable. Total fertiliser transport reached 211 million tonnes in 2025, up 2.4%. This shows that global demand for agricultural production continued to support fertiliser transport.

Metals and minerals were among the areas of strongest growth within minor bulk cargoes. Bauxite shipments in particular increased sharply by 26.2% to 236 million tonnes in 2025. By contrast, scrap shipments declined by 4.3%. Increases in cement (7.5%) and nickel (11.3%) shipments indicate that construction and industrial activity supported demand for these items. As a result, the total volume of metals and minerals increased by 6.7%.



⁷⁷ Clarksons Research. (2026, January). Seaborne Trade Monitor (Vol.13, No.1). Clarkson Research Services Limited.

From Heavy Material Handling to Logistics, All Operational Needs of Ports Are at **FORSEN**



Mebusan Yokuşu No:22 Fındıklı 34427 Beyoğlu-Gümüşsuyu/İSTANBUL Tel: +90 212 393 24 00 Fax: +90 212 393 24 24 E-Mail: info@forsen.com.tr

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Table 2.13. Minor bulk cargoes (million tons)⁷⁸

Minor Bulks	2023	2024	2025	24/25
Raw Sugar	40	42	39	-7,1%
White Sugar	28	28	25	-10,7%
Total Sugar	68	70	64	-8,6%
Soybean meal	61	68	71	4,4%
Oilseeds (Processed)	60	59	58	-1,7%
Rice	54	60	62	3,3%
Total Agricultural Bulk	196	206	212	2,9%
Urea	55	55	56	1,8%
Potassium	46	51	53	3,9%
Sulfur	33	36	37	2,8%
Phosphate rock	24	29	29	0,0%
Processed phosphate	35	35	35	0,0%
Total Fertilizer	194	206	211	2,4%
Coke	28	31	33	6,5%
Petroleum coke	74	76	76	0,0%
Bauxite	167	187	236	26,2%
Alumina	35	36	36	0,0%
Scrap	95	93	89	-4,3%
Manganese ore	45	43	45	4,7%
Anthracite coal	36	34	34	0,0%
Cement	137	134	144	7,5%
Salt	55	58	57	-1,7%
Nickel	50	53	59	11,3%
Copper	39	39	40	2,6%
Stone & Aggregates	166	162	164	1,2%
Other metals and minerals	167	169	175	3,6%
Total Metals and Minerals	1.093	1.114	1.189	6,7%
Steel products	376	398	401	0,8%
Forest products	309	317	320	0,9%
Total Industrial Products	685	716	722	0,8%
Total Minor Bulk	2.236	2.312	2.397	3,7%

Transport of steel products and forest products under the heading of industrial products displayed more limited but stable growth; total industrial product shipments reached 722 million tonnes in 2025, increasing by 0.8%.

Overall, growth in minor bulk transport was supported especially by metals and minerals and agricultural inputs, while some traditional cargo items, such as sugar and scrap, declined. This picture shows that minor bulk cargoes have a more dynamic structure that is more sensitive to the transformation of global production chains.

Demand for critical minerals and rare earth elements is increasing

The global energy transition and the rapid spread of clean energy technologies have sharply increased demand in recent years for lithium, copper, cobalt, graphite, nickel and similar critical minerals, which are classified within minor bulk cargoes. Within this framework, rare earth elements stand out as a separate strategic category among critical minerals because of their indispensable roles in permanent magnet technologies and advanced manufacturing systems.

These minerals are strategic not only for climate and energy policies, but also for semiconductors, digital technologies, aerospace, the defence industry and high-technology manufacturing value chains. Critical minerals are therefore increasingly becoming “geo-economic assets” and are moving to the centre of supply security, supply dependencies and geopolitical competition.

As the clean energy transition accelerates, the long-term growth of these minerals in global seaborne trade has become more pronounced. Shipment data for 1994–2025 show that critical minerals trade has undergone fundamental expansion. During this period, nickel ore increased by 1,222.5%, manganese ore by 711.2%, copper concentrates by 634.2% and bauxite by 589.6%. The strongest momentum was seen in nickel ore; high demand after 2010, rising refining capacity, particularly in China, and the emergence of new supply centres accelerated this increase. Bauxite shipments rose steadily over the long term and became the largest component of critical mineral flows by volume (**Figure 2.14**).

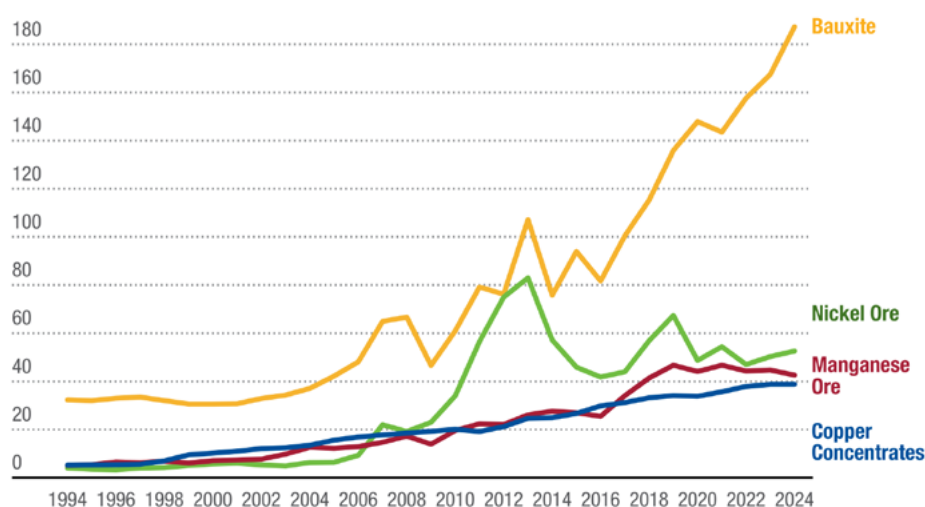


Figure 2.14. SWorld maritime trade of selected critical minerals, million tons, 1994–2024⁷⁹

This expansion also transformed the structure of supply chains. The production, extraction and processing of critical minerals are geographically concentrated in a few centres, while global demand comes from a much broader group of countries.

As a result, a small number of international trade corridors and processing centres have come to direct a large share of critical mineral flows, increasing both geopolitical tensions and logistical vulnerabilities.

Dependence on a limited number of supply-chain nodes raises the strategic importance of alternative sources and new extraction and processing investments. Rising demand, the needs of clean energy systems, accelerating industrialisation and supply-chain repositioning will continue to increase the weight of critical minerals in global trade. In the coming period, as these mineral flows diversify, new exporting regions emerge and strategic dependencies are managed, critical minerals will become an important component of international trade policy.

2.3. Container Trade⁸⁰

Cargo demand at ports is a consequence of demand for maritime transport. This section examines the amount of containers carried by merchant vessels. Developments in container handling at ports are discussed in detail in subsequent sections.

Global container transport has traditionally been carried on three main trade routes – the transatlantic, trans-Pacific and Far East-Europe routes – all of which are East-West routes. In addition, there are other East-West routes outside the main corridors. North-South routes and intra-regional routes are also routes on which container trade is intense.

When container transport is examined by route, a general and balanced growth trend in global container transport volume is observed in the 2023–2025 period. Total container transport rose from 201 million TEU in 2023 to 214 million TEU in 2024 and 222 million TEU in 2025, with total growth of 3.7% in the 2024–2025 period.

Mainline routes continued to be the route group with the highest volume in container transport. The number of containers carried on these routes rose from 59 million TEU to 63 million TEU during 2023–2025, recording a limited increase of 1.6% between 2024 and 2025. By contrast, volume growth on

non-mainline East-West routes stalled in 2024 and remained unchanged at 26 million TEU in 2025. This indicates a demand structure approaching saturation on traditional long-distance trade corridors.

North-South services, however, displayed a more dynamic outlook. Container volume on these routes rose from 34 million TEU in 2023 to 39 million TEU in 2025, recording the highest growth rate, 8.3%, during 2024–2025. This development shows that links between developing economies and global trade networks have strengthened and that trade flows have diversified geographically.

Intra-regional and other routes also made a meaningful contribution to overall growth. Container volume in this route group rose from 86 million TEU to 95 million TEU during 2023–2025 and increased by 4.4% between 2024 and 2025. This increase shows the growing role of hinterland connections, regional distribution networks, transshipment by sea and short-sea shipping in container trade.

Overall, container transport growth appears to be taking place more through North-South and regional routes than through mainline routes. The spatial structure of global trade is therefore evolving towards a more multi-directional and balanced route distribution (**Table 2.14.**).

Table 2.14. Container transport shares by routes (million TEU)^{81,82}

Routes	2023	2024	2025	24/25
Main Lines	59	62	63	1,6%
East/West Routes Outside the Main Lines	23	26	26	0,0%
North-South Routes	34	36	39	8,3%
Inland Regions/Other	86	91	95	4,4%
Total	201	214	222	3,7%

On the other hand, UNCTAD estimated the increase in 2025 at 4.5%. **Figure 2.15** shows the development in container trade from 1996 to the present.

⁸¹ Clarksons Research. (2026, January). Seaborne Trade Monitor (Vol. 13, No. 1). Clarkson Research Services Limited.

⁸² Data for 2025 is an estimate.

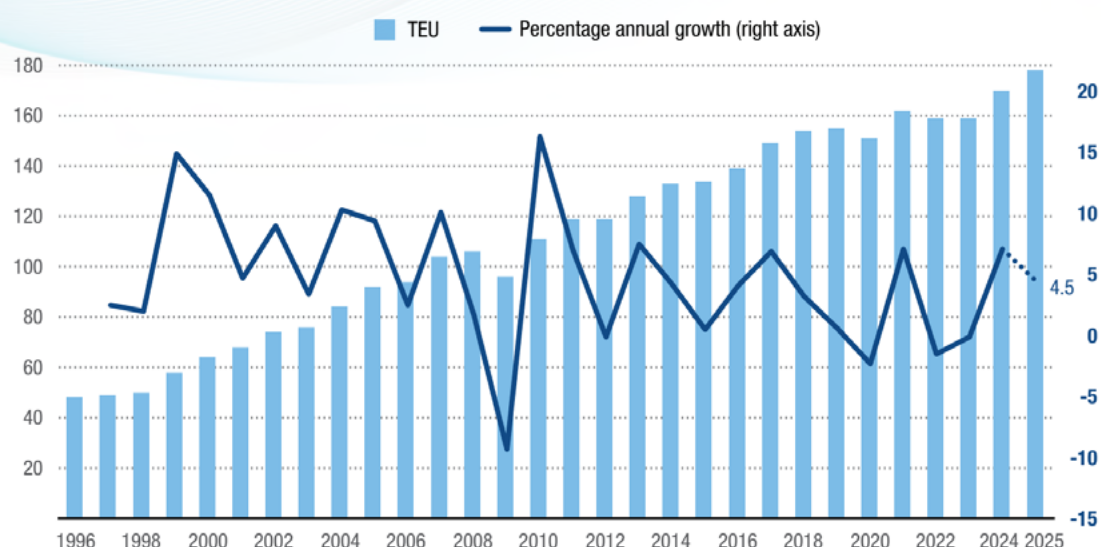


Figure 2.15. Global container trade⁸³

Developments in container trade in 2024 and 2025 were also examined regionally. In 2024, growth in container trade spread across all main trade lanes; East Asia-North America, East Asia-Europe and Europe-North America recorded the strongest expansion, at 8.8%. These lanes continued to form the basic axis of global container transport. At the same time, the share of flows outside the main lanes increased. South-South trade, in particular, grew by 8.7% and became one of the most dynamic segments. Strengthening links between East Asia and Latin America, and between Africa and East Asia, supported this trend. East-West trade flows outside the main East-West corridors also increased by 5.7%.

Global container transport recorded a strong recovery in 2024, with volumes increasing by more than 6% year on year. The acceleration observed in 2024 continued in 2025. This made container transport the second-fastest-growing segment among all cargo types. Growth was supported especially by strong consumer demand in the United States and by expanding trade flows between East Asia and Latin America, the Caribbean, the Indian subcontinent and Africa. Significant increases were recorded on all main East-West trade lanes. Volumes rose by 14.7% on eastbound trans-Pacific services, by 14.7% on westbound East Asia-Europe services and by 5.2% in transatlantic trade. These routes continued to form the backbone of global container transport and carried a large share of total volume.

Entering 2025, the outlook became more cautious. Although global container volumes were expected in July 2025 to increase by around 1.4% during the year, the actual increase, as noted above, was much higher.

In the first months of 2025, significant fluctuations occurred on the trans-Pacific container route, the highest-volume container trade lane. In the first quarter, the Chinese New Year and the front-loading of cargo in anticipation of possible tariff increases led to a 10% year-on-year increase in China-US trade. In April and early May, when the United States raised tariffs on Chinese-origin products to 145%, volumes fell sharply and weekly bookings declined by around 60%. The 90-day tariff pause that entered into force in mid-May triggered a sudden jump in bookings, but this momentum weakened within a short period.

Despite these fluctuations, total eastbound volumes out of China in the period 1 January-1 June 2025 remained below 2024 levels, confirming a year-on-year contraction. Westbound flows (United States-China) did not show a similar recovery; the volume carried between mid-May and early June fell by more than 50% compared with the previous year. This clearly showed how sensitive trans-Pacific trade had become to policy changes (**Table 2.15.**).

Table 2.15. Freight flow on major trade routes (full container, million TEUs)⁸⁴

Years	TransPacific			Asia-Europe			TransAtlantic		
	East Asia -America	America- East Asia	Total	Europe- Asia	Asia- Europe	Total	East Asia -America	America- East Asia	Total
2018	20.1	8.1	28.2	8.2	15.6	23.8	3.3	5.0	8.3
2019	19.5	7.6	27.1	8.4	16.1	24.5	3.2	5.2	8.3
2020	20.0	7.4	27.4	8.2	15.9	24.1	2.7	5.0	7.7
2021	23.8	6.4	30.2	7.8	17.0	24.8	2.7	5.6	8.4
2022	22.6	6.0	28.6	6.7	16.4	23.1	2.6	5.5	8.1
2023	20.8	6.2	27.0	6.6	16.6	23.2	2.5	4.9	7.5
2024	23.8	6.4	30.2	6.3	18.3	24.7	2.6	5.2	7.8
2025	24.2	6.2	30.4	6.4	19.8	26.2	2.8	5.4	8.2

Recent developments show that global supply chains are evolving towards a more dispersed and multi-centred structure. Geopolitical tensions, supply-chain disruptions and rising trade-policy uncertainty have led firms away from single-centre production and supply models towards networks based on multiple sources and multiple production points. As a result, global container transport has moved towards a more complex but more flexible geographical structure.

In addition, because of geopolitical tensions in the region, rerouting in the Red Sea continued throughout the year, keeping average voyage distances elevated. However, if routes gradually normalised later in the year, TEU-mile growth was expected to slow further. This expectation was only partly realised.

During the first three quarters of 2025, a clear recovery trend was observed in container-vessel traffic through the Suez Canal; canal transits increased by approximately 6.8% compared with

the previous year, demonstrating the continuing commercial importance of this key maritime corridor. Towards the end of the year, however, this increase did not show equal and sustainable performance across all vessel segments. This indicates that canal use followed an irregular course due to both regional risks and operational fluctuations. Suez Canal transport trends underline that the geographical distribution and route preferences of global container shipping still have a flexible and dynamic structure depending on prevailing security and economic conditions.

2.4. Liquid Bulk Cargoes

Data on tanker transport show that total volume followed a largely flat course during the 2023-2025 period. Total liquid cargo transport, which was 3.979 billion tonnes in 2023, fell to 3.974 billion tonnes in 2024 and remained at 3.975 billion tonnes in 2025, showing no significant change in the 2024-2025 period. This points to general stagnation in the tanker market (**Table 2.16.**).

Table 2.16. Tanker transportation (million tons)⁸⁵

Liquid Cargoes	2023	2024	2025	24/25
Crude Oil	1.965	1.947	1.958	0,6%
Petroleum Products	1.071	1.063	1.032	-2,9%
Gases	560	575	601	4,5%
Chemicals	383	389	384	-1,3%
Total	3.979	3.974	3.975	0,0%

⁸⁴ UNCTAD (2025). Review of maritime transport 2025: Staying the course in turbulent waters. United Nations.

⁸⁵ UNCTAD (2025). Review of maritime transport 2025: Staying the course in turbulent waters. United Nations.

By sub-cargo group, crude oil transport displayed a limited but stable upward trend. Crude oil transport, which stood at 1.947 billion tonnes in 2024, rose to 1.958 billion tonnes in 2025 and increased by 0.6% year on year. Petroleum-product transport, by contrast, declined over the same period, falling to 1.032 billion tonnes in 2025, a decrease of 2.9%. This development is associated with changes in refining capacity, product trade and regional demand structures.

Gas transport was the item showing the strongest growth within the tanker segment. During 2023-2025, gas transport rose from 560 million tonnes to 601 million tonnes, increasing by 4.5% between 2024 and 2025. Of this volume, 433 million tonnes consisted of LNG and the remainder of LPG. This increase shows that energy supply security, the expansion of LNG trade and regional energy-transition processes supported gas transport.

Chemical transport refers to the seaborne international carriage, generally by chemical tankers, of petrochemical products, industrial chemicals, liquid fertilisers, acids, solvents and similar hazardous or specialised liquid substances. Chemical transport followed a relatively volatile course, declining to 384 million tonnes in 2025 and falling by 1.3%.

Overall, gas transport drove growth in tanker transport, while crude oil transport displayed a stable outlook. Petroleum products and chemicals, by contrast, performed more weakly. This picture shows that the transformation in global energy markets has had different and divergent effects on the sub-segments of tanker transport.

2.5. Cruise Sector⁸⁶

As of 2024, cruise tourism constituted a relatively small part of the international travel and tourism sector, corresponding to only around 2.7% of the total market. This limited share shows that the sector's growth potential remains high.

Long-term trends show that the cruise sector has grown steadily over the last 50 years and displayed a more resilient structure than many tourism sub-sectors even during periods of economic stagnation. This feature makes the sector a more resilient form of tourism activity in the medium and long term.

During the same period, responsibility and sustainability dimensions became more prominent in cruise transport. While high safety standards were maintained, cruise operators adopted more comprehensive sustainability strategies to reduce environmental impacts. Investments in fleet renewal, energy efficiency and emissions reduction show that cruise tourism is evolving towards a more responsible form of travel.

In 2024, the number of global cruise passengers increased significantly and reached 34.6 million. This represented growth of approximately 9.3% compared with 2023 and showed that the post-pandemic recovery continued. Globally, passenger numbers exceeded 2019 levels by 6.8%.

By regional distribution, North America was the main driver of growth. The number of passengers originating from the region rose to 20.5 million in 2024, an increase of 13.3% year on year. Growth in Europe was more limited: passenger numbers rose to 8.4 million, while the growth rate remained relatively low at 2.4%. In Asia and Oceania, passenger numbers reached 4.0 million, representing a recovery of approximately 17.6% compared with 2023. Nevertheless, this region remained below 2019 levels. In South America, passenger numbers reached 1.2 million and increased by 20% year on year.

This outlook shows that cruise tourism has re-entered the growth path on a global scale; however, it showed that the recovery was not evenly distributed across regions. While the North American market was the main driver of growth, Europe followed a more balanced course, and Asia and Oceania continued to compensate for their losses after the pandemic.

Table 2.17. The change in the number of cruise passengers can be seen according to the main regions. The pre-pandemic period is also given as 2019 data in the table, thus providing the opportunity to compare it with 2024.

Table 2.17. Improvement in the number of cruise passengers⁸⁷

Source Region	2019	2023	2024	23/24	19/24
Global	29,7	31,7	34,6	9,1%	16,5%
North America	15,4	18,1	20,5	13,3%	33,1%
Europe	7,7	8,2	8,4	2,4%	9,1%
Asia and Oceania	5,1	3,4	4,0	17,6%	-21,6%
South America	1,0	1,0	1,2	20,0%	20,0%

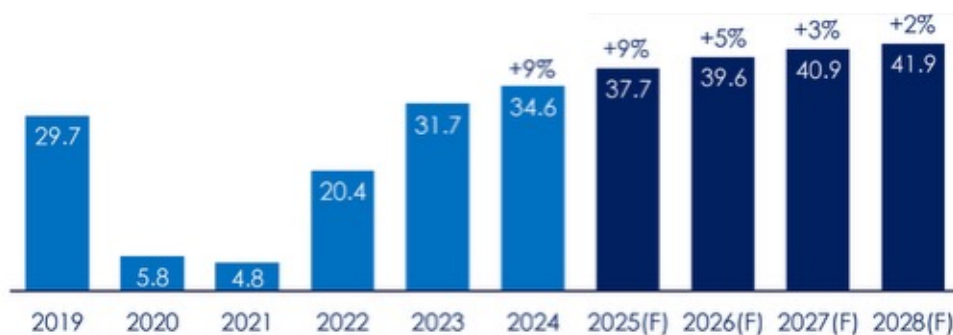
In 2024, destination preferences in cruise tourism showed a clear concentration. The Caribbean, Bahamas and Bermuda route retained its position as the clear leader; passenger numbers reached approximately 15 million, increasing by more than 17% compared with the previous year. The fact that approximately 43% of total cruise passengers preferred this region reinforced the dominant role of the Caribbean in the global cruise market.

The Mediterranean emerged as the second-largest destination, welcoming approximately 5.8 million passengers in 2024 and recording annual growth of 5.8%. This result showed that one out of every six cruise passengers chose the Mediterranean. European destinations outside the Mediterranean recorded a more limited increase, with passenger numbers reaching around 3 million and growth remaining at around 2%.

Growth on the Asia and China route was slower; passenger numbers reached 2.6 million, but the growth rate was limited to 1.5%. The Alaska market performed steadily and increased by 3.8%, with passenger numbers approaching 1.7 million. Australia, New Zealand and Pacific destinations also recorded moderate growth.

By contrast, contraction was observed in some regions. Passenger numbers on the North America West Coast-Mexico-California-Pacific route declined by approximately 8%, while the South America and Panama Canal route fell by nearly 3%. African and Middle Eastern destinations recorded a decline of around 4% in passenger numbers. Expedition-oriented cruise routes such as Antarctica, the Arctic and Galapagos, despite their limited volume, became one of the fastest-growing segments, with passenger numbers increasing by more than 20%.

This distribution shows that cruise tourism recovered strongly in 2024, but that growth was concentrated in particular destinations. The Caribbean and the Mediterranean continued to be the main centres of attraction for global cruise traffic, while demand weakened in some traditional and geopolitically more sensitive regions. This outlook made demand concentration more decisive in the capacity planning of cruise companies.

**Figure 2.16.** Cruise passenger projection (Million Passengers)⁸⁸

⁸⁷ Cruise Lines International Association. (2025). State of the cruise industry report 2025.

⁸⁸ CLIA, 2025

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Current projections envisage that cruise passenger numbers will rise to approximately 37.7 million in 2025, 39.6 million in 2026 and 40.9 million in 2027. By 2028, the global number of cruise passengers is expected to reach around 42 million. However, annual growth rates are seen to slow gradually over time, with the increase of around 9% in 2025 falling towards 2% by 2028.

This slowdown indicates that the new capacity to be added to the global fleet will remain more limited in the medium term. Strong short-term demand, together with slower capacity growth on the supply side, has shifted the sector towards a more balanced growth path. In this context, the cruise sector is expected to continue growing in the coming years, although its growth rate is projected to be more moderate than during the post-pandemic recovery period.

2.6. Developments in the World Port Sector

Developments in the world's leading ports and in ports in Türkiye's nearby regions are examined under this heading.

2.6.1. Assessment in Terms of Total Cargo

As of 2025, the total amount of cargo transported by sea worldwide reached 12.87 billion tonnes, increasing the operational burden on port areas. Considering that every unit of cargo carried by sea is loaded at one port and discharged at another port at its destination, the global port network is estimated to have managed at least 25.7 billion tonnes of handling traffic in 2025. This enormous volume places direct pressure not only on quay capacities, but also on port equipment, back-up storage areas and inland/intermodal connections.

Approximately 40% of this total global traffic passes through around 20 very large-scale ports. This shows that global cargo mobility is concentrated at certain strategic nodes, and that the operational efficiency of these nodes is critical for the entire world trade chain. Managing the increasing cargo flow forces port authorities to deepen berths, increase equipment numbers and invest in information technologies that optimise traffic within ports. As a result, every 1% increase in global tonnage creates approximately 250 million tonnes of additional transaction volume at ports, triggering the constant need for logistics infrastructure expansion.

Top 20 ports

The world's 20 largest ports, with total handling of approximately 10.5 billion tonnes in 2025, manage around 40% of global port traffic alone. Data for the 2021-2025 period show that the centre of gravity of maritime trade is firmly fixed in the Far East. Ningbo-Zhoushan, at the top of the list, exceeded 1.4 billion tonnes of throughput in 2025. It not only broke its own record, but also became a single decisive force in global tonnage capacity. The performance of the Tangshan and Shanghai ports that follow it confirms China's two-way dominance in both heavy industrial raw materials and exports of manufactured goods. The fact that seven of the top 10 ports are located in the People's Republic of China proves that the structural dependence of the global supply chain on this region had deepened further by 2025. On the Southeast Asia and Oceania route, centres such as Singapore, Busan and Port Hedland retained their positions by tonnage despite geopolitical risks and fluctuations in global demand, showing their indispensability as strategic transshipment points and raw-material export gateways.

Table 2.18. Top 10 ports in the world by amount of cargo handled (million tons)⁸⁹

#	Port	Country	2021	2022	2023	2024	2025	24/25
1	Ningbo-Zhoushan	China	1.224,0	1.257,0	1.320,0	1.370,0	1.410,0	2,9%
2	Tangshan	China	722,4	768,9	842,2	890,5	925,0	3,9%
3	Shanghai	China	769,7	727,8	754,0	810,0	845,0	4,3%
4	Guangzhou	China	651,0	655,9	675,0	695,0	715,0	2,9%
5	Qingdao	China	630,3	657,5	660,0	685,0	708,0	3,4%
6	Suzhou	China	569,0	573,4	598,6	615,0	635,0	3,3%
7	Singapore	Singapore	599,0	578,2	591,7	622,7	614,3	-1,3%
8	Rizhao	China	541,0	571,0	552,0	568,0	585,0	3,0%
9	Port Hedland	Australia	546,0	561,0	540,0	555,0	572,0	3,1%
10	Busan	South Korea	442,5	424,9	492,0	510,0	528,0	3,5%
11	Yantai	China	423,0	462,0	485,0	502,0	521,0	3,8%
12	Tianjin	China	529,5	549,0	445,0	460,0	472,0	2,6%
13	Rotterdam	Holland	468,7	467,4	438,8	435,8	428,4	-1,7%
14	Beibu Gulf	China	358,0	371,0	380,4	395,0	412,0	4,3%
15	Taizhou	China	352,0	364,0	379,7	388,0	398,0	2,6%
16	Nanjing	China	308,0	315,0	338,0	352,0	365,0	3,7%
17	Antwerp-Bruges	Belgium	289,0	286,8	271,0	278,5	282,0	1,3%
18	Gwangyang	S. Korea	292,0	269,0	265,0	272,0	278,0	2,2%
19	Laem Chabang	Thailand	243,0	254,0	260,0	268,5	276,5	3,0%
20	Port Kelang	Malaysia	235,0	232,0	255,0	265,0	273,0	3,0%

The development of global ports provides critical data in terms of operational efficiency and regional economic transformation. Technological transformation enables giants such as Ningbo-Zhoushan and Shanghai to raise capacity limits every year while also reducing operating costs. According to 2025 data, the success of the fastest-growing large ports in the world is based on digitalisation, infrastructure expansion and the ability to adapt rapidly to changing trade routes.

Ningbo-Zhoushan broke tonnage records by investing in "smart port" technologies such as 5G-supported autonomous trucks and remotely controlled cranes and by optimising cargo flows from inland regions through stronger rail and maritime integration. Tangshan increased operational efficiency by 8.6% by digitalising the huge bulk terminals serving the industrial basin in northern China and became an indispensable centre in energy raw-material logistics. Shanghai, in third place, continued to grow as Phase IV of Yangshan, the world's largest fully automated terminal, reached full capacity and as the port offered a safe and rapid

transshipment hub for vessels whose routes were altered because of geopolitical disruptions in the Red Sea.

By contrast, the stagnant or slightly declining performance of Rotterdam and Antwerp-Bruges, Europe's main gateways, during the 2021-2025 period is directly linked to the continent's target of moving away from fossil fuels and to the slowdown in industrial production. Ports in Southeast Asia such as Port Klang and Laem Chabang, which gained momentum as production bases partly shifted from China, consolidated their places in the top 20 list as concrete reflections of the China+1 strategy in maritime logistics.

The China+1 strategy refers to the approach by which multinational companies spread production and supply operations to another alternative country, usually Vietnam, India, Malaysia or Thailand, rather than focusing solely on the People's Republic of China, for purposes of risk management and cost optimisation. Changes observed in port data for 2021-2025 are a concrete reflection of this strategy

in logistics. China maintains its position as the world's main production centre and the largest-volume port authority; however, the stable tonnage increase in Southeast Asian ports proves that global trade routes are evolving from a single-centre structure towards a multi-centred one. This strategic diversification is regarded as a cornerstone of a new economic order aimed at making global trade more resilient against geopolitical crises and regional constraints.

In conclusion, 2025 data clearly show that global trade continues to evolve from West to East not only in terms of volume, but also in terms of technological infrastructure and strategic positioning.

Ports in the nearby region

The relevant table (**Table 2.19**) clearly presents the major European ports in regions geographically close to Türkiye and the relative position of Turkish ports within this group. The list covers ports on the line extending from the North Sea to the Western Mediterranean and the Eastern Mediterranean whose cargo volumes exceed 60 million tonnes. In this framework, the Turkish ports included in the list stand out not only as regional actors, but also as actors of comparable size at European scale.

Table 2.19. Major ports in our immediate region (2025, million tons)^{90,91}

Sıra	Port	Country	Annual Cargo
1	Rotterdam	Netherlands	435,8
2	Antwerp-Bruges	Belgium	277,7
3	Hamburg	Germany	111,8
4	Algeciras	Spain	103,6
5	Aliağa	Türkiye	85,5
6	Kocaeli	Türkiye	83,8
7	Le Havre-Rouen-Paris	France	83,2
8	Valencia	Spain	81,1
9	Constanța	Romania	77,5
10	Marseille	France	70,5
11	Barcelona	Spain	69,7
12	İskenderun	Türkiye	68,6
13	Bergen	Norway	68,0
14	Genoa	Italy	64,5
15	Amsterdam	Netherlands	62,2
16	Bremen	Germany	61,9
17	Trieste	Italy	59,5

From a numerical perspective, Turkish ports are clearly positioned in the medium-upper segment at European scale. Aliağa (85.5 million tonnes) and Kocaeli (83.8 million tonnes) rank fifth and sixth respectively, placing them in the same scale band as France's Le Havre-Rouen-Paris system and Spain's Port of Valencia. These two ports are ahead of, or immediately alongside, established European ports such as Amsterdam, Genoa, Trieste and Barcelona. This shows that Türkiye has achieved strong capacity, particularly in industry-, energy- and bulk-based transport. Although İskenderun (68.6 million tonnes) is in the middle of the list, it displays a volume comparable with ports such as Bergen and Barcelona.

Another numerically significant point is that the cargo volume of Turkish ports is not concentrated in a single mega-port but distributed across multiple centres. While Rotterdam alone sits at the top of the system with 435.8 million tonnes, the Aliağa-Kocaeli-İskenderun trio in Türkiye displays a multi-centred structure. This demonstrates that Türkiye is integrated into the European port system not through a single gateway, but through regional nodes, and that it forms a complementary logistics backbone particularly along the Eastern Mediterranean-Marmara axis.

⁹⁰ https://en.wikipedia.org/wiki/List_of_busiest_ports_in_Europe

⁹¹ Ministry of Transport and Infrastructure of the Republic of Türkiye

2.6.2. Assessment in Terms of Container Transport

Drewry estimates that container ports worldwide reached a cargo volume of approximately 980 million TEU in 2025, an increase of 5.5%. In 2026, growth is projected to be in the 1.8% range.

In 2024, global container port handling volume increased by 7.2% compared with the previous year and reached approximately 928 million TEU. This increase points to a clear recovery after the limited

growth recorded in 2022 and 2023. Compared with growth rates below 1% in 2022 and 2023, the 2024 increase represented a significant rebound. From a longer-term perspective, however, the average growth rate over the last five years remained limited at 2.8%, indicating that the market is moving towards a more mature structure. Despite continuing supply-chain disruptions, this strong increase in container demand shows that a temporary normalisation occurred in global trade flows (**Figure 2.17.**).

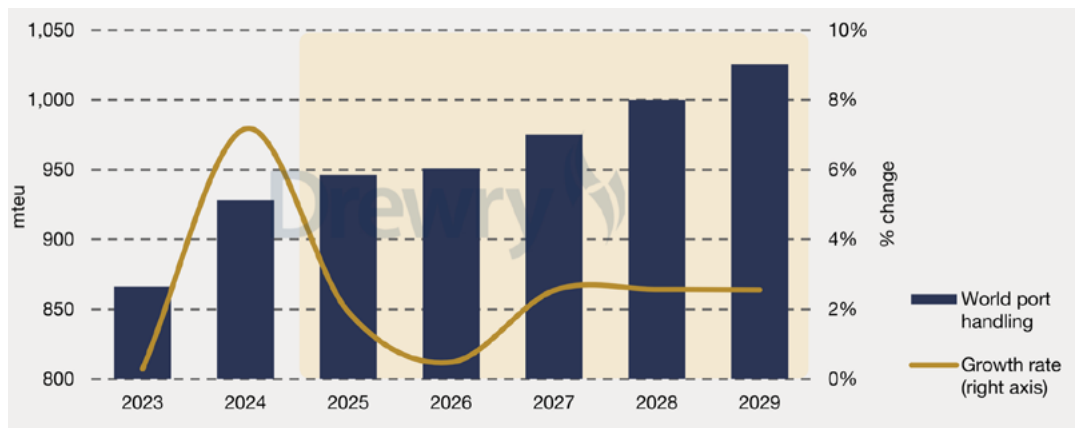


Figure 2.17. Drewry container handling projection⁹²

As of the first months of 2026, more comprehensive assessments of 2024 can be made. By regional distribution, Asia remained by far the largest-volume region, with 513.8 million TEU in 2024, accounting

for more than half of the global total. Annual growth in Asia was 6.2%, indicating a strong but relatively balanced increase (**Table 2.20.**).

Table 2.20. World container ports handling data by region (*000 TEU)⁹³

Regions	2021	2022	2023	2024	23/24
Asia	463.288	472.015	483.666	513.762	6,2%
Europe	143.308	137.805	133.351	141.852	6,4%
North America	74.224	75.732	78.911	81.516	3,3%
Middle East and South Asia	77.332	77.881	69.703	77.435	11,1%
Latin America	52.529	52.260	52.077	58.894	13,1%
Africa	33.318	32.908	35.489	40.891	15,2%
Oceania	13.758	14.797	13.145	14.098	7,2%
World	857.757	863.398	866.342	928.448	7,2%

Following the decline in Europe during 2022-2023, a recovery of 6.4% occurred in 2024 and volume rose to approximately 141.9 million TEU. Growth in North America was more limited; with an increase of 3.3%, the region performed below the global average.

By contrast, the Middle East and South Asia stood out with growth of 11.1%, showing the region's increasing importance in global trade networks.

⁹² Drewry. (2025). Global container terminal operators annual review and forecast: Annual report 2025/26. Drewry Shipping Consultants.

⁹³ Drewry. (2025). Global container terminal operators annual review and forecast: Annual report 2025/26. Drewry Shipping Consultants.

Latin America and Africa were among the fastest-growing regions in 2024. Volumes increased by 13.1% in Latin America and by 15.2% in Africa. Although both regions remain relatively small in absolute volume, their growth rates show that global trade is spreading over a broader geography and that regions outside traditional centres are gaining increasing weight. In Oceania, growth of 7.2% was in line with the global average.

Overall, this picture indicates a strong and widespread recovery in container transport in 2024, while showing that the centre of gravity of growth is gradually expanding towards emerging regions such as Africa, Latin America and South Asia. This trend confirms that the geography of global trade is evolving towards a more multipolar and regionally diversified structure.

In the first quarter of 2025, demand for container transport remained relatively strong. Front-loading of cargo, particularly in the United States, in order to avoid expected tariff increases supported container traffic. However, the reciprocal tariffs announced by the US administration in April 2025, with a scope wider than expected, increased uncertainty in the global container market. This development caused demand growth to slow significantly in the second half of 2025.

In the medium term, a more balanced growth rate of 2.5%-2.6% per year is forecast for global port handling volume in the 2027-2029 period. This outlook, however, remains largely dependent on US trade policies and the effects of tariffs on economic growth. "On-off" tariff practices continue to be the most important risk factor for global container trade.

On the supply side, global port capacity continued to increase. Global container port capacity is expected to grow by an average of 2.4% per year until 2029 and reach approximately 1.49 billion TEU. This represents

additional capacity of approximately 166 million TEU compared with 2024. In the short term, capacity is forecast to increase by 4.7% in 2025, equivalent to a rise of 63 million TEU. This would be the highest annual absolute capacity increase since the 2009 global financial crisis and reflects the direct result of terminal investments accelerated by severe post-pandemic congestion.

At the same time, changes in the structure of the global container fleet continued to support port and terminal investment. Infrastructure and equipment modernisation undertaken to accommodate larger vessels often brought additional handling capacity. Renewal investments in mature markets increased operational efficiency through semi-automated cranes, advanced terminal operating systems and denser yard layouts, enabling gradual increases in port capacity.

Overall, 2024 data show that the recovery in global container port handling was not limited to traditional main trade centres. Stronger and more dynamic growth emerged in Africa, South America and the rising sub-regions of Asia. This points to a global trade geography that is becoming increasingly multipolar and regionally diversified.

Top 30 container ports

According to 2025 data, Shanghai maintained its title as the world's busiest container port, with a volume exceeding 55 million TEU. The most noteworthy change among the top 10 ports was Ningbo-Zhoushan's strong growth rate of 11.6%, which gave it renewed momentum within the top 10. Singapore, Shenzhen, Qingdao, Guangzhou, Busan and Tianjin followed a steady upward path, while LA/LB and Dubai, located at the lower end of the top 10, were stagnant in 2025.

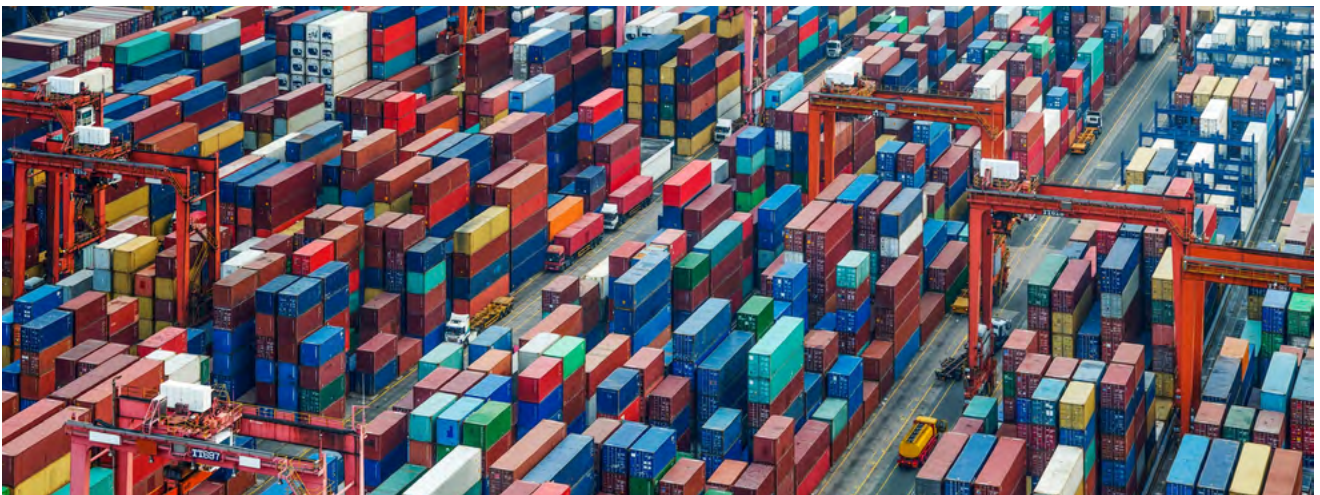


Table 2.21. Ports handling the most containers (TEU)⁹⁴

#	Port	2024	2025	24/25
1	Shanghai	51.508.000	55.062.000	6,9%
2	Singapore	41.124.045	44.663.699	8,6%
3	Ningbo-Zhoushan	39.300.800	43.870.000	11,6%
4	Shenzhen	33.398.600	35.410.000	6,0%
5	Qingdao	30.870.000	32.890.000	6,5%
6	Guangzhou	26.070.000	27.680.000	6,2%
7	Busan	24.402.022	24.881.704	2,0%
8	Tianjin	23.292.500	24.032.800	3,2%
9	LA/LB	19.947.077	20.120.917	0,9%
10	Dubai	15.536.000	15.552.000	0,1%
11	Port Kelang	14.644.527	15.138.772	3,4%
12	Rotterdam	13.822.000	14.245.000	3,1%
13	Tanjung Pelepas	12.253.309	14.028.376	14,5%
14	Antwerp	13.517.000	13.610.000	0,7%
15	Hong Kong	13.688.000	12.944.000	-5,4%
16	Xiamen	12.255.700	12.507.700	2,1%
17	Tanger Med	10.241.392	11.106.164	8,4%
18	Laem Chabang	9.554.675	10.452.400	9,4%
19	Beibu Gulf	9.020.000	10.060.000	11,5%
20	Ho Chi Minh City	9.158.200	10.002.586	9,2%
21	Mundra	8.231.000	9.301.030	13,0%
22	NY/NJ	8.698.498	8.897.531	2,3%
23	Kaohsiung	9.228.418	8.885.854	-3,7%
24	Cai Mep	7.440.000	8.779.200	18,0%
25	Hamburg	7.795.313	8.364.000	7,3%
26	Colombo	7.792.069	8.301.210	6,5%
27	Nhava Sheva	7.052.689	7.944.257	12,6%
28	Jakarta	7.600.000	7.880.000	3,7%
29	Rizhao	6.710.000	7.370.000	9,8%
30	Lianyungang	6.690.700	7.160.000	7,0%

Developments in container ports in the nearby region

When the ports handling the largest number of containers in Europe are examined, Rotterdam increased by 3.1% in 2025 and became the leading container-handling port in Europe with 14.2 million

TEU. Rotterdam was followed by Antwerp with 13.6 million TEU and Hamburg with 8.3 million TEU. In this ranking, prepared on the basis of port authorities and harbour master's offices, the Ambarlı and Kocaeli harbour master's offices from Türkiye were also among the top 15 ports.



Table 2.22. The 15 ports that handle the most containers in Europe (*000 TEU)⁹⁵

#	Port	2023	2024	2025	24/25
1	Rotterdam	13.477	13.820	14.245	3,1%
2	Antwerp	12.515	13.528	13.630	0,8%
3	Hamburg	7.700	7.800	8.300	6,4%
4	Valencia	4.804	5.476	5.663	3,4%
5	Algeciras	4.733	4.706	4.738	0,7%
6	Piraeus	5.100	4.702	4.501	-4,3%
7	Bremerhaven	4.181	4.486	4.858	8,3%
8	Gioia Tauro	3.549	3.940	4.491	14,0%
9	Barcelona	3.280	3.886	3.727	-4,1%
10	Le Havre/Rouen	2.630	3.122	3.217	3,0%
11	Ambarlı	3.009	3.016	3.428	13,7%
12	Marsaxlokk	2.800	2.857	2.868	0,4%
13	Genoa	2.741	2.821	2.999	6,3%
14	Gdansk	2.051	2.242	2.767	23,4%
15	Kocaeli	2.159	2.322	2.505	7,9%

Developments among global terminal operators

In 2024, the weight of major terminal operators in global container port handling became even more pronounced. The top 20 global/international terminal operators handled approximately 761 million TEU in total and came to control 82% of world container port volume. Compared with 2023, this ratio indicates concentration in both absolute volume and market share.

China-based COSCO Shipping, at the top of the ranking, maintained its leadership in 2024 with handling volume above 110 million TEU, while its global share approached 12%. It was followed by APM Terminals and PSA International; both operators reached volumes of around 100 million TEU and strengthened their positions in the top three. DP World and Hutchison Ports formed the second group with similar volumes and shares of around 9% (**Table 2.23**).

⁹⁵ Based on data from Theo Notteboom and the General Directorate of Maritime Affairs

Table 2.23. Business volume table of global terminal operators (million TEU, %)⁹⁶

#	Operator	2023	2024	23/24	24 Pay
1	China COSCO SHIPPING	105,5	110,3	4,5%	12.3%
2	APM Terminals	92,9	101,1	8,8%	10.5%
3	PSA International	94,7	100,2	5,8%	10.8%
4	DP World	79,5	85,8	7,9%	9.5%
5	Hutchison Ports	80,6	85,7	6,3%	8.9%
6	MSC Group	70,4	74,0	5,1%	7.5%
7	China Merchants Port	49,6	53,9	8,7%	4.3%
8	CMA CGM	35,4	42,5	20,1%	3.9%
9	SSA Marine	12,0	14,5	20,8%	1.6%
10	ICTSI	13,4	13,8	3,0%	1.5%
11	Eurogate	10,7	11,9	11,2%	1.3%
12	HMM	10,1	10,7	5,9%	1.2%
13	Adani	8,9	10,4	16,9%	1.3%
14	Evergreen	9,2	10,3	12,0%	0.8%
15	ONE	4,4	9,7	120,5%	1.0%
16	Wan Hai	7,4	7,7	4,1%	0.8%
17	Yildirim/Yilport	7,1	7,6	7,0%	0.8%
18	Hanseatic Global Terminals (SAAM dahil)	3,6	6,1	69,4%	0.6%
19	AD Ports Group	3,5	4,7	34,3%	0.6%
	GTO Total	698,9	760,9	8,9%	
	World Total	866,3	928,5	7,2%	
	GTO Share	80,7%	81,9%		

The 2024 data show that not only the largest players but also medium-sized global terminal operators recorded notable growth. Groups such as CMA CGM, SSA Marine and Adani stood out with double-digit growth rates, while average cargo growth across all global operators was 8.9%. Another notable point is that Chinese terminal groups maintained their strong position within the global system. China Merchants Port and COSCO continued to be decisive actors in the global container port network through their direct and indirect influence. European-based operators, by contrast, displayed stable but relatively low growth rates with more limited shares.

Overall, 2024 was characterised by high concentration in global container terminal operations, the strengthening of large-scale players and the rapid growth of selected medium-sized operators. This trend shows that competition in port operations is increasingly shaped around capital, network breadth and strategic partnerships.

The following sections refer to vessel performance indicators in ports published by UNCTAD, as well as the current status of port connectivity indices.

2.6.3. Vessel Performance in Ports⁹⁷

Developments in the number of port calls

In 2024, the number of port calls generally followed a stable course. Container-ship port calls remained broadly at the same level throughout 2024 after reaching high levels in the second half of 2023. Similarly, no significant change occurred in the port

calls of liquid bulk vessels compared with previous years. Dry bulk vessels, by contrast, displayed a more active outlook: port calls increased by around 2% year on year in the first half of 2024 and by 4% in the second half. Passenger vessels continued to increase, with port calls rising by 5% in the first half of 2024 and by 2% in the second half.

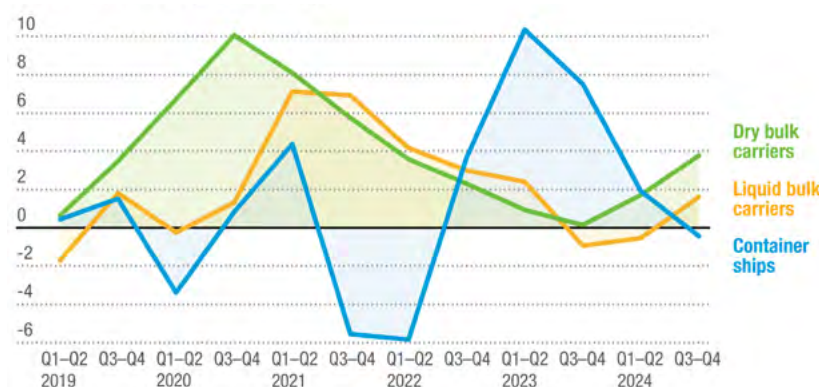


Figure 2.18. Total ship calls (Annual change, %)⁹⁸

When the geographical distribution of port calls is examined, tanker and container vessels are seen to be concentrated mainly in Asian and European ports. Together, these two regions accounted for approximately 80% of total port calls for both vessel types. In recent years, however, there has been a clear geographical shift. Comparing the first half of 2018 with the second half of 2024, Europe's share of container-ship port calls declined while Asia's share increased. A similar tendency emerged even more strongly in tanker transport: Europe's share fell while the importance of Asian ports rose markedly. This development shows that changes in the direction of global trade flows are directly reflected in port activity.

Changes in trade policies in 2025 were expected to create new pressure on port activity. Customs tariffs announced by major economies and countermeasures taken by other countries increased costs, particularly

together with additional port fees planned at US ports. Rising costs encouraged carriers to consolidate services, reduce sailing frequency or route cargoes to alternative transshipment centres. These tendencies are likely to have decisive medium-term effects on port connectivity, competitiveness and regional trade networks.

Time and performance values in port operations

In 2024, operational slowdowns, deterioration in cargo-handling performance and deepening global logistics bottlenecks created clear pressure on port operations. Overall, average time in port for most vessel types remained close to 2023 levels. Average time in port was 2.7 days for dry bulk vessels, 0.9 days for dry general cargo vessels and 1.5 days for tankers. Container ships, however, followed a different trend: the decline observed in previous years reversed and average time in port rose to 0.8 days by the end of 2024.

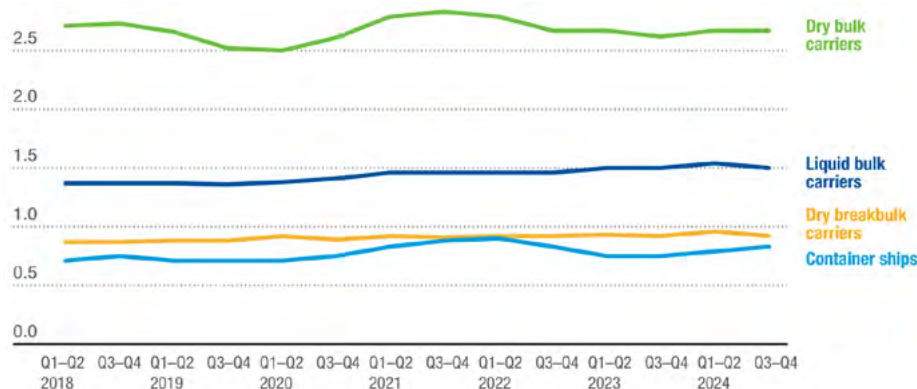


Figure 2.19. Average time spent in ports (Median, days)

⁹⁷ UNCTAD (2025). Review of maritime transport 2025: Staying the course in turbulent waters. United Nations.

⁹⁸ UNCTAD (2025). Review of maritime transport 2025: Staying the course in turbulent waters. United Nations.

During the same period, port congestion increased globally. Geopolitical developments, changes in the direction of trade flows and capacity constraints extended the time vessels waited before berthing. Waiting times, which had partly declined in 2023, rose again in 2024. As of December 2024, average

waiting time reached 6.4 hours in developed countries and 10.9 hours in developing countries. This increase represented a clear deterioration in both country groups compared with the same period of the previous year.

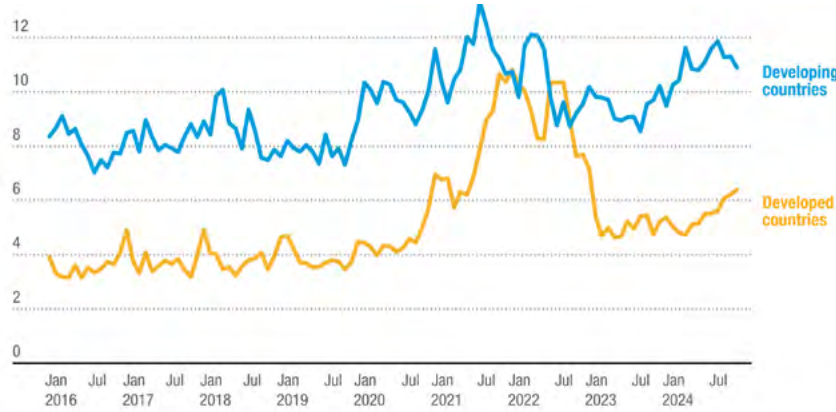


Figure 2.20. Average port wait times for container ships (hours)

The next heading of the report addresses the current values of the Liner Shipping Connectivity Index.

2.7. Türkiye in the Liner Shipping Connectivity Index (LSCI)⁹⁹

The purpose of the LSCI is to measure the level of integration in liner-shipping port connections. The index makes measurements at both country and port level. It can be considered an indicator of access to global trade through the maritime transport network. High index values indicate the presence of high-capacity and high-frequency maritime transport and imply efficient participation in international trade.

The index is calculated using five main components.

- **Scheduled vessel calls:** the number of vessels calling on a weekly basis. Import, export and transit cargo are handled during these calls. Where transit intensity is high, these vessel calls are not counted for the global trade system, and the port is shown as a transit cargo center. Nevertheless, it is accepted that import and export services exist at these ports.
- **Deployed capacity:** while the previous component relates to vessel-call frequency, the capacity allocated for these vessels is another measurement component. High-capacity increases trade potential with global markets.
- **Number of shipping companies:** a measurement of the number of maritime transport companies serving a particular country and port.

• **Average vessel size:** there are relatively few ports in the world that serve 10,000 TEU vessels and above. Calls by large-scale vessels are an important indicator of economies of scale and mean lower transport costs per TEU.

• **Directly connected ports:** this measurement shows the number of ports directly connected to the relevant port and vessel services. Because there is no transshipment between these ports, a stronger commercial mechanism can be established.

For the measurements made under the index, the 2006 value is accepted as 100. This provides a reference value for comparisons in subsequent years. Naturally, countries with high index values are those actively integrated into international trade. According to index data for the fourth quarter of 2025, the three ports with the highest index values were Shanghai, Ningbo and Singapore. In this period, Shanghai, with an index value of approximately 2,416, Ningbo with 2,057 and Singapore with 1,877, stood out as the ports with the highest connectivity levels globally.

Looking at Türkiye's fourth-quarter values for 2021-2025, Ambarlı had the highest index value, followed by the port clusters of Mersin, İzmit, Aliğa, İskenderun, Gemlik and İzmir (Figure 2.21.).

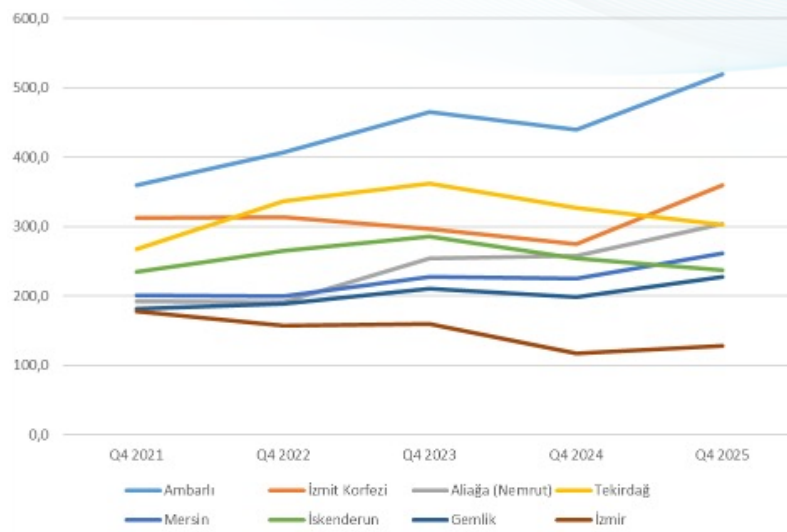


Figure 2.21. Port Regions of Türkiye in the Port Connection Index¹⁰⁰

The index values are also shown in the **Table 2.24**. Comparing the fourth quarter of 2024 with the fourth quarter of 2025, increases are observed in all port clusters except Aliğa and Gemlik.

Table 2.24. LSCI values of important ports in Türkiye

Port Regions	Q4 2021	Q4 2022	Q4 2023	Q4 2024	Q4 2025	2024/2025
Ambarlı	359,6	406,5	465,1	439,8	519,8	18,2%
Mersin	312,3	313,5	296,8	275,0	359,8	30,8%
İzmit Bay	192,7	190,9	254,8	257,6	304,0	18,0%
Aliğa (Nemrut)	267,8	336,1	362,1	327,3	303,1	-7,4%
İskenderun	201,4	199,3	227,6	225,5	261,9	16,2%
Gemlik	234,8	264,6	285,1	254,7	236,9	-7,0%
Tekirdağ	181,1	188,5	211,2	198,5	227,9	14,8%
İzmir	177,6	156,8	160,3	117,9	127,8	8,4%

The next chapter examines in detail the cargoes handled at ports in Türkiye.

¹⁰⁰ <https://unctadstat.unctad.org/wds/TableViewer/tableView.aspx?ReportId=92>

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A total of **2 Mobile Harbour Cranes (MHC)**, **5 Yard Terminal Tractors (YTT)**, **9 Terminal Tractor Chassis (TTC)** and a **Reach Truck** belonging to our company will be offered for sale.

EQUIPMENT	#	BRAND	MODEL	YEAR
Mobile Harbour Crane (MHC)	1	LIEBHERR	LHM 500	2005
	2	LIEBHERR	LHM 500	2005

EQUIPMENT	#	BRAND	MODEL	YEAR
Yard Terminal Tractor (YTT)	1	TERBERG	YT182	2010
	2	TERBERG	YT182	2010
	3	TERBERG	YT182	2010
	4	TERBERG	YT182	2010
	5	TERBERG	YT182	2010

EQUIPMENT	#	BRAND	MODEL	YEAR
Terminal Tractor Chassis (TTC)	1	HİDRO-MAK	Single Axle, 20-ft	2008
	2	BMS	Single Axle, 20-ft	2010
	3	BMS	Single Axle, 20-ft	2010
	4	HİDRO-MAK	Single Axle, 40-ft	2008
	5	HİDRO-MAK	Single Axle, 40-ft	2013
	6	BMS	Single Axle, 40-ft	2010
	7	BMS	Single Axle, 40-ft	2010
	8	BMS	Single Axle, 40-ft	2010
	9	HİDRO-MAK	Single Axle, 40-ft	2015

EQUIPMENT	#	BRAND	MODEL	YEAR
Reach Truck	1	LINDE	R16HD	2007



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UNIT 3

THE TURKISH PORT SECTOR

- 3.1. Developments in Turkish Ports
- 3.2. Dry Bulk and General Cargo Ports
- 3.3. Container Ports
- 3.4. Liquid Bulk Cargo Ports
- 3.5. Rolling Cargo Ports
- 3.6. Passenger Ports

3. THE TURKISH PORT SECTOR

3.1. Developments in Turkish Ports

Ports undoubtedly constitute the most important infrastructure of maritime trade, which plays a decisive role in Türkiye's foreign trade. For this reason, the efficient and effective operation of ports, and the availability of infrastructure, superstructure, equipment and service quality in line with international standards, are among the foremost priorities of the sector.

The main ports in Türkiye have reached a remarkable level both in terms of their physical characteristics and their service quality. Work continues at Turkish ports on digitalisation and the transition to environmentally friendly technologies.

Coastal regions are under intense pressure from urbanisation. In regions where demand remains high, such as Marmara and the Aegean, it is virtually impossible to find sites that can be allocated for new port investments. For this reason, the priority is to increase the capacity, effectiveness and efficiency of existing ports.

An increase in capacity utilisation rates as a result of cargo growth, combined with a decline in the investment appetite of

port operators, may lead to a deterioration in the supply-demand balance in the short to medium term.

As of today, according to data from the Directorate General of Shipyards and Coastal Structures, Türkiye has 217 coastal facilities serving maritime trade in the form of piers, buoys, dolphins and platforms.

Of these coastal facilities, 198 are actively serving maritime transport. Approximately 89 of these facilities, corresponding to around 45%, are located in the Marmara Region; 49, corresponding to 25%, are located in the Mediterranean Region; 31, corresponding to 16%, are located in the Black Sea Region; and 28, corresponding to 14%, are located in the Aegean Region (**Figure 3.1**).

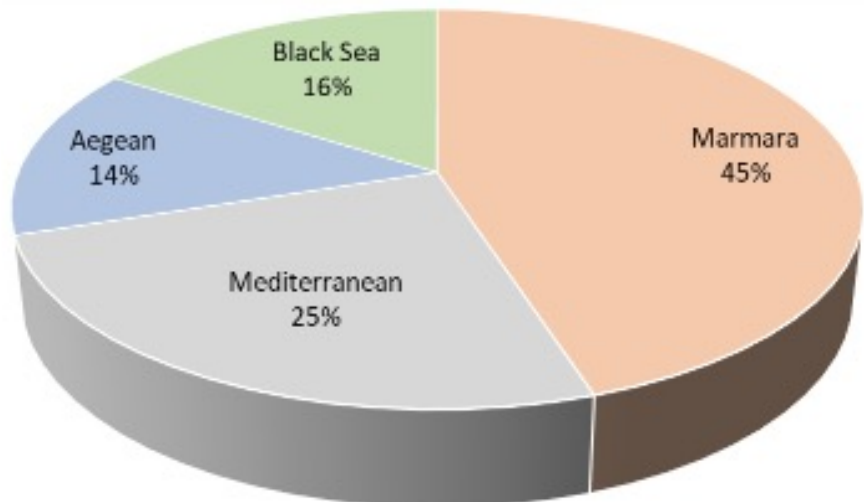


Figure 3.1. Distribution of ports by regions

The changes in the cargo handled at Turkish ports over one-year, five-year and ten-year periods have been analysed. Compared with the previous year (2024-2025), cargo handled at ports increased by 2% in loadings, 5% in unloadings and 4% in total. In the short term (2021-2025), the highest increase in

port cargo occurred in unloaded cargoes, at 15%, while loadings fell by 7% over the same period. In the medium term, cargo growth was 5%. Over the long term (2016-2025), loadings increased by 26%, unloadings by 31%, and total cargo by 29% (**Figure 3.4**).

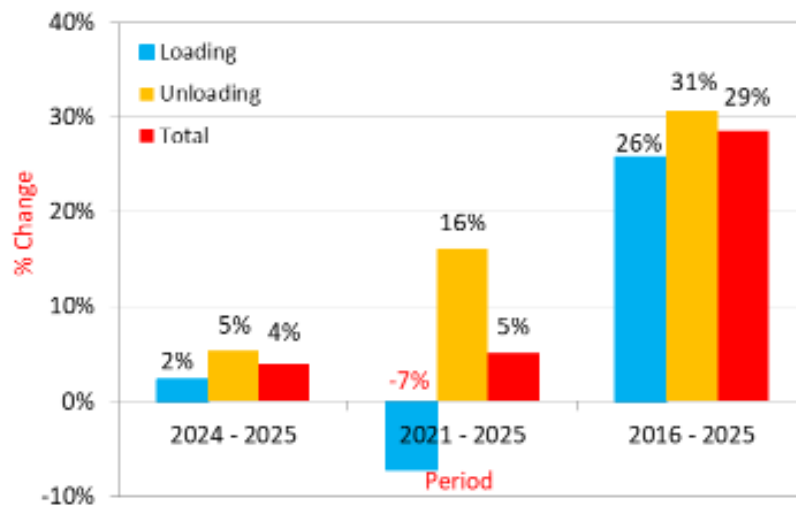


Figure 3.4. Rates of increase in cargo handled in the 1, 5 and 10 year period.

When the distribution of cargo handled at Turkish ports is examined by customs/trade regime, foreign-trade cargoes account for 75,1% of the total.

As of 2024, the share of transit cargo was 13%, while the share of cabotage cargo was 11,9% (**Figure 3.5**).

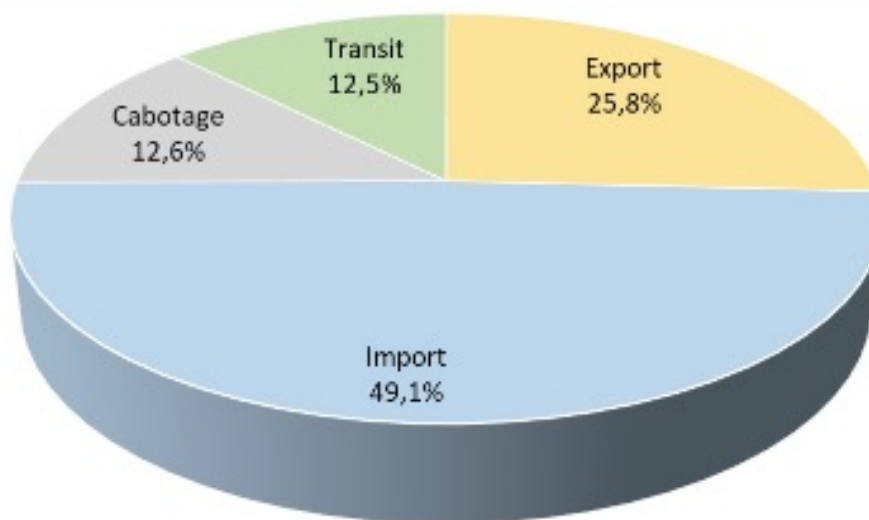


Figure 3.5. Distribution of cargo handled in our ports according to their regimes.

When the proportional change in cargo by regime is analysed compared with the previous year, import cargoes increased from 48,4% to 49,1%, and cabotage cargoes increased from 11,9% to 12,6%. Export cargoes declined from 26,8% to 25,8%, while transit cargoes fell from 13% to 12,5%.

In 2025, compared with the previous year, Turkish ports handled a total of 553,2 million tonnes of cargo. Import cargoes increased by 5,6% (14,5 million

tonnes) to 271,6 million tonnes; export cargoes increased by 0,3% (491.000 tonnes) to 142,7 million tonnes; cabotage cargoes increased by 10% (6,4 million tonnes) to 69,6 million tonnes; and transit cargoes increased by 0,1% (92.900 tonnes) to 69,1 million tonnes. Total cargo increased by 21,5 million tonnes, or 4%, compared with the previous year. Cabotage cargoes exceeded transit cargoes for the first time (Table 3.1).

Table 3.1. Distribution of cargo handled in our ports according to regimes. *

Cargo Regime	2021	2022	2023	2024	2025
Imports	232.633.060	243.917.119	256.206.627	257.136.420	271.659.580
Exports	153.763.658	150.172.902	135.510.681	142.278.137	142.769.980
Transit	78.008.944	81.018.986	66.735.403	69.064.361	69.157.356
Cabotage	61.901.122	67.501.276	62.627.093	63.258.440	69.678.982
Total	526.306.784	542.610.283	521.079.804	531.739.382	553.265.898

Considering the last fifteen years, the most significant increase was experienced in import cargoes. Transit and cabotage cargoes changed within a narrow band in the same period (**Figure 3.6**).

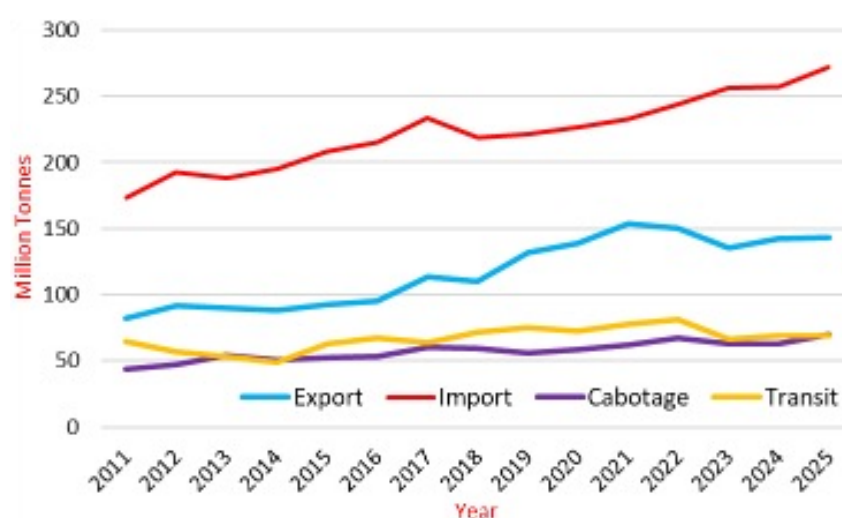


Figure 3.6. Development of cargo handled in our ports according to their regime.

When the change in cargo handled at Turkish ports by regime is analysed, cabotage cargoes increased by 10,1%, import cargoes by 5,6%, export cargoes by 0,3% and transit cargoes by 0,1% over the most recent one-year period (2024-2025). Total cargo handled at Turkish ports increased by 4% compared with the previous year.

When port cargo volumes are analysed by regime over the short term (2021-2025), the highest increase was recorded in import cargoes, at 16,8%. Import

cargoes were followed by cabotage cargoes with an increase of 12,6%. Transit cargoes declined by 11,3%, while export cargoes fell by 7,1%. Over the medium term covering the ten-year period (2016-2025), the highest increase among cargo regimes was recorded in export cargoes, at 50,6%. Export cargoes were followed by cabotage cargoes at 30,7%, import cargoes at 26,3% and transit cargoes at 3,3%. Over this period, the cargo handled at Turkish ports increased by 28,6% (**Figure 3.7**).

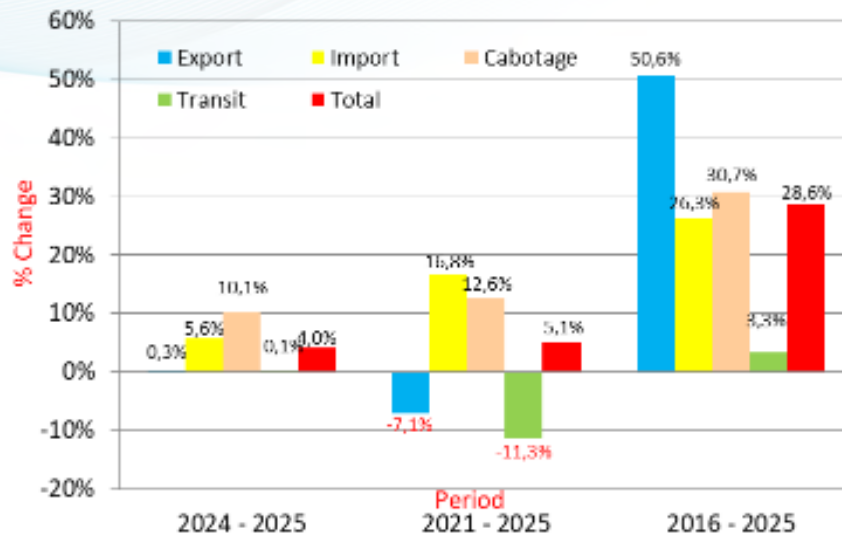


Figure 3.7. Development rates of cargoes handled in our ports according to their regimes.

When the last fifteen years are considered, the most pronounced increase occurred in import cargoes. Transit and cabotage cargoes fluctuated within a narrow band over the same period.

When the annual changes in cargo handled at Turkish ports are examined, increases were recorded in all

cargo regimes during the last two years (Figure 3.8.). In the period analysed, the highest year-on-year increases were recorded in export cargoes, with 19,9% in 2017 and 19,2% in 2019. The sharpest year-on-year decline was again recorded in transit cargoes in 2023, at 17,6%.

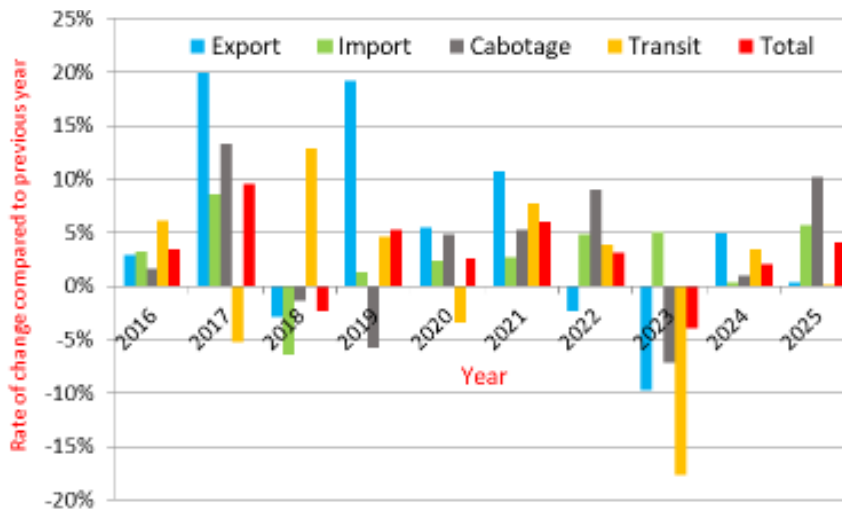


Figure 3.8. Change in the cargoes handled at our ports compared to the previous year

Taking 2015 as the base year, the ten-year growth rate of total cargo handled at Turkish ports was 2,9%. Relative to 2015, the ten-year growth rate was 4,5%

in export cargoes, 2,9% in cabotage cargoes, 2,7% in import cargoes and 0,9% in transit cargoes (**Figure 3.9**).

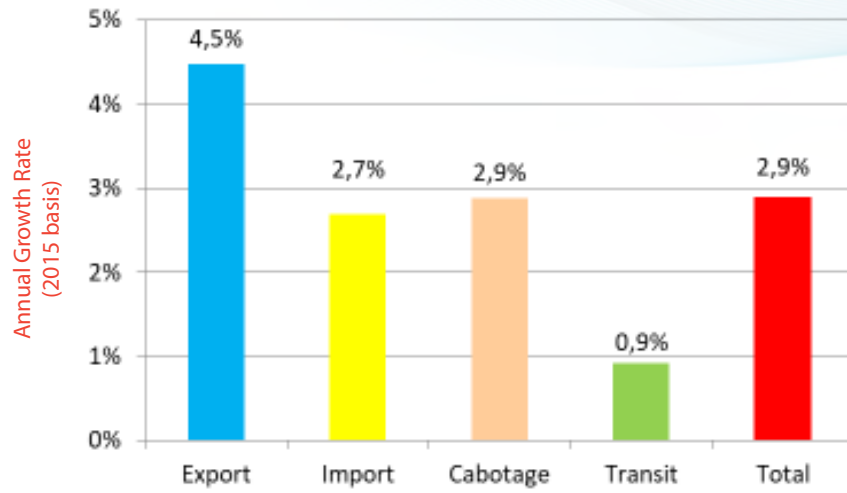


Figure 3.9. Ten-year growth rate of cargo handled in our ports.

According to 2025 data, liquid bulk cargoes accounted for 31% of the cargo handled at Turkish ports. Liquid bulk cargoes were followed by dry bulk cargoes with 29%, containers with 26%, and general cargo with 12%.

As of 2025, the share of Ro-Ro cargoes on a tonnage basis remained only 2% (Figure 3.10). Compared with the previous year, the share of liquid bulk cargoes rose from 30% to 31%, while the share of container cargoes declined from 27% to 26%.

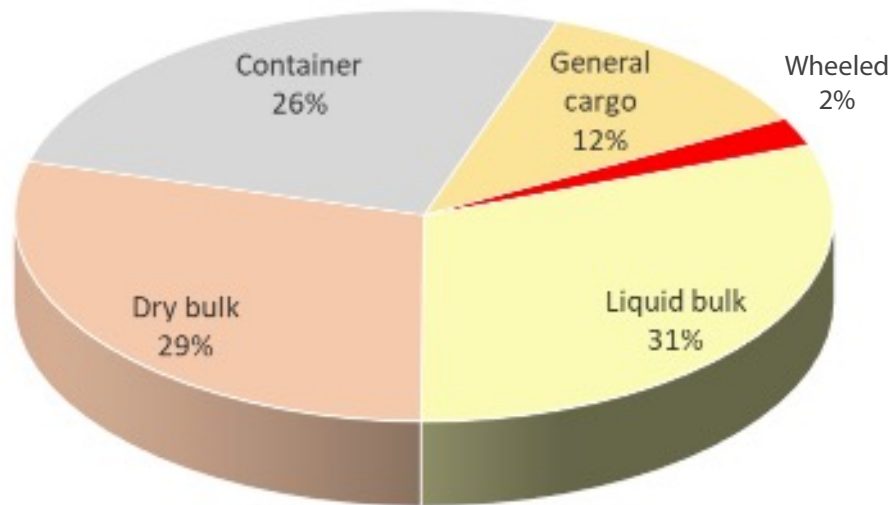


Figure 3.10. Freight distribution in our ports.

In 2025, the cargo handled at Turkish ports increased by 3.9% (21.5 million tonnes) compared with the previous year, reaching 553.2 million tonnes. Including all cargo types (liquid bulk, containers, etc.) and customs regimes (transit, cabotage, etc.), 58.5% of the cargo handled on a tonnage basis consisted of unloading operations (323.6 million tonnes), while

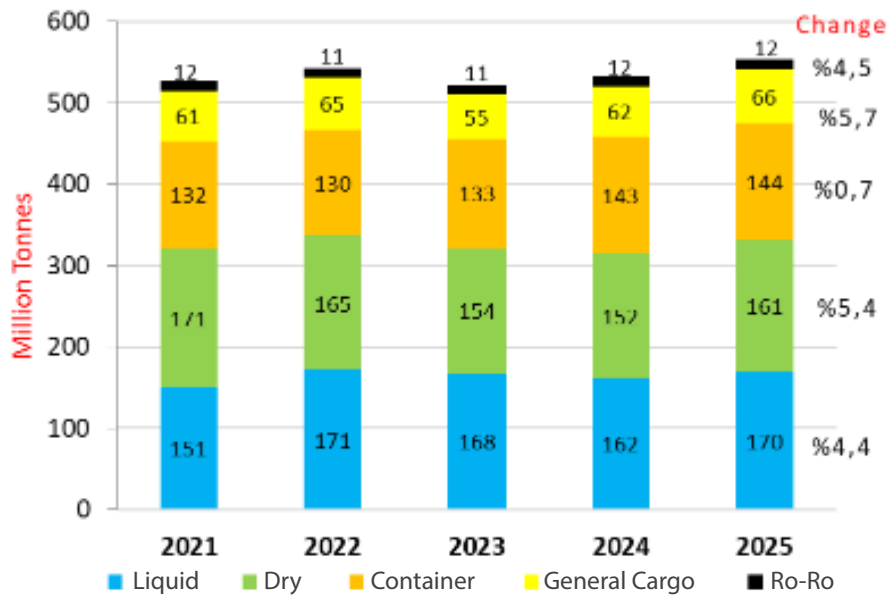
41.5% consisted of loading operations (229.6 million tonnes). When discharged cargoes at Turkish ports are considered, dry bulk cargoes ranked first with 110 million tonnes. On a tonnage basis, the highest loading volume at Turkish ports was recorded in container cargoes, at 77.6 million tonnes (**Table 3.2**).

Table 3.2. Loading/unloading according to cargo types. * (tons)

Cargo Type	2024	2025		
	Total	Loading	Unloading	Total
Liquid Bulk Cargo	162.214.988	72.515.964	97.198.745	169.714.709
Solid Bulk Cargo	152.196.648	50.909.242	110.029.333	160.938.575
Container	143.357.666	77.615.618	66.723.909	144.339.527
General Cargo	62.100.115	21.749.245	44.098.342	65.847.587
Vehicle	11.867.941	6.835.423	5.590.077	12.425.500
Total	531.737.358	229.625.492	323.640.406	553.265.898

Compared with the previous year, general cargo increased by 5,7%, dry bulk cargoes by 5,4%, vehicles (Ro-Ro) by 4,5%, liquid bulk cargoes by 4,4% and container cargoes by 0,7% on a tonnage basis. Compared with the previous year, dry bulk cargoes

handled at Turkish ports increased by 8,7 million tonnes, liquid bulk cargoes by 7,4 million tonnes, general cargoes by 3,7 million tonnes, container cargoes by 981.800 tonnes and vehicle (Ro-Ro) cargoes by 557.500 tonnes (**Figure 3.11**).

**Figure 3.11.** Load development in 2021-2025 (million tons)

By export regime, the highest handling volume on a tonnage basis was recorded in container cargoes, at 53,1 million tonnes. In imports, the highest handling volume was recorded in dry bulk cargoes, at 103,3 million tonnes. Within the cabotage regime, the most

heavily handled cargo type was liquid bulk cargoes, at 34,8 million tonnes, while in the transit cargo regime container cargoes ranked first with 35,5 million tonnes (**Table 3.3**).

Table 3.3. Cargo distribution according to the types of cargo handled in our ports. (ton, 2025)

Cargo Type	Export	Import	Cabotage	Transit	Total
Liquid Bulk Cargo	21.787.818	79.909.828	34.801.969	33.215.094	169.714.709
Dry Bulk Cargo	44.199.987	103.300.974	13.197.084	240.530	160.938.575
Container	53.150.669	43.566.354	12.041.524	35.580.980	144.339.527
General Cargo	16.849.128	39.344.214	9.533.628	120.617	65.847.587
Vehicle	6.782.378	5.538.210	104.777	135	12.425.500
Total	142.769.980	271.659.580	69.678.982	69.157.356	553.265.898

Cargo groups handled at the highest rates in ports were combined and analysed according to their basic characteristics. Petroleum products, which had ranked first among handled cargo groups for many years, ranked second in 2025, as in 2024. Machinery, machinery parts and containers ranked first, accounting for 29,8% of total cargo handled.

Petroleum products accounted for 29,1% of the cargo handled at ports, solid mineral fuels for 8,6%, crude and manufactured minerals and construction materials for 8,4%, ores and metal waste for 7%, and metal products for 6,9%. All remaining products were below 5% (**Table 3.4**).

Table 3.4. Cargo groups handled at the highest rate in our ports (tons, 2025). *

#	Type of cargo	Loading	Unloading	Total	Share %	Change %**
1	Machinery, machine parts, and containers	88.386.189	76.736.348	165.122.537	29,8	1,2%
2	Petroleum products	67.946.953	93.200.440	161.147.393	29,1	4,4%
3	Solid mineral fuels	602.360	47.121.686	47.724.046	8,6	10,1%
4	Raw and processed minerals, construction materials	38.825.618	7.421.746	46.247.364	8,4	12,7%
5	Ores and metal scrap	8.321.937	30.369.755	38.691.692	7,0	-5,1%
6	Metal products	14.062.250	23.986.847	38.049.097	6,9	12,1%
7	Foodstuffs and animal feed	1.892.616	15.212.022	17.104.638	3,1	4,4%
8	Chemicals	5.830.259	10.224.410	16.054.669	2,9	-1,8%
9	Agricultural products and live animals	1.730.691	12.489.339	14.220.030	2,6	1,7%
10	Fertilizers	1.810.166	6.794.497	8.604.663	1,6	11,3%
11	Other	216.453	83.316	299.769	0,1	-59,2%
	Total	229.625.492	323.640.406	553.265.898	100,0	

Among the types of cargo handled at Turkish ports in 2025, the largest tonnage increase was recorded in petroleum products. Petroleum products increased by 6,7 million tonnes compared with the previous year. They were followed by crude and manufactured minerals and construction materials, with an increase of 5,4 million tonnes; solid mineral fuels, with an increase of 4,3 million tonnes; and metal products,

with an increase of 4,1 million tonnes. Compared with the previous year, the highest proportional increases were recorded in crude and manufactured minerals and construction materials (13,4%), metal products (12,1%) and fertilisers (11,3%). Ores and metal waste declined by 2,3 million tonnes (5,7%), while chemicals decreased by 287.700 tonnes (1,8%).

* General Directorate of Maritime Affairs-Department of Maritime Trade Development

** Change in freight volume for 2024 & 2025.



In order to understand the intra-year changes in cargo handled at Turkish ports, it is important not only to know which cargoes increased and which declined, but also whether those increases and decreases originated from loading or unloading operations. Within this framework, the types of cargo loaded and unloaded at Turkish ports over the last year have been analysed.

Among cargoes loaded at Turkish ports over the last year, crude and manufactured minerals increased by 4,4 million tonnes (47,3%), petroleum products by 2,9 million tonnes (4,6%), and metal products by 1,6 million tonnes (13%). Among loaded cargoes, machinery, transport equipment, components, various parts and

containers increased by 1,1 million tonnes (1,3%), and ores and metal waste increased by 1 million tonnes (3,1%); however, foodstuffs and animal feed declined by 581.000 tonnes (-23,5%).

Among cargoes unloaded at Turkish ports over the last year, solid mineral fuels increased by 4,5 million tonnes (10,7%), petroleum products by 3,8 million tonnes (4,3%), machinery, transport equipment, components, various parts and containers by 3,1 million tonnes (4,2%), and metal products by 2,4 million tonnes (11,6%). Among unloaded cargoes, ores and metal waste declined by 1,2 million tonnes (19,6%) (**Table 3.5**).

Table 3.5. Change in the cargo handled in our ports compared to the previous year.*

TYPE OF CARGO	LOADING		UNLOADING		TOTAL	
	%	Ton	%	Ton	%	Ton
Machinery, machine parts, and containers	-1,3	88.386.189	4,2	76.736.348	1,2	165.122.537
Petroleum products	4,6	67.946.953	4,3	93.200.440	4,4	161.147.393
Solid mineral fuels	-21,6	602.360	10,7	47.121.686	10,1	47.724.046
Raw and processed minerals, construction materials	47,3	38.825.618	3,3	7.421.746	13,4	46.247.364
Ores and metal scrap	-3,1	8.321.937	-19,6	30.369.755	-5,7	38.691.692
Metal products	13,0	14.062.250	11,6	23.986.847	12,1	38.049.097
Foodstuffs and animal feed	-23,5	1.892.616	9,3	15.212.022	4,4	17.104.638
Chemicals	-7,0	5.830.259	1,5	10.224.410	-1,8	16.054.669
Agricultural products and live animals	-11,3	1.730.691	3,8	12.489.339	1,7	14.220.030
Fertilizers	-1,3	1.810.166	4,2	6.794.497	1,2	8.604.663
Other	-52,1	216.453	-70,6	83.316	-59,2	299.769



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Harbour Master's Office areas where total cargo of 10 million tonnes or more was handled are presented in the **Table 3.6**. In 2025, the highest handling volume was recorded at ports within the area of responsibility of the Aliğa Harbour Master's Office, with 88,6 million tonnes. Aliğa was followed by the Kocaeli Harbour Master's Office with 83,9 million tonnes, the İskenderun Harbour Master's Office with 70,9 million tonnes, and the Ceyhan Harbour Master's Office with 51,3 million tonnes.

The Ceyhan Harbour Master's Office recorded the highest increase, at 12,5%. Among the Harbour Master's Office areas where more than 10 million tonnes of cargo were handled, Karabiga was the only area to experience a decline. Ports within the area of responsibility of the Karabiga Harbour Master's Office recorded a 3,3% decrease compared with the previous year.

Table 3.6. Port authorities load ranking.*

#	Port	2024	2025	%
1.	Aliğa	85.454.864	88.699.276	3,8
2.	Kocaeli	83.787.739	83.939.975	0,2
3.	İskenderun	68.563.930	70.905.737	3,4
4.	Ceyhan	45.723.036	51.367.947	12,3
5.	Tekirdağ	48.184.044	50.609.188	5,0
6.	Mersin	40.526.707	40.969.849	1,1
7.	Ambarlı	31.147.705	34.096.806	9,5
8.	Gemlik	16.814.940	17.786.774	5,8
9.	Samsun	12.747.789	12.832.655	0,7
10.	Karabiga	12.975.655	12.548.772	-3,3
11.	Zonguldak	11.966.306	12.051.929	0,7

Regionally, 41% of the cargo handled at Turkish ports (225,8 million tonnes) was handled in the Marmara Region. The Mediterranean Region ranked second with a share of 32% (176 million tonnes), the Aegean

Region ranked third with 19% (105,8 million tonnes), and the Black Sea Region ranked fourth with 8% (45,5 million tonnes) (**Figure 3.12**).

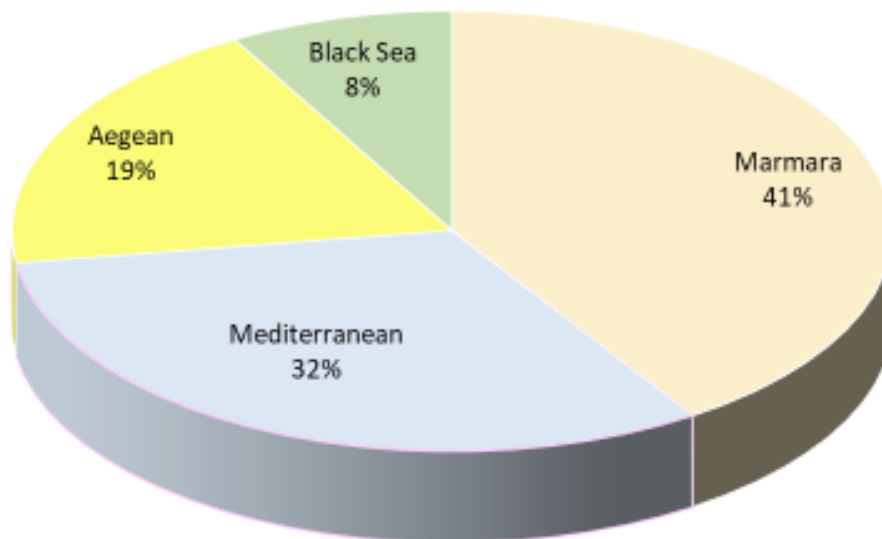


Figure 3.12. Cargo handling rates by regions.

Between 2024 and 2025, the distribution of cargo by region changed by less than one percentage point. The only region to increase its share was the Mediterranean Region (**Figure 3.13**).

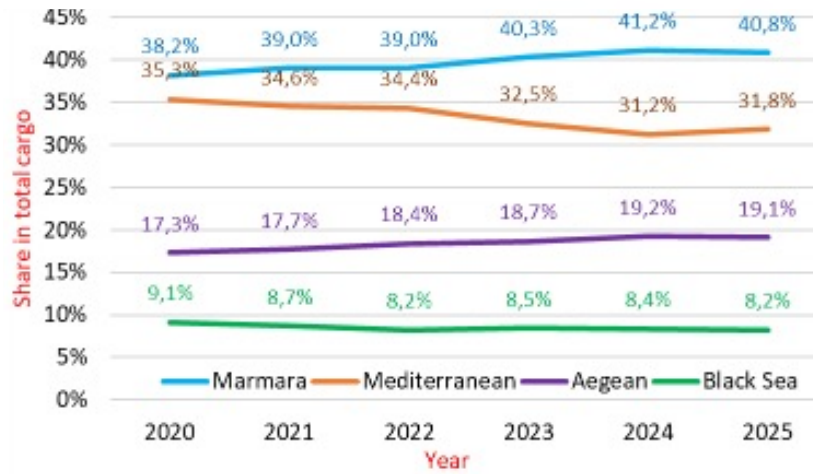


Figure 3.13. Proportional distribution of cargo handled by regions.

In terms of tonnage handled by region, the highest increase was recorded in the Mediterranean Region, with 9,9 million tonnes (6%). The Mediterranean Region was followed by the Marmara Region with an

increase of 6,8 million tonnes (3,2%) and the Aegean Region with 3,5 million tonnes (3,5%). The increase in the Black Sea Region was 1,1 million tonnes (2,6%) (**Table 3.7**).

Table 3.7. Cargo handling by regions (tons). *

Regions	2022	2023	2024	2025	Change % 2024 - 2025
Marmara	211.707.897	210.196.062	218.945.921	225.845.635	3,2
Akdeniz	186.452.430	169.462.853	166.125.751	176.047.336	6,0
Ege	99.793.264	97.326.421	102.249.567	105.807.268	3,5
Karadeniz	44.656.692	44.094.468	44.416.119	45.565.659	2,6
Total	542.610.283	521.079.804	531.737.358	553.265.898	4,0

In TÜRKLİM sector reports, while cargo analyses are carried out, geographical regions are divided into sub-regions by taking port hinterlands into account. The Marmara Region is examined under three sub-regions (North-West Marmara, North-East Marmara and South Marmara), the Aegean Region under two

sub-regions (North Aegean and South Aegean), the Mediterranean Region under two sub-regions (West Mediterranean and East Mediterranean), and the Black Sea Region under two sub-regions (West Black Sea and East Black Sea) (**Figure 3.14**).



Figure 3.14. Port sub-regions

In the TÜRKLİM Sector Report, ports in Türkiye are examined at terminal level by sub-region. In port terminology, the term “terminal” is used to express specialisation according to cargo and vessel type. The term is generally used to cover a particular type of cargo in its entirety, such as a liquid bulk terminal, container terminal or passenger terminal. It may also be used to define the service provided for a specific type of cargo, such as a “coal terminal” at a port handling only coal or a “crude oil terminal” at a port handling crude oil.

When the terminal distribution and number of the 198 currently active ports are assessed according to their operating permits, the largest number of terminals is located in the East Mediterranean Region, with 94

terminals. The East Mediterranean Region is followed by East Marmara with 87 terminals and the North-West Marmara regions with 75 terminals (**Table 3.8 and 3.9**). The total number of terminals at Turkish ports is 450.

There is no port facility providing container services in the South Aegean Region. Operating permits, including temporary operating permits, were taken as the basis for calculating the number of terminals. There are many port facilities that do not actually provide a service even though it is included in their operating permit. For example, although container handling is included in the operating permits of TTK Zonguldak Port, Güllük Port and Bandırma Bağfaş Port, these ports do not provide this service.

Table 3.8. Number of terminals by sub-regions (Excluding Liquid).

Regions / Terminals	Ferry/ Passenger	General Cargo	Bulk Cargo	Ro-Ro	Container
Eastern Black Sea	6	14	13	7	7
Western Black Sea	3	6	6	4	4
Northeastern Marmara	0	20	20	6	7
Southern Marmara	9	18	18	11	7
Northwestern Marmara	8	9	10	10	8
Northern Aegean	5	10	10	4	4
Southern Aegean	4	2	1	3	1
Western Mediterranean	2	2	2	1	2
Eastern Mediterranean	3	18	20	9	6
Total Terminals	40	99	100	55	46

Table 3.9. Number of liquid bulk cargo terminals by sub-regions.

REGIONS / TERMINALS	OIL AND PRODUCTS	CHEMICAL	LPG/LNG
Eastern Black Sea	9	5	5
Western Black Sea	5	3	3
Northeastern Marmara	14	15	5
Southern Marmara	2	7	3
Northwestern Marmara	6	4	4
Northern Aegean	6	5	8
Southern Aegean	1	0	0
Western Mediterranean	5	1	1
Eastern Mediterranean	22	9	7
Total Terminals	70	49	36

When assessed by sub-region, the highest handling volume on a tonnage basis was recorded in the East Mediterranean Region, where the ports located in Mersin and İskenderun Bay are situated (Table 3.10).

The North Aegean Region, where the ports located in Aliğa Bay are situated, ranked second, while the East Marmara Region, where the ports located in the Gulf of İzmit are situated, ranked third.

Table 3.10. The amount of cargo handled in our ports by sub-regions.

Sub Regions Handled	Cargo (Ton)		Change
	2024	2025	2024 & 2025
Eastern Mediterranean (EM)	160.512.042	169.030.938	%5,3
Northern Aegean (NA)	96.072.318	99.585.413	%3,7
Northwestern Marmara (NWM)	89.265.076	94.868.388	%6,3
Northeast Marmara (NEM)	83.787.739	83.939.975	%0,2
Southern Marmara (SM)	45.893.106	47.037.272	%2,5
Western Black Sea (WBS)	38.425.471	38.503.444	%0,2
Eastern Black Sea (EBS)	5.990.648	7.062.215	%17,9
Western Mediterranean (WM)	5.613.709	7.016.398	%25,0
Southern Aegean (SA)	6.177.249	6.221.855	%0,7
Total	531.737.358	553.265.898	%4,0

When the proportional distribution of cargo handled by sub-region is examined on a tonnage basis, 30% of the total cargo handled at Turkish ports was handled at ports in the East Mediterranean Region.

The North Aegean Region ranked second with 18%, while the North-West Marmara Region ranked third with 17% (**Figure 3.15**).

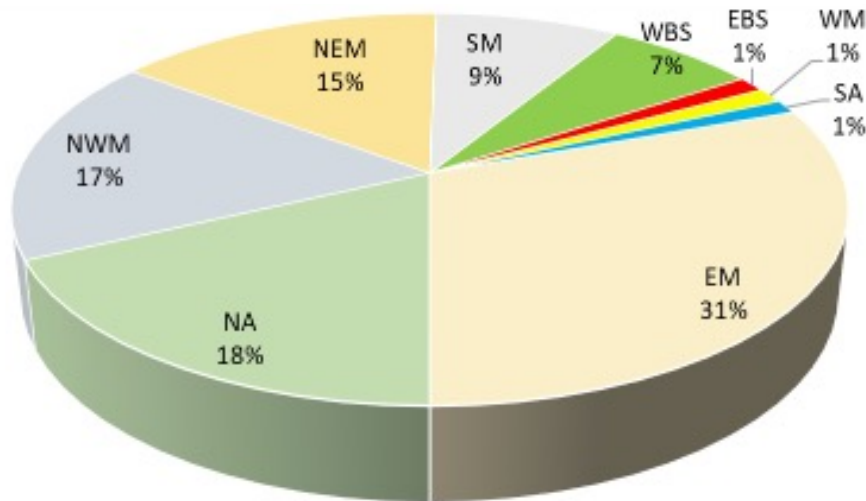


Figure 3.15. Proportional distribution of cargo handled in our ports by sub-regions

When foreign-trade cargoes handled at Turkish ports are considered, the Russian Federation ranks first on a tonnage basis both in terms of the preceding country of origin, the subsequent country of destination and the total cargo volume. Cargo volume, which stood at 100,9 million tonnes in 2024, increased by 6,9% in 2025 to 107,9 million tonnes. Italy, which ranked second in total cargo volume, closed the year with 47,4 million tonnes of cargo, representing an increase of 6,1% (2,7 million tonnes) compared with 2024. When the top 20 countries in foreign-trade cargo handling

are considered, the highest proportional increase compared with the previous year was recorded in cargoes related to Morocco, at 20,7%. Colombia and Malta, which were among the top 20 countries in 2024, dropped out of the list and were replaced by Bulgaria and Georgia.

When total handling is considered, the top three countries – Russia, Italy and the United States – accounted for 39,9% of total cargo. The top ten countries in total handling accounted for approximately 64,8% of total cargo (**Table 3.11**).

Table 3.11. Distribution of cargo handled in our ports by countries. * (ton)

#	Countries	Total 2024	Export 2025	Import 2025	Transit 2025	Total 2025
1	Russian Federation	100.916.377	3.660.168	101.562.166	2.678.562	107.900.896
2	Italy	44.723.310	17.276.832	8.341.684	21.817.246	47.435.762
3	United States	33.582.187	13.518.965	21.729.680	1.872.173	37.120.818
4	Egypt	23.637.746	10.869.420	14.354.073	2.313.371	27.536.864
5	China	20.768.317	5.947.005	11.826.603	4.443.798	22.217.406
6	Greece	20.141.401	7.228.329	8.085.781	6.028.286	21.342.396
7	Spain	15.563.171	9.097.050	4.178.068	1.464.941	14.740.059
8	Romania	11.132.455	5.866.104	3.384.874	3.537.426	12.788.404
9	Belgium	10.796.013	5.495.496	4.916.737	950.953	11.363.186
10	Ukraine	9.384.411	2.618.672	7.224.524	1.203.018	11.046.214
11	Brazil	8.597.350	546.793	8.514.788	35.001	9.096.582
12	Netherlands	9.139.667	3.538.934	4.709.011	546.474	8.794.419
13	Algeria	9.201.616	1.846.298	6.247.968	611.874	8.706.140
14	Morocco	6.726.294	5.613.511	1.728.328	777.850	8.119.689
15	United Kingdom	8.501.060	4.130.354	3.021.427	732.636	7.884.417
16	Bulgaria	6.261.315	2.071.688	2.053.743	2.926.878	7.052.309
17	France	6.932.903	3.320.005	2.795.371	575.334	6.690.710
18	Georgia	5.186.005	1.206.956	1.616.345	3.387.137	6.210.438
19	Singapore	7.520.764	2.778.267	1.587.747	1.801.716	6.167.730
20	South Korea	7.121.195	355.176	4.449.888	969.484	5.774.548

When the cargo handled at Turkish ports by country is analysed on the basis of the top ten countries, the highest year-on-year increase was recorded in cargoes related to Ukraine, at 17,7%. The largest decline was recorded in cargoes related to Spain, at 5,3%. Over the five-year period (2021-2025), the highest increase was recorded with the People's Republic of China.

Cargo volume, which was 12 million tonnes in 2021, reached 22 million tonnes in 2025. In foreign-trade cargoes, the Russian Federation ranked second with an increase of 85,3%. Cargo volume, which was 59 million tonnes in 2021, reached 107,9 million tonnes in 2025 (**Table 3.12**).

Table 3.12. Five-year development of cargo handled in our ports on a country basis.

#	Countries	Years (Million ton)					Change	
		2021	2022	2023	2024	2025	24&25	21&25
1	Russian Federation	59	103	79	101	108	%6,9	%85,3
2	Italy	62	45	60	45	47	%6,1	-%26,4
3	United States	27	28	33	34	37	%10,5	%40,3
4	Egypt	20	23	23	24	28	%16,5	%36,6
5	China	12	14	14	21	22	%7,0	%113,7
6	Greece	18	17	17	20	21	%6,0	%16,4
7	Spain	19	18	18	16	15	-%5,3	-%24,3
8	Romania	9	11	11	11	13	%14,9	%47,6
9	Belgium	13	12	12	11	11	%5,3	-%9,9
10	Ukraine	20	10	10	9	11	%17,7	-%53,4

3.2. Dry Bulk and General Cargo Ports

In Türkiye, 105 ports provide general cargo and/or dry bulk cargo services (**Figure 3.16**). When the cargo handled in Türkiye is considered, excluding buoy

and dolphin-type coastal structures serving liquid bulk cargoes, ports handling general cargo and dry bulk cargo constitute the largest port group in terms of number of ports.

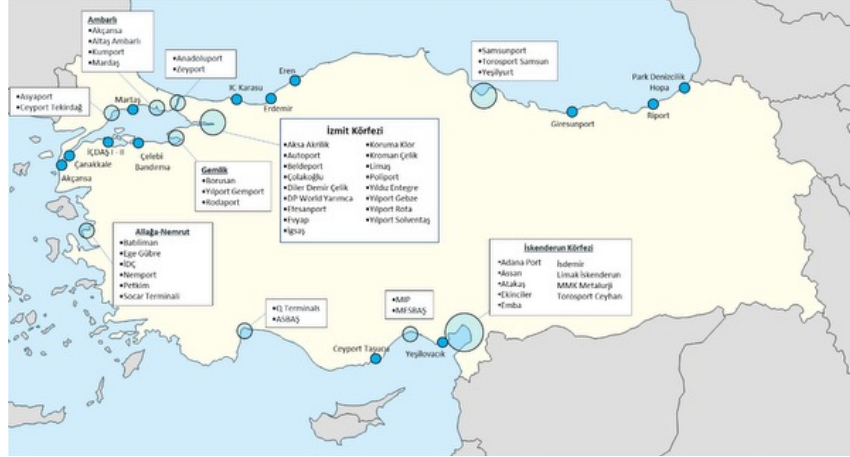


Figure 3.16. TÜRKLİM member ports with dry bulk cargo and general cargo handling permits

In 2025, dry bulk cargoes increased by 5,7% (8,7 million tonnes) compared with the previous year, reaching 160,9 million tonnes. General cargo increased by 6% (3,7 million tonnes) in 2025 compared with the previous year, reaching 65,8 million tonnes.

The combined volume of general cargo and dry bulk cargo increased by 5,8% (12,4 million tonnes) in 2025, reaching 226,7 million tonnes (**Table 3.13** and **Figure 3.17**).

Table 3.13. Development of general cargo and dry bulk cargo over the years

Years	2021	2022	2023	2024	2025
Marmara	78.373	75.787	67.795	69.425	71.294
Aegean	37.911	37.160	32.450	34.373	36.847
Mediterranean	76.990	78.297	71.339	73.384	80.539
Black Sea	38.817	38.619	36.995	37.114	38.106
Türkiye	232.091	229.863	208.579	214.297	226.786

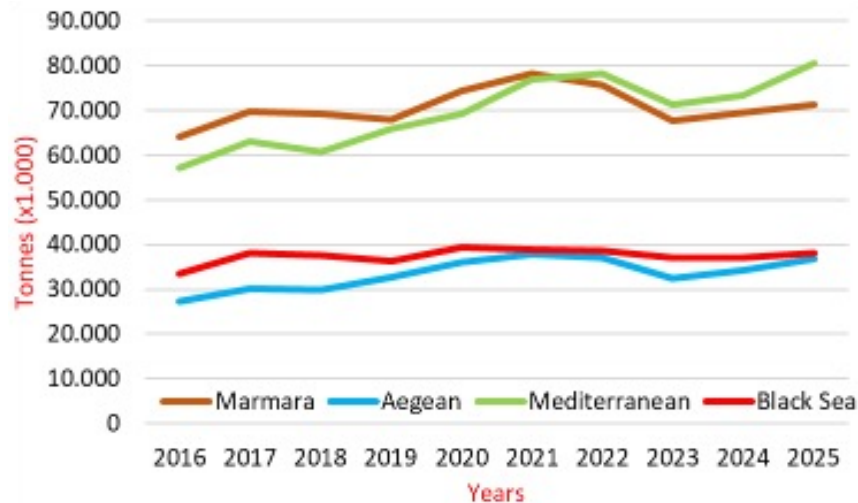


Figure 3.17. Change of general cargo (+dry bulk) cargoes by region.

Among all cargo groups, general cargo and dry bulk cargo accounted for a 41% share, with 226.786.162 tonnes. The year 2025 closed with an increase of 12.489.399 tonnes compared with the previous year. Dry bulk cargoes made the largest contribution to this increase. Considering ports handling general cargo and dry bulk cargo, the highest proportional handling volume on a tonnage basis was recorded at ports in the Mediterranean Region, with 80,5 million tonnes and a share of 36%. The Mediterranean Region was followed

by the Marmara Region with 71,2 million tonnes (31%), the Black Sea Region with 38,1 million tonnes (17%) and the Aegean Region with 36,8 million tonnes (16%). Compared with 2024, the share of the Mediterranean Region increased from 34% to 36%, while the share of the Marmara Region declined from 33% to 31%. The shares of the Aegean and Black Sea regions in general cargo and dry bulk cargo remained unchanged compared with the previous year.

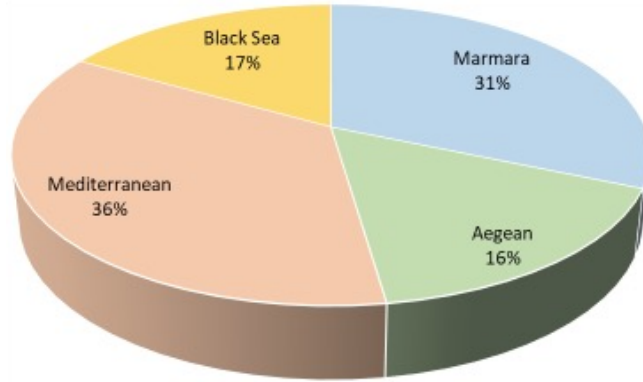


Figure 3.18. Proportional distribution of general cargo (+dry bulk) cargoes by regions

As of 2025, approximately 67,9% of dry bulk and general cargo, which together reached 226 million tonnes, was handled by TÜRKLİM member ports. The ports handling the largest volumes of general cargo and dry bulk cargo on a tonnage basis were İSDEMİR,

EREN and ERDEMİR. Public ports, consisting of TCDD Haydarpaşa and TCDD İzmir ports, handled 4,6 million tonnes of cargo, corresponding to a share of 2% (Table 3.14).

Table 3.14. Our ports handling dry bulk cargo and general cargo.

#	Port	2023	2024	2025
1	İsdemir	10.452.445	12.559.133	12.774.815
2	Eren	9.811.517	10.139.697	10.365.793
3	Erdemir	9.153.843	9.831.571	8.828.285
4	Atakaş	7.956.521	8.824.133	8.740.512
5	İÇDAŞ 1	6.112.762	6.145.584	5.566.009
6	Yeşilyurt	5.583.710	5.015.464	5.327.335
7	Yeşilovacık	3.560.214	5.035.899	5.308.089
8	Batılman	4.280.860	4.762.180	5.077.657
9	İDÇ Limanı	4.418.269	4.454.705	4.810.003
10	Çelebi Bandırma	4.010.543	4.349.345	4.681.057
11	Çolakoğlu	4.079.962	5.222.871	4.463.259
12	Nuh Çimento	4.072.309	3.850.456	4.295.567
13	Ekinciler İskenderun	3.513.994	3.379.008	4.219.767
14	Akçansa Çanakkale	3.864.918	3.915.595	4.178.285
15	MIP Mersin	7.435.988	6.132.216	3.778.041
16	MMK	5.564.065	3.781.091	3.506.712
17	EMBA	3.824.398	3.438.427	3.482.712
18	İÇDAŞ 2	3.066.751	3.426.068	3.468.472
19	Adana Port	2.404.836	3.195.164	3.352.588
20	Martaş	2.410.950	2.984.551	3.327.456
(Tons)	TÜRKLİM Total	148.758.418	148.844.912	153.894.956
(Tons)	Türkiye Total	208.579.217	214.296.763	226.786.162
(%)	TÜRKLİM Share	71,30%	69,50%	67,86%
	Other Private Ports	55.659.609	60.776.417	68.270.811
(%)	Share of Private Ports	26,70%	28,40%	30,10%
	Public Ports*	4.161.190	4.675.434	4.620.395
(%)	Public Ports*	4,00%	2,20%	2,04%

3.3. Container Ports

In Türkiye, a total of 46 ports, including those with temporary operating permits, are authorised to serve container vessels and container cargoes. However, only 28 of these ports are able to provide services for container vessels and cargoes.

At present, 18 of the ports actively providing container services are located in the Marmara Region. The Mediterranean and Aegean regions each have four ports serving container vessels and cargoes (**Figure 3.19**).



Figure 3.19. TÜRKLİM member ports with container handling permits

In terms of total container handling volume, the Marmara Region ranked first by handling 64% of the containers handled in Türkiye. The Marmara Region has maintained its leading position for many years by a clear margin. It is followed by the ports of the Mediterranean Region with 21% and the ports of the Aegean Region with 14%.

The share of Black Sea ports in total container handling volume is only 1% (**Figure 3.20**). Compared with the previous year, the Marmara Region increased its container share from 61% to 64%, while the Mediterranean Region increased its share from 20% to 21%. The Aegean Region declined from 18% to 14%. There was no change in the Black Sea Region.

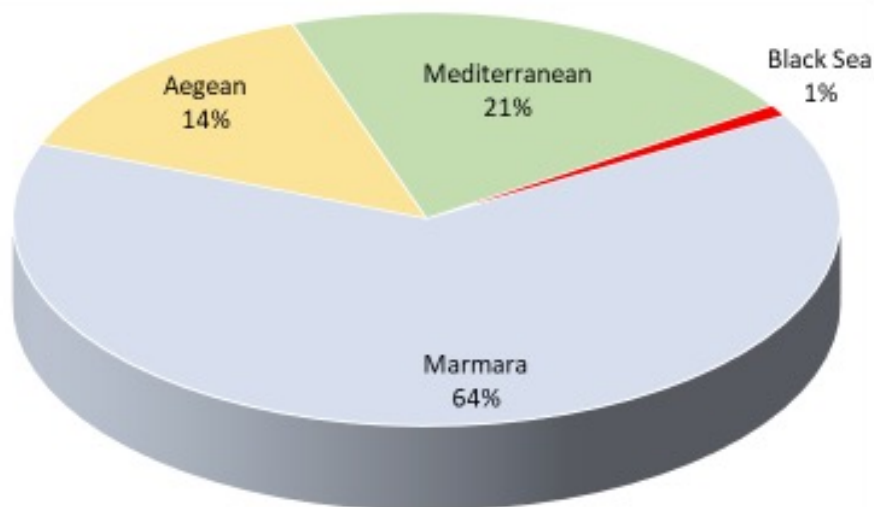


Figure 3.20. Container handling rates by regions

The Marmara Region's share of total container handling rose to 64,2%, the highest level of the last ten years. No significant change was observed in the Mediterranean or the Black Sea.

However, the Aegean Region's share of containers handled in Türkiye declined to 13,8%, the lowest level of the last ten years (**Figure 3.21**)

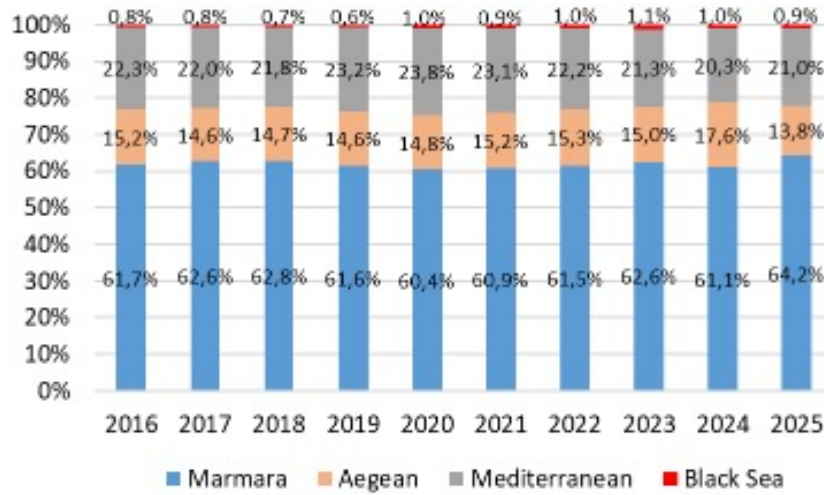


Figure 3.21. Share of regions in total container handling

As of 2025, the total number of containers handled at our ports amounted to 13.996.578 TEUs. While the container subject to foreign trade and cabotage is 9.802.402 TEU, the number of transit containers is 4.194.176 TEU (**Figure 3.22, Table 3.14, Table 3.15**).

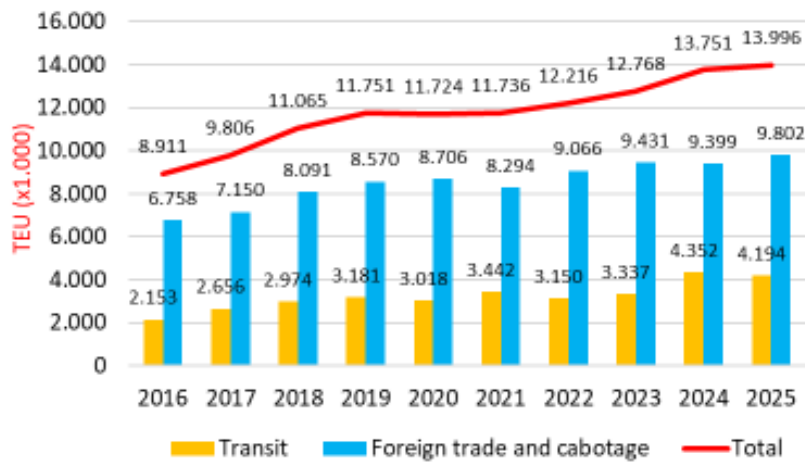


Figure 3.22. The evolution of container handling in Turkish ports. (TEU)

Asyaport Port, which handled 15,8% of the total containers handled in Türkiye, ranked first in 2025 with 2.214.371 TEU. MIP Mersin International Port ranked second. MIP Mersin International Port was followed by Kumport Port with 1,5 million TEU. Marport Port, in fourth place, handled a total of 1,4 million TEU. DP World Evyap Port became the fifth

port to handle more than one million containers (**Table 3.15**).

As of 2025, there was no port in the Aegean Region handling one million TEU or more. The share of the public ports, TCDD İzmir Port and TCDD Haydarpaşa Port, in total container handling was 1,8%.

Table 3.15. Cargo development at container handling ports in Türkiye. (TEU)

#	Ports	2021	2022	2023	2024	2025
1	Asyaport	1.802.517	1.796.876	1.719.426	2.098.255	2.214.371
2	MIP	2.097.349	2.020.967	1.949.882	1.932.319	N/A
3	Kumport	1.211.515	1.175.741	1.275.200	1.217.885	1.501.333
4	Marport	1.503.254	1.340.099	1.472.811	1.348.906	1.420.601
5	DP World Evyap*	1.265.740	1.303.867	1.213.417	1.238.897	1.230.852
6	Nemport	544.568	558.648	589.267	1.139.123	719.475
7	Ege Gübre	488.507	512.015	564.661	489.142	658.917
8	Gemport	682.064	676.782	583.713	635.225	629.422
9	Limak İskenderun	476.627	496.583	405.479	541.278	612.545
10	Yılport	566.447	546.866	639.852	679.664	596.710
11	Mardaş	222.640	354.910	441.873	448.782	519.496
12	Socar Terminal	357.314	414.702	432.000	531.737	350.374
13	Assanport	214.484	177.661	255.334	257.516	281.148
14	Rodaport	92.408	94.330	136.095	168.922	182.246
15	Beldeport	N/A	49.300	128.471	163.327	157.534
16	Qterminals Antalya	116.786	93.016	84.523	74.274	84.972
17	Samsunport	102.155	106.042	124.913	91.190	77.822
18	Borusan Port	138.491	122.796	96.808	90.506	69.845
19	Giresunport	N/A	N/A	N/A	21.121	22.942
20	TBH Port Adana	0	0	0	0	19.319
(TEU)	TÜRKLİM Total	11.910.074	11.608.774	12.243.032	13.188.606	13.307.785
(TEU)	Türkiye Total	12.442.449	12.215.269	12.767.934	13.750.585	13.996.578
(%)	TÜRKLİM Share	%95,7	%95,2	%95,9	%95,9	95,1%
(%)	Other Private Ports	%0,7	%1,5	%1,7	%2,1	436.854
(%)	Share of Private Ports	%95,5	%96,7	%97,6	%98,0	3,1%
(%)	Public Ports**	%4,5	%3,5	%2,4	%2,0	%1,8

* Total DP World Evyap, Yarımca and Evyap Ports before 2025

** Izmir and Haydarpaşa Ports, Derince and Trabzon Ports, which are not members of TÜRKLİM, are not included in the list.

As of 2025, 13.307.785 TEU, corresponding to 95,1% of the total container volume of 13.996.578 TEU handled at Turkish ports, was handled by TÜRKLİM member ports. The Marmara Region is clearly ahead in transshipment cargo traffic.

Of the transit cargo traffic in Türkiye, 82,3% was handled at ports in the Marmara Region. Asyaport alone handled 42% of total transit cargo (**Table 3.16**).

CUTTING-EDGE TECHNOLOGY IS NOW AT MARPORT

With the addition of four new **25+1 side-capacity high tech SSG cranes**, **Marport has achieved another milestone in Türkiye**, becoming the first port in the country operating with a total of 14 SSG cranes. Now prouder than ever, Marport is faster and more efficient.

Table 3.16. Transit container handling. (TEU)

Ports	2021	2022	2023	2024	2025
Asyaport	1.443.235	1.375.789	1.341.926	1.665.165	1.760.637
Kumport	556.436	444.818	533.647	569.079	741.742
Marport	702.220	549.691	567.512	508.923	564.713
MIP Mersin	456.225	437.064	437.220	462.485	N/A
Nemport	11.009	10.588	43.477	584.849	167.388
Mardaş	4.732	88.730	93.824	86.563	128.130
Rodaport	3.133	22.781	63.081	86.886	95.248
DP World Evyap *	195.470	111.675	32.245	163.054	84.774
Socar Terminal	13.068	15.660	24.779	51.280	38.589
Limak İskenderun	24.698	30.359	27.465	43.935	35.968
Beldeport	N/A	182	53.592	64.705	33.135
Gemport	10.179	24.424	22.073	13.462	21.946
Yılport	3.584	4.315	34.284	28.643	21.188
Assanport	8.622	10.711	1.301	10.089	18.005
Ege Gübre	9.261	22.872	26.734	12.834	10.005
TBH Port Adana	0	0	0	0	457
Transit Container	3.441.872	3.149.656	3.337.095	4.351.952	4.194.176
Foreign Trade + Cabotage	8.294.003	9.065.610	10.530.962	9.398.633	9.802.402
Grand Total	12.442.449	12.215.269	12.767.909	13.750.585	13.996.578

3.4. Liquid Bulk Cargo Ports

In 2025, 169,7 million tonnes of liquid bulk cargo were handled at Turkish ports. Of this liquid bulk cargo, 47,1% (79,9 million tonnes) consisted of import cargoes,

20,5% (34,8 million tonnes) of cabotage cargoes, 19,6% (33,2 million tonnes) of transit cargoes and 12,8% (21,7 million tonnes) of export cargoes (**Figure 3.23** and **Table 3.17**).

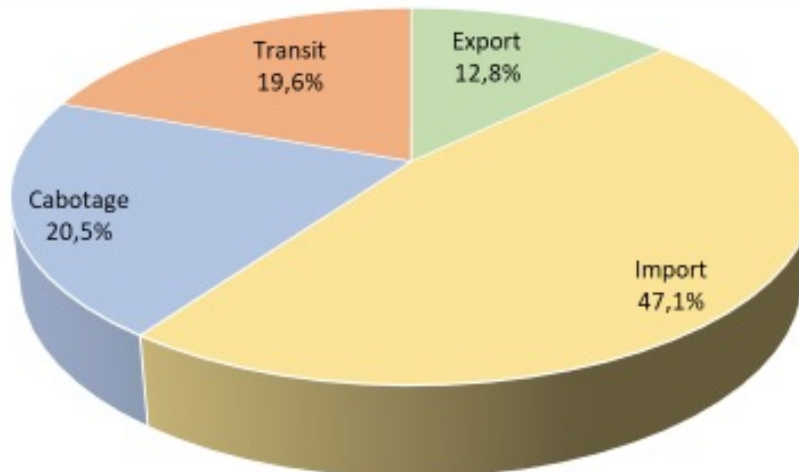
**Figure 3.23.** Distribution of liquid bulk cargo by regimes



Table 3.17. The development of liquid bulk cargo over the years.*

Years	Export	Import	Cabotage	Transit	Total
2016	11.555.158	59.213.777	18.522.994	55.732.438	145.024.367
2017	21.255.057	64.856.860	19.645.258	47.140.172	152.897.347
2018	7.097.622	58.727.643	21.484.957	52.406.847	139.717.069
2019	15.222.293	61.319.859	25.139.744	53.572.018	155.253.914
2020	10.798.291	59.112.900	26.943.079	49.798.126	146.652.396
2021	11.160.418	61.069.525	30.071.646	48.229.787	150.531.376
2022	15.629.517	69.612.852	35.197.141	50.761.639	171.201.149
2023	21.071.795	76.585.220	31.767.061	38.363.994	167.788.070
2024	24.467.266	76.778.722	28.977.814	31.991.186	162.214.988
2025	21.787.818	79.909.828	34.801.969	33.215.094	169.714.709
2024 & 2025 % Change	-11,0	4,1	20,1	3,8	4,6

Liquid bulk cargoes increased by 4,6% compared with the previous year. Over the same period, cabotage cargoes increased by 20,1%, import cargoes by 4,1%, and transit cargoes by 3,8%.

Export cargoes, however, declined by 11% (**Figure 3.24**). Exported liquid bulk cargoes fell year-on-year for the first time in the last five years.

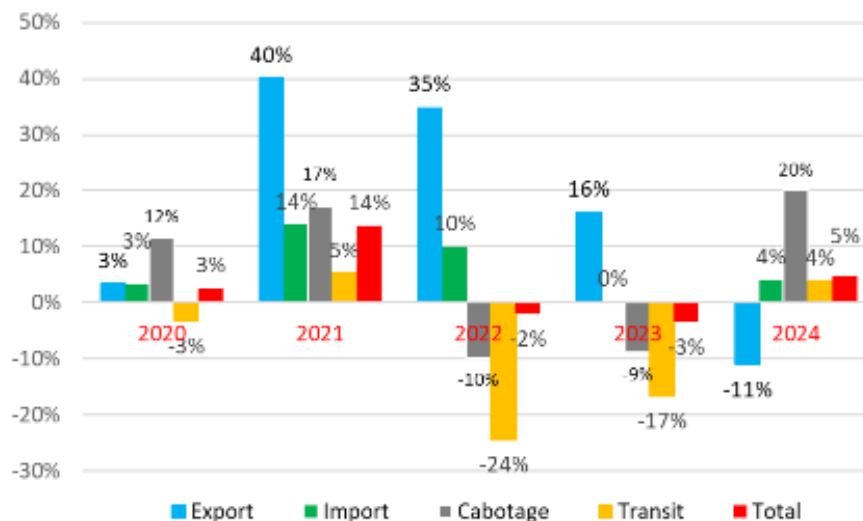


Figure 3.24. Rate of change of liquid bulk cargoes compared to the previous year

Table 3.18. TÜRKLİM member ports handling petroleum products. (ton)

Ports*	2021	2022	2023	2024	2025
Global Terminal Hizmetleri	1.626.455	3.355.717	7.413.133	8.483.830	8.741.755
TFS Port	1.768.964	2.947.671	3.583.579	3.855.392	4.321.956
Likitport	N/A	N/A	N/A	618.938	1.868.843
Aves Depoculuk	389.756	704.364	2.611	2.757.463	1.606.306
Solventaş	1.164.193	1.194.357	1.335.276	1.450.327	1.330.761
Limaş	306.621	398.068	491.060	952.500	1.061.473
Poliport	717.166	413.464	1.018.888	886.083	740.855
Petkim	220.392	90.398	430.937	848.637	739.076
Torosport Ceyhan	267.928	5.439	461.146	62.535	671.736
Mesbaş	361.494	422.918	20.002	318.702	486.258
Altintel	540.353	480.542	465.035	450.458	406.619
Çanakkale	90.959	66.313	69.199	30.758	64.084
Martaş	N/A	N/A	N/A	7.933	16.059
Ege Gübre	13.796	13.910	11.022	8.818	8.844
Total	7.270.620	10.002.763	15.291.909	20.774.836	22.064.571

Among TÜRKLİM members, the ports that handled the most cargo in liquid chemical products were TOROSPORT CEYHAN, LİMAŞ and POLİPORT (**Table 3.19 and 3.20**).

Table 3.19. TÜRKLİM member ports handling liquid chemical cargo.

Ports	2021	2022	2023	2024	2025
Torosport Ceyhan	1.153.100	1.230.106	1.125.764	1.174.356	1.631.440
Limaş	1.305.266	1.167.804	920.972	898.105	889.285
Poliport	737.255	713.073	804.351	660.244	831.135
Petkim	856.904	592.058	675.103	710.117	752.270
Solventaş	625.984	588.188	617.951	601.001	625.347
Çelebi Bandırma	531.187	652.859	560.103	781.924	434.179
Altintel	228.528	232.469	232.672	232.836	352.683
Likit Port	26.655	234.988	195.221	288.393	341.934
Aksa	333.589	347.480	353.101	308.120	298.837
Koruma Klor	132.430	173.573	206.000	246.905	252.413
Toros Tarım (Samsun)	390.543	521.817	542.583	309.242	166.372
MESBAŞ	388.494	218.956	20.890	198.704	138.061
İGSAŞ	144.661	116.614	105.690	128.025	112.588
Aktaş	91.901	75.129	71.223	68.820	101.677
Yıldız Entegre	N/A	N/A	98.545	98.804	93.593
İsdemir	87.380	63.878	88.507	115.897	74.918
Erdemir	45.706	29.934	29.807	45.829	43.818
Total	8.145.509	7.340.177	6.522.808	6.768.518	7.044.969

• Ro-Ro transport

When Türkiye's international liner Ro-Ro transport is examined, 724.726 vehicles were handled in 2025, representing an increase of 3% (18.339 vehicles) (Figure 3.28).

Over the last four years, international liner Ro-Ro transport has remained above 700.000 vehicles, despite minor fluctuations.

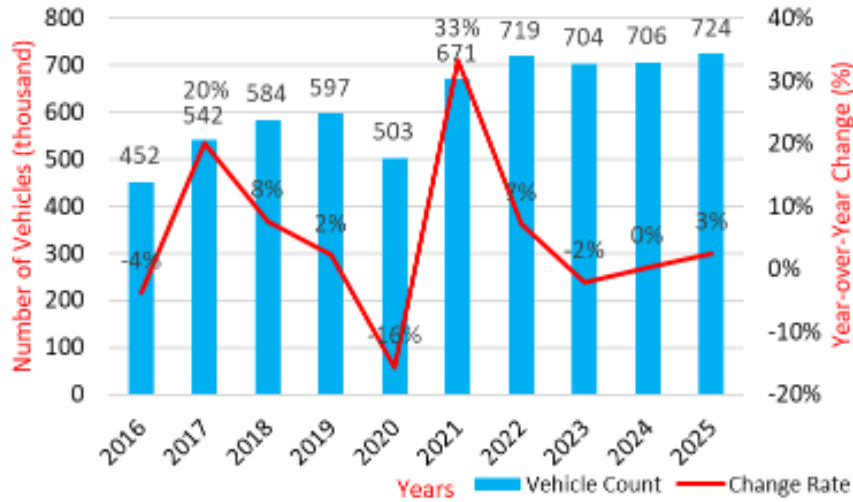


Figure 3.28. Ro-Ro transportation. (Vehicle)

Ro-Ro transport is predominantly directed towards Italy-Trieste, which accounts for 50% of the total (Figure 3.29). As of 2025, a significant share of these operations was carried out by TÜRKLİM members (Table 3.21).

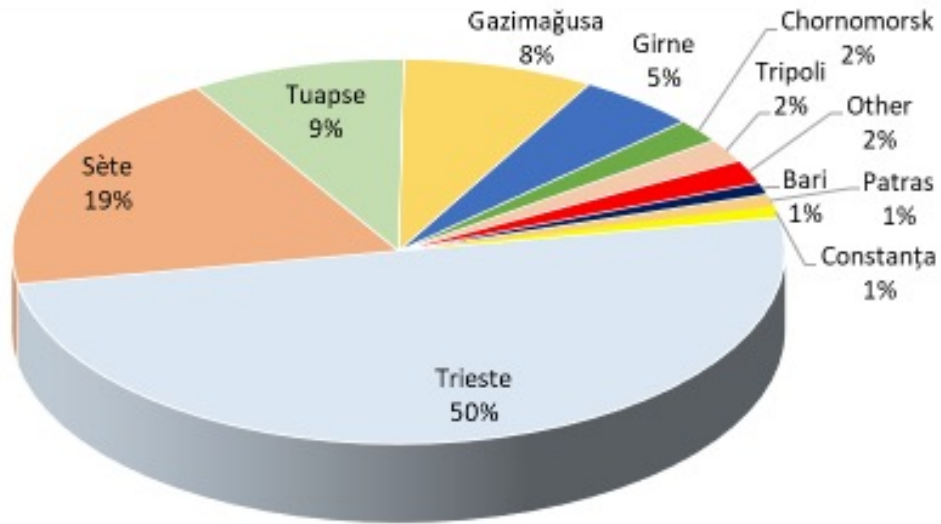


Figure 3.29. Shares of foreign ports with Ro-Ro transportation.

Regular Ro-Ro services are operated from 15 ports in Türkiye to 24 ports abroad (Table 3.21). In terms of regular international Ro-Ro lines, the top three were Tuzla-Trieste with 167.000 vehicles, Yalova-France/

Sète with 125.000 vehicles, and Çeşme-Trieste with 66.000 vehicles. Of the vehicles carried on regular international Ro-Ro lines, 98% were handled at TÜRKLİM member ports.

Table 3.21. Ro-Ro statistics on the basis of international regular lines (Units). *

Lines	Incoming	Outgoing	Total
Tuzla (Pendik) - Trieste	90.505	76.845	167.350
Yalova - Sete	68.411	57.264	125.675
Çeşme - Trieste	33.088	33.603	66.691
Mersin - Gazimağusa	27.201	28.667	55.868
Mersin - Trieste	26.599	24.639	51.238
Gemlik- Trieste	20.706	28.310	49.016
Samsun - Tuapse	19.228	18.516	37.744
Taşucu - Girne	15.128	17.809	32.937
Ambarlı - Trieste	10.497	15.812	26.309
Karasu - Tuapse	9.835	10.637	20.472
Samsun - Novorossisk	6.759	7.241	14.000
Taşucu - Trablusşam	5.089	5.025	10.114
Tuzla (Pendik) - Bari	3.584	6.334	9.918
İstanbul - Tuapse	3.778	5.192	8.970
Karasu - Köstence	4.065	4.242	8.307
Tekirdağ - Sete	0	5.204	5.204
Tuzla (Pendik) - Patras	2.846	1.937	4.783
İzmir - Sete	11	3.195	3.206
Tekirdağ - Trieste	0	3.182	3.182
Mersin - Girne	1.981	885	2.866
Gemlik - Patras	1.726	600	2.326
Karasu - Çornomorsk	803	998	1.801
Taşucu - Gazimağusa	1.482	36	1.518
Kocaeli - Koper	25	1.472	1.497
İskenderun- Akabe	123	1.324	1.447
Çeşme - Sakız Adası	229	1.111	1.340
Ambarlı - Patras	1.168	113	1.281
Kocaeli - Valensiya	1.111	0	1.111
İstanbul - Marsilya	0	484	484
Mersin Akabe	0	355	355
Kocaeli - Barselona	3	307	310
İstanbul - Novorossisk	246	48	294
İstanbul - Cidde	3	269	272
Gemlik - Vasto	230	0	230
Kocaeli - Anvers	207	21	228
Gemlik - Valensiya	0	204	204
İskenderun - El Arış	66	125	191
Kocaeli - Pire	9	107	116
Gemlik - Molfalcone	0	106	106
Others	3.181	1.672	4.853
Total	359.923	363.891	723.814

Vehicles linked to foreign trade handled at Turkish ports increased by 11,3% in 2025, reaching 2.242.558 vehicles. Of these handling operations, 72,7% took place at TÜRKLİM member ports (**Table 3.22**).

Table 3.22. Foreign-related vehicle handling at our ports (Units).*

Ports	Total 2023	Total 2024	Incoming	Outgoing	Total 2025
Autoport	338.659	363.066	105.054	317.305	422.359
Port Yarımca	398.323	385.163	266.639	148.747	415.386
Efesanport	167.539	169.933	202.886	2	202.888
Ford Otosan	165.203	93.883	3.270	96.240	99.510
Borusan	220.437	167.849	38.698	220.428	259.126
Gemport	134.864	144.234	12.492	80.410	92.902
Yalova Ro-Ro	710	13.273	41.208	8.846	50.054
Ceyport Taşucu	36.365	39.252	17.711	19.551	37.262
Limakport İskenderun	1.063	3.929	22.030	117	22.147
Ulusoy Çeşme	7.224	12.287	6.448	6.600	13.048
MIP Mersin	9.363	17.092	8.651	2.239	10.890
Karasu	407	4.959	912	3.370	4.282
Bodrum Cruise Port	1.185	1.303	565	691	1.256
Samsunport	399	555	12	171	183
TÜRKLİM	1.481.741	1.423.267	726.576	904.717	1.631.293
TCDD Haydarpaşa	45.524	87.781	109.433	2.460	111.893
TCDD Alsancak	4.711	3.478	1.444	391	1.835
Public Total	50.235	91.259	110.877	2.851	113.728
Other Private Ports	523.174	485.230	282.453	215.043	497.496
Total Other Private Ports	523.174	501.168	282.453	215.043	497.496
Total	2.055.150	2.015.694	1.119.912	1.122.646	2.242.558
TÜRKLİM Share	72,1%	70,61%	64,9%	80,6%	72,7%

• Finished vehicle handling for foreign trade

All Turkish ports handling the highest volumes of vehicles in automotive foreign trade are located in the Marmara Region. The Turkish ports handling the highest volumes of foreign-trade vehicles are,

respectively, Port Yarımca, Autoport, Borusan, Efesan Port and Gemport. In 2025, automotive foreign trade at TÜRKLİM member ports increased by 6,4% compared with the previous year, with a total of 1.669.647 finished vehicles handled (**Table 3.23**).

Table 3.23. Vehicle import and export figures by port (Units).

Ports	Transit	Export	Import	Total
Port Yarımca	76.035	122.484	228.965	428.119
Autoport	0	311.446	107.961	426.390
Borusan Port	7.874	222.057	39.410	269.372
Efesanport	0	3	205.616	205.619
Gemport	0	107.113	35.079	142.192
Ford Otosan	0	94.381	3.269	97.650
Yalova Ro-Ro	0	9.232	41.516	50.748
DFDS	0	11.790	13.179	24.969
Limak İskenderun	20.116	797	2.993	23.906
Samsunport	0	619	26	682
Total	104.025	879.922	678.014	1.669.647
2024/2025 Change	-36,2%	11,1%	12,3%	6,4%



A Safe Port in Global Trade!



BULK LIQUID STORAGE

In accordance with API standards, offers storage services for **more than 65** types of chemical and petroleum products across **175 tanks** with a total capacity of **273,000** cubic meters.

Provides services using environmentally friendly closed filling systems.

Real-time data sharing with automation systems.

BULK
LIQUID
STORAGE
175
TANKS

BULK
LIQUID
STORAGE
273.000 m³
CAPACITY



DRY BULK AND GENERAL CARGO SERVICES

Reaches up to 24 meters in water depth with an annual **5 million tons** of handling capacity.

We handle all types of cargo, including project cargo, with our diverse and high-capacity equipment fleet, ensuring efficiency and reliability in every operation.



WAREHOUSE SERVICES

GDA offers a extensive storage area of **55,000 m²**, including both temporary, open, closed and chemical warehouses.

It provides storage solutions suitable for all types of cargo, including standard, non-standard, and bulk groups. With a diverse fleet of equipment, including forklifts with capacities of up to **32 tons**.

• Number of vehicles and passengers carried on cabotage routes

In 2024, 10,1 million vehicles were carried on cabotage routes. In 2025, the number of vehicles carried declined by 5,1% to 9,6 million vehicles (Table 3.24 and Figure 3.30).

Table 3.24. Number of vehicles transported on the cabotage line.*

Years	Vehicle	% Change
2015	13.042.399	7,2
2016	13.050.241	0,1
2017	12.638.289	-3,2
2018	13.159.820	4,1
2019	13.420.802	2,0
2020	10.892.467	-18,8
2021	12.619.473	15,9
2022	10.958.382	-13,2
2023	9.334.763	-14,8
2024	10.259.903	8,8
2025	9.636.762	-5,1

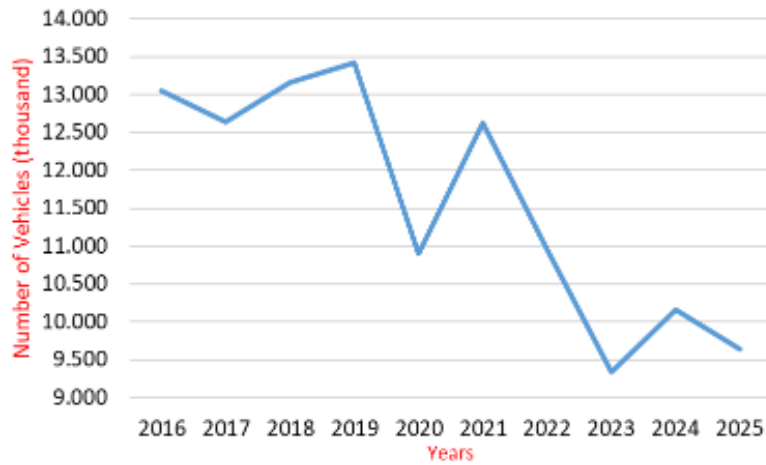


Figure 3.30. Change in the number of vehicles transported on the cabotage line.

3.6. Passenger Ports

Cruise ports and terminals, as part of the transport sector, are coastal structures where sea-based tourism activities are carried out.

In Türkiye, a total of 27 ports provide services to passenger and cruise vessels (Figure 3.31).



Figure 3.31. TÜRKİM member ports with passenger handling permits.

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

• Developments at Turkish cruise ports

In the cruise industry, which accounts for only 2% of the travel and tourism sector, cruise capacity is expected to grow by approximately 7% per year over the five-year period from 2025 to 2030. The global cruise market is expected to exceed 37 million passengers in 2026. The positive development in the sector has also been reflected in Türkiye.

Cruise vessel and passenger numbers, which have been increasing since 2020, reached their highest level of the last twelve years in 2025. In 2024, the number of cruise passengers per cruise vessel calling at Turkish ports also reached an all-time high of 1.581 passengers per vessel. In 2025, the average number of passengers per vessel was 1,555. In 2025, the number of cruise vessels calling at Turkish ports increased by 13% compared with the previous year, reaching 1.375 vessels. Passenger numbers increased by 15% year on year, reaching 2.138.136 passengers (**Figure 3.32**).

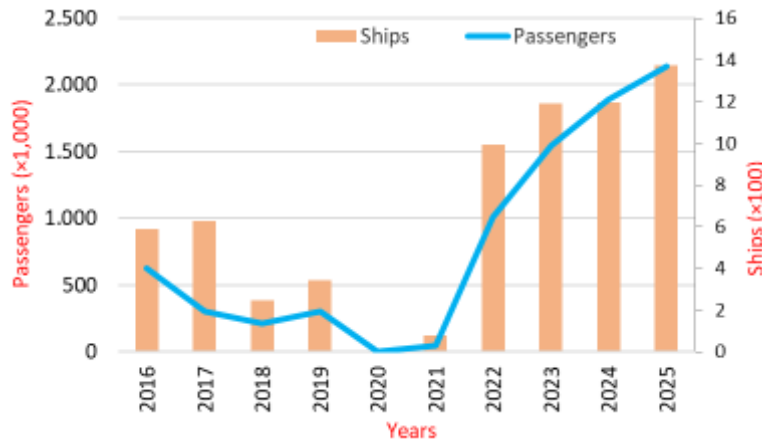


Figure 3.32. Change in the number of cruise ships and passengers.

In 2025, the Kuşadası Harbour Master's Office ranked first with 617 passenger vessels and 995.000 passengers. It was followed by the Istanbul Harbour

Master's Office with 265 vessels and 625.000 passengers, and the Bodrum Harbour Master's Office with 116 vessels and 131.000 passengers (**Table 3.25**).

Table 3.25. Passenger ships and passenger numbers on the basis of our Port Authorities.*

Ports	2023		2024		2025	
	Ship	Passenger	Ship	Passenger	Ship	Passenger
Kuşadası	531	779.434	524	821.748	617	995.843
İstanbul	225	402.729	204	439.968	265	625.517
Bodrum	97	101.159	97	118.053	116	138.166
İzmir	31	38.500	66	171.614	51	87.540
Marmaris	23	26.347	45	116.873	43	60.626
Çeşme	76	52.030	73	53.967	69	53.971
Amasra	20	14.962	26	25.116	31	28.578
Çanakkale	40	19.672	28	18.241	41	27.424
Alanya	18	19.119	15	19.873	23	25.172
Trabzon	21	15.785	29	26.947	22	21.848
Samsun	4		29	27.427	21	20.886
Antalya	26	34.423	22	29.317	18	20.043
Kaş	4	1.777	-	-	8	15.405
Dikili	25	6.530	15	4513	24	8.453
Bozcaada	19	6.311	13	9875	12	5.960
Others	32	20.481	9	5.894	14	2.704
Total	1.192	1.542.522	1.195	1.889.426	1.375	2.138.136

The number of passengers arriving at TÜRKLİM's member ports by cruise ships and ferries increased by 32% compared to the previous year and exceeded 2,2 million in 2025 (**Table 3.26**).

Table 3.26. Passenger handling of TÜRKLİM member ports.

Ports	Passenger		
	Cruise Ship	Ferryboat	Total
Ege Ports – Kuşadası	995.303	181.232	1.176.535
Ulusoy Çeşme	56.336	375.176	431.512
Bodrum Cruise Port	138.151	140.841	278.992
Ceyport Taşucu	0	216.300	216.300
Ceyport Tekirdağ	4.795	66.477	71.272
Çanakkale Port	27.439	0	27.439
Q Terminals Antalya	20.476	0	20.476
Samsunport	20.294	0	20.294
DFDS	4.105	0	4.105
Total	1.266.899	980.026	2.246.925

• Passenger transport in cabotage

The number of passengers on cabotage routes completed 2025 at 118,8 million, representing a 0,9% increase compared with the previous year (**Table 3.26** and **Figure 3.33**).

Table 3.27. Passenger transport statistics on cabotage lines*

Years	Passenger
2016	148.101.589
2017	137.195.691
2018	139.556.332
2019	150.312.216
2020	85.866.238
2021	85.866.238
2022	126.204.029
2023	119.512.485
2024	117.832.340
2025	118.891.577



Figure 3.33. Change in the number of passengers carried on the cabotage line.



UNIT 4

THE ECONOMIC GEOGRAPHY OF THE PORT SECTOR IN TÜRKİYE

4.1. Basic Approach

4.2. Primary Hinterland of Ports

4.3. Geographical Distribution of Turkish Ports

4.4. Economic Geography of the Port Sector in Türkiye

4.5. Conclusion and General Assessment

SUSTAINABLE SOLUTIONS FOR PORTS

Shore Power Solutions for Ships

Reliable, efficient and standard-compliant shore power systems for a cleaner maritime future.



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New regulations require ports and vessels to invest in shore power solutions for cleaner and more sustainable operations.



Container Terminals

Our shore power solutions provide safe, efficient and scalable energy systems for container ships and other applicable vessels.



Compliant with IEC 80005

Our systems are designed in compliance with IEC 80005 standards, ensuring safe, reliable and efficient shore power operations.

Main Transformer

Drive System

Isolation Transformer

Shore Connection Box



4. SPECIAL FILE: THE ECONOMIC GEOGRAPHY OF THE PORT SECTOR IN TÜRKİYE

4.1. Basic Approach

The port sector is an important component of global and regional trade networks and is directly linked to economic geography. Ports do not generate cargo on their own; the cargo volumes directed to ports are largely determined by industrial production, trade volumes, import and export activities, and the level of development of logistics networks in the regions in which they are located.

In this respect, the port sector may be regarded in the economic literature as an area of activity characterised by derived demand. The cargo volume of a port largely depends on economic activity within the hinterland and foreland regions with which the port interacts. Hinterland refers to the land-side economic area that supplies cargo to the port through industry, agriculture, trade and logistics activities. Foreland covers the port's international trade connections on the sea side and the commercial network it establishes through maritime transport.

Ports therefore develop as a result of production and trade activity in their surrounding economic areas, and they play a critical role in transferring that activity to global markets. This study examines the port sector from the perspective of economic geography and aims to analyse the relationship between ports and the economic activities taking place in their hinterland and foreland regions, together with the cargoes generated by those activities and the ports at which those cargoes are handled.

The economic geography of the port sector was first addressed in Türkiye in the Türkiye Port Sector Report published in 2016. Since then, significant developments have taken place at both national and global level. During this period, economic activity and trade volumes have grown much faster than population at both global and national level. World population increased from approximately 7,4 billion to 8,2 billion, an increase

of around 1,1 times, while global merchandise trade value rose from around USD 16 trillion to USD 24–25 trillion, an increase of approximately 1,5 times. Over the same period, global seaborne trade volume increased from around 10,3 billion tonnes to 12,7 billion tonnes, corresponding to a rise of around 1,2 times.

In Türkiye, economic and commercial expansion has followed global trends but has occurred at a faster pace. Türkiye's total foreign trade volume increased from approximately USD 342 billion in 2016 to approximately USD 639 billion in 2025, almost 1,9 times higher. Over the same period, Türkiye's gross domestic product rose from around USD 869 billion to more than USD 1,5 trillion, while per capita income increased from around USD 10.900 to USD 18.000. By contrast, Türkiye's population rose only from around 79,8 million to 86,1 million^{101, 102, 103, 104}.

This rapid growth in Türkiye's foreign trade volume has also been reflected in maritime trade through the country's ports. Cargo handled at Turkish ports increased from approximately 420 million tonnes to more than 530 million tonnes over the same period. These figures show that the growth in trade and economic activity has far exceeded population growth, both globally and in Türkiye, and that demand in the port sector is largely a derived demand linked to the development of production, trade and global logistics networks.

¹⁰¹ <https://www.worldometers.info/world-population/world-population-by-year/>

¹⁰² https://www.wto.org/english/res_e/publications_e/trade_outlook25_e.htm

¹⁰³ <https://unctad.org/publication/review-maritime-transport-2025>

¹⁰⁴ <https://www.tuik.gov.tr/>

Within the scope of these economic developments, the number of ports in Türkiye has also increased significantly. The number of ports serving vessels over 1.000 GRT rose from 116 in 2016 to 198 in 2026. Taking account of the substantial developments observed over the last decade, the Port Operators Association of Türkiye considered that updating the 2016 study on the economic geography of ports would make an important contribution to Turkish port operations. Accordingly, the main theme of this year's report was determined as the economic geography of Turkish ports.

A wide range of parameters play a role in the formation of a port hinterland. Among these, sixteen are regarded as particularly determinant. Their relative significance varies according to cargo type.

- a) Proximity to production and consumption centres;
- b) Quality of road transport connections;
- c) Freight rates and total logistics cost;
- d) Service level offered by the port;
- e) Physical and technical capacity of the port;
- f) Cargo type and cargo profile;
- g) Maritime transport network and liner connections;
- h) Presence of competing ports;
- i) Customs, regulatory and administrative processes;
- j) Logistics clustering and the industrial ecosystem;
- k) Geographical and natural conditions;
- l) Historical trade relations and market habits;
- m) Security, risk and continuity;
- n) Public investments and incentive policies;
- o) Economic and unit value of cargo;
- p) Digitalisation, automation and green port practices.

The main purpose of this section, which examines the economic geography of the port sector in Türkiye, is to determine which provinces and which cargo types are served by each sub-region. In this context, the first step is to define the hinterlands of the sub-regions.

4.2. Primary Hinterland of Ports

Minerals, energy resources and agricultural products are not distributed homogeneously across the world. In a similar manner, population density, industrial activity, development levels and foreign trade volumes vary across regions and even between neighbouring provinces. Therefore, the cargo volumes originating from port hinterlands differ by region and by province.

When the hinterland of a port is considered, the provinces with which it interacts most strongly constitute that port's primary hinterland. The primary hinterland consists of the provinces that feed the port and from which, or to which, most of the cargo

originates or is destined. These provinces do not necessarily have to be the province in which the port is located, or neighbouring provinces. For example, feldspar extracted in Aydın is handled at a port located in Milas, Muğla; in this case, the primary hinterland of the port is Aydın.

For container and liquid bulk cargoes, port hinterlands are broader. For dry bulk cargo and passenger traffic, they are much more limited. Kuşadası Passenger Port, one of Türkiye's leading cruise ports, is 187 km from Denizli, an important tourism destination because of Pamukkale. This distance is too long for cruise passengers, and Denizli is therefore not within the hinterland of Kuşadası Port. By contrast, for container cargoes, Denizli is within the hinterland of İzmir Port even though it is around 240 km away. Accordingly, while proximity to the port is important, distance is not the only parameter determining hinterland.

In the first stage of this study, the provinces that feed ports and that are important in terms of cargo were identified. Subsequently, the sub-regions with which those provinces are associated were determined; foreign trade cargoes by cargo type and by region were separated; and the regions in which different cargoes are handled were analysed.

In identifying the provinces that have a strong relationship with ports, parameters such as population, GDP, GDP per capita, foreign trade volume, budget revenues and socio-economic development level were examined. Organised Industrial Zones, Free Zones and Logistics Centres located in the provinces were also taken into consideration.

Population was selected as the first parameter in identifying cargo centres. As population density increases in a region, the intensity of commercial activities in that region also increases. Population growth also affects demand: as the number of people living in a region rises, consumption in that region increases, and the volume of goods and trade expands. Population density increases not only cargo at ports but also inter-provincial road transport.

There is a positive correlation between population and load, which is generally used as an independent variable in demand forecasting studies. Because the end user of a good or service is human beings, and as the number increases, the demand for that good or service will increase. There are 24 provinces with a population of more than one million in our country. Approximately 72,5% of our total population lives in these provinces (**Figure 4.1**).

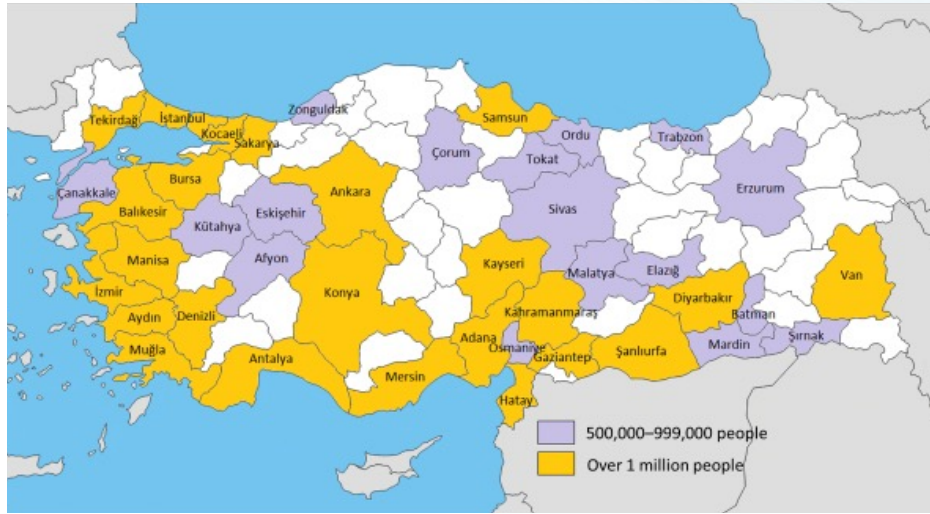


Figure 4.1. Provinces with the highest population.

Approximately 90% of domestic freight transport in Türkiye is carried by road. Bulk cargoes such as coal, grain and fertiliser, as well as project cargoes, generally arrive at the port closest to the final user. However, qualified products arriving in containers mainly enter through the Marmara, Aegean and East Mediterranean ports and are distributed across the country predominantly by road. Population is therefore not sufficient on its own to determine port hinterlands.

GDP, the most fundamental indicator used to measure the size and performance of a country's economy, was used as the second parameter in identifying cargo centres. GDP represents the total monetary value of all final goods and services produced within the borders of a country. Each value created, and every raw material, semi-finished product and finished product required to create that value, naturally generates cargo volume. For the purposes of identifying cargo centres, provinces with GDP above TRY 500 billion were selected; 18 provinces met this criterion (**Figure 4.2**).



Figure 4.2. Cities with a GDP of 500 billion Turkish liras and above.

GDP alone is not sufficient to determine cargo volume. Household economic welfare indicates, on average, how much income or production each

person accounts for. GDP per capita at provincial level shows the average economic strength of the city.

Türkiye's GDP per capita in 2024 was USD 15.325. For identifying cargo centres, provinces with GDP per

capita above USD 15,000 were selected; 13 provinces met this criterion (**Figure 4.3**).



Figure 4.3. Cities with a GDP per capita of more than 15.000 US dollars.

Another parameter used in identifying the provinces that constitute port hinterlands is general budget tax revenue. In this study, on a collection basis, a 0,3% share of Türkiye's total general budget revenues was

taken as the lower threshold. Six provinces account for more than 2% of national budget revenues (**Figure 4.4**)¹⁰⁵.

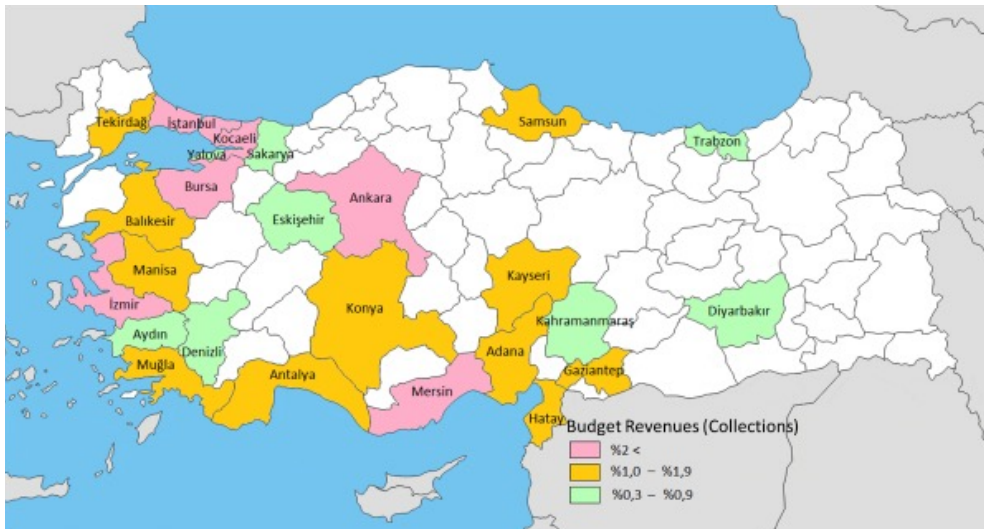


Figure 4.4. Provinces with the highest budget revenues (on the basis of collection)

One of the direct indicators of cargo volume in a province is that province's foreign trade volume. In determining the economic geography of Turkish ports,

cities with foreign trade volumes of USD 6 billion or more were identified; 17 provinces met this criterion (**Figure 4.5**).



Figure 4.5. Cities with a foreign trade volume of over 6 billion US dollars.

One of the important criteria for freight centers is the socio-economic development level of the city. While determining the level of socio-economic development, provinces are analyzed in a wide perspective such as employment, education, health, financial, competitive and innovative capacity variables as well as demographic characteristics. In determining the freight centers of the ports, the “Socio-Economic

Development Ranking 2025” study of the provinces prepared by the Ministry of Industry and Technology of the Republic of Türkiye was used. According to the study in question, there are 8 provinces in the First Tier socio-economic development ranking and 12 provinces in the Second Tier socio-economic development ranking (**Figure 4.6**).



Figure 4.6. Socio-economic development levels of provinces.

Organized industrial zones, logistics centers and free zones in the port hinterland are areas where direct cargo flow takes place with ports.

Approximately half of the 1,000 largest industrial enterprises in our country are located in Organized Industrial Zones. Organized industrial zones realize approximately 40% of Türkiye’s exports and OIZs are important production centers that affect approximately 25-30% of total foreign trade.

There are a total of 418 organized industrial zones in our country. 297 of these OIZs are active. The Ministry of Industry and Technology approved the establishment of 285 of the active OIZs and the Ministry of Agriculture and Forestry approved 12 of them.

The highest number of OIZs is located in Bursa. Bursa province is followed by Kocaeli, Ankara and Tekirdağ provinces, respectively (**Figure 4.7**).

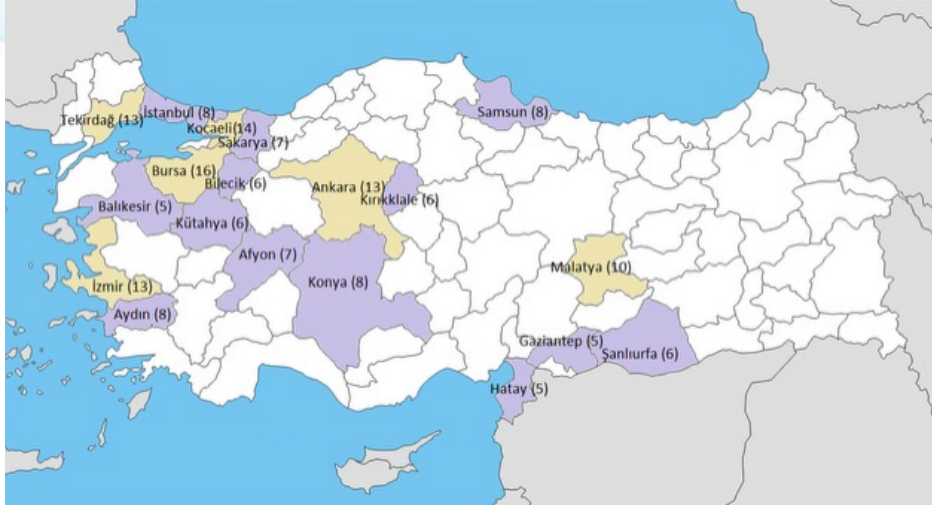


Figure 4.7. Provinces with five or more organized industrial zones.

Logistics centers are strategic transfer centers that are located in the interaction area between organized industrial zones, production facilities and ports, providing the collection, storage and distribution of cargo. These centers ensure a regular flow of cargo to ports, while at the same time reducing congestion and waiting times at ports, speeding up loading

and unloading processes, and contributing to more effective and efficient operation of ports.

On the basis of storage capacity, area size and activity intensity, 33 logistics centers were determined within the scope of this study. A significant part of the logistics centers are operated by TCDD (**Figure 4.8**)¹⁰⁶.

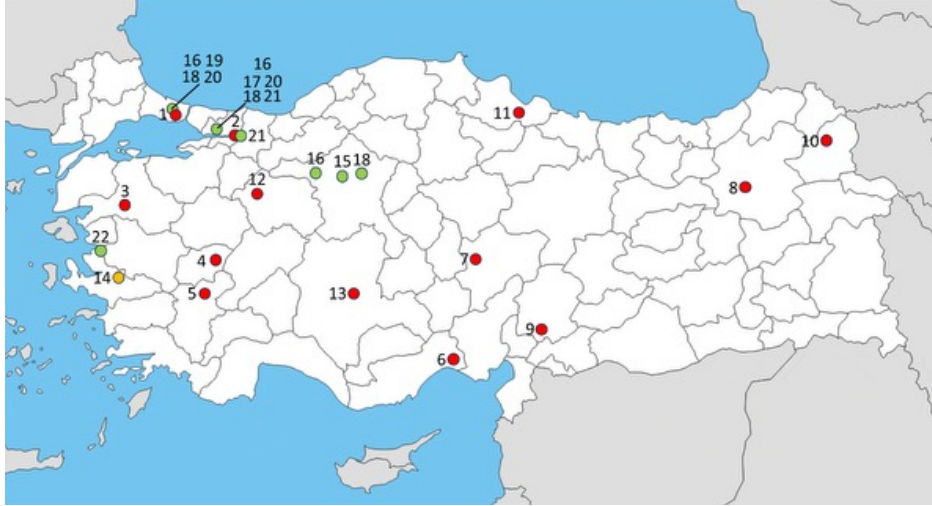


Figure 4.8. Logistics Centers

- | | | |
|----------------------------------|--------------------------------------|--------------------------------------|
| 1. Halkalı L.M. (İstanbul) | 11. Gelemen L.M. (Samsun) | 18. Ekol L.M. (Lotus-İstanbul), |
| 2. Köseköy L.M. (Kocaeli) | 12. Hasanbey L.M. (Eskişehir) | (Lavanta-Ankara) |
| 3. Gökköy L.M. (Balıkesir) | 13. Kayacık L.M. (Konya) | (Orkide-İstanbul), (Tuzla-İstanbul) |
| 4. Uşak L.M. (Uşak) | 14. Kemalpaşa L.M. (İzmir) | 19. Mars L.M. (Hadımköy-İstanbul) |
| 5. Kaklık L.M. ((Denizli) | 15. Ankara L.M. (Ankara) | 20. Reysaş L.M. (Çayırova-Kocaeli), |
| 6. Yenice L.M. (Mersin) | 16. Netlog L.M. (Ankara), (İstanbul) | (Esenyurt, Tuzla-İstanbul) |
| 7. Boğazköprü L.M. (Kayseri) | (Kocaeli) | 21. Borusan L.M. (Tepeören-İstanbul) |
| 8. Paşandöken L.M. (Erzurum) | 17. Omsan L.M. (Gebze-Kocaeli), | (Köseköy Araç L.M.-Kocaeli) |
| 9. Türkoğlu L.M. (Kahramanmaraş) | (Tuzla-İstanbul) | 22. Arkas L.M. (Aliağa-İzmir) |
| 10. Kars L.M. (Kars) | | |

Free zones, where export-oriented production and trade activities take place, are also important cargo centres for ports. Free zones account for approximately 4% to 6% of Türkiye's total exports and are of strategic importance, particularly for higher

value-added products such as electronics, defence products and pharmaceuticals. Türkiye has 19 free zones in total, almost all of which are located close to ports (**Figure 4.9**).

Aegean Free Zone	→	Very close to the Izmir Alsancak and Aliğa ports
Mersin Free Zone	→	One of the largest in Türkiye, directly in the port
Antalya Free Zone	→	Port-connected, yacht and boat production is important
Adana Yumurtalık Free Zone	→	Close to port and energy transportation
Istanbul Thrace Free Zone	→	Close to Ports (Ambarlı, etc.)
European Free Zone	→	Close to the port of Tekirdag
Kocaeli Free Zone	→	Connected to Gulf ports
Bursa Free Zone	→	Connected to the Gemlik Port

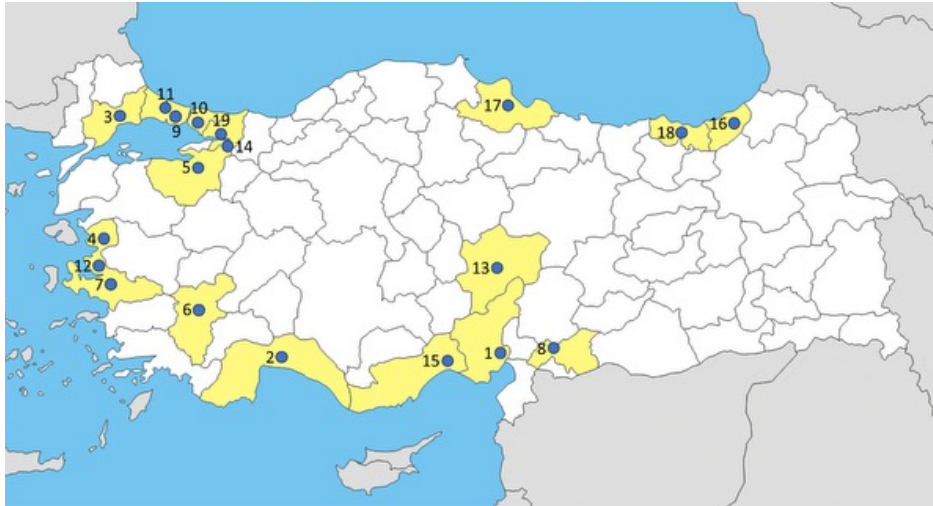


Figure 4.9. Free Zones¹⁰⁷

- | | | |
|----------------------------|--------------------------------------|---------------------------------|
| 1. Adana – Yumurtalık F.Z. | 8. Gaziantep F.Z. | 15. Mersin F.Z. |
| 2. Antalya F.Z. | 9. İstanbul Specialization F.Z. | 16. Rize F.Z. |
| 3. Avruga F.Z. | 10. İstanbul Industry and Trade F.Z. | 17. Samsun F.Z. |
| 4. Western Anatolia F.Z. | 11. İstanbul Thrace F.Z. | 18. Trabzon F.Z. |
| 5. Bursa F.Z. | 12. İzmir F.Z. | 19. TÜBİTAK MAM Technology F.Z. |
| 6. Denizli F.Z. | 13. Kayseri F.Z. | |
| 7. Ege F.Z. | 14. Kocaeli F.Z. | |

Taking into account the foreign trade volumes of provinces, twenty-four provinces were identified under nine criteria: population, GDP, GDP per capita, budget revenues, foreign trade volumes, socio-economic development level, the number and operating intensity of Organised Industrial Zones,

and logistics centres. These provinces constitute the primary hinterland of the ports. A substantial part of the cargo arriving at and departing from ports originates from these provinces. In terms of regional cargo, 8 additional provinces stand out as second-tier cargo centres (**Figure 4.10**).

¹⁰⁷ Doğan, S., Alıcı A., Meydan M., C., (2025). "İllerin ve Bölgelerin Sosyo-Ekonomik Gelişmişlik Sıralaması Araştırması SEGE-2025", T.C. Sanayi ve Teknoloji Bakanlığı.



Figure 4.10. Container cargoes handled at ports are mainly in the provinces of origin and destination.

4.3. Geographical Distribution of Turkish Ports

Although Türkiye, with a coastline of 8.333 km, is geographically divided into seven regions, four of its geographical regions have access to the sea. Approximately 1.685 km of the coastline is on the Black Sea, 930 km on the Sea of Marmara, 2.800 km on the Aegean Sea and 1.670 km on the Mediterranean. The long Mediterranean and Black Sea coastlines provide maritime access to many cities. The Western Black Sea is adjacent to Eastern Marmara, while the Western Mediterranean is adjacent to the Southern Aegean (Figure 4.11).

For this reason, the TÜRKLİM Sector Report analyses the Black Sea Region as two sub-regions, Eastern and Western Black Sea; the Marmara Region as three sub-regions, North-Eastern Marmara, North-Western Marmara and Southern Marmara; the Aegean Region as two sub-regions, Northern Aegean and Southern Aegean; and the Mediterranean Region as two sub-regions, Western Mediterranean and Eastern Mediterranean. This division takes into account not only the geographical distribution of ports but also the industrial and commercial characteristics of the hinterland, foreign trade volumes, cargo patterns and distances to the port groups that they feed or by which they are served.

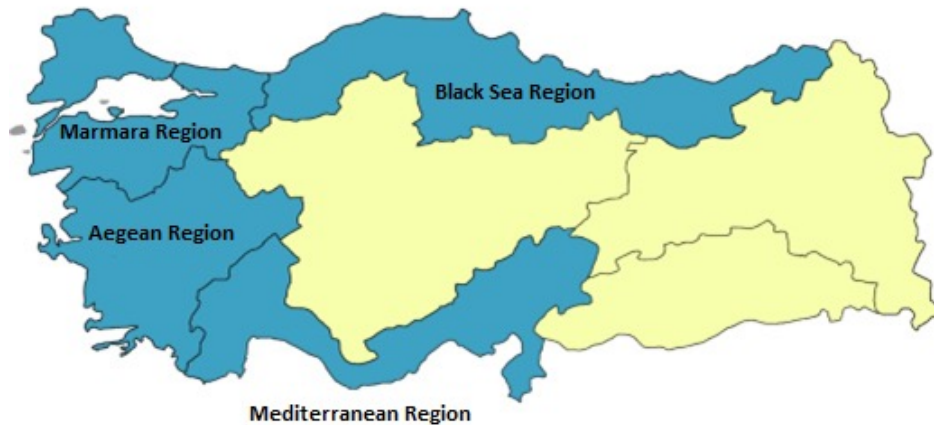


Figure 4.11. Coastal regions in Türkiye

Excluding yacht berthing piers, sunbathing piers and recreational quays and piers, Türkiye has nearly two hundred coastal facilities, including ports, fishing shelters and marinas. The number of main cargo and passenger ports examined in the TÜRKLİM Sector Report – facilities open to international maritime trade and capable of serving vessels of 1.000 GRT or more

– is 198. These ports have 509 terminals (Table 3.8 and 3.9). In terms of the total number of ports, the Northeast Marmara region, where the Gulf of İzmit is located, and the Eastern Mediterranean region, where the Gulf of Mersin and Iskenderun are located, rank first. Northwest Marmara, where Ambarlı and Tekirdağ ports are located, ranks second.

In terms of the total number of terminals, Northeast Marmara ranks first. The Eastern Mediterranean ranks second. When the sub-regions are evaluated in terms of cargo volume handled (**Table 4.1**), the Eastern Mediterranean Region ranks first in dry bulk cargo,

general cargo, liquid bulk cargo and container cargoes with the highest handling volume. While Northeast Marmara ranks first in the number of vehicles transported on Ro-Ro lines, the North Aegean region ranks first in the number of cruise passengers.

Table 4.1. Handling volumes in Turkish Ports on the basis of sub-regions¹⁰⁸

Subregions	Dry Bulk Cargo	General Cargo	Liquid Bulk Cargo
	Tons	Tons	Tons
Eastern Black Sea	4.668.178	760.081	1.731.436
Western Black Sea	26.351.583	6.326.562	2.241.669
Northeastern Marmara	12.164.829	16.119.178	36.515.604
Northwestern Marmara	8.229.299	2.505.251	20.235.828
Southern Marmara	24.367.979	7.905.669	1.202.391
Northern Aegean	19.780.498	10.918.013	47.006.679
Southern Aegean	6.089.614	60.101	72.138
Western Mediterranean	2.499.088	146.526	3.159.798
Eastern Mediterranean	56.787.507	21.106.206	57.549.166
Total	160.938.575	65.847.587	169.714.709

Table 4.1. Handling volumes in Turkish Ports on the basis of sub-regions (more)²

Subregions	Container	Ro-Ro ¹	Ro-Ro ²	Passenger
	TEU	Unit	Unit	Person
Eastern Black Sea	47.509	-	0	21.848
Western Black Sea	79.623	51.744	183	50.540
Northeastern Marmara	2.512.234	225.913	1.737.496	-
Northwestern Marmara	5.566.375	35.976	0	625.517
Southern Marmara	911.339	178.469	402.082	27.424
Northern Aegean	1.935.533	71.237	31.201	1.151.767
Southern Aegean	1	-	1.256	215.825
Western Mediterranean	84.851	-	0	45.215
Eastern Mediterranean	2.859.114	156.534	70.299	-
Total	13.996.578	724.726	2.242.517	2.138.136

⁽¹⁾ Vehicle transported on regular Ro-Ro lines with international connections

⁽²⁾ Cars and other vehicles transported on lines with international connections

4.4. Economic Geography of the Port Sector in Türkiye

The economic geography of the ports was examined on the basis of sub-regions. The sub-regions show the economic sphere of influence as well as the common hinterland of the ports. Ports that are close to each other and serve similar ships and cargoes have the same hinterland in terms of sub-regions. However, the port preferences of cargoes coming from the common hinterland have a more complex algorithm. Because, as mentioned before, which port the cargo prefers does not depend only on the distance; It depends on a more complex decision mechanism that is affected by many variables such as service quality, cost, transshipment connections, service frequency, port efficiency, capacity, waiting time, specialization level, storage and handling fees, speed of customs procedures and integration with logistics networks. Since the aim of this study is to make a hierarchical ranking among ports, freight and freight centers were analyzed on the basis of sub-regions, not on port or provincial basis.

Within the scope of the study, the ports in each sub-region were determined respectively. The facility names and terminals of the ports in question (which ship and cargo types they serve) were created from the list of coastal facilities with operating permits of the General Directorate of Shipyards and Coastal Structures of the Republic of Türkiye. In the next stage, the basic cargoes handled by the ports in terms of sub-regions were extracted, and it was analyzed which cities the determined basic cargoes were related to. At this stage, the export and import products of the provinces in the sub-regional hinterland are listed on the basis of foreign trade prices. In this order, port-related products have been tried to be limited. In terms of sub-regions, the relationship of both import and export products with the hinterland was analyzed and as a result, the provinces that primarily use that sub-region for each sub-region were mapped.

In the determined provinces, the cargo volume (in tons, TEU, units) was mainly taken into account. The foreign trade data of the provinces entering the port hinterland were also analyzed on a foreign currency basis according to their intervals. At this stage, provinces were determined based on the total cargo volume handled at the port, not on the basis of loading and unloading (arrival & departure province). In short, the determined provinces do not only represent the cargoes arriving at the port. It represents the provinces that carry out the majority of the total handling.

The list of coastal facilities with operating permits of the Ministry of Transport and Infrastructure of the Republic of Türkiye has been taken into account in the port names, number of ports and number of terminals given by regions. The number of terminals is determined according to the types of ships mentioned in the operating permit.

A port can receive more or less cargo from all provinces it is geographically close to. In this study, the basis is not what percentage of the cargo of the provinces in the hinterland of the port comes to the port, but what percentage of the cargo coming to the port comes from which province. A province is very close to the port and sends and receives all of its foreign trade cargoes from the port in its region, but it constitutes only a very small share in the total load of the port. However, a city in a more remote region sends ten percent of its cargo through the same port, but this ten percent of the cargo accounts for fifty percent of the port's total cargo. In this study, the hinterland, which is determined on the basis of sub-regions, expresses which provinces the dominant cargoes for the port come from.

Black Sea Region and Sub-Regions

The Black Sea Region is divided into two sub-regions. The Eastern Black Sea Region extends from Artvin to Ordu, while the Western Black Sea Region represents the area from Samsun to Düzce (**Figure 4.12**).



Figure 4.12. Black Sea region and sub-regions

Eastern Black Sea Region

The first sub-region analysed in the economic geography of ports is the Eastern Black Sea Region (**Figure 4.13**). In this sub-region, Ordu, Trabzon and Tokat have populations above 500.000. Within the Eastern Black Sea Region, only Trabzon accounts for 0,3% of Türkiye's total collected general budget revenues; the shares of other provinces in budget revenues are lower.

There are 11 ports included in the Eastern Black Sea assessment. On the basis of their operating permits, these ports have a total of 28 terminals. Liquid bulk cargo services are dominant in the region. Although there are four container terminals, only Giresun and Trabzon ports provide container services (**Table 4.2**).

Table 4.2. Ports of the Eastern Black Sea Region.

#	East Black Sea	Terminals				
	Ports	Container	General Cargo	Liquid Bulk	Ro-Ro	Passenger
1	Aytemiz Trabzon Termn.			1		
2	Çayeli		1			
3	Fatsa		1			
4	Giresunport	1	1	1	1	1
5	Hopa Port	1	1	1	1	
6	Karadeniz LPG			1		
7	Opet Espiye			1		
8	Poaş Trabzon			1		
9	Riport Rize	1	1		1	1
10	Trabzon	1	1	1	1	1
11	Ünye		1	1	1	1
Total		4	7	8	5	4

From the perspective of the national or regional economy, the value of a product is a key concern. From the perspective of port operations, however, the quantity of cargo arriving at the port in tonnes or units is more important. The revenues and costs of a port, as well as the equipment and personnel required operationally, the physical characteristics of the port such as quay and back-up area, and the port's ability to operate effectively and efficiently, are directly linked to the quantity of cargo handled and to the port's capacity.

In the Eastern Black Sea ports, petroleum and its derivatives rank first among liquid bulk cargoes. Soybeans, arriving as general cargo and used mainly as feed in animal husbandry, are imported principally from Russia and Ukraine, as well as from Brazil,

Argentina and the United States, and are mainly sent to Erzurum, Bayburt, Gümüşhane and Trabzon. Hard coal used for heating and cement production, one of the most heavily handled cargoes in Eastern Black Sea ports, is imported mainly from Russia and Colombia. Cement, which ranks second, is exported from Giresun, Trabzon and Ordu (Ünye) mainly to Georgia, Russia and Ukraine and, periodically, to Bulgaria and Romania. Bentonite, which has a wide range of uses including casting, oil and gas drilling mud, cat litter and ground improvement, is exported from Ordu (Ünye-Fatsa line) and Giresun to nearly seventy countries, including Germany, the Netherlands, the United Kingdom, Italy and France (**Table 4.3**).

Table 4.3. Basic cargoes handled in Eastern Black Sea Ports

Cargo Type	Tons	Major Products Handled
Liquid Bulk Cargo	1.731.436	Diesel, Unleaded Gasoline, Jet Fuel (Gasoline-Type), LPG (Liquefied Petroleum Gas), Sunflower Oil, Alcohol (Methanol, Propanol, etc.), Jet Fuel (Kerosene-Type), and White Spirit, Asphalt
General Cargo	760.081	Soybeans, Petroleum Coke, Wood-Based Particleboard and Similar Panels, Including Label-Laminated Panels (Waferboard-Wfb), Glass
Dry Bulk	4.668.178	Bituminous Coal, Cements, Bentonite, Corn – Grain, Urea Fertilizer, Portland Cement, Oil Cake, Silica Sand, Clinker, Beet Pulp, Bagasse, Copper Ore and Concentrates
Container (TEU)	47.509	Electrical machinery, plastics and plastic products, various chemical substances, and minerals.

When the export values of the provinces in the Eastern Black Sea hinterland are examined, it is understood that food, agricultural and mineral products are decisive in the foreign trade of the region and these product groups are positioned at the top (**Table 4.4**). On the other hand, although machinery and some industrial products are more limited in volume, they have a remarkable share in exports thanks to their high unit values. This situation reveals that the production structure of the provinces

that make up the primary hinterland of the region, especially Trabzon, Rize and Ordu, is largely based on agriculture and natural resources. Considering the foreign trade activities of the provinces located in the hinterland of the Eastern Black Sea ports, 84% of the foreign trade value consists of export products. The top ten products in exports constitute approximately 80% of total exports in dollar terms. The Russian Federation, Germany, Bulgaria and Georgia are the countries with the highest exports in foreign currency.

Table 4.4. Important export chapters in the Eastern Black Sea hinterland

#	Chapter No	Chapter Title
1	20	Vegetables, fruits, etc.
2	08	Edible fruits and nuts
3	26	Metal ores, slag, and ash
4	03	Fish, shellfish, etc.
5	61	Knitted clothing and accessories
6	38	Various chemical substances, etc.
7	25	Salt, sulfur, soils and stones, plasters, lime, and cement
8	12	Oilseeds and fruits, etc.
9	23	Waste and byproducts of the food industry, etc.
10	11	Milling products, malt, starch, inulin, wheat gluten

When the import values of the provinces in the Eastern Black Sea hinterland are evaluated, it is seen that energy, machinery and industrial inputs come to the fore in the foreign trade of the region (**Table 4.5**). While these product groups are at the top of imports, agricultural and consumer products have an important place in line with regional needs despite their lower unit values.

In this context, it is understood that the primary hinterland provinces, especially Trabzon, Samsun and Rize, have a production and consumption-based demand structure. Considering the foreign trade activities of the provinces located in the hinterland of the Eastern Black Sea ports, the top ten cargoes in imports constitute approximately 77% of total imports.

Table 4.5. Important import chapters in the Eastern Black Sea hinterland

#	Chapter No	Chapter Title
1	27	Mineral fuels, mineral oils, etc.
2	84	Boilers, machinery, mechanical devices, etc.
3	85	Electrical machinery and equipment, etc.
4	01	Live animals
5	72	Iron and steel
6	39	Plastics and plastic products
7	44	Wood and wooden goods
8	12	Oilseeds
9	89	Ships
10	08	Fruits

Eastern Black Sea Ports have a limited hinterland. The provinces that primarily use the Eastern Black Sea ports are Giresun, Trabzon, Ordu, Gümüşhane, Bayburt and Erzurum (**Figure 4.13**).

**Figure 4.13.** Provinces that primarily use the Eastern Black Sea Ports.

Western Black Sea Region

The Western Black Sea Region consists of the coastline starting from Düzce province to Samsun province. Since the sub-regions are determined according to the load centers and type, Sakarya, Kocaeli, Istanbul, Kırklareli, which have a coast to the Black Sea, are evaluated within the Marmara sub-regions.

There are a total of 43 terminals belonging to 20 main ports in the Western Black Sea. The main cargo in the region is dry bulk cargo. The biggest contribution to dry bulk cargo is made by the thermal power plants and the iron and steel sector in the region. The Ukraine-Russia crisis puts serious pressure on the regional burdens (**Table 4.6**).



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Table 4.6. Ports of the Western Black Sea Region.

#	West Black Sea	Terminals				
	Ports	Container	General Cargo	Liquid Bulk	Ro-Ro	Passenger
1	Akkonak	0	1	0	0	0
2	Akpet	0	0	1	0	0
3	Alpet Altınbaş	0	0	1	0	0
4	Amasra	0	0	0	0	0
5	Aygaz Samsun	0	0	1	0	0
6	Bartın	0	1	1	0	1
7	Erdemir	1	1	1	1	1
8	Eren	1	1	0	1	0
9	Eti Bakır Kırı	0	1	1	0	0
10	Filyos TPAO	0	1	1	0	0
11	İnebolu	1	1	1	1	0
12	Bozahane	0	1	0	0	0
13	Likitgaz	0	0	1	0	0
14	Petrol Ofisi A.Ş..	0	0	1	0	0
15	Sadaş Samsun	0	0	1	0	0
16	Samsunport	1	1	1	1	1
17	Sinop	0	1	0	1	1
18	Toros Tarım	0	1	1	0	0
19	TTK Zonguldak	1	1	0	1	1
20	Yeşilyurt	1	1	0	0	0
	Total	6	13	13	6	5

Within the scope of this study, operating permits were taken as a basis in determining the terminals of the ports. Although 6 container terminals appear in the western Black Sea region in the operating permit, today only Ceynak Samsun Port and Eren Port are regularly stopped by.

The Western Black Sea is our country's gateway to the Black Sea countries. Due to its geographical location, it has an unrivaled position in trade with the Black Sea countries, especially in central Anatolia and eastern Marmara cargoes.

Considering the ports in the Western Black Sea region, the highest amount of liquid bulk cargo is diesel. Diesel oil handled in the Black Sea region as a whole is handled in ports as cabotage cargo. Sulfuric acid, which is used in agriculture (fertilizer), iron and

steel and chemical industries and ranks second in terms of handling volume in western Black Sea ports, comes to the ports both as cabotage and imported cargo. A significant part of the cargoes handled in the eastern Black Sea ports as liquid bulk cargo consists of unloading cargo. The distribution provinces of liquid chemicals consist of Zonguldak, Karabük, Bartın, Düzce, Sakarya, Ankara and partly Kırıkkale provinces. In terms of tonnage, the main general cargo load of the western Black Sea is iron and steel products. Scrap iron imports and coil sheet, profile iron/pipe exports have an important place in the total handling volume. The power plant and iron and steel industry in the Western Black Sea region have a high need for coal. Iron ore and concentrates, which are highly handled in the Western Black Sea region, are import-oriented (**Table 4.7**).

Table 4.7. Basic cargoes handled in Western Black Sea Ports

Cargo Type	Tons	Major Products Handled
Liquid Bulk Cargo	2.241.669	Diesel Fuel, Sulfuric Acid (Oleum), LPG, Ammonium Compounds, Tars, Phosphoric Acid, Liquid Fertilizers, Molasses (Sugar Syrup), Alcohol (Methanol, Propanol, etc.)
General Cargo	6.326.562	Coiled Sheet Metal, Slabs, Shaped Steel/Pipes, Steel Ingots (including continuous cast ingots), Pig Iron, Other Manufactured Fertilizers, Soybeans, Sunflower Seeds, Wheat Flour, Other Unprocessed Plastic Materials, Iron and Steel Products, Sheet Metal, Petroleum Coke
Dry Bulk	26.351.583	Coke and Semi-Coke, Iron Ore and Concentrates, Bituminous Coal, Unprocessed Natural Phosphate, Wheat and Meslin, Scrap Iron, Ash and Slag Unsuitable for Metal Recovery, Coke and Semi-Coke, Copper Ore and Concentrates, Clinker, Oil Cake
Container (TEU)	84.851	Machinery, mechanical devices, rubber and rubber goods, paper and pulp.

When the export performance of the provinces in the Western Black Sea hinterland is evaluated, it is seen that the iron and steel, machinery and automotive sectors stand out in the foreign trade of the region. While these product groups are at the top of the list, food, forestry products and some industrial products have an important place in exports thanks to their production volumes, although they have lower unit values. This structure reflects the metal industry and production-oriented economic character of

the primary hinterland, especially consisting of Zonguldak, Karabük and Ankara. Considering the foreign trade activities of the provinces located in the hinterland of the Western Black Sea ports, 57,5% of the foreign trade value consists of export products. The top ten products in exports constitute approximately 70% of total exports in dollar terms (**Table 4.8**). Italy, the USA, the Netherlands, the Russian Federation and Georgia are the countries with the highest exports in foreign currency.

Table 4.8. Important export chapters in the Western Black Sea hinterland

#	Chapter No	Chapter Title
1	72	Iron and steel
2	73	Articles made of iron or steel
3	85	Electric machinery and equipment
4	84	Boilers, machinery, and mechanical devices
5	3	Fish, shellfish, etc.
6	87	Motor vehicles and parts
7	44	Wood and wood products
8	74	Copper and copper products
9	40	Rubber and rubber products
10	62	Unknitted clothing
11	93	Firearms and ammunition

When the import values of the provinces in the Western Black Sea hinterland are examined, it is understood that energy, metal and machinery groups have gained weight in the region's foreign trade (**Table 4.9**). While these products are at the top of imports, agricultural and chemical products have a significant share in line with regional needs despite their relatively

low unit values. This situation reveals the demand structure based on industrial production of the primary hinterland provinces, especially Zonguldak, Karabük and Ankara. Considering the foreign trade activities of the provinces located in the hinterland of the Eastern Black Sea ports, the top ten cargoes in imports constitute approximately 89% of the total imports.

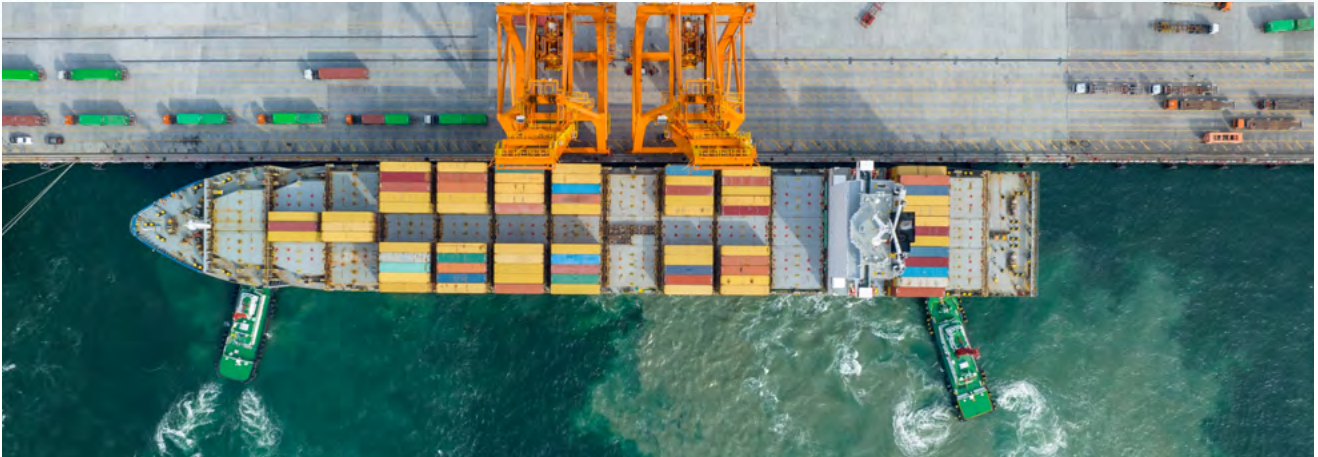


Table 4.9. Important import chapters in the Western Black Sea hinterland

#	Chapter No	Chapter Title
1	72	Iron and steel
2	27	Mineral fuels, mineral oils
3	26	Metal ores, slag, and ash
4	84	Boilers, machinery, and mechanical equipment
5	10	Grains
6	85	Electrical machinery and equipment
7	28	Inorganic chemicals
8	23	Food industry byproducts (feed, etc.)
9	25	Salt, sulfur, stone, cement
10	79	Zinc and zinc products

Western Black Sea Ports can receive cargo from the western Black Sea, central Anatolia and eastern Marmara regions due to their location. The provinces that primarily use the Western Black Sea ports are Zonguldak, Samsun, Karabük, Sakarya, Ankara, Bolu, Bartın, Kocaeli, Tokat and Kırıkkale (**Figure 4.14**).



Figure 4.14. Provinces that primarily use Western Black Sea Ports.

Marmara Region and Sub-Regions

The Marmara Region is divided into three sub-regions. Sub-Regions are determined on the basis of hinterland, not province. For this reason, a part of Istanbul is located in the Northwest Marmara Region

and a part in the Northeast Marmara Region. A similar situation is valid in the province of Çanakkale (**Figure 4.15**). The Marmara Region ranks first in our country in terms of population and GDP, foreign trade and socio-economic development.



Figure 4.15. Marmara region and its sub-regions

Northeast Marmara Region

The Northeast Marmara Region consists of the provinces of Sakarya, Kocaeli, Yalova and Istanbul (Anatolian side). The Northeast Marmara sub-region, which forms the Gulf of İzmit and its immediate

surroundings, is the densest region in terms of the number of ports. There are a total of 42 ports and 75 terminals belonging to these ports. All types of cargo, including containers and passengers, can be handled on a terminal basis in the zone (**Table 4.10**).



Table 4.10. Main ports of the Northeast Marmara Region.

#	Northeastern Marmara	Terminals				
	Ports	Container	General Cargo	Liquid Bulk	Ro-Ro	Passenger
1	Akçansa Yalova	0	1	0	0	0
2	Aksa Akrilik	0	1	1	0	0
3	Ak-Taş Tank	0	0	1	0	0
4	Altintel	0	0	1	0	0
5	Aslan Çimento	0	1	0	0	0
6	Autoport	1	1	0	1	0
7	Bayramoğlu	0	1	0	0	0
8	Beldeport	1	1	0	1	0
9	Çolakoğlu Met.	0	1	0	0	0
10	Diler Demir Çelik	0	1	0	0	0
11	DP World Yarımca.	1	1	0	0	0
12	Efesanport Liman	0	1	1	1	0
13	DP World Evyap	1	1	1	1	0
14	Ford Otosan	0	1	0	1	0
15	Gübretaş Yarımca	0	1	1	0	0
16	Güzel Enerji	0	0	1	0	0
17	Habaş	0	0	1	0	0
18	İDO Maltepe	0	1	0	1	1
19	İGSAŞ	0	1	1	0	0
20	Karasu	1	1	0	1	1
21	Karayolları	0	0	1	0	0
22	Koruma Klor	0	1	1	0	0
23	Kroman Çelik	0	1	0	0	0
24	Likitgaz Yarımca	0	0	1	0	0
25	Limaş	1	1	1	0	0
26	Nuh Çimento	0	1	0	0	0
27	Op-Ay Platform	0	0	1	0	0
28	Petline	0	0	1	0	0
29	PO Derince	0	0	1	0	0
30	Poliport	0	1	1	0	0
31	Port Yarımca	0	0	0	1	0
32	Rota	0	1	0	0	0
33	Safi Derince	1	1	1	1	0
34	Shell Derince	0	0	1	0	0
35	Solventaş	0	1	1	0	0
36	Şişecam Gebze	0	1	0	0	0
37	Haydarpaşa	1	1	0	1	1
38	TP Petrol- İzgin	0	0	1	0	0
39	Tüpraş Rafineri	0	1	1	0	0
40	Yalova Ro-Ro	0	0	0	1	0
41	Yıldız Entegre Port	0	1	1	0	0
42	Yılport	1	1	0	0	0
Total		9	29	23	11	3

In the northeast Marmara region, the largest refinery in our country, Tüpraş İzmit Refinery, is located. Tüpraş Körfez Petrochemical Plant is located in the same region. For this reason, the main load of the region in terms of tonnage is liquid bulk cargoes. Crude oil imports and exports of petroleum and petrochemical products are among the main factors shaping the region's liquid bulk cargo traffic and determining the port-hinterland relationship. There are 23 ports in the Northeast Marmara Region

that handle liquid chemicals. Kocaeli and Istanbul provinces constitute the most important market for liquid chemical products. The Northeast Marmara region is a rich region in terms of both general cargo and dry bulk cargo diversity. In terms of tonnage, iron and steel products have a share of over fifty percent in general cargo loads. Cement ranks first in tonnage in dry bulk cargoes. Sodium carbonate used in the glass industry ranks second (**Table 4.11**).

Table 4.11. Basic cargoes handled in Northeast Marmara Ports

Cargo Type	Tons	Major Products Handled
Liquid Bulk Cargo	33.679.888	Crude Oil, Diesel, Jet Fuel (Gasoline-Type), Fuel Oil, Jet Fuel (Kerosene-Type), and White Spirit, Unleaded Gasoline, LPG, Gas Oil, Palm Oil, Alcohol (Methanol, Propanol, etc.), Asphalt, Machine and Motor Oil, Propane or Butane, Naphtha, Caustic Soda (Sodium Hydroxide)
General Cargo	16.119.178	Coiled Steel, Iron and Steel Products, Various Other Basic Chemicals, Slabs, Unprocessed Aluminum and Aluminum Alloys, Pig Iron, Cast Iron, Reinforcing Bars, Paper Pulp, Shaped Steel/Pipes, Styrene Monomer, Petroleum Coke, Soybeans
Dry Bulk	15.000.545	Portland Cement, Sodium Carbonate (Washing Soda), Scrap Iron, Corn – Grain, Clinker, Wood Chips and Shavings, Bituminous Coal, Urea Fertilizer, Clay, Gravel, Silica Sand, Slag, Phosphate Fertilizers, Wheat and Meslin, Kaolin and Kaolin-Containing Clays
Container (TEU)	2.512.234	Automotive Parts and Spare Parts, Machinery, Electronics, Petrochemicals, Textiles, Metals, Chemicals/Healthcare (cold chain), High Technology

When the export values of the provinces in the Northeast Marmara hinterland are evaluated, it is seen that automotive, chemical and metal industry products are decisive in the foreign trade of the region. While these product groups rank high, some semi-finished and intermediate goods have an important place in exports thanks to their high production volumes, although they have lower unit values. This structure reflects the heavy industry-oriented production capacity of the primary

hinterland, especially formed by Kocaeli and Sakarya. Considering the foreign trade activities of the provinces located in the hinterland of the Northeast Marmara ports, 39% of the foreign trade value consists of export products. The top ten products in exports constitute approximately 70% of total exports in dollar terms (**Table 4.12**). The United Kingdom, Germany, USA, Italy, Iraq, Spain, France and Morocco are the countries with the highest exports in foreign currency.

Table 4.12. Important export chapters in the Northeast Marmara hinterland

#	Chapter No	Chapter Title	#	Chapter No	Chapter Title
1	87	Motor vehicles, tractors, etc.	9	72	Iron and steel
2	84	Boilers, machinery, and mechanical devices	10	76	Aluminum and articles made of aluminum
3	71	Precious stones and metals	11	62	Non-knitted clothing
4	85	Electrical machinery and equipment	12	89	Ships and floating vessels
5	27	Mineral fuels and oils	13	74	Copper and articles made of copper
6	39	Plastics and plastic products	14	40	Rubber and articles made of rubber
7	61	Knitted garments	15	30	Pharmaceutical products
8	73	Articles of iron or steel			

When the import values of the provinces in the Northeast Marmara hinterland are examined, it is seen that energy, chemical and industrial inputs come to the fore in the foreign trade of the region (**Table 4.13**). While these product groups rank high, some agricultural and intermediate products have lower unit values but occupy an important place in imports due to intensive production activities.

This situation reveals the production-oriented demand structure of the primary hinterland provinces, especially Kocaeli and Sakarya. Considering the foreign trade activities of the provinces located in the hinterland of the Northeast Marmara ports, the top ten cargoes in imports over the foreign trade value constitute approximately 72% of the total imports.

Table 4.13. Important import chapters in the Northeast Marmara hinterland

#	Chapter No	Chapter Title	#	Chapter No	Chapter Title
1	87	Motor vehicles and parts	8	29	Organic chemical products
2	84	Boilers, machinery, and mechanical devices	9	74	Copper and copper articles
3	85	Electrical machinery and equipment	10	90	Optical, medical, and measuring instruments
4	71	Precious stones and metals	11	30	Pharmaceutical products
5	27	Mineral fuels and oils	12	76	Aluminum and aluminum articles
6	72	Iron and steel	13	88	Aircraft and aircraft parts
7	39	Plastics and plastic products	14	40	Rubber and rubber articles

The ports of the Northeast Marmara Region have a large hinterland. There is an area of influence extending to Ankara on the east-west axis and to Manisa on the north-south axis.

The provinces that primarily use the ports of the Northeast Marmara region are Kocaeli, Istanbul, Ankara, Eskişehir, Sakarya, Bursa, Bandırma, Bolu, Yalova and Manisa.



Figure 4.16. Provinces that primarily use Northeast Marmara Ports.

Northwest Marmara Region

It consists of the provinces of Istanbul (European side), Tekirdağ, Kırklareli and Edirne (**Figure 4.17**). There are a total of 66 terminals belonging to 37 main ports in the Northwest Marmara Region,

which includes the Ambarlı region, where Türkiye's important ports are located (**Table 4.14**). 17 of the terminals are general cargo and dry bulk cargo terminals, and 16 are liquid bulk cargo terminals.

Table 4.14. Main ports of the Northwest Marmara Region.

#	Northwest Marmara	Terminals				
	Ports	Container	General Cargo	Liquid Bulk	Ro-Ro	Passenger
1	Ambarlı	0	0	1	0	0
2	Akçansa Ambarlı	1	1	1	1	0
3	Ambarlı Mardaş	1	1	0	0	0
4	Anadolu Port	0	1	0	1	0
5	Argaz LPG	0	0	1	0	0
6	Asyaport	1	1	0	1	0
7	Aygaz A.Ş.	0	0	1	0	0
8	Botaş LNG	0	0	1	0	0
9	Bütangaz LPG	0	0	1	0	0
10	Cenal Karabiga	0	1	0	0	0
11	Tekirdağ	1	1	1	1	1
12	Akçansa	0	1	0	0	0
13	Çanakkale	1	1	1	1	1
14	DFDS Pendik	0	0	0	1	0
15	Galataport	0	0	0	0	1
16	Gestaş	0	0	0	0	1
17	Gisaş	0	1	0	0	0
18	Haramidere	0	0	1	0	0
19	İçdaş-1	1	1	0	0	0
20	İçdaş-2	0	1	0	0	0
21	Yeni Havalimanı.	0	0	1	0	0
22	Karabiga	0	1	0	1	1
23	Kumport	1	1	0	1	0
24	Likit Port	0	0	1	0	0
25	Likitgaz	0	0	1	0	0
26	Marmara	0	0	1	0	0
27	Marport	1	1	0	1	0
28	Martaş	1	1	1	1	1
29	Opet	0	0	1	0	0
30	Gökçeada Kuzu	0	0	0	0	1
31	Gökçeada Uğurlu	0	0	0	1	1
32	TDİ Kabatepe	0	0	0	0	1
33	TDİ Kuruçeşme	0	0	0	0	1
34	TDİ Sarayburnu	0	0	0	0	1
35	THY Opet	0	0	1	0	0
36	TMO Tekirdağ	0	1	0	0	0
37	Zeyport	0	1	0	1	1
	Total	9	17	16	12	12

In the northwest Marmara region, liquid bulk cargoes mainly consist of oil and its derivatives, and these cargoes are directly related to refinery and storage activities in the region. The refinery and energy infrastructure, especially concentrated around Kocaeli and Istanbul, plays a decisive role in the export of these products. Rebar, pulp and chemical products and materials not classified elsewhere, which stand out in terms of tonnage among general cargo cargoes, are connected to provinces such as Tekirdağ, Istanbul and

Bursa, where industrial production and commercial activities in the region are concentrated. Products such as wheat and mixed grain (corn-wheat-rye), hard coal and gravel, which are handled in the highest volume in terms of tonnage among dry bulk cargoes, are related to freight flows to provinces such as Edirne and Tekirdağ, where agricultural production and trade are prominent, on the one hand, and to Istanbul and Kocaeli, where industrial and construction activities are intense, on the other hand (**Table 4.15**).

Table 4.15. Basic cargoes handled in Northwest Marmara Ports

Cargo Type	Tons	Major Products Handled
Liquid Bulk Cargo	20.235.828	Fuel Oil, LNG, Diesel, Gas Oil, Unleaded Gasoline, Acrylonitrile (ACN), Molasses
General Cargo	1.658.271	Reinforcing Bar, Paper Pulp, Various Other Chemical Products and Materials, Wheat Flour, Pig Iron, Filmaşın Iron, MDF, Pig Iron
Dry Bulk	9.076.279	Wheat and Meslin, Bituminous Coal, Gravel, Scrap Iron, Clay, Clinker, Scrap Iron, Calcite, Urea Fertilizer, Grinding Sand
Container (TEU)	5.566.375	Machinery, High Technology, Precious Metals, Textiles, Electronics, Petrochemicals, Automotive Parts and Spare Parts, Chemicals (tank containers), Chemicals

Considering the foreign trade activities of the provinces located in the hinterland of Northwest Marmara ports, 29% of the foreign trade value consists of export products. The top ten products in exports constitute approximately 64% of total exports in dollar terms. However, "Precious or semi-precious stones, etc.", which are in the first place of the region's exports, are high in price but extremely low in tonnage, and these cargoes are mainly transported insured with a high-security logistics network and exported mainly by air. Export products mainly consist of cargo transported by container. When the export values of

the provinces in the northwest Marmara hinterland are evaluated, it is seen that textile, machinery and metal products stand out in the foreign trade of the region. While these product groups are at the top, agriculture and some mineral products find an important place in exports in line with the regional production structure, although they have lower unit values. This structure reflects the production and trade-centered character of the primary hinterland, especially where Istanbul and Tekirdağ are located. Germany, Italy, the USA, the United Kingdom and Spain are the countries with the highest exports in foreign currency.

Table 4.16. Important export chapters in the Northwest Marmara Hinterland

#	Chapter No	Chapter Title	#	Chapter No	Chapter Title
1	71	Precious and semi-precious stones	10	73	Iron or steel products
2	84	Boilers, machinery, and mechanical devices	11	88	Aircraft and parts
3	61	Knitted clothing and accessories	12	48	Paper and cardboard products
4	85	Electrical machinery and equipment	13	30	Pharmaceutical products
5	39	Plastics and plastic products	14	33	Essential oils and cosmetic products
6	27	Mineral fuels and oils	15	74	Copper and copper articles
7	62	Non-knitted clothing and accessories	16	89	Ships and watercraft
8	76	Aluminium and aluminium products	17	71	Precious and semi-precious stones
9	87	Motor vehicles and parts			

When the import values of the provinces in the northwest Marmara hinterland are examined, it is seen that energy, chemical and metal products come to the fore in the foreign trade of the region (**Table 4.17**). While these product groups are at the top, some products in the nature of agricultural and intermediate goods have an important place in imports due to their industrial and consumption structure, although they have lower unit values. This situation reveals the trade and consumption-oriented

structure of the primary hinterland provinces, especially Istanbul and Tekirdağ. In imports, the top ten cargoes account for approximately 71% of total imports. In the first place in imports, “Motor vehicles, tractors, etc.”, which are Ro-Ro cargo, take place. These cargoes are distributed over a wide geography through Istanbul, Kocaeli and Bursa. “Precious or semi-precious stones, etc.”, which ranks third in imported cargoes, is also not the subject of maritime transportation.

Table 4.17. Important import chapters in the northwest Marmara hinterland

#	Chapter No	Chapter Title	#	Chapter No	Chapter Title
1	87	Motor vehicles, tractors, etc.	10	76	Aluminium and aluminium articles
2	84	Boilers, machinery, and mechanical devices	11	29	Organic chemical products
3	71	Precious and semi-precious stones	12	90	Optical, medical, and measuring instruments
4	85	Electrical machinery and equipment	13	88	Aircraft and parts
5	27	Mineral fuels and oils	14	40	Rubber and rubber goods
6	72	Iron and steel	15	38	Various chemical substances
7	39	Plastics and plastic products	16	62	Unknitted clothing
8	30	Pharmaceutical products	17	33	Essential oils and cosmetic products
9	74	Copper and copper articles			

The ports of the Northwest Marmara Region are primarily used by the provinces in the Thrace Region, the provinces in the Southern Marmara Region, and Eskişehir and Ankara (**Figure 4.17**).



Figure 4.17. Provinces that primarily use Northwest Marmara Ports.

When the Northwest Marmara and Northeast Marmara regions are compared, they are largely similar in terms of hinterland, but the industrial density

is in the Northeast Marmara Region. The Northwest Marmara Region is in a remarkable position with its container volume.

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Southern Marmara Region

The Southern Marmara Region consists of the provinces of Bursa, Balıkesir, Çanakkale and Bilecik (**Figure 4.18**). There are a total of 30 terminals belonging to 12 main ports in Southern Marmara, where the ports of the Gulf of Gemlik are located (**Table 4.18**). 9 of the terminals are general cargo (+ dry bulk cargo) terminals.

Table 4.18. Main ports of the Southern Marmara Region.

#	South Marmara	Terminals				
	Ports	Container	General Cargo	Liquid Bulk	Ro-Ro	Passenger
1	Ayvalık Belediye	0	1	0	1	1
2	Çelebi Bandırma	1	1	1	1	1
3	Bagfaş Bandırma	1	1	1	0	0
4	Botaş Saros	0	0	1	0	0
5	Castrol Gemlik	0	0	1	0	0
6	Gemport Gemlik	1	1	1	1	0
7	Borusan	1	1	0	1	0
8	Roda Gemlik	1	1	0	0	0
9	MKS Marmara	0	0	1	0	0
10	Marmara Adası	0	1	0	0	0
11	Saraylar Belediye	0	1	0	1	1
12	Burulaş Mudanya	0	1	0	1	1
Total		5	9	6	6	4

When the liquid bulk cargoes handled in the ports of Southern Marmara are evaluated in terms of tonnage, they are mainly in the liquid chemical group such as ammonium, sulfuric acid, alcohol derivatives (methanol, propanol). In terms of tonnage, general cargo loads handled in southern Marmara ports include iron and steel products, agricultural and chemical products handled with big-bags. Although agricultural products have an important place in terms of volume among dry bulk cargoes, hard coal, cement, gravel and scrap iron rank first in terms of tonnage. In terms of liquid chemicals handled at ports, Bursa and Balıkesir are at the forefront as freight centers in both loading and unloading. Considering the

general cargo loads, Bursa and Balıkesir come to the fore in import cargoes, while Bursa province plays a decisive role in export products. When the dry bulk cargoes handled in the Southern Marmara region are examined on a tonnage basis, it is seen that the cargo flows are shaped around inputs for the energy, metal and agriculture sectors, and the export of mining and construction materials. While products such as hard coal, scrap iron and bauxite are imported for use in industrial production; cement, clinker, gravel and boron products stand out in exports due to the production structure of the hinterland extending to Kütahya, Eskişehir and Ankara, especially Balıkesir and Bursa (**Table 4.19**).

Table 4.19. Basic cargoes handled in Southern Marmara Ports

Cargo Type	Tons	Major Products Handled
Liquid Bulk Cargo	1.202.391	Ammonium Compounds (Ammonia, etc.), Sulfuric Acid (Oleum), Molasses, Ammonium Compounds (Ammonia, etc.), Alcohol (Methanol, Propanol, etc.), Phosphoric Acid, Sodium Carbonate, Machine and Motor Oil, Sunflower Oil, Soybean Oil
General Cargo	7.905.669	Coiled Steel, Construction Reinforcing Bars, Pig Iron, Iron and Steel Products, Soybeans, Other Manufactured Fertilizers, Pig Iron, Polyesters; in Primary Forms, Sodium Bicarbonate (Bicarbonate), Sunflower Seeds, Structural Steel/Pipes, etc. Other Chemical Products and Materials, Particleboard
Dry Bulk	24.367.979	Bituminous Coal, Portland Cement, Gravel, Scrap Iron, Clinker, Corn - Grain, Calcite, Etibor (Borax Pentahydrate), Dolomite, Etc. Bran, Grain By-Products and Other Animal Feeds, Food Industry Waste, Oil Cake, Ash and Slag Unsuitable for Metal Recovery, Silica Sand, Aluminium Ore (Bauxite) and Concentrates, Clay, Compound (Blended) Fertilizers, Wheat and Meslin
Container (TEU)	911.339	Automotive parts and spare parts, Electronics, Machinery, Furniture, Chemicals, Petrochemicals, Textiles, Agriculture (cold chain), Textile Raw Materials, Petrochemicals

When the export values of the provinces in the Southern Marmara hinterland are evaluated, it is understood that the automotive, machinery and textile sectors stand out in the foreign trade of the region (**Table 4.20**). While these product groups are at the top of the list, mining, agriculture and some semi-finished products have an important place in exports thanks to their high production volumes, although they have lower unit values. This structure reflects the

strong industrial production capacity of the primary hinterland, especially where Bursa is located in the center. Considering the foreign trade activities of the provinces located in the hinterland of the Southern Marmara ports, 65% of the foreign trade value consists of export products. The top ten products in exports constitute approximately 76% of total exports in dollar terms. France, Germany, Italy and Spain are the countries with the highest exports in foreign currency.

Table 4.20. Important export chapters in the Southern Marmara hinterland

#	Chapter No	Chapter Title	#	Chapter No	Chapter Title
1	87	Motor vehicles, tractors, etc.	9	28	Inorganic chemicals
2	84	Boilers, machinery, and mechanical devices	10	40	Rubber and rubber goods
3	85	Electrical machinery and equipment	11	61	Knitted apparel
4	94	Furniture and bedding	12	62	Non-knitted apparel
5	72	Iron and steel	13	25	Salt, sulfur, stones, Cement, etc.
6	73	Articles made of iron or steel	14	26	Metal ores, slag, ash
7	54	Synthetic and artificial filaments	15	07-08	Vegetables, fruits
8	39	Plastics and plastic products			

When the import values of the provinces in the Southern Marmara hinterland are examined, it is seen that the machinery, metal and chemical sectors are decisive in the foreign trade of the region (**Table 4.21**). While these product groups rank high, some products for agriculture and energy have an important place

in imports due to their intensive use in production processes, although they have lower unit values. This situation reveals a strong demand structure based on industrial production of primary hinterland provinces, especially Bursa.

Table 4.21. Important import chapters in the Southern Marmara hinterland

#	Chapter No	Chapter Title	#	Chapter No	Chapter Title
1	87	Motor vehicles, tractors, etc.	9	54	Synthetic and artificial filaments
2	84	Boilers, machinery, and mechanical devices	10	23	Food industry byproducts and animal feed
3	85	Electrical machinery and equipment	11	55	Synthetic and artificial discontinuous fibers
4	72	Iron and steel	12	32	Paints and chemical derivatives
5	39	Plastics and plastic products	13	94	Furniture, lighting fixtures
6	73	Articles made of iron or steel	14	76	Aluminium and aluminium articles
7	29	Organic chemical products	15	40	Rubber and rubber articles
8	90	Optical, medical, and measuring instruments	16	28	Inorganic chemicals

The Southern Marmara Region is a region that can receive loads from many different regions of Türkiye. Çelebi Bandırma Port is one of the important bulk cargo handling ports of our country. The Gemlik region is a port region where all types of cargo, from containers to wheeled loads, are handled. Although Northeast Marmara and Southern Marmara have

different load volumes, they receive loads from the same regions to a significant extent. This similarity is also seen in the product pattern when liquid bulk cargoes are excluded. The ports of the Southern Marmara Region are primarily used by the provinces of Bursa, Kocaeli, İstanbul, Eskişehir, Balıkesir, Çanakkale, Bilecik, Kütahya and Sakarya (**Figure 4.18**).



Figure 4.18. Provinces that primarily use Southern Marmara Ports.

Aegean Region and Sub-Regions

The Aegean Region is divided into two sub-regions. The ports located in Izmir Port and Aliağa Nemrut Bay generally serve the entire Aegean region. However, especially in general cargo and dry bulk cargo transportation, it is necessary to evaluate the Aegean region Muğla province separately. For this reason, the region located in the port of Güllük and its hinterland was considered as the South Aegean region, and the other regions were considered as the North Aegean

region (**Figure 4.19**). As a whole, the Aegean Region includes the provinces with the highest population density. The population of the provinces of Manisa, İzmir, Aydın, Denizli and Muğla is over one million people. The GDP of Manisa, İzmir and Muğla is over 500 billion Turkish Liras. In addition, İzmir is among the top 6 provinces in terms of collected budget revenues. The foreign trade volume of İzmir, Manisa, Aydın and Denizli provinces is over 6 billion dollars.



Figure 4.19. Aegean region and its sub-regions

North Aegean Region

The North Aegean Region includes the provinces of İzmir, Aydın, Manisa, Kütahya, Uşak, Denizli and Afyon. There are a total of 33 terminals belonging to 20 main ports in the North Aegean, where the ports of Aliağa Bay are located (**Table 4.22**). 9 of the terminals are general cargo (+ dry bulk cargo) and 12 are liquid bulk cargo terminals.

Table 4.22. Main ports of the North Aegean Region.

#	North Aegean	Terminals				
	Ports	Container	General Cargo	Liquid Bulk	Ro-Ro	Passenger
1	Alpet Aliağa	0	0	1	0	0
2	Alsancak	1	1	1	1	1
3	Batılman	0	1	0	0	0
4	Dikili	0	1	1	1	1
5	Ege Çelik	0	1	0	0	0
6	Ege Gaz	0	0	1	0	0
7	Ege Gübre	1	1	1	1	0
8	Etki	0	0	1	0	0
9	Güzel Enerji	0	0	1	0	0
10	Habaş Nemrut	0	1	0	0	0
11	İDÇ Nemrut	0	1	0	0	0
12	Kuşadası Yolcu	0	0	0	0	1
13	Nemport	1	1	0	0	0
14	Nemrut	0	0	1	0	0
15	Petkim	0	0	1	0	0
16	Socar Konteyner	1	1	0	0	0
17	Socar Akaryakıt	0	0	1	0	0
18	Star Rafineri Liman	0	0	1	0	0
19	Tüpraş-Aliağa	0	0	1	0	0
20	Ulusoy Çeşme	0	0	0	1	1
Total		4	9	12	4	4

When the cargoes handled in the North Aegean ports are examined, it is seen that the region has a dense structure especially in terms of energy and petrochemical products. Liquid bulk cargoes, such as crude oil, diesel, LNG, fuel oil, and naphtha, stand out in terms of tonnage, reflecting the region's strong connectivity with refineries and petrochemical facilities. In addition, chemical intermediates such as ethylene, propylene and benzene and vegetable oils also have an important place.

Iron and steel products (coil sheet, billets, slabs, rebar and profile products) and petroleum-derived solid fuels (petroleum coke, coke) draw attention among the cargoes for the industry, and these cargoes provide input to the metal and manufacturing industry of the region. In addition, semi-finished and intermediate goods such as pulp, MDF and fertilizer are among the important imported items that support production processes.

In the solid bulk cargo group, agricultural products and feed raw materials (soybean, corn, wheat, pulp and bran) as well as construction and mining products (cement, clinker, perlite, bitumen and derivatives) stand out. This structure shows that North Aegean ports have a versatile cargo composition that provides inputs not only to industry but also to the agricultural and construction sectors.

These freight flows are directed to industrial and production centers such as İzmir, Manisa, Balıkesir and Kütahya; it also creates an expanded hinterland network covering inland regions such as Uşak and Afyonkarahisar. In this context, North Aegean ports play a strategic role as the entry point for energy and raw materials in imports and as the exit gate for mineral and industrial products in exports (**Table 4.23**).

Table 4.23. Basic cargoes handled in North Aegean Ports

Cargo Type	Tons	Major Products Handled
Liquid Bulk Cargo	47.006.679	Crude Oil, Diesel, LNG, Fuel Oil, Naphtha, Jet Fuel (Kerosene-Type) and White Spirit, Jet Fuel (Gasoline-Type), Bys. Liquid Fuels: Unleaded Gasoline, Gas Oil, Other Medium Petroleum Oils, etc. Medium Petroleum Preparations, Asphalt, Soybean Oil, Benzene, Sunflower Oil, Ethylene, Propylene, Butylene, and Other Petroleum Gases or Gaseous Hydrocarbons, Palm Oil
General Cargo	10.918.013	Coiled Steel, Soybeans, Iron Ingots (Including Continuous Cast Ingots), Slabs, Construction Steel, Shaped Steel/Pipes, Products Made from Petroleum Coke, Asphalt, or Similar Materials, Iron and Steel Products, Pig Iron, Paper Pulp, Natural Bitumen, Petroleum Bitumen, Bituminous Mixtures Based on Mineral Tar or Pitch, Paraxylene (P-Xylene), MDF, Other Manufactured Fertilizers, Sunflower Seeds, Aerated Concrete (Ytong Blocks, etc.)
Dry Bulk	19.780.498	Scrap Iron, Bituminous Coal, Cement, Corn – Grain, Clinker, Oil Cake, Wheat and Mixed Grain, Bys. Bran, Grain Byproducts and Other Animal Feeds, Food Industry Waste, Coke and Semi-Coke, Bran, Ammonium Sulfate, Perlite, Urea Fertilizer, Refined Sulfur
Container (TEU)	1.935.533	Machinery, Electronics, Automotive Parts, Agriculture, Petrochemicals, Seafood (Cold Chain), Textiles, High Technology, Chemistry

When the export values of the provinces in the North Aegean hinterland are evaluated, it is seen that the machinery, automotive and electronics sectors stand out in the foreign trade of the region (**Table 4.24**). While these product groups are at the top of the list, agricultural, mining and some semi-finished products have an important place in exports thanks to their high volumes, although they have lower unit values.

This structure reflects the production structure of the primary hinterland, where Izmir and Manisa are located, which includes industrial and agricultural activities together. 66% of the North Aegean foreign trade is export-oriented. Germany, the United Kingdom, the USA, the United Kingdom, Spain, the Netherlands and Italy are the countries with the highest exports in foreign currency.

Table 4.24. Important Export Chapters in the North Aegean Hinterland

#	Chapter No	Chapter Title	#	Chapter No	Chapter Title
1	84	Boilers, machinery, and mechanical equipment	10	07-08	Vegetables and fruits
2	27	Mineral fuels and oils	11	61	Knitted clothing
3	85	Electrical machinery and equipment	12	68	Stone, plaster, cement, and similar goods
4	72	Iron and steel	13	24	Tobacco and tobacco products
5	87	Motor vehicles and parts	14	63	Ready-made goods made of textile materials
6	8	Fresh fruits and nuts	15	25	Salt, sulfur, stones, cement
7	39	Plastics and plastic products	16	74	Copper and copper goods
8	3	Fish and shellfish	17	48	Paper and cardboard products
9	73	Articles made of iron or steel	18	62	Non-knitted clothing

When the import values of the provinces in the North Aegean hinterland are examined, it is seen that machinery, metal and electronic products are decisive in the foreign trade of the region (**Table 4.25**). While these product groups rank highly, agricultural and chemical products have a significant

share in imports due to their widespread use in production and consumption processes, despite their lower unit values. This shows that the primary hinterland provinces, especially Izmir and Manisa, have a strong demand structure based on industrial production.

Table 4.25. Important import chapters in the North Aegean hinterland

#	Chapter No	Chapter Title	#	Chapter No	Chapter Title
1	84	Boilers, machinery, and mechanical equipment	11	12	Oilseeds and fruits
2	72	Iron and steel	12	48	Paper and cardboard products
3	85	Electrical machinery and equipment	13	23	Food industry by-products and animal feed
4	87	Motor vehicles and parts	14	90	Optical, medical, and measuring instruments
5	39	Plastics and plastic products	15	29	Organic chemical products
6	74	Copper and copper articles	16	32	Paints and chemical derivatives
7	24	Tobacco and tobacco products	17	73	Articles of iron or steel
8	15	Animal and vegetable oils	18	38	Miscellaneous chemical substances
9	76	Aluminum and aluminum articles	19	52	Cotton and cotton textiles
10	27	Mineral fuels and oils	20	8	Fresh fruits and nuts

The North Aegean Region has two important industrial zones such as Alağa and Manisa. It is a center for liquid chemicals, especially due to the refineries in the Alağa Region. The provinces where the North Aegean ports are primarily used are

located on the Izmir - Ankara and Balıkesir - Muğla axis. Ankara is one of the most important provinces of our country in terms of economic size and population. Therefore, Ankara province is located in the common hinterland of many ports.

**Figure 4.20.** Provinces that primarily use North Aegean Ports.

South Aegean Region

There are 7 ports and 11 terminals belonging to these ports in the South Aegean Region. The South Aegean Region, which is a region with a focus on tourism and

agriculture, consists of the province of Muğla, where the port of Güllük is located. There are 4 passenger ports and two cargo ports in the region, two of which serve cruise ships (**Table 4.26**).

Table 4.26. Main ports of the South Aegean Region.

#	South Aegean	Terminals				
	Ports	Container	General Cargo	Liquid Bulk	Ro-Ro	Passenger
1	Bodrum Yolcu	0	0	0	1	1
2	Güllük Mandalya	1	1	0	1	0
3	Kılıç	0	0	0	0	0
4	Marmaris Yolcu	0	1	0	1	1
5	Muttaş Bodrum	0	0	0	0	1
6	Muttaş Fethiye	0	0	0	0	1
7	POAŞ Dalaman	0	0	1	0	0
Total		1	2	1	3	4

Dry bulk cargoes constitute the main load of the South Aegean ports on a tonne basis (**Table 4.27**). While mineral products such as feldspar, bauxite, quartz and marble have an important place, liquid bulk cargoes such as jet fuel and diesel oil among petroleum derivatives stand out. Güllük Port is mainly used for the export of feldspar from the vicinity of Aydın Çine.

In addition, aquaculture products such as fish and fish meal, and agricultural loads such as bran and food industry residues also increase the cargo diversity of the region. This load composition reflects the natural resource, agriculture and tourism-oriented economic structure of the provinces located in the South Aegean hinterland, especially Muğla and Aydın.

Table 4.27. Basic cargoes handled in South Aegean Ports

Cargo Type	Tons	Major Products Handled
Liquid Bulk Cargo	72.138	Jet Fuel (Kerosene-Type) and White Spirit, Diesel Fuel, Jet Fuel (Gasoline-Type)
General Cargo	60.101	Fish Meal Powders and Pellets, Live Fish
Dry Bulk	6.089.614	Feldspar, Aluminium Ore (Bauxite) and Concentrates, Quartz (Quartzite), Marble and Other Calcareous Ornamental or Building Stones (Including Onyx), Bentonite, Wheat Bran, Grain Byproducts and Other Animal Feeds, Food Industry Waste

When the export values of the provinces in the South Aegean hinterland are examined, it is seen that the prominent sectors in the foreign trade of the region are aquaculture, mining and agriculture, and these product groups are at the top of the list (**Table 4.28**). On the other hand, energy and some industrial products have an important place in exports thanks to their high unit values, although they have lower

volumes. This structure reflects the natural resource and agriculture-oriented production structure of the provinces that make up the primary hinterland of the region, especially Muğla and Aydın. 80% of the South Aegean foreign trade is export-oriented. Japan, the Russian Federation, Greece, the USA and the United Kingdom are the countries with the highest exports in foreign currency.

Table 4.28. Important export chapters in the South Aegean hinterland

#	Chapter No	Chapter Title	#	Chapter No	Chapter Title
1	3	Fish, shellfish, etc.	6	7	Edible vegetables
2	25	Salt, sulfur, soil, and rocks, etc.	7	95	Toys and sports equipment
3	68	Stone, plaster, cement, etc.	8	27	Mineral fuels and oils
4	89	Ships and watercraft	9	26	Metal ores, slag, and ash
5	23	Food industry byproducts and animal feed	10	8	Edible fruits and nuts

When the import values of the provinces in the South Aegean hinterland are evaluated, it is seen that machinery, chemical and agricultural inputs are especially decisive in the foreign trade of the region (**Table 4.29**). While these product groups have a significant share in imports, aquaculture products and some consumer goods have a remarkable place

in imports due to regional production processes and consumption structure, although they have relatively lower unit values. This structure shows that the provinces that make up the primary hinterland of the region, especially Aydın and Denizli, have a demand structure that supports production activities.

Table 4.29. Important import chapters in the South Aegean hinterland

#	Chapter No	Chapter Title	#	Chapter No	Chapter Title
1	23	Food industry byproducts and animal feed	6	32	Paints and chemical derivatives
2	15	Animal and vegetable oils	7	5	Other animal-derived products
3	84	Boilers, machinery, and mechanical equipment	8	3	Fish and seafood
4	8	Fresh fruits and nuts	9	39	Plastics and plastic products
5	89	Ships and watercraft	10	85	Electrical machinery and equipment

South Aegean ports have a limited hinterland in terms of geographical location and economic structure and mainly interact with the provinces of Muğla, Aydın and Denizli. When the economic structure of the region is examined, it is seen that mining activities (especially feldspar and natural stone production),

agriculture and aquaculture and tourism sector are decisive. The primary economy of the region is based on tourism. The ports of İzmir in the north and the port of Antalya in the southeast have an effect that narrows the hinterland of the South Aegean.

**Figure 4.21.** Provinces that primarily use South Aegean ports

Mediterranean Region and Sub-Regions

It has a very wide geography of the Mediterranean region and covers approximately 1.500 km of coastline. The hinterland of Q-Terminals Antalya Port in Antalya and the background areas of MIP Port in Mersin do not intersect with each other. For this reason, the Mediterranean Region is divided into two

sub-regions (**Figure 4.22**). The population of the provinces of Antalya, Mersin, Adana and Hatay, which lie along the Mediterranean coastline, is over one million. The GDP of the same provinces is 500 billion Turkish liras and above. In terms of socio-economic development level, Antalya province is in the first tier and Mersin province is in the second tier cities.



Figure 4.22. Mediterranean region and sub-regions

Western Mediterranean Region

The Western Mediterranean Region includes the provinces of Antalya, Burdur and Isparta. The most

important port of the Western Mediterranean Region is Q-Terminals Antalya Port. 7 ports in the region have a total of 12 terminals (**Table 4.30**).

Table 4.30. Main ports of the Western Mediterranean Region.

#	West Mediterranean	Terminals				
	Ports	Container	General Cargo	Liquid Bulk	Ro-Ro	Passenger
1	Akdeniz Akaryakıt	0	0	1	0	0
2	Alanya	0	0	0	0	1
3	Asbaş	1	1	0	0	0
4	Aytemiz	0	0	1	0	0
5	POAŞ.	0	0	1	0	0
6	Q-Terminals	1	1	1	1	1
7	Shellturcas	0	0	1	0	0
Total		2	2	5	1	2

When the cargoes handled in the Western Mediterranean ports are evaluated on a tonne basis, the general cargo cargoes include processed marble, wood products and various chemicals, while products such as cement, clinker, coal and fertilizer draw attention among the dry bulk cargoes, which are directly related to the construction, energy and agricultural activities in the region (**Table 4.31**).

Liquid bulk cargoes consisting of petroleum derivatives have an important place, especially in connection with the intensity of tourism and transportation activities. This load structure reflects the economic character of the hinterland, which consists of the provinces of Burdur and Isparta, especially Antalya; it reveals that tourism, mining and agriculture sectors are the main elements shaping port activities.

Table 4.31. Basic cargoes handled in Western Mediterranean Ports

Cargo Type	Tons	Major Products Handled
Liquid Bulk Cargo	3.159.798	Diesel, Jet Fuel, Gasoline, LPG
General Cargo	146.526	Processed wood, MDF, Processed marble, Potassium nitrate, Petroleum coke, BYS and other chemicals
Dry Bulk	2.499.088	Portland cement, clinker, Briquetted bituminous coal, barite, marble, sawdust, wood scraps and chips, compound (blended) fertilizers, coke and semi-coke
Container (TEU)	84.851	Agriculture, Technology, Machinery, Electronics, Food (Cold Chain), Chemistry, Petrochemicals, Fast-Moving Consumer Goods.

When the export structure of the provinces in the Western Mediterranean hinterland is evaluated, it is seen that agriculture, mining and natural resource-based product groups gain weight in the foreign trade of the region (**Table 4.32**). While fresh fruit-vegetable and herbal products and stone and mineral products come to the fore, the accompanying machinery and some industrial products contribute to the diversification of exports. Although the hinterland of the region mainly consists of the provinces of Antalya, Burdur and Isparta, there is also an area of influence

extending to Konya, especially within the scope of agriculture and certain industrial products. This shows that Western Mediterranean ports are an alternative outlet that connects not only local production but also production centers in Central Anatolia to foreign markets on a limited scale. 61% of the Western Mediterranean foreign trade is export-oriented. The USA, Ukraine, the Russian Federation, Romania, the Netherlands and China are the countries with the highest exports in foreign currency.

Table 4.32. Important export chapters in the Western Mediterranean hinterland

#	Chapter No	Chapter Title	#	Chapter No	Chapter Title
1	7	Fresh vegetables and certain roots and tubers	9	39	Plastics and plastic products
2	25	Salt, sulfur, soil, stones, etc.	10	85	Electrical machinery and equipment
3	44	Wood and wooden items	11	20	Vegetables, fruits, etc. (processed)
4	68	Items made of stone, plaster, cement, etc.	12	72	Iron and steel
5	90	Optical and medical devices	13	18	Cocoa and cocoa preparations
6	8	Fresh fruits and nuts	14	33	Cosmetics and essential oils
7	84	Boilers, machines, and mechanical devices	15	6	Live plants and seedlings
8	89	Ships and watercraft			

When the import structure of the provinces in the Western Mediterranean hinterland is considered, it is understood that the machinery, energy and industrial inputs needed by the regional economy come to the fore. In this context, while the equipment used in production processes and petrochemicals and chemical products have an important place in imports, inputs such as fertilizers and oilseeds for agricultural activities also draw attention (**Table 4.33**). In addition, technology and consumption-oriented product

groups contribute to the diversification of imports. In addition to the provinces of Antalya, Isparta and Burdur, which constitute the hinterland of the region, there is also a limited area of influence extending to Konya, especially in the scope of machinery and industrial products. This situation reveals that the Western Mediterranean ports support regional production and partially function as a supply gateway to Central Anatolia.

Table 4.33. Important import chapters in the Western Mediterranean hinterland

#	Chapter No	Chapter Title	#	Chapter No	Chapter Title
1	84	Boilers, machinery, and mechanical devices	9	48	Paper and cardboard products
2	88	Aircraft and parts	10	28	Inorganic chemicals
3	39	Plastics and plastic products	11	87	Motor vehicles
4	85	Electrical machinery and equipment	12	73	Articles of iron or steel
5	27	Mineral fuels and oils	13	38	Miscellaneous chemical substances
6	12	Oilseeds and fruits	14	94	Furniture and lighting products
7	90	Optical and medical devices	15	29	Organic chemical products
8	31	Fertilizers			

The hinterland, which primarily uses the ports of the Western Mediterranean, mainly consists of the provinces of Antalya, Burdur, Isparta and Konya (**Figure 4.23**). This hinterland structure is directly related to the economic activities of the region; Tourism and fresh fruit and vegetable production concentrated in Antalya, mining and agricultural activities prominent in Burdur and Isparta, and Konya's large agricultural areas and developing industrial structure determine the types of cargo

reflected in the ports. In this context, the cargoes handled at the ports; It has a balanced structure consisting of agricultural products, natural stone and mineral products, and machinery, fertilizer and energy inputs that support these activities. With these features, Western Mediterranean ports function as an important logistics center that both carries regional production to foreign markets and supports production activities in inland areas.

**Figure 4.23.** Provinces that primarily use Western Mediterranean Ports.

Eastern Mediterranean Region

The Eastern Mediterranean Region includes the provinces of Mersin, Adana, Kahramanmaraş, Osmaniye and Hatay (**Figure 4.24**). There are a total of 63 terminals belonging to 42 ports in the region

covering the ports in Mersin and Iskenderun Bay (**Table 4.34**). All types of cargo, including Ro-Ro and passengers, can be handled in the region. Region It is also the second largest region of our country in terms of container volume.

Table 4.34. Main ports of the Eastern Mediterranean Region

#	Eastern Mediterranean	Terminals				
	Ports	Container	General Cargo	Liquid Bulk	Ro-Ro	Passenger
1	Adana Port	1	1	0	0	0
2	Akkuyu	1	1	0	0	0
3	Akpet Akaryakıt	0	0	1	0	0
4	Alpet Mersin	0	0	1	0	0
5	Anamur Feribot	0	0	0	1	1
6	Assan Port İskenderun	1	1	0	1	0
7	Atakaş	1	1	0	0	0
8	Ataş Mersin	0	0	1	0	0
9	Aygaz Dörtol	0	0	1	0	0
10	Botaş Ceyhan	0	0	1	0	0
11	Botaş Dörtol	0	0	1	0	0
12	BTC Deniz	0	0	1	0	0
13	Byport Petrol	0	0	1	0	0
14	Ceyport Taşucu	0	1	0	1	1
15	Ekinciler	0	1	0	0	0
16	Emba	0	1	0	0	0
17	Enerji Mersin	0	0	1	0	0
18	Euroil Mersin	0	0	1	0	0
19	Global	0	0	1	0	0
20	Wimba Dörtol	0	0	1	0	0
21	İpragaz Dörtol	0	0	1	0	0
22	İsdemir	0	1	1	0	0
23	Likitgaz Dörtol	0	0	1	0	0
24	Limakport	1	1	0	1	0
25	Mersin Serbest Bölge.	1	1	1	0	0
26	MIP Mersin	1	1	1	1	1
27	MMK Metalurji	0	1	0	1	0
28	Nergis Mersin	0	0	1	0	0
29	Opet Mersin	0	0	1	0	0
30	Pet Gaz LPG	0	0	1	0	0
31	POAŞ	0	0	1	0	0
32	PO Mersin	0	0	1	0	0
33	Sasa	0	0	1	0	0
34	Savka Mersin	0	0	1	0	0
35	Sönmez Çimento	0	1	0	0	0
36	Sugözü	0	1	0	0	0
37	Toros Tarım	0	1	1	1	0
38	Tosyalı	0	1	0	0	0
39	Turkis Enerji - 2	0	0	1	0	0
40	Turkis Enerji	0	0	1	0	0
41	Yazıcılar	0	1	0	1	0
42	Yeşilovacık Taşucu	0	1	0	0	0
Total		7	18	27	8	3

When the cargoes handled in the Eastern Mediterranean ports are evaluated on a tonne basis, it is seen that the cargo structure of the region exhibits a multifaceted composition in which energy, heavy industry and agricultural products coexist (**Table 4.35**). Crude oil and refined products stand out among liquid bulk cargoes, while iron and steel products and petrochemical derivatives stand out in the general cargo group. In solid bulk cargoes, the density of products such as coal, ore, grain and fertilizer shows

that the region has a strong hinterland in terms of both industrial production and agricultural activities.

This structure indicates a wide sphere of influence, encompassing production centers directly connected to ports, particularly Mersin, Adana, and Hatay, as well as industrial and agricultural centers located in inland regions such as Konya, Gaziantep, and Kayseri. In this respect, Eastern Mediterranean ports are a strategic logistics center on a national scale, serving one of Türkiye's largest and most diverse hinterlands.

Table 4.35. Basic cargoes handled in Eastern Mediterranean Ports

Cargo Type	Tons	Major Products Handled
Liquid Bulk Cargo	57.549.166	Crude oil, Diesel, Fuel oil, LNG, Diesel, Unleaded gasoline, Sodium carbonate
General Cargo	21.106.206	Coiled Sheet, Slabs, Iron and Steel Products, Pig Iron, Iron Ingots (including Continuous Casting Ingots), Construction Reinforcing Bars, Plastic Scrap, Residues, and Scrap, Lentils, Soybeans, Paraxylene (P-Xylene), Petroleum Coke, etc. Other Chemical Products and Materials, Paper Pulp
Dry Bulk	56.787.507	Bituminous Coal, Scrap Iron, Iron Ore and Concentrates, Portland Cement, Aluminum Ore (Bauxite) and Concentrates, Wheat and Meslin, Urea Fertilizer, Oil Cake, Coke and Semi-Coke, Clinker, Slag (Waste from Steel Mills and Blast Furnaces), Corn – Grain, Ammonium Sulfate, Barley
Container (TEU)	2.859.114	Agriculture, Agriculture (Cold Chain), Food (Cold Chain), Textiles, Consumer Goods, Machinery, Automotive Parts and Spare Parts, Textiles, Petrochemicals, Electronics

When the export structure of the provinces in the Eastern Mediterranean hinterland is examined, it is seen that energy, metal and agricultural products stand out together in the foreign trade of the region (**Table 4.36**). While mineral fuels and iron and steel products are at the top, fresh fruits and vegetables, textiles and food products constitute important components of exports. However, industrial products such as machinery and automotive contribute to the diversification of exports, albeit with lower volumes. The hinterland of the region is not limited to the coastal

provinces, but also has a wide sphere of influence, including production centers located in inland regions such as Gaziantep, Kahramanmaraş and Konya, especially Mersin, Adana and Hatay. This situation reveals that the Eastern Mediterranean ports are one of Türkiye's most important foreign trade exit gates in terms of both industrial and agricultural products. The Russian Federation, Iraq, Italy, Romania and Spain are the countries with the highest exports in foreign currency.

Table 4.36. Important export chapters in the Eastern Mediterranean hinterland

#	Chapter No	Chapter Title	#	Chapter No	Chapter Title
1	27	Mineral fuels and oils	9	85	Electrical machinery and equipment
2	8	Fresh fruits and nuts	10	94	Furniture and lighting products
3	72	Iron and steel	11	84	Boilers, machinery, and mechanical equipment
4	57	Carpets and floor coverings	12	87	Motor vehicles
5	73	Articles made of iron or steel	13	19	Grains and food products
6	39	Plastics and plastic products	14	52	Cotton and cotton products
7	15	Animal and vegetable oils	15	62	Unknitted clothing
8	7	Fresh vegetables			

When the import structure for the Eastern Mediterranean hinterland is evaluated, it is seen that energy, raw materials and intermediate goods that feed the strong industrial and production infrastructure of the region are decisive. In particular, mineral fuels, iron and steel and chemical products constitute the main components of imports, while plastic, machinery and textile inputs support the continuity of production processes. Products such as cereals, oilseeds and fertilizers for the agricultural sector are directly related

to the wide agricultural activity area of the region (**Table 4.37**). This structure indicates the existence of a vast hinterland, encompassing manufacturing centers close to ports, particularly Mersin, Adana, and Hatay, as well as industrial and agricultural centers located in inland regions such as Gaziantep, Kahramanmaraş, and Konya. In this respect, Eastern Mediterranean ports are not only an export gateway, but also one of the main import centers that feed Türkiye's production chain.

Table 4.37. Important import chapters in the Eastern Mediterranean hinterland

#	Chapter No	Chapter Title	#	Chapter No	Chapter Title
1	27	Mineral fuels and oils	9	10	Grains
2	72	Iron and steel	10	7	Fresh vegetables
3	39	Plastics and plastic products	11	12	Oilseeds and fruits
4	84	Boilers, machinery, and mechanical equipment	12	76	Aluminum and aluminum products
5	29	Organic chemical products	13	85	Electrical machinery and equipment
6	52	Cotton and cotton products	14	55	Synthetic fibers
7	8	Fresh fruits and nuts	15	31	Fertilizers
8	15	Animal and vegetable oils			

The hinterland, which has a heavy cargo relationship with the ports of the Eastern Mediterranean, has a wide sphere of influence covering the provinces of Konya, Gaziantep, Kahramanmaraş, Diyarbakır, Kayseri and Ankara, especially Mersin, Adana and Hatay (**Figure 4.24**). These provinces are not only regions that provide cargo to ports, but also centers where raw materials and intermediate goods supplied through imports are included in the production processes. While the concentrated agricultural production and fresh fruit-vegetable and grain flows in Çukurova come to the fore, semi-finished and finished metal loads

related to the iron and steel industry attract attention in the Hatay region. While industrial centers such as Gaziantep and Kahramanmaraş strengthen container transportation with textile, plastic and food products, inland regions such as Konya, Kayseri and Ankara establish a two-way freight relationship with ports with machinery, automotive and various industrial inputs. This integrated structure demonstrates that Eastern Mediterranean ports are not just a point of departure but also a versatile logistics platform at the heart of production and supply chains.



Figure 4.24. Provinces that primarily use Eastern Mediterranean Ports.

4.5. Conclusion and General Assessment

The Türkiye Port Sector Report 2026 brings together a broad perspective ranging from global economic developments to the current state of Turkish port infrastructure, from transformations in world maritime trade to the structural problems facing the sector.

At the global level, the world economy is seeking to preserve its resilience under the pressure of geopolitical tensions, uncertainties in trade policies and increasing protectionist tendencies. Although global trade volume reached a new record of USD 35 trillion in 2025, growth forecasts for 2026 were revised markedly downwards following the outbreak of the Hormuz crisis. This picture clearly shows that the global trade system is growing at the same time in both value and vulnerability.

On the world maritime trade front, increasing geopolitical risks affecting traditional routes such as Hormuz, Suez and Panama are pushing supply chains towards more complex and diversified structures. In this sense, geopolitical risks have become one of the most important issues affecting global risks.

In global maritime trade, consolidation and alliance activity in container shipping are gaining momentum, while the world fleet continues its technological and environmental transformation. In this environment, port connectivity indices and handling capacities increasingly determine the competitive position of countries within global trade networks.

When the Turkish port sector is assessed, total handling volume reached 553 million tonnes in 2025 and continued to grow. In cargo types such as containers, dry bulk, liquid bulk, Ro-Ro and passenger transport, Turkish ports have reached an important level in terms of both capacity and service quality. However, rising capacity utilisation rates and weakening investment appetite may create a risk of deterioration in the supply-demand balance in the short to medium term.

The special file subject of this year's report – the economic geography of the port sector – demonstrates how complex and multi-layered the port-hinterland relationship is in Türkiye. The sphere of influence of ports is not limited to geographical proximity; inland regions such as Gaziantep, Konya, Kayseri and Ankara also form decisive hinterlands in maritime trade. This finding indicates that decisions concerning port investment and logistics policies must be addressed from a much broader economic geography perspective.

The section on the sector agenda and solution proposals clearly sets out the chronic structural problems of Turkish port operations. The urgent resolution of these problems depends on concrete steps, including bringing all port investments within the scope of strategic investment, extending usage agreements, strengthening railway integration, establishing regional port authorities and encouraging the green transition through public support.

In conclusion, the rapid increase in Türkiye's foreign trade volume and economic size increases the strategic importance of ports with each passing year. The urgent elimination of existing structural problems will make a critical contribution not only to Türkiye's own foreign trade but also to its goal of becoming a regional logistics centre. As the Port Operators Association of Türkiye (TÜRKLİM), we will continue to generate common wisdom with all stakeholders in this structural transformation process in order to support the sustainable growth of the sector and enhance its global competitiveness.

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UNIT 5

THE AGENDA OF THE TURKISH PORT SECTOR AND SOLUTION PROPOSALS

- 5.1. Incentive and Investment Needs of the Turkish Port Sector
- 5.2. Expansion of Port Areas and Usage Agreements
- 5.3. Strengthening the Hinterland Connections of Ports
- 5.4. Port Management Model and Legislative Issues
- 5.5. Digitalisation and Technological Transformation
- 5.6. Green Transformation and Sustainable Port Operations

5. THE AGENDA OF THE TURKISH PORT SECTOR AND SOLUTION PROPOSALS

While maritime trade forms the backbone of foreign trade; Ships are the carrier element of this system, and ports are not only infrastructure, but also strategic centers where the supply chain is managed, value production takes place and new generation energy and logistics solutions are shaped.

The merchant fleet has a dynamic structure that is highly sensitive to the drivers of global trade. During periods of expansion when demand rises, strengthening freight markets accelerate new-building investments, leading to growth in fleet capacity and a shift towards larger and more efficient vessels. Conversely, during periods of contraction, declining trade volumes, falling freight revenues and excess supply force sector actors into cost-oriented restructuring; in this context, older and less efficient vessels in particular are removed from the fleet.

The merchant fleet has a cyclical structure shaped by the balance of supply and demand. Nevertheless, despite these fluctuations in capacity, the development of ship technologies continues without interruption. In newly built vessels, fuel efficiency, digitalization, automation and environmental performance are prioritized; alternative fuel systems, low-emission technologies and smart-ship applications are becoming increasingly widespread. This shows that the merchant fleet is undergoing continuous transformation not only quantitatively, but also qualitatively.

Ports, which have to adapt to the rapid changes in the merchant fleet, cannot transform at the same pace because of their structural characteristics.

Limited opportunities for port expansion, long investment processes, high investment costs and complex legal and bureaucratic procedures in permit and approval stages delay ports in adapting to changes in the merchant fleet in a timely manner.

However, delayed or unrealized investments adversely affect not only the port sector, but also the national economy directly. As the main carrier of foreign trade, ports perform a leverage function within the economic system; any bottleneck or operational disruption at ports is reflected directly in supply chains and, consequently, in macroeconomic balances. Sustainable development is therefore considered a priority area not only for ports, but also for the national economy.

Within this framework, TÜRKLİM presents the sector's agenda and solution proposals in the Port Sector Report it prepares each year, in line with its mission to ensure the sustainable development of the port operations sector in Türkiye, to produce solutions to the sector's common problems, to represent the sector at national and international level, and to contribute to the development of policies and practices that will enhance the competitiveness of ports.

5.1. Incentive and Investment Needs of the Turkish Port Sector

Ports constitute one of the most critical links in the logistics chain. In recent years, however, interest in port investments in Türkiye has tended to decline. The main reasons include the limited availability of suitable areas for new port investments, the length of legal permit and approval processes, high initial investment and maintenance costs, the level of operating costs including payments made to the public sector, difficulties in securing financing and the long payback period of investments.

In addition, the dynamic structure of global trade, the increasing size of vessels and rapid developments in port technologies require ports to invest continuously. This increases the financial burden on the sector and makes sustainability more difficult. The inadequacy of existing incentive mechanisms limits both new investments and the modernisation of existing ports.

Existing incentives and investment support remain insufficient both for new investments and for the compulsory investments that existing ports are required to make. Despite this situation, the regulation published in the Official Gazette dated 30 November 2022 brought only port investments of TRY 3 billion or more to be made in industrial zones within the scope of strategic investment. This creates unfair competition within the sector.

Under the “Decision No. 9903 on State Aid for Investments”, published in May 2025, port investments are included indirectly within strategic and priority investment categories, not directly, but through support particularly for energy and logistics infrastructure investments. In addition, in the 2024–2028 National Development and Transport Plans, ports are defined as strategic nodes of the logistics system and as critical infrastructure elements of foreign trade.

A sector that is so critical to the development and growth of the national economy must also be supported by the state through sector-specific incentives.

Solution proposals

- All port investments should be included within the scope of strategic investment.
- Interest support, grants and tax reductions should be expanded.
- Port services should be evaluated within the scope of “service exports” and should benefit from additional incentives.

5.2. Expansion of Port Areas and Usage Agreements

One of the most important problems facing ports is undoubtedly the shortage of back-up areas. The ability of ports located within settlement areas to expand their land areas is extremely limited. Dense development and ownership problems in coastal areas in Türkiye seriously restrict the expansion opportunities of ports. Capacity increases through land reclamation in particular cannot be implemented sufficiently quickly because of lengthy bureaucratic processes.

When planning, project preparation, permitting, construction and commissioning processes are considered together, port investments are seen to take at least three to four years. It is therefore of great importance to accelerate, support and facilitate these investments so that the port capacity Türkiye needs can be brought into service on time.

In order to make port investments attractive, the usage and/or operating agreements of ports that are already in operation should be extended without waiting for their existing terms to expire. Among privatised and private ports, operators whose remaining contract term has fallen below ten years do not appear able to make new investments economically within the time remaining.

Waiting for the expiry of existing contract terms would prevent port capacity increases from being implemented on time. This would cause port infrastructure to become insufficient in the face of increasing foreign trade and cabotage cargoes, resulting in bottlenecks and delays. Ultimately, these developments would increase foreign trade costs and adversely affect the competitiveness of Türkiye, its industry and exports, thereby harming the country’s economic growth and development process.

Following the increase in environmental problems in the Sea of Marmara, the deterioration of ecological balance due to marine pollution and, in particular, the mucilage crisis, the Sea of Marmara and its coasts were declared a “Special Environmental Protection Area” by Presidential Decision during the 2021–2022 period. This status covers not only the sea itself, but also the coastal strip of the provinces bordering the Sea of Marmara. With the designation of this Special Environmental Protection Area, planning, permitting processes and operating standards were significantly tightened; permit procedures became more difficult and approval periods became longer.

All facilities of privately operated ports located on the seaward side of the shoreline, as well as areas

allocated from the public sector, are operated under usage agreements. However, revenue shares ranging from 1% to 15%, collected as annual rental payments for leased Treasury lands, constitute a major burden for investors. In addition, keeping operating periods short at privatised ports weakens the economic feasibility of long-term investments. In the extension of terms for privatised ports where different revenue shares are applied, arrangements that encourage investors should be introduced.

Solution proposals

- Port usage agreements should be extended up to 49 years.
- Revenue shares should be simplified and reduced to a low and fixed level.
- Legislation relating to land reclamation and expansion projects should be made more flexible.

5.3. Strengthening the Hinterland Connections of Ports

A significant proportion of ports in Türkiye are dependent on road transport, and inadequate railway connections increase logistics costs. Railway transport, however, offers significant advantages in terms of both cost and carbon emissions.

In heavily used port regions such as Iskenderun, Kocaeli, Gemlik and Aliağa, congestion caused by road traffic reduces operational efficiency and limits Türkiye's competitiveness.

Solution proposals

- The railway connections of ports should be strengthened.
- Road infrastructure should be improved to provide uninterrupted access.
- The integration of logistics centres and industrial zones with ports should be increased.

5.4. Port Management Model and Legislative Issues

In many countries around the world, the "Port Authority" model is used for port management. This allows common solutions to be produced quickly at regional level for the common problems of ports, while protecting the rights and interests of all port stakeholders.

In the maritime sector, the ability to take decisions quickly and implement them is essential in order to secure competitive advantage in foreign trade carried out through ports. This is possible only

through a regionally organised Port Authority that can overcome bureaucratic obstacles encountered in investment processes, simplify fragmented permit mechanisms and operate with a flexible decision-making structure.

Solution proposals

- A port management model specific to Türkiye should be developed.
- Permit processes should be simplified and brought together under a single authority.
- Regional port authorities should be established to increase coordination.

5.5. Digitalisation and Technological Transformation

The global port sector is digitalising rapidly in line with Industry 4.0 applications. Smart port systems, automation, artificial intelligence and data analytics applications increase operational efficiency while reducing costs. In Türkiye, however, this transformation process is still at an early stage.

Solution proposals

- Smart port and automation investments should be encouraged.
- A national digital information infrastructure should be developed to ensure integration across all modes of transport.
- Digital customs and single-window systems should be expanded.
- Data integration between ports should be ensured.

5.6. Green Transformation and Sustainable Port Operations

With the strengthening of environmental sustainability policies at global level, the port sector has entered an important transformation process aimed at reducing carbon emissions and minimising environmental impacts. This process is shaped in line with the international standards and targets set by the International Maritime Organization.

In Türkiye, certain provisions of the "Regulation on the Issuance of Green Port Certificates to Coastal Facilities", which entered into force in 2023, were updated by the amendment published in the Official Gazette dated 24 March 2026 and numbered 33203. Green port practices have thus been moved to a new stage. With this regulation, practices that were previously based largely on voluntariness have become mandatory for certain port facilities, and

sanctions have been envisaged for operators that do not comply with environmental criteria.

In this context, ports have been assigned comprehensive obligations such as establishing shore-side electricity (cold ironing) infrastructure, increasing the use of renewable energy, implementing emission measurement and control systems, developing zero-waste management and mechanisms to prevent marine pollution.

In Europe, a significant portion of these investments is undertaken by the public sector, whereas in Türkiye these investments are expected to be made entirely by the private sector. This transformation, however, also creates significant financial and operational pressure for port operators because of high investment costs and the need to ensure compliance within a short period. Especially for small and medium-sized ports, meeting these obligations requires additional financing and incentive mechanisms. In this context, the green transition has become not only an environmental necessity, but also one of the key factors determining competitiveness in the sector.

Solution proposals

- Special incentive programmes should be established for green port investments.
- Shore-side electricity (cold ironing) investments should be supported by the public sector.
- Access to financing for renewable energy investments should be facilitated.
- The transition process should be supported for small and medium-sized ports.
- Green port certification processes should be integrated with incentives.

General Assessment

The Turkish port sector is undergoing an important transformation process under the pressure of increasing foreign trade volume and global competition. In the current situation, however, insufficient incentives, bureaucratic obstacles, infrastructure deficiencies and coordination problems prevent the sector from fully realising its potential.

In this context;

- improving the investment environment,
- strengthening logistics integration,
- accelerating digital and green transformation,
- and development of corporate governance structure

It is critical for the Turkish port sector to achieve a more competitive, sustainable and globally effective structure.

IN THE HEART OF TURKISH INDUSTRY, RIGHT NEXT TO ISTANBUL

YILPORT Gebze Terminal, strategically located in Türkiye's industrial hub, provides **integrated logistics solutions** for **container, general cargo, and bulk cargo** operations. Supported by **inland terminals, extensive storage areas, warehouses, and modern logistics centers**, the terminal maximizes the efficiency of intermodal transportation through its **railway connection**.



Container

1,000.000 TEU



General Cargo

5,000.000 Tons



Equipment

QC: 8
(4x22 ve 4x18)
RTG: 31 MHC: 1
RS: 5 ECH: 3



Length of Quay

6 Berths,
1,465 m



Warehouse

Covered: 4,350 m²
Open: 4,500 m²



Terminal Area

305,000 m²



Drafts

Container: 16 m
General Cargo: 6 - 12 m
Channel Depth: 38 - 40 m



Max. Vessel Size

ULCV - 24,000 TEU
Full Loaded:
ULCV - 20,000 TEU



OUR MEMBER PORTS



AKÇANSA PORT

AKÇANSA
AMBARLI PORT

PORT FEATURES

Administrator	Akçansa Çimento San. ve Tic. A.Ş.
Coordinates	40° 58' N - 28° 41' E
Handled Cargo	General Cargo, Bulk Cargo, Liquid Cargo, Container, Ro-Ro
Handling Capacity	3.000.000 ton, 60.000 TEU, 150.000 qua.

Warehouse Area

Customs Area	2.012 m ²
Bounded Area	49.766 m ²
Non-Bounded Area	439 m ²
Total Area	50.205 m ²

Berth-Pier Dimensions

Length	930 m
Maximum Draft	-13,0 m
Ro-Ro Ramp	2 qua.

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

CONTACT DETAILS

Related Persons	İbrahim Anıl ZANA
Address	Marmara Mah. Kumcular Yolu, Ambarlı Liman Tesisleri, Akçansa Terminali, 34524 Beylikdüzü / İSTANBUL
Telephone	0.212.875 27 00
Fax	0.212.875 27 22
E-mail	ibrahimanil.zana@akcansa.com.tr
Website	www.akcansa.com.tr

AKÇANSA PORT

AKÇANSA ÇANAKKALE PORT



PORT FEATURES

Administrator	Akçansa Çimento San. ve Tic. A.Ş.
Coordinates	39° 52' 48"N & 26° 09' 15"E
Handled Cargo	General Cargo, Bulk Cargo
Handling Capacity (Ton/ year)	4.500.000
Warehouse Area	10.000 m ²
Customs Area	47.000 m ²
Open Area	37.196 m ²

Berth-Pier Dimensions

Length	895 m
Maximum Draft	13.5 m

Equipment	Number	Capacity (ton)
Sennebogen	1	10
Sennebogen	1	10
Siwertell Ship Loader	1	800 tph
PH Ship Loader	1	500 tph

CONTACT DETAILS

Related Persons	Sinan İNAÇ
Address	Kumburun Köyü Mevkii, Ezine / ÇANAKKALE
Telephone	0.286.295 20 00 / 0.212.875 27 00
Fax	0.286.648 91 85 / 0.212.875 27 22
E-mail	sinan.inac@akcansa.com.tr
Website	www.akcansa.com.tr



AKSA ACRYLIC CHEMICAL INDUSTRY INC.



PORT FEATURES

Administrator	Aksa Acrylic Chemical Industry Co., Ltd.
Coordinates	40° 41' 10" N & 29° 24' 30" E
Handled Cargo	Liquid Bulk and General Cargo

Handling Capacity

Liquid Cargo (Ton/ Year)	350.000
General Cargo (Ton/Year)	600.000
Total Port Area	21.500 m ²
Parking Area	-
Equipment Parking Area	-

Berth-Pier Dimensions

Liquid Berthing Length	36 m
General Berthing Length	175 m
Maximum Draft	8,5 m

CONTACT DETAILS

Related Persons	Ali DEMİREL
Address	Merkez Mah. Yalova Kocaeli Yolu Caddesi No:34 Taşköprü Çiftlikköy YALOVA
Telephone	+ 90 226 353 25 45
Fax	+ 90 226 353 33 07
E-mail	ali.demirel@aksa.com
Website	www.aksa.com



AK-TAŞ TERMINAL

PORT FEATURES

Administrator	Ak-Taş Dış Ticaret A.Ş.
Coordinates	29 °-51 N & 40 °-42 E
Handled Cargo	Liquid Bulk

Handling Capacity

Liquid Bulk (Ton/Year)	135,000
Total Port Area	7900m ²
Closed Warehouse	38.000m ³

Berth-Pier Dimensions

Length	90 m
Maximum Draft	8 m

Equipment	Number	Capacity (ton)
Forklift	2	3 ton

CONTACT DETAILS

Related Persons	Dinçer DEMİREL
Address	Plaj Yolu Mevkii İzmit
Telephone	(0262) 239 51 42
Fax	(0850) 762 69 78
E-mail	dincer.demirel@aktasdis.com
Website	www.aktasdis.com



ALTAŞ AMBARLI PORT COMPLEX



PORT FEATURES

Administrator	Altaş Ambarlı Port Facilities Trade Co. Inc.
Coordinates	40°58 ' N & 28° 41' E
Ports	Kumport, Akçansa, Mardaş, Marport
Handled Cargo	Container, General Cargo, Bulk Cargo
Total Port Area	1.760.000 m ²

Berth-Pier Dimensions

Length	6.150 m
Minimum Depth	-7 m
Maximum Draft	-17 m

CONTACT DETAILS

Related Persons	Gürdal KARADENİZ
Address	Marmara Mah. Liman Cad.No:49 İç Kapı No:96 34524 Beylikdüzü/ İSTANBUL
Telephone	0212 875 28 00 – 0212 875 28 01
Fax	0212 875 28 02
E-mail	info@altasliman.com
Website	www.altasliman.com



ALTINTEL PORT AND TERMINAL



PORT FEATURES

Administrator	Altintel Liman ve Terminal İşletmeleri A.Ş.
Coordinates	40° 46' 06" N & 29° 32' 43" E
Handled Cargo	Liquid Bulk

Handling Capacity

Liquid Bulk (Ton/year)	1.000.000
Total Port Area	8.689 m ²
Customs Warehouse (open)	8.689 m ²
Customs Warehouse (closed)	106.500m ³ - Storage tanks capacity

Berth-Pier Dimensions

Length	237 m
Maximum Draft	13.5 m

CONTACT DETAILS

Related Persons	Kıvanç BOZTEPE
Address	Dilovası Organize Sanayi Bölgesi I.Kısım Tuna Cad. No:12 Dilovası/Kocaeli
Telephone	+90 262 648 23 00
Fax	+90 262 754 94 78
E-mail	altintel@altintel.com.tr
Website	www.altintel.com.tr



ANADOLU PORT



PORT FEATURES

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

Handling Capacity

Dry Bulk Cargo (Ton/Year)	6.000.000
Vehicle/Year	50.000
Total Port Area (m²)	25.000
Customs Area (m²)	25.000

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

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

CONTACT DETAILS

Related Person	Nabi ERBERK
Address	Malkoçoğlu Sokak No: 14 Güzelyalı Pendik/İstanbul
Telephone	0216 494 32 06
Fax	0216 494 62 31
E-mail	anadoluport@anadoluport.com.tr
Website	www.anadoluport.com.tr



PORT OF ASBAŞ - ANTALYA FREE ZONE



PORT FEATURES

Administrator	ASBAŞ – Antalya Serbest Bölge Kurucu ve İşleticisi A.Ş.
Coordinates	36° 50' 18" N, 30° 36' 20" E
Handled Cargo	General Cargo, Bulk, Container
Handling Capacity (Ton/year)	1.500.000
Warehouse Area	---
Customs Area	---
Open Area	---
Total Port Area	24.575 m ²

Berth-Pier Dimensions

Length	371 m
Maximum Draft	9,50 m

CONTACT DETAILS

Related Persons	Volkan KURT
Address	Serbest Bölge Liman Mah. Liman Cad. No 44 Konyaaltı/ANTALYA
Telephone	(0 242)259 09 30
Fax	(0 242)259 09 32
E-mail	v.kurt@asbas.com.tr
Website	www.asbas.com.tr

AssanPort

ASSAN LİMAN İŞLETMELERİ A.Ş. (ASSAN PORT)



PORT FEATURES

Administrator	ASSAN Liman işletmeleri A.Ş.
Coordinates	36° 41' 06" N, 36° 11' 40" E
Handled Cargo	Container-General Cargo & Project Cargo

Handling Capacity

Container (TEU/ year)	500.000
General Cargo (Ton/ year)	1.000.000
Total Port Area	134.444 m ²
Car-Truck Parking Area	2.240 m ²

Berth-Pier Dimensions

Length	2 x 336 m + 30 m Dolphin
Maximum Draft	-17,0 m

Equipment List

2 x MHC - HMK 7608 (150 Tonnes)
2 x MHC - HMK 6407 (100 Tonnes)
1 x MHC- ESP.8 (125 Tonnes)
12 x Container Reach Stacker
2 x Empty Container Stacker

CONTACT DETAILS

Related Persons	Cem KUVAS
Address	Organize Sanayi Bölgesi Sarıseki-İskenderun/Hatay
Telephone	+ 90 326 629 40 00
Fax	+ 90 326 629 40 44
E-mail	info@assanport.com
Website	www.assanport.com



ASYAPORT



PORT FEATURES

Administrator	Asyaport Liman A. Ş.
Coordinates	40° 54' 00" N; 27° 28' 00" E
Handled Cargo	Container, General Cargo, Bulk Cargo, Ro-Ro

Handling Capacity

Container (TEU/Year)	4.000.000
Total Port Area	354.000 m ²
Land Terminal	210.000 m ²

Berth-Pier Dimensions

Length	2.810 m
Maximum Draft	-18 m

Equipment

Equipment	Number
STS	15
SCR	6
RTG	32
TT	79
RST	4
ECH	5
ATC	1

CONTACT DETAILS

Related Persons	Besim DÖNMEZ
Address	Barbaros Mah. Bülent Ecevit Cad. No:407/Süleymanpaşa 59020 TEKİRDAĞ
Telephone	0 282 273 ASYA (2792)
Fax	0 282 273 19 29
E-mail	bdonmez@asyaport.com
Website	www.asyaport.com



ATAKAŞ PORT

PORT FEATURES

Administrator	Atakaş Liman İşletmeciliği ve Tic. A.Ş.
Coordinates	36° 41' 57" N, 36° 11' 03" E
Handled Cargo	Container, General Cargo, Dry Bulk Cargo, Project Cargo

Handling Capacity

Container (TEU/Year)		
General Cargo (Ton/Year)	2,000,000	
Bulk Cargo (Ton/Year)	8,000,000	
Total Port Area	Open Area	Warehouse
Customs Area (m²)	168,520 m²	2,200 m²
Duty free Area (m²)	10,000 m²	22,500 m²

		Length (m)	With (m)	Max. Draft (-metre)
Berth-Pier Dimensions	Pier	716	35	(-9 min -27 max)

Equipment	Remarks	Number	Capacity (ton)
Crane	Gottwald HMK 7608	2	140
	Gottwald HSK 7528	2	125
	Liebherr LHM 550	1	144
	Sennebogen 895 EQ	1	60
	Sennebogen 880 EQ	3	40
Other equipment	Excavator	9	11-38
	Loader	13	11-26
	Stacker	4	46
	Forklift	15	3-32
Railway (iltisak hattı)	Metre	Line	
	1,500 m	3	

CONTACT DETAILS

Related Persons	Ali Sinan YILMAZ Furkan KADİROĞLU
Address	Azganlık Mah.1822.Sok. No:5 (İsk.2.OSB) İskenderun / HATAY
Telephone	(0326) 656 35 35 Pbx
Fax	(0326) 656 35 43
E-mail	sinan.yilmaz@atakasliman.com.tr furkan.kadiroglu@atakasliman.com.tr
Website	www.atakas.com.tr



AUTOPORT TERMINAL OPERATORS S.A.



PORT FEATURES

Administrator	Autoport Terminal Operators S.A.
Coordinates	40° 43' 22" N & 029° 52' 39 E
Handled Cargo	RoRo, General Cargo, Container

Handling Capacity

Ro-Ro (CEU/Year)	650.000
General Cargo (Ton/Year)	2.000.000
Total Port Area	243.351 m ²
Temporary Bonded Storage Area Open Field	164.083 m ²
Temporary Bonded Storage Area Closed Field	6.020 m ²
Non-Bonded Storage Area Open Field	62.362 m ²
Customs Bonded Warehouse	10.886 m ² (5.400 m ² closed, 5486 m ² open)
Total Satellite Terminal Stock Field	74.000 m ²

Berth-Pier Dimensions

Length	Berth 1 - 303 m / Bert 2 - 328 m
Berth 1 Maximum Draft	- 10,00 m (Considering 200m LOA vessel)
Berth 2 Maximum Draft	- 12,00 m (Considering 200m LOA vessel)

Equipments	Number	Capacity (Ton)
MHC	2	80
Crane	1	80
Sennebogen	1	7
RMG	1	10
Forklift	6	16 / 12 / 8
Terminal Tractor	2	100 / 150

CONTACT DETAILS

Related Persons	Bilgin İŞLER
Address	Sepetlipınar Mahallesi Arpalık Caddesi No:100 41275 Başiskele - Kocaeli
Telephone	0.262.315 38 00
Fax	0.262.315 38 70
E-mail	autoport@autoport.com.tr bilgin.isler@autoport.com.tr
Website	www.autoport.com.tr



AVES İÇ VE DIŞ TİC. A.Ş.

PORT FEATURES

Administrator	Savka Platform ve Boru Hatları A.Ş.
Coordinates	36° 46' 07" N - 34° 43' 49" E
Handled Cargo	Clean Petroleum Products/Vegetable Oil

Handling Capacity

Liquid Bulk (Ton/year)	2.500.000 MT / Year
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Berth-Pier Dimensions

	East Berth	West Berth
Length	282m	282 m
Maximum Draft	-12m	-12 m

CONTACT DETAILS

Related Persons	Cpt.Halime TUNÇ EKİNCİ İsmail Hakkı TAS
Address	Kazanlı Mh. 32960 Sk. Aves Mersin Doğu terminali PK: 33281 Akdeniz/Mersin
Telephone	0 324 241 58 50 / 0 324 451 30 21
Fax	0 324 241 58 60 / 0 324 451 30 22
E-mail	h.tuncekinci@savka.com.tr h.tas@avesas.com.tr
Website	www.savka.com.tr



BATILIMAN LİMAN İŞLETMELERİ A.Ş.



PORT FEATURES

Administrator	Batiliman Liman İşletmeleri A.Ş.			
Coordinates	38° 45'00" N - 26° 53'50" E			
Handled Cargo	General Cargo, Bulk Cargo, Project Cargo , Dangerous Goods			
Handling Capacity	6.000.000 Ton/year (Total)			
Total Port Area	231.420 m ²			
Customs warehouse (closed)	26.630 m ²			
Customs warehouse (open)	31.300 m ²			
Open area (customs-free)	50.000 m ²			
Temporary storage area	30.000 m ²			
Berth-Pier Dimensions	Pier 1	Pier 2	Pier 3	Berth 1
Length (m)	215	390	381	178
Minimum Draft (-m)	12	17	12	3
Maximum Draft (-m)	17	34	34	10
Equipment	Number		Capacity(ton)	
Liebherr LHM 250 MHC	1		64	
Liebherr LHM 180 MHC	1		64	
Liebherr LHM 150 MHC	2		40	
Sennebogen 850 MHC	1		15	

CONTACT DETAILS

Related Persons	Serdar ZENGİN
Address	Nemrut Körfezi, No:13, Çakmaklı Köyü, Aliğa / İZMİR
Telephone	0 232 625 54 45 - 46
Fax	0 232 625 54 53
E-mail	info@batiliman.com.tr
Website	www.batiliman.com.tr

BELDEPORT

BELDEPORT

PORT FEATURES

Administrator	MED Lojistik A.Ş.
Coordinates	40° 46' 18" Noth 029° 30' 55" East
Handled Cargo	Container, General Cargo, Bulk Cargo, Project Cargo, Ro-Ro, Liquid Bulk

Handling Capacity (Phase IA)

Container (TEU/Year)	550.000 TEU (Phase I)-(After all investment phase completed 2.150.000 TEUs)
General and Bulk Cargo (Ton/Year)	2.000.000 Tons
Liquid Load (Ton/ Year)	140.000 cbm / Instant - 1.500.000 Tons
Vehicle (PCC)/Year	200.000 Units
Total Port Area (m ²)	600.000 m ² (After all investment phase completed 1.000.000 m ²)
Bonded Storage Area (open)(m ²)	149.000 m ²
Unbonded Storage Area (open)(m ²)	112.000 m ²
TIR Parking Area	12.000 m ²
Warehouse	1.100 m ²

Berth-Pier Dimensions

Length	450 m (1,384 m, when all phases are completed)
Draft (uniform)	16,5 m (18 m, further phases)

Equipment	Number	Capacity	Equipment	Number	Capacity
Liebherr LHM 550	3	144 ton	Forklift	9	3-32 ton
Liebherr LHM 500	1	104 ton	Bromma Telescopic Spreader	6	41 ton (2x25 ton)
Konecranes CRS	4	45 ton	Bromma Automatic Overheight Frame	2	51 ton
Sanny CRS	3	45 ton	SMAG Clamshell Buckets (30m ³)	2	
Konecranes ECH	1	11 ton	Reefer Rack	3	190 plugs
Sanny ECH	1	9 ton	SSG	4	Ordered (25 Rows)
Terberg YTT	20	168 kW (225 Hp) at 1800 rpm	RTG	13	Ordered (7+1 rows and 6+1 high)
Seyit Usta Trailer	23	65 ton			

CONTACT DETAILS

Related Persons / Operation Manager	Kapt. Hasan Enis NALBANTOĞLU
Sales and Marketing Manager	Zeynep Şahin TAŞKIN
Address	Diliskelesi Mah. Liman Cad. No:13/8 41455, Dilovası/Kocaeli
Telephone	+90 262 677 7400
Fax	+90 262 677 7401
E-mail	enis.nalbantoglu@beldeport.com.tr zeynep.taskin@beldeport.com.tr
Website	www.beldeport.com.tr



BODRUM CRUISE PORT

PORT FEATURES

Administrator	Bodrum Yolcu Limanı İşletmeleri A.Ş.
Coordinates	37° 01' 30" N & 27° 26' 13" E
Handled Cargo	Passenger
Total Port Area	23.539 m ²
Closed Warehouse	-
Customs Area (Open)	2,081 m ²
Parking Area	2.856,25 m ²

Berth-Pier Dimensions

Length	Berth No 1: 350 m Berth No 2: 330 m
Maximum Draft	8 m (Max depth 25 m)

CONTACT DETAILS

Related Persons	Aziz GÜNGÖR Global Ports Holding, East Med Regional Director Erkan ÖZTUNALI Port Manager
Address	Bodrum Cruise Port-Kumbahçe Mh. İskele Cad. No:1 Bodrum / Muğla
Telephone	0 252 316 48 72
Fax	0 252 316 18 72
E-mail	info@bodrumcruiseport.com
Website	www.bodrumcruiseport.com



BORUSAN PORT

PORT FEATURES

Administrator	Borusan Lojistik Dağıtım Depolama Taşımacılık Ve Tic. A.Ş
Coordinates	40° 25' 12" N & 29° 05' 18" E
Handled Cargo	General Cargo, Project Cargo, Container, Vehicle Handling (Ro-Ro)

Handling Capacity

Container (TEU/year)	450.000
General Cargo (Ton/ year)	5.000.000
Ro-Ro (Vehicle/ year)	350.000
Total port area	523.319 m ²
Closed warehouse	25.000 m ²
Customs warehouse (open)	361.554 m ²
Truck parking area (Pregate)	17.000 m ²

Berth-Pier Dimensions

Length	1.923 m
Maximum Draft	14,5 m

Equipment	Number	Capacity (ton)
MHC	8	40-140
RTG	8	41
Stacker	3	45
Stacker	3	10
Stacker	2	46
SSG	3	60 (under spreader)
Overhead Bridge Crane	12	20-35
Forklift	20	3-33
Terminal Tractor	31	80-120
Reefer Plug	224	

CONTACT DETAILS

Related Persons	Esra Atmaca ASLAN
Address	Ata Mahallesi 125 Nolu Sok. No:3 16601 Gemlik – Bursa
Telephone, Fax	0224 270 13 00, 0224 519 01 53
E-post	borusanlimaniletisim@borusan.com
Website	www.borusanport.com



PORT OF ÇANAKKALE

PORT FEATURES

Administrator	Çanakkale Liman İşletmesi San.ve Tic.A.Ş.
Coordinates	40° 06' 21" N & 26° 22' 41" E
Handled Cargo	Bulk Cargo - General Cargo - RO-RO - Container - Fuel Products - Passenger - Ferry - Liquid Cargo

Handling Capacity

Bulk-General Cargo (Ton/ year)	1.000.000 Ton
Liquid Bulk (Ton/year)	150.000
Container (TEU/year)	100.000
General Cargo (Ton/ year)	
Ro-Ro (Vehicle/year)	74.463 m ²
Total port area	2.688 m ²
Closed warehouse	28.746 m ²
Customs warehouse (open)	

Berth-Pier Dimensions

Width	24 m
Length	214 m
Maximum Draft	14-28 m

Equipment	Number	Capacity
Gottwald HMK 280E MHC	2	100 ton Capacity
Sennebogen 835 Mobile Crane	4	12 ton Capacity
Radio Frequency Grabbing	4	12 m ³ Capacity
Bulk Cargo Bunker	4	8 ton Capacity
Forklift	3	2 qty. 5 ton and 1 qty. 3 ton
Wheel Loader	1	
Bobcat brand mini Loader	1	

CONTACT DETAILS

Related Persons	Serkan YARDIMCI
Address	Cumhuriyet Mahallesi Sahil Yolu Cad. No. 42 17110 KEPEZ / ÇANAKKALE
Telephone, Fax	0 286 263 55 00, 0 286 263 08 08
E-mail	liman@portofcanakkale.com ; info@portofcanakkale.com
Website	www.portofcanakkale.com



ÇELEBİ PORT OF BANDIRMA

PORT FEATURES

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

Handling Capacity

Container (TEU/year)	188.000
Bulk and General Cargo (Ton/ year)	11.951.000
Liquid Bulk (Ton/ year)	4.320.000
Ro-Ro (Vehicle/ year)	569.159
Total port area (Customs)	268.348 m ²
Warehouse	12.250 m ²
Vertical Silo	84.000 m ³
Parking area	42.000 m ²

Berth-Pier Dimensions

Length	2.974 m.
Maximum Draft	12 m

Equipment	Number	Capacity (ton)
Conecranes Gottwald ESP.7	2	125
Reggiane MHC 200	1	100
Gottwald HMK 170	1	63
Liebherr LHM 400	1	104
Sennebogen 880 EQ	1	30
Sennebogen 835 R Special	1	13
Sennebogen 835 M Special	2	13
Sennebogen 870 R Special	1	16
Sennbogen 870 E Hybrid	2	16

CONTACT DETAILS

Related Persons	Gürkan BAYIR, Fatih UZUNÇAKIR
Address	Paşabayır Mah. Liman Sahası Sk. No:6/3 10200/Bandırma/Balıkesir
Telephone	0266 714 04 04
Fax	0266 713 79 79
E-mail	gurkan.bayir@celebi.com.tr, fatih.uzuncakir@celebi.com.tr
Website	www.portofbandirma.com.tr



CEYPORT TAŞUCU

PORT FEATURES

Administrator	Ceyport Taşucu International Port Management Inc.
Coordinates	36° 18' 30" N / 33° 53' 30" E
Handled Cargo	Bulk Cargo (Solid/Liquid) – General Cargo – Project Cargo – Container – Ro Ro – Passenger – Livestock

Handling Capacity

Container (TEU/Year)	100.000
General and Bulk Cargo (Ton/Year)	3.000.000
Liquid Bulk Cargo (Ton/Year)	250.000
Vehicle/Passenger	250.000/200.000
Total port area	1.509.000 m ²
Closed Warehouse	61.000 m ²
Silo (Ton)	---

Berth-Pier Dimensions

Length	1150 m
Maximum Draft	-14 m

Equipment	Number	Capacity (ton)
Cranes	5	Max. 154

CONTACT DETAILS

Related Persons	Rahman ÇOBAN
Address	Taşucu Mah. Palmiye_1 Sk. No:90 Silifke/Mersin
Telephone	0324 741 53 00
Fax	0324 741 53 73
E-mail	info@ceyporttasucu.com.tr
Website	www.ceyporttasucu.com.tr



CEYPORT TEKİRDAĞ

PORT FEATURES

Administrator	Ceyport Tekirdağ International Port Management Inc.
Coordinates	40° 57' 43" N - 27° 30' 30" E
Handled Cargo	Bulk Cargo (Solid/Liquid) - General Cargo - Project Cargo - Container - RoRo - Passenger - Train Ferry - Livestock

Handling Capacity

Container (TEU/Year)	450.000
General and Bulk Cargo (Ton/Year)	15.500.000
Liquid Bulk Cargo (Ton/Year)	1.150.000
Vehicle/Passenger	400.000/650.000
Total Port Area	261.542 m ²
Closed Warehouse	20 units /24.601 m ²
Silo (Ton)	6 units / 30.000 (ton)
Tank Terminal (m ³)	20 units / 69.750 m ³

Berth-Pier Dimensions

Length	2.930 m
Maximum Draft	-12,00 m (10.50 m channel draft)

Equipment	Quantity	Capacity (ton)
Cranes	15	11 - 154

CONTACT DETAILS

Related Persons	Osman KAYALAR
Address	Vatan Mah. Barbaros Cad.No:9/1 SÜLEYMANPAŞA/TEKİRDAĞ
Telephone	0282 261 08 00
Fax	0282 261 23 46
E-mail	info@ceyporttekirdag.com.tr
Website	www.ceyporttekirdag.com.tr



ÇOLAKOĞLU METALURJİ A.Ş.

PORT FEATURES

Administrator	Çolakoğlu Metalurji A.Ş.
Coordinates	40° 46' N - 29° 31' E
Handled Cargo	General Cargo, Bulk Cargo

Handling Capacity

General Cargo and Bulk Cargo	7.000.000 Ton/Year
Total Port Area	22.620 m ²

Berth-Pier Dimensions

	Length (m)	Max. Draft (-m)
Pier No.1	458	17-18 m
Pier No.2	266	10-18 m

Equipment	Number	Capacity (ton/day)	Remark
Mobile Crane	7	19.000 ton/day	-

CONTACT DETAILS

Related Persons	Kaan KARAASLAN
Address	Dilovası Organize Sanayi Bölgesi, 1. Kısım Mahallesi İzmit
Telephone	+90 (262) 676 75 00
Fax	+90 (262) 754 84 20
E-mail	kkaraaslan@colakoglu.com.tr
Website	www.colakoglu.com.tr



DFDS PENDİK PORT

PORT FEATURES

Administrator	DFDS Denizcilik ve Taşımacılık A.Ş.
Coordinates	40° 51' 30" N 29° 16' 19" E
Handled Cargo	RO-RO

Handling Capacity (Annual)

Vehicle	250.000
Container	100.000
Special Cargo	40.000
Total Port Area	117.953 m2

Berth-Pier Dimensions

Pier Length	210 m
East Ramp Width	27 m
West Ramp Width	35 m
Maximum Draft	11 m

Equipment

Number

Terminal Tractor	23
Container Reach Stacker	3
Forklift	6

CONTACT DETAILS

Related Persons	Levent ŞİNEL
Address	İstanbul Tersanesi Komutanlığı Yanı, Kemikli Dere Mevkii, Güzelyalı 34903 Pendik - İSTANBUL
Telephone	(216) 392 5050
Fax	(216) 392 5051/2
E-mail	levent.sinel@dfds.com lesin@dfds.com
Website	www.dfds.com.tr


DİLER


DİLER DEMİR ÇELİK

PORT FEATURES

Administrator	Diler Demir Çelik End. ve Tic. A.Ş.
Coordinates	40° 46' 42" N & 29° 36' 00" E
Handled Cargo	General Cargo, Bulk Cargo

Handling Capacity

Bulk Cargo (Ton/year)	6.000.000
General Cargo (Ton/ year)	6.000.000
Total Port Area	52.705 m ²
Closed Warehouse	5.551 m ²
Temporary Storage Area (Closed)	1.637 m ²
Temporary Storage Area (Open)	30.893 m ²
Parking Area	2.500 m ²

Berth-Pier Dimensions

Length	965m
Maximum Draft	11.5 m

Equipment

LHM MHC	1 x 180 rubber tired 1 x 150 rubber tired
Handling Machine	9 x palletized
Forklift	1X3 ton, 2X5 ton, 4X5.5 ton, 3X10 ton

CONTACT DETAILS

Related Persons	Bülent YALABAÇOĞLU
Address	Hacı Akif Mah. Tayyar Yıldırım Cad. No :26 PK.39 Hereke Körfez/KOCAELİ
Telephone	0.262.511 44 49
Fax	0.262.511 32 22 - 0.262.754 61 17
E-mail	dilerliman@dilerhld.com
Website	www.dilerhld.com



DP WORLD EVYAP

DP WORLD EVYAP



PORT FEATURES

Coordinates	Yarımca: 40° 45' 42'' N - 029° 44' 53'' E Körfez: 40° 46' 29'' N - 029° 42' 47'' E
Handled Cargo	Yarımca: Container, General Cargo, Project Cargo Körfez: Container, General Cargo, Project Cargo, Liquid Cargo, Vehicle (Ro-Ro)

Handling Capacity

Container (Teu/year)	Yarımca: 1.250.000 - Körfez: 850.000
Liquid Cargo(Storage mt/year)	Körfez: 1.120.000
Total Port Area	Yarımca: 452.000 m ² - Körfez: 279.000 m ²
CFS & Inspection Area	Yarımca: 24.000 m ² - Körfez: 16.000 m ²
Partial Warehouse	Yarımca: 4.000 m ² - Körfez: 1.000 m ²
Tank Terminal Area	Körfez: 20.000 m ² (36 TANKS - 99.340 m ³ Capacity)

Berths (Yarımca)	Berth 1	Berth 2
Length (m)	457 m	465 m
Maximum Draft	16 m	16 m

Berths (Körfez)	No:1 Berth	No:2 Pier	No:3 Pier	No:4 Berth	No:5-6 Berths
Length (m)	35 m	358 m	358 m	80 m	455 m
Maximum Draft	17.5 m	17.5 m	17.5m	17.5 m	17.5 m

Equipment (Körfez)	Quantity	Equipment (Yarımca)	Number
STS	4	STS	8 (8 Remote Control)
MHC	5	E-RTG	24 (8 Remote Control)
E-RTG	26	TT	58
TT	52		

CONTACT DETAILS

Related Persons	Ali KESKİN
Address	Mimar Sinan Mah. Mehmet Akif Ersoy Cad. No:168, 41780 Yarımca-Körfez-Kocaeli
Telephone	0 262 316 11 00
Fax	0 262 316 11 29
E-mail	ali.keskin@dpworld.com
Website	www.dpworld.com/en/turkiye



EFESANPORT

PORT FEATURES

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

Handling Capacity

General Cargo (Ton/Year)	2.000.000
Bulk Cargo (Ton/Year)	500.000
Asphalt (Ton/Year)	150.000
Ro-Ro (Auto) (Vehicle/Year)	300.000
Ro-Ro (Track) (Vehicle/Year)	15.000
Total Port Area	145.000 m ²
Parking Area	116.000 m ² (Multi-Storey Car Parking Area Included)
Dry Bulk Cargo GDA	22.500 m ²

Berth-Pier Dimensions

Maximum Draft	25m
Total Berth Length	870m

Equipment	Number	Capacity
Fuchs F120 MH	1	22 mton
Terex Fuchs 880XL	3	16 mton
Liebherr LHM 180	1	64 mton
Sennebogen 3300	1	45 mton
Sennebogen 850	1	14 mton
Gottwald HMK 300E	1	104 mton

CONTACT DETAILS

Related Persons	İlker TUNCER
Address	Dilovası OSB, 1.Kısım D-1006 Sok No 8 Dilovası/Kocaeli
Telephone	+90 262 7548461 – 62 – 63
Fax	+90 262 7545155
E-mail	ilker.tuncer@efesan.com.tr
Website	www.efesanport.com



EGE GÜBRE TERMINAL

PORT FEATURES

Administrator	Ege Gübre Sanayi A.Ş.
Coordinates	38° 45' 65"N & 026° 55' 68" E
Handled Cargo	Container, General Cargo, Bulk Cargo, Liquid Bulk, IMDG Cargo

Handling Capacity

Container (Teu/Year)	1.500.000
General Cargo (Ton/ Year)	2.500.000
Bulk Cargo (Ton/ Year)	5.000.000
Total Port Area	485.000m ²
Custom Warehouse	4.615m ²
Warehouse	37.415m ²
Custom Area	350.000m ²
Parking Area	25.000m ²

Berth-Pier Dimensions

Length	East Jetty: 517mx30m	West Jetty: 467mx40m
Maximum Draft	32m	

Equipment	Quantity	Total Capacity (T)
STS (Single Boom)	2	75
STS (Double Boom)	2	140
MHC	2	160
LHM	3	228
Sennebogen 870EQ	1	30
RTG	15	480
RS	6	270
ECH	6	36
Terminal Trailer	46	60 (each)

CONTACT DETAILS

Related Persons	M. Şükrü ÖNDER
Address	25. Cadde No:2 Çakmaklı, Aliağa/İZMİR
Telephone	0.232.625 1250
Fax	0.232.625 1245
E-mail	sukru.onder@egegubre.com.tr
Website	www.egegubre.com.tr



EKİNCİLER - ORHAN EKİNCİ İSKELESİ



PORT FEATURES

Administrator	EKMAR Denizcilik ve Gemi Acenteliği A.Ş.
Coordinates	36° 41' 030" N, 36° 11' 46" E
Handled Cargo	Dry Bulk and General Cargo

Handling Capacity

Dry Bulk Cargo(Ton/yıl)	11.500.000
General Cargo (Ton/yıl)	500.000
Open Stock Area	214.000 m ²
Custom Bounded Area	62.000 m ²
Total Enclosed St. Area	20.000 m ²
Railway Connection	Railway line – 40 wagon capacity

Berth-Pier Dimensions

Length	2 x 800 m
Maximum Depth	12 m – 32 m

Equipment

Equipment	Number
Sennebogen 895	2
Sennebogen 880	3
Sennebogen 870	2
Sennebogen 6180	1
Gotwald ESP 8B	1

CONTACT DETAILS

Related Persons	Kpt. Vahtettin ERİŞEN – Kpt. Bahri ÇARDAK
Address	Organize Sanayi Bölgesi PK 240 Sarıseki-İskenderun/Hatay
Telephone	+ 90 326 656 22 31
Fax	+ 90 326 656 22 30
E-mail	verisen@ekmar.com.tr bcardak@ekmar.com.tr
Website	www.ekinciler.com



EMBA HUNUTLU THERMAL POWER PLANT PORT



PORT FEATURES

Administrator	EMBA Elektrik Üretim A.Ş.
Coordinates	N:4076052.5748 E:487319.1190
Handled Cargo	Coal

Handling Capacity

Solid Bulk (Ton/year)	3.500.000
Total Port Area	26.420 m ²
Closed Warehouse	3x90.000 ton

Berth-Pier Dimensions

Length	343 m
Maximum Draft	21 m

Equipment	Number	Capacity (ton)
CSU	2	1250 ton/hour

CONTACT DETAILS

Related Persons	Tamer KIRGIL
Address	Akyuva Mah. Kümeevler Mevkii No:1 Yumurtalık / Adana
Telephone	(0212) 269 96 69
Fax	(0212) 269 96 09
E-mail	tamerkirgil@embapower.com
Website	www.embapower.com



ERDEMİR PORT



PORT FEATURES

Administrator	Ereğli Demir ve Çelik Fab.T.A.Ş.
Coordinates	41° 16' N - 31° 15' E
Handled Cargo	General Cargo, Bulk Cargo, Liquid Bulk, Ro-Ro
Bulk Cargo (Ton/year)	13.750.000
General Cargo (Ton/ year)	6.250.000
Total Port Area	750.000 (m ²)
Closed Warehouse	3.000 (m ²)
Bonded Warehouse (A type)	139.000 m ²

Berth-Pier Dimensions

Length/Maximum Draft	1.670 m (Excluding Ro-Ro and Train Ferry berths) / -20 m		
Equipment	Number	Brand	Capacity
Bulk Cargo Crane	4	Caillard-Kawaden	30-31 Ton
General Cargo Crane	5	Caillard- Siemag- MŞM	40-25-15 Ton
MHC	1	Liebherr	40 Ton
Forklift	9	Konecrane-Doosan	3-10-16-20-32-42 Ton
Loader	5	Doosan-Liu Gong	0,4-3-4 m ³
Excavator	1	Liebherr	1,8 m ³
Tele Handler	1	Caterpillar	14 m
Palletized Excavator	4	Doosan- Caterpillar	1,3-1,5 m ³
Tanker	1	Ford	7 m ³
Pilot Boat	2	Erdemir Pilot 1, Med Pilot 3	2x600bg ,2x640bg 2x500bg
Moorings	1	M.Boat 26	2 x500 bg
Towages	3	MED FIRAT, ROTA PORT, POLİ PORT M	70, 30, 33 ton

CONTACT DETAILS

Related Persons	Caner ÖZLEYEN
Address	Ereğli Demir ve Çelik Fab. T.A.Ş. Liman Müdürlüğü Uzunkum No:7 P.K.:67330 Kdz.Ereğli / Zonguldak
Telephone\Fax	0 (372) 329 35 92
E-mail	cozleyen@erdemir.com.tr / erdemirport@erdemir.com.tr
Website	www.erdemir.com.tr



EREN ENERJİ ELEKTRİK ÜRETİM A.Ş.



PORT FEATURES

Administrator	Eren Enerji Elektrik Üretim A.Ş.
Coordinates	31° 37' 51" N, 41° 23' 30" E
Handled Cargo	Dry Bulk Cargo, General Cargo, Project Cargo, Ro-Ro, Container
Total Bulk and General Cargo (Ton/year)	15.000.000 Ton/year
Container (Teu/year)	200.000 Teu/year
Total Port Area	1.096.984 m ²
Custom Bonded Area	231.000 m ²
Closed Warehouse	7.700 m ²
Container Storage Area	2.000 TEU – 32.620 m ²

Berth-Pier Dimensions	Length	Maximum Draft
Berth 1	300 m	20 m
Berth 2	250 m	15,5 m
Berth 3	260 m	15,5 m
Berth 4	240 m	14 m

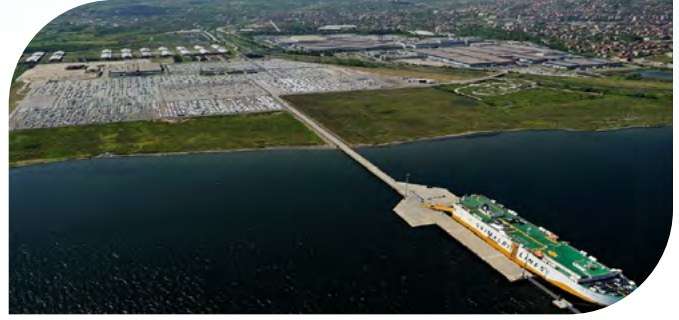
Equipment	Number	Capacity
Liebherr LPS 600 Harbour Crane	2	1500 ton/h
Liebherr LPS 420 Harbour Crane	2	1000 ton/h
Liebherr LPS 400 Harbour Crane	2	750 ton/h
Liebherr LHM 550 Mobile Harbour Crane	2	20 teu/h
Cat 966GC Loader	4	5,5 m ³
Cat 950H Loader	1	4 m ³
Liebherr L566XP	2	5 m ³
Liebherr T33-10S Thelehandler	1	
Cat 236 Miniloader	1	
Cat 434 Beko Loader	1	
Hitachi ZX210H	3	
CAT 330GC	2	
Terberg Terminal Tractor (RT283-YT223)	8	
Konecranes Liftace 4532 TCE5	3	
Konecranes SMV 5/6 ECC 90	1	

CONTACT DETAILS

Related Persons	Ömer BUĞER, Türker ÖZPOYRAZ
Address	Head Office: Ataşehir Bulvarı, Metropol İstanbul, İstanbul Port: Eren Limanı Muslu / Zonguldak
Telephone\Fax	0 216- 606 37 37 / 0 372- 264 31 99
E-mail	omer.buger@erenholding.com.tr, turker.ozpoyraz@erenholding.com.tr
Website	www.erenport.com.tr www.erenlimani.com.tr



FORD OTOSAN YENİKÖY PIER



PORT FEATURES

Administrator	Ford Otomotiv Sanayi A.Ş.
Coordinates	40° 43' N , 0° 29' 51' E
Handled Cargo	Auto

Handling Capacity

Auto (Vehicle/Year)	400.000
Total Port Area	326.384 m ²
Customs Area (Open)	26.384 m ²
Parking Area	300.000 m ²

Berth-Pier Dimensions

Length	132 m
Maximum Draft	-21 m

CONTACT DETAILS

Related Persons	Fatih KILINÇ
Address	Denizevler Mah. Ali Uçar Cad. Gölcük, Kocaeli
Telephone	0262 3155000
Fax	0262 3155402
E-mail	fkilinc1@ford.com.tr
Website	www.ford.com.tr



GEMPORT

PORT FEATURES

Administrator	GEMPORT Gemlik Liman ve Depolama İşletmeleri A.Ş.
Coordinates	40° 24'59.28 N & 29° 6'40.13 E
Handled Cargo	Container, Vehicle (Ro-Ro), General Cargo, Bulk Cargo, Project Cargo, Liquid Cargo, Trailer (Ro-Ro)

Handling Capacity

Container (TEU/ year)	2.000.000
General Cargo (Ton/ year)	10.000.000
Liquid Cargo (Ton/ year)	500.000
Ro-Ro (Vehicle/year)	800.000
Ro-Ro (Trailer/year)	200.000
Total Port Area	1.250.000 m ²
Bonded Area	564.400 m ²
Closed Bonded Area	6.000 m ²
Closed Bonded Warehouse	8.000 m ²
Customs Warehouse (closed)	8.077 m ²
Closed Car Parking Area	60.000 m ²
Unbonded Area	304.000 m ² (2.000 m ² semi-enclosed+20.000 m ² semi-enclosed area for mining area) 280.000 m ² (other port areas)
Berth Capacity	24.000TEU's Vessel

Berth-Pier Dimensions

Length	2.050 m
Maximum Draft	36 m

Equipment	Number	Capacity(ton)
STS	8	70
MHC	4	80-104
Reach Stacker	7	45
Empty Handler	5	8
RTG	26	41
TT	50	60
FL	7	3-16

CONTACT DETAILS

Related Persons	Serhan ÇİLENGİR
Address	Ata Mah. Liman Cad. No:12 16600 Gemlik, BURSA
Telephone	0(224) 524 7720
E-mail	serhan.cilengir@aryholding.com
Website	



GİRESUNPORT

PORT FEATURES

Administrator	Giresunport Liman İşletmeciliği A.Ş.
Coordinates	40° 50' 06" N, 38° 22' 51" E
Handled Cargo	Dry Bulk Cargo, General Cargo, Liquid Bulk, Ro-Ro, Passenger, Container

Handling Capacity

Container (TEU/Year)	
Dry Bulk Cargo (Ton/ Year)	3.000.000
General Argo (Ton/ Year)	1.000.000
Ro-Ro (Vehicle/ Year)	
Total Port Area	94,000m ²
Warehouse Area	21
Closed Warehouse	28,300m ²
Customs Bonded Area	65,700m ²
Parking Zone	
Non-Bonded Area	

Berth-Pier Dimensions

Length	800
Maximum Draft	-10

Equipment	Number	Capacity (ton)
Crane	4	63-25-8-5-2,2
Loder	4	21,2-2x18,6-10
Bobcat	2	2x3
Forklift	3	10-5-3,5
Stacker	1	45

CONTACT DETAILS

Related Persons	Murat SOLAK
Address	Sultan Selim Mah. G.M.K Blv. No:9 Merkez / GİRESUN
Telephone	0454 216 23 82
Fax	0454 216 17 34
E-mail	murat.solak@tiryaki.com.tr
Website	www.giresunport.com.tr



GLOBAL TERMINAL

PORT FEATURES

Administrator	Global Terminal Hizmetleri A.Ş.			
Coordinates	Pier 1 (YP1)			
	36° 08' 02,25" E	36° 08' 04,09" E	36° 50' 12,14" N	36° 50' 14,35" N
	36° 08' 04,76" E	36° 08' 00,56" E	36° 50' 13,61" N	36° 50' 12,88" N
	Pier 2 (YP2)			
	36° 08' 35,07" E	36° 08' 35,51" E	36° 50' 31,56" N	36° 50' 33,27" N
	36° 08' 36,37" E	36° 08' 34,21" E	36° 50' 32,33" N	36° 50' 33,28" N
	Pier 3 (YP3)			
	36° 08' 54,54" E	36° 08' 55,10" E	36° 50' 43,17" N	36° 50' 44,66" N
	36° 08' 55,84" E	36° 08' 53,87" E	36° 50' 43,93" N	36° 50' 43,90" N
Handled Cargo	Crude Oil, Black and White Products			
Handling Capacity	721.600 m ³			
Total Port Area	62,251 m ²			
Customs Warehouse (Open)	222,576 m ²			
Berth-Pier	2,300 m. Length jettty can accomadate between 1,000-230,000 displacement tonnage vessels.			
Maximum Draft	YP1: 16,5 m.	YP2: 12,5 m.	YP3: 7,5 m.	

CONTACT DETAILS

Related Persons	Aytaç TAYGAL
Address	Yeşilköy Mah. Kırıkköprü Çankaya Cad. No:151 31650 Dörtöy/Hatay
Telephone	+90 326 734 16 20
Fax	+90 326734 16 27
E-mail	aytac.taygal@globalterminal-tr.com
Website	www.globalterminal-tr.com

HOPAPORT

PARK DENİZCİLİK VE HOPA LİMAN İŞLETMELERİ A.Ş.



PORT FEATURES

Administrator	Park Denizcilik ve Hopa Liman İşletmeleri A.Ş.
Coordinates	41°24'45"N & 41°21'45"E
Handled Cargo	General Cargo, Dry Bulk Cargo, Project Cargo, Liquid Bulk, Ro-Ro

Handling Capacity

Container (TEU/year)	320.000
Dry Bulk Cargo (Ton/yıl year)	2.500.000
General Cargo (Ton/ year)	600.000
Liquid Bulk (Ton/ year)	900.000
Total port area	216.000 m ²
Warehouse Area (open)	102.462 m ²
Closed Warehouse	18.220 m ²
Customs Warehouse	5.000 m ² +22.000 m ³
Grain Terminal	10 x 1000 Ton
Cement Terminal	7.700 Ton
Tank Terminal	32.000 m ³
LPG Terminal	2 x 210 m ³

Berth-Pier Dimensions

Length	1.346 m
Maximum Draft	-10 m

Equipment	Number	Capacity (ton)
Quay Crane	2(1+1)	10-25
Coles	3(2+1)	10-25
Sennebogen 835	2	7

CONTACT DETAILS

Related Persons	Meriç Burçin ÖZER
Address	Ortahopa Mah. Liman Cd. 08600 Hopa / ARTVİN
Telephone	0 466 351 22 59
Fax	0 466 351 47 91
E-mail	meric.ozar@hopaport.com.tr hopaport@hopaport.com.tr
Website	www.hopaport.com.tr



IC KARASU PORT

PORT FEATURES

Administrator	IC İtař Sakarya Karasu Limanı Yatırım ve İřletme A.ř.
Coordinates	41° 7' 17" N, 30° 40' 37" E
Handled Cargo	Container, General Cargo, Dry Bulk Cargo, Ro-Ro, Passenger

Handling Capacity

Container (TEU/year)	53,930	Ro-Ro (Vehicle/ year) 70,056
General/Bulk Cargo (Ton/ year)	2.086.566	
Total Port Area	476.000 m ²	
Total Storage Area	74.500 m ²	
Sheltered Warehouse	6.500 m ²	
Total Land Area	272.500 m ²	
Customs Bonded Area (Open)	78.130 m ²	
Ro Ro Park Area	48.179 m ²	
Non Bonded Area (Open)	142.500 m ²	

Berth-Pier Dimensions

Length	670 m
Maximum Draft	-11 m

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

CONTACT DETAILS

Related Persons	Göken ERDEM
Address	Yalı Mah. Batı Karadeniz Cd. No:244/1 Karasu - SAKARYA
Telephone	(0264) 888 44 00
Fax	(0264) 888 44 01
E-mail	gokcen.erdem@karasuport.com.tr
Kep	icictaskarasulimani@hs02.kep.tr
Website	www.karasuport.com.tr



İÇDAŞ 1 PORT

PORT FEATURES

Administrator	İçdaş Çelik Enerji Tersane ve Ulaşım San. A.Ş.
Coordinates	40° 27' N & 27° 08' E

Handling Capacity

Dry Bulk Cargo (Ton/year)	20.000.000
General Cargo (Ton/ year)	15.000.000
Total Port Area	200.00 m ²
Closed Warehouse	250.000 mt product warehouse capacity
Customs Area	75.000m ²

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

Equipment	Number	Capacity (ton)
Quay Crane	2	45
Quay Crane	2	50
Quay Crane	6	100
Truck	26	150
Forklift	11	28/14

CONTACT DETAILS

Related Persons	Türker ÖZMAN
Address	Mahmutbey Mahallesi Dilmenler Caddesi No:20 34218 Bağcılar/İSTANBUL
Telephone	0 (212) 604 0404 (Pbx)
Fax:	0 (212) 651 97 89, 0 (212) 550 20 24
E-post	icdas@icdas.com.tr
Website	www.icdas.com.tr



İÇDAŞ 2 PORT

PORT FEATURES

Administrator	İçdaş Çelik Enerji Tersane Ve Ulaşım San. A.Ş.
Coordinates	40° 24,5' N & 27° 02,5' E

Handling Capacity

Dry Bulk Cargo (Ton/year)	15.000.000
General Cargo (Ton/ year)	10.000.000
Total Port Area	100.000 m ²
Customs Area	15.000 m ²

Berth-Pier Dimensions	Berth 1	Berth 2
Length	350 m	450 m
Maximum Draft	32 m	32 m
Equipment	Number	Capacity (ton)
Quay Crane	2	100
Excavator	2	30
Bobcat	2	-
Truck	3	30
Forklift	2	28/14

CONTACT DETAILS

Related Persons	Türker ÖZMAN
Address	Mahmutbey Mahallesi Dilmenler Caddesi No:20 34218 Bağcılar/İSTANBUL
Telephone	0 (212) 604 0404 (Pbx)
Fax	0 (212) 651 97 89, 0 (212) 550 20 24
E-post	icdas@icdas.com.tr
Website	www.icdas.com.tr



İDÇ PORT

PORT FEATURES

Administrator	İDÇ Liman İşletmeleri A.Ş.
Coordinates	38° 76' N & 26° 92' E

Handling Capacity

Dry Bulk and General Cargo (Ton/year)	7.500.000
Total Port Area	226.181,19 m ²
Customs Warehouse (Closed)	6.520 m ²
Customs Warehouse (Open)	36.385 m ²

Berth-Pier Dimensions	Pier 1	Pier 2
Length	475	475
Maximum Draft	28	28
Equipment	Number	Capacity (ton)
9300 Sennebogen	1	90
6200 Sennebogen	1	50
895E Sennebogen	2	25
880 Sennebogen	4	20
870 Sennebogen	1	15
630 M Sennebogen	1	20
Quay Crane	2	12.5
Excavator	7	
Loader	10	
Forklift	14	2,5-3-7-9-12-16

CONTACT DETAILS

Related Persons	Emre SÖYLER
Address	Gümrük Caddesi No:7 Çakmaklı - Aliağa / İZMİR
Telephone	0.232.625 54 65
Fax	0.232.625 54 75
E-mail	idcport@idcliman.com.tr
Website	www.idcliman.com.tr



İGSAŞ İSTANBUL GÜBRE SANAYİİ A.Ş.



PORT FEATURES

Administrator	İgşaş İstanbul Gübre Sanayii A.Ş.
Coordinates	40°45" N & 29°45" E
Handled Cargo	General Cargo, Dry Bulk Cargo, Dry Liquid Cargo (Ammonia, Molasses)

Handling Capacity

Dry Bulk Cargo (Ton/year)	3.000.000
Total Port Area	20,953 m ²

Berth-Pier Dimensions

Length	375m + 296m + 243 m
Maximum Draft	21 m

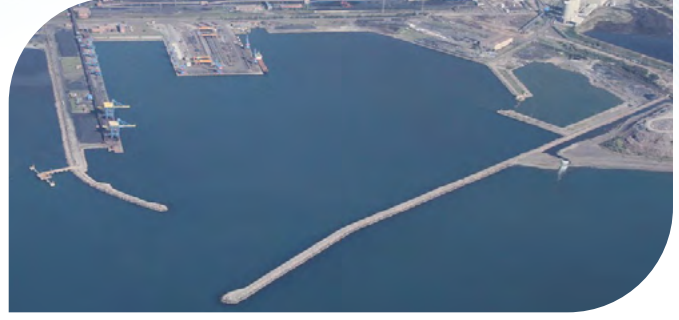
Equipment	Number	Capacity (ton)
Sennebogen 880	1	30
Liebherr LHM 250	1	65
ATLAS	1	6
Liebherr LH 40	3	5
Sennebogen 835	3	7
Excavator	5	*
Bulk Loading Machine	1	Approx. 3000mt/daily
Bobcat	1	*
Loder	2	1
Forklift	5	5-10-32

CONTACT DETAILS

Related Persons	Özkan UYGUR Gürkan BİLGE
Address	Güney Mah. Petrol Cad. No:27 41780 Körfez/Kocaeli
Telephone	0 262 316 22 30-31
Fax	0 262 316 22 95-96-97
E-mail	ozkan.uygur@igsas.com.tr gurkan.bilge@igsas.com.tr
Website	www.igsas.com.tr



İSKENDERUN DEMİR ÇELİK A.Ş.



PORT FEATURES

Administrator	İskenderun Demir Çelik A.Ş.
Coordinates	36° 43,30' N, 036° 11,06' E / 36° 43,35' N, 33° 11,15' E
Handled Cargo	General Cargo, Dry Bulk Cargo, Project Cargo, Liquid Bulk

Handling Capacity

General Cargo (Ton/year)	7.000.000
Dry Bulk Cargo (Ton/ year)	13.000.000
Liquid Bulk (Ton/ year)	1.000.000
Total Port Area	786.896 m ²
Customs Warehouse (Closed)	4.186 m ²
Customs Warehouse (Open)	69.640 m ²
Temporary Storage Area	270.190 m ²

Berth-Pier Dimensions

Length	1.501 m
Maximum Draft	-19 m

Equipment	Number	Brand	Capacity (ton)
Unloader Quay Crane	2	Tenova	50
MHC	2	Liebherr-Sennebogen	30-120
Quay Crane	4	Caillard-Ardelt	55
Quay Crane	2	Rikon	63
Forklift	11	Kalmar-TCM	5-7-10-32-45
Loader	5	Volvo-Komatsu-Cat	6,5-20,2
Excavator	9	Hyundai-Cat-Komatsu-Volvo	20-25,7
Mini Loader	2	Cat-Gehl	3
Cleaning Vehicle	1	-	7m ³

CONTACT DETAILS

Related Persons	Önder ÇAĞLAYAN
Address	Karşı Mahalle Şehit Yüzbaşı Ali Oğuz Bulvarı No:1 31900 Payas / HATAY
Telephone/Fax	0(326) 758 42 80 - 0(326) 758 52 41
E-mail	ocaglayan@isdemir.com.tr
Website	www.isdemir.com.tr



KORUMA KLOR ALKALİ

PORT FEATURES

Administrator	Koruma Klor Alkali San.ve Tic. A.Ş.
Coordinates	40° 45'1.44" N, 29° 51'41.1"E
Handled Cargo	General Cargo, Dry Bulk Cargo, Liquid Bulk

Handling Capacity

Dry Bulk Cargo (Ton/year)	50,000
General Cargo (Ton/year)	100,000
Liquid Bulk (Ton/ year)	250,000
Total Port Area	3,060 m ²

Berth-Pier Dimensions

Length	155 m
Maximum Draft	-12,5 m

CONTACT DETAILS

Related Persons	Özgür GÖKKAYA
Address	Deniz Mahallesi Petrol Ofisi Cad. No:43 41900 Derince/KOCAELİ
Telephone	0262- 239 22 70
Fax	0262- 223 12 12
E-mail	ozgur.gokkaya@koruma.com.tr
Website	www.koruma.com



KROMAN PORT

PORT FEATURES

Administrator	Kroman Çelik Sanayi A.Ş.
Coordinates	40°46'35"N & 29°35'45"E
Handled Cargo	General Cargo, Dry Bulk Cargo

Handling Capacity

Dry Bulk Cargo (Ton/year)	3.000.000
General Cargo (Ton/ year)	
Total Port Area	29.000 m ²
Warehouse Area	16.000 m ²
Customs Area	16.000 m ²
Parking Area	1.000 m ²

Berth-Pier Dimensions

Length	420 m
Maximum Draft	13 m

Equipment	Number	Capacity (ton)
MHC	4	40
Excavator	9	8-18
Forklift	6	5-25

CONTACT DETAILS

Related Persons	Ali ÇAKAR
Address	Kroman Liman Tesisleri Tavşancıl / DİLOVASI
Telephone	0.262.753 04 62 - 63
Fax	0.262.753 05 14
E-mail	ali.cakar@kromancelik.com.tr
Website	www.kromancelik.com.tr

KUMPORT

KUMPORT



PORT FEATURES

Administrator	Kumport Liman Hiz. ve Loj. San. Tic. A.Ş.
Coordinates	40° 58' N - 028° 41' E
Handled Cargo	Container, General Cargo, RORO

Handling Capacity

Container (TEU/year)	2.100.000
Total Port Area	473.347 m ²
Closed Warehouse	7.977 m ²
Customs Warehouse (Open)	369.605 m ²

Berth-Pier Dimensions

Length	2.238 m
Maximum Draft	-16,5 m

Equipment	Number	Capacity (ton)
SSG	9	70
MHC	5	104
RTG	24	45
Stacker	12	45
Empty Stacker	8	8

CONTACT DETAILS

Related Persons	E. Oğuzhan AĞCA
Address	Marmara Mah. Liman Cad. No:43 34524, Beylikdüzü - İSTANBUL
Telephone	+90 (212) 866 83 74
Fax	+90 (212) 875 27 60
E-mail	eoagca@kumport.com.tr
Website	www.kumport.com.tr



KUŞADASI CRUISE PORT - TRKUS



PORT FEATURES

Administrator	Ege Liman İşletmeleri A.Ş. (Ege Port)		
Coordinates	37° 51' 48" N 27° 15' 18" E		
Handled Cargo	Passenger		
Total Port Area	23,096 m ²		
Customs area (open)	2,135 m ²		
Pier Area	8.673 m ²		
Equipment Parking Area	3,800 m ²		
Berth-Pier Dimensions	Pier No 1-2	300 m length	9m - 17.0m depth
	Pier No 3-4	253 m length	9m - 17.0m depth
	Pier No 5-6	331 m length	9m - 18.0m depth
	Pier No 7-8	387 m length	9m - 18.0m depth

CONTACT DETAILS

Related Persons	Aziz GÜNGÖR Ege Port Kuşadası GM, Global Ports Holding Regional Director, East Med
Address	Ege Port - Kuşadası Cruise Port, Camikebir Mahallesi, Mahmut Esat Bozkurt Cd. No:20, 09400 Kuşadası/Aydın
Telephone	0256 614 15 81
Fax	0256 614 13 10
E-mail	info@egeportkusadasi.com
Web	www.kusadasicruiseport.com www.globalportsholding.com



LIKIT PORT TERMINAL

PORT FEATURES

Administrator	Likit Kimya San. ve Tic. A.Ş.
Coordinates	41° 00' 29" N - 27° 59' 43" E
Handled Cargo	Liquid Chemical Products, Petroleum Products

Handling Capacity

Liquid Bulk (Ton/year)	4.000.000 ton/yıl
Total Dolphin Area	1447m ²
Closed Warehouse	-

Berth-Pier Dimensions

Length	272 m
Maximum Draft	17,5 m

Equipment	Number	Capacity (ton)
Hose Handling Crane	1	2,5 ton - 22M

CONTACT DETAILS

Related Persons	Hasan ÖZMEN Özgür TEZCAN
Address	Sultanköy Mah. Ekşielma Cad. No:28 Marmaraereğlisi/TEKİRDAĞ
Telephone	(0282) 613 41 38 #204
Fax	(0282) 613 41 39
E-mail	hasan_ozmen@likitkimya.com ozgur_tezcan@likitkimya.com
Website	www.likitport.com



LİMAKPORT İSKENDERUN

PORT FEATURES

Administrator	Limak İskenderun Uluslararası Liman İşletmeciliği A.Ş.
Coordinates	36° 36' N, 36° 11' E
Handled Cargo	Container, Project Cargo, General Cargo, Dry Bulk Cargo, Ro-Ro, Livestock

Handling Capacity

Container (TEU/Year)	1.000.000
Dry Bulk Cargo (Ton/ Year)	3.000.000
General Cargo (Ton/ Year)	1.000.000
Ro-Ro (CEU/ Year)	100.000
Total Port Area	1.000.000 m ²

Berth-Pier Dimensions

Length	1.432 m
Maximum Draft	15.5 m

CONTACT DETAILS

Related Persons	Gündüz ARISOY
Address	Limakport İskenderun Limanı-İskenderun/HATAY
Telephone	0326 626 16 00
Fax	0326 614 00 48
E-mail	musterihizmetleri@limakports.com
Website	www.limakports.com



LİMAŞ LİMAN İŞLETMECİLİĞİ A.Ş.



PORT FEATURES

Administrator	Limas Liman İşletmeciliği A.Ş.
Coordinates	40°43'04"N & 29°53'07"E
Handled Cargo	Container, General Cargo, Dry Bulk Cargo, Liquid Bulk (Chemicals, Fuel Oil and Oil Products, Base Oil)

Handling Capacity

Dry Bulk Cargo (Ton/year)	1.000.000
General Cargo (Ton/ year)	1.000.000
Liquid Bulk (Ton/ year)	3.500.000
Total Port Area	120.000 m ²
Temporary Storage Area	44.100 m ²
Parking Area	1.000 m ²

Berth-Pier Dimensions	Berth 1	Berth 2
Length	202 m	285 m
Width	20,4 m	22,0 m
Maximum Draft	11,5 m	11,5 m

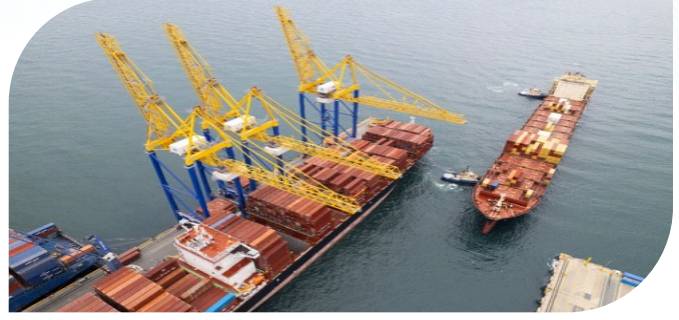
Equipment	Number	Capacity (ton)
Tanks	85	269.428 m ³

CONTACT DETAILS

Related Persons	Dr. Kürşat BAL
Address	Sepetlipınar mah. Sanayi Cad. No: 73 Başiskele / KOCAELİ
Telephone	0.262.317 58 00
Fax	0.262. 341 30 67
E-mail	kursat.bal@limas.com.tr
Website	www.limas.com.tr



MARDAŞ



PORT FEATURES

Administrator	Mardas Maritime Management Inc.
Coordinates	40°57.08'N & 028°40.07'E
Handled Cargo	Container, General Cargo, Bulk, Bulk Solid

Handling Capacity

Container (TEU/ year)	2.000.000
General Cargo (TON/year)	3.000.000
Total Area	265.415,40 m ²
Non-bonded Off-Dock Area	132.972,40 m ²
Customs Warehouse	9.369 m ²
Customs Area	123.074 m ²
Automobile – Truck Parking Area	10.000 m ²
CFS	5.000 m ²

Berth-Pier Dimensions

Length	1115 m
Maximum Draft	16,5 m

Equipment	Number	Capacity (ton)
SSG	3	24 rows
Mobile Crane	6	100-140
RTG	12	40
Reach Stacker	21	10-45
Excavator	4	10,7-22-22,3
MAFI	41	32-35-43,5
Forklift	33	3-5-10-12
Reach Truck	10	2
Loader	4	2,5-12-14,5

CONTACT DETAILS

Related Persons	Gökhan BEKİRCAN
Address	Marmara Mah. Liman Cad. Dış Kapı No:51 İç Kapı No:1 34524 Beylikdüzü/İSTANBUL
Telephone-Fax	0.212.875 27 32 - 0.212.875 27 38
E-mail	gokhanb@mardas.com.tr
Website	www.mardas.com.tr



MARPORT

PORT FEATURES

Administrator	Marport Terminal Operators S.A.
Coordinates	40° 57' 50" North, 28° 40' 25" East

Handling Capacity

Container (TEU/Year)	2.300.000
Total Port Area	530.000 m ²
Closed Warehouse	6.103 m ²
Customs Area	428.810 m ²

Berth-Pier Dimensions

Length	1.675 m + 30 m dolfen
Maximum Draft	- 16 m

Equipment

Equipment	Number
STS	14
MHC	2
RTG	41
CRS	8
ECS	13
Truck	102
Trailer	118

CONTACT DETAILS

Related Persons	Alp ÇAPA Özgür KALELİOĞLU
Address	Marmara Mahallesi, Liman Caddesi No: 53/1 Beylikdüzü İSTANBUL
Telephone	(0 212) 866 52 00
Fax	(0 212) 875 43 43
E-mail	info@marport.com.tr
Website	www.marport.com.tr



MARTAŞ PORT



PORT FEATURES

Administrator	Martaş Marmara Ereğlisi Liman Tesisleri A.Ş.
Coordinates	40° 58' N & 27° 56' E
Handled Cargo	General Cargo, Dry Bulk Cargo, Project Cargo, Liquid Bulk, Ro-Ro, Passenger, Container, Live Stock

Handling Capacity

Dry Bulk Cargo (Ton/year)	4.000.000
General Cargo (Ton/ year)	2.500.000
Liquid Bulk (Ton/ year)	500.000
Total Port Area	135.320 m ²
Warehouse Area	25.000 m ²
Closed Warehouse	6.000 m ²
Customs Warehouse	18.960 m ²
Customs Area	135.320 m ²
Parking Area	20,000 m ²
Equipment Parking Area	5.000 m ²

Berth-Pier Dimensions

Length	1500 m
Maksimum Derinlik	-20 m

Equipment	Number	Capacity (ton)
MHC	10	15 - 20 - 35 - 120 - 180
Forklift	9	3 - 7 - 16 - 32
Excavator	7	

CONTACT DETAILS

Kişi	Orhan ÇEBİ, Hayati ŞAHİN
Address	Martaş Marmara Ereğlisi Liman Tesisleri Bahçelievler Mah.Limanyolu Cad.No:19/ A Marmara Ereğlisi / Tekirdağ
Telephone	0. (216) 547 49 00 / 0(282)611 40 00
Fax	0. (216) 428 74 74 / 0(282)613 18 51
E-mail	orhancebi@kaptandemir.com.tr, hayati.sahin@kaptandemir.com.tr
Website	www.kaptandemir.com.tr



MESBAS - MERSIN FREE ZONE

PORT FEATURES

Administrator	MESBAS - Mersin Free Zone Founder and Operator Inc.
Coordinates	36° 46'20" N - 34° 39'00" E
Handled Cargo	General Cargo, Dry Bulk Cargo, Liquid Bulk, Container
Handling Capacity (ton/year)	2.000.000
Warehouse Area	---
Customs Area	---
Open Area	6.000 m ²
Total Port Area	38.532 m ²

Berth-Pier Dimensions

Length	521 m + 100 m
Maximum Draft	-10 m

Equipment	Number	Capacity (ton)
MHC	2	15
MHC	3	25

CONTACT DETAILS

Related Persons	Edvar MUM
Address	MESBAŞ İdari Binası Serbest Bölge Girişi - Akdeniz/Mersin
Telephone	(0 324)238 74 00
Fax	(0 324)238 74 10
E-mail	mail@mesbas.com.tr
Website	www.mesbas.com.tr



MERSİN INTERNATIONAL PORT



PORT FEATURES

Administrator	Mersin Uluslararası Liman İşletmeciliği A.Ş.
Coordinates	36° 47,15' N, 034° 38,50' E / 36° 47,30' N, 034° 38,6' E
Handled Cargo	Container, General Cargo, Dry Bulk Cargo, Project Cargo, Liquid Bulk, Ro-Ro, Passenger

Handling Capacity

Container (TEU/year)	3.600.000 TEU
General Cargo (Ton/ year)	1.500.000 Ton
Dry Bulk Cargo (Ton/ year)	8.500.000 Ton
Vehicle/Passenger	120.000 Vehicle / 20.000 Passenger
Total Port Area	138 hectares
Closed Warehouse	13.923,75 m ²
Customs B. Warehouse (open)	1.228.742,85 m ²

Berth-Pier Dimensions

Length	4013 m- (Excluding Ataş, Nato and Free Zone Berths)
Maximum Draft	-17,6 m

Equipment	Number	Capacity (ton)
SSG	15	40-65
MHC	5	70-150
aRMG	14	41
RTG	42	35-41
Stacker	15	45
Empty Stacker	15	12

CONTACT DETAILS

Related Persons	Erdal TONGUÇ
Address	Cami Şerif Mahallesi İsmet İnönü Bulvarı No:13 A Akdeniz/MERSİN
Telephone	0 (324) 241 29 00
Fax	0 (324) 232 46 71
E-mail	mip-info@globalpsa.com
Website	www.mersinport.com.tr



MMK METALURJİ

PORT FEATURES

Administrator	MMK Metalurji San. Tic. ve Liman İşletmeciliği A.Ş.
Coordinates	36° 46" 51.7' N & 36° 11" 12' E
Handled Cargo	Container, General Cargo, Dry Bulk Cargo, Project Cargo

Handling Capacity

General Cargo (Ton/year)	4.000.000
Dry Bulk Cargo (Ton/ year)	6.000.000
Total Port Area	40.000 m ²
Closed Warehouse	15.000 m ²
Customs warehouse (open)	20.000 m ²

Berth-Pier Dimensions	Length (Metre)	Width (Metre)	Max. Draft (Metre)
Pier 1	265	42	(-14,00)
Pier 2	265	42	(-13,50)
Pier 3	155	30	(-6,20)
Pier 4	200	17	(-9,00)
Pier 5	200	17	(-11,50)
Pier 6	160	17	(-12,00)
Pier 7	265	42	(-13,50)
Pier 8	265	42	(-14,00)

Equipment	Number	Capacity (ton/day)	Remarks
Cranes	1	6.000, 7.000	
	5	5.000, 6.000	
	7	3.000, 2.000	

CONTACT DETAILS

Related Persons	Gürol ÇETİN
Address	Özerli Mah. Alparslan Türkeş Blv. No:342/91 31600 Dört Yol-Hatay
Telephone	+90 (326) 770 10 00-1513
Fax	+90 (326) 718 16 18
E-mail	gurolcetin@mmkturkey.com.tr
Website	www.mmkturkey.com.tr



NEMPORT LİMAN İŞLETMELERİ



PORT FEATURES

Administrator	Nemport Liman İşletmeleri ve Özel Antrepo Nakl. Tic. A.Ş.
Coordinates	38° 46" 07' N & 26° 55" 51' E
Handled Cargo	Container, General Cargo, Project Cargo

Handling Capacity

Container (TEU/ year)	1.750.000
General Cargo (Ton/year)	2,000.000
Total Port Area	350.000 m ²
Customs Warehouse (Open)	245.000 m ²
Parking Area	26.000 m ²

Berth-Pier Dimensions

Length	1.689 m
Width	40 - 55 m
Maximum Draft	-19 m

Equipment	Number	Capacity (ton)
SSG	5	65 TON
MHC	5	4x100 T - 1x140 T
E-RTG	15	6+1 - 7
CRS	11	5 High 45 T
ECS	3	6 High 10 T
ECH	4	8 High 9 T
Truck	50	60 T

CONTACT DETAILS

Related Persons	Hakan TURUNÇ
Address	Siteler Mah. Kardeşlik Cad. No:12 Nemrut Körfezi Aliağa 35800-İZMİR
Telephone	0 232 618 3001
Fax	0 232 618 3020
E-mail	hturunc@nemport.com.tr
Website	www.nemport.com.tr



PETKİM PORT

PORT FEATURES

Administrator	Petkim Petrokimya Holding A.Ş.
Coordinates	38° 46.550' N - 026° 55.408' E Harbor light at E position and 38° 46' 30" N - 026° 55' 30" E on land 38° 46' 30" N - 026° 55' 49" It was established in the area connecting to point E.
Handled Cargo	Petroleum and Petroleum Derivatives within the Scope of MARPOL APPENDIX 1 & APPENDIX 2 Propylene , Butane, Liquefied Petroleum Gas and Ammonia within the scope of IGC CODE , Paraxylene, Acrylonitrile, Paygaz, Naphtha, C5, Orthoxylene, Acetic Acid, Heptane , Hexane , Meg, Deg, Aromatic Oil, Cuttersotck, VCM, EDC, Raffinate and Caustic within the scope of IBC CODE

Handling Capacity

Ton/year (Total)	1.500.000		
Berth-Pier Dimensions	Quay- II	Quay- III	Jetty -V
Length (m)	It is out of use due to the works carried out within the scope of modernization, and the Ship / Cargo operation is not carried out	190	221
Maksimum Depth (m)		11,49	10,5

CONTACT DETAILS

Related Persons	Ali Samed ATAMAN
Address	Petkim Petrokimya Holding A.Ş Siteler Mah. Necmettin Giritlioğlu Cad. No: 6/1, SOCAR Türkiye Aliğa Yönetim Binası 35800 Aliğa - İZMİR
Telephone	0232 616 12 40 (2690)
Fax	0232 616 36 53
E-mail	samed.ataman@socar.com.tr
Website	https://www.petkim.com.tr/liman-operasyonlari



POLİPORT

PORT FEATURES

Administrator	Poliport Kimya Sanayi ve Ticaret A.Ş.
Coordinates	40° 46' N & 29° 31' E
Handled Cargo	General Cargo, Dry Bulk Cargo, Liquid Bulk

Handling Capacity

Dry Bulk Cargo (Ton/Year)	3.000.000
General Cargo (Ton/ Year)	2.000.000
Liquid Bulk (Ton/ Year)	2.500.000
Tank Storage Capacity	272.727 m ³
Total Port Area	230.000 m ²
Customs Warehouse (Closed)	4.268 m ²
Customs Warehouse (Open)	29.881 m ²
Chemical Customs Warehouse (Closed)	2.125 m ²
Temporary Bonded Warehouse (Closed)	1.260 m ²
Temporary Bonded Warehouse (Open)	14.740 m ²
Unbonded Warehouse	3.100 m ²

Berth-Pier Dimensions

Length	1.200m
Maximum Draft	Min 10.0 Max 27,0 m

Equipment	Number	Capacity (ton)
Crane	6	20-124

CONTACT DETAILS

Related Persons	Erdoğan AKDENİZ, Güven KARAGÜVEN, Burçin YALAZAN
Address	Dilovası Organize Sanayi Bölgesi 1. Kısım Liman Cd. No:7 Dilovası / KOCAELİ
Telephone	0262 679 71 00
Fax	0262 754 52 25
E-mail	eakdeniz@poliport.com, gkaraguvan@poliport.com, byalazan@poliport.com
Website	www.poliport.com



PORT YARIMCA RO-RO TERMINAL



PORT FEATURES

Administrator	Oyak Nyk Ro-Ro Port Management Inc.
Coordinates	29°45'253" E 40°45'731" N
Handled Cargo	Ro-Ro

Handling Capacity

Vehicle (CEU/Year)	780.000
Total Port Area	235.000 m ²
Multi Storey Car Park	265.000 m ²

Berth-Pier Dimensions

Length	540 m
Maximum Drift	12 m

Equipment	Number	Capacity
Terminal Tractor	1	G.V.W 47 tons / G.C.W 130 tons
Gooseneck	2	SWL 36 tons / Tare 3.5 tons
Forklift	2	9 ton, 5 tons

CONTACT DETAILS

Related Persons	Gökalp SÖZEN
Address	Mimar Sinan Mahallesi Seramik Caddesi No:2 41780 Körfez / KOCAELİ
Telephone	0 262 310 56 00
Fax	0 262 310 57 49
E-mail	info@portyarimca.com
Website	www.portyarimca.com



QTERMINALS ANTALYA

PORT FEATURES

Administrator	Ortadoğu Antalya Liman İşletmeleri A.Ş.
Coordinates	36°50'02"N - 30°36' 59"E
Types of ships	All types of general / bulk cargo ships, container ships, ro-ro ships which carries vehicles on tyre, all types of cruise ships

Handling Capacity

Container (TEU/Year)	350.000
Dry Bulk Cargo (Ton/ Year)	4.000.000
Passenger	600.000
Total Port Area	201.204 m ²
Warehouse	30.918 m ²
Customs Area	Whole port area
Custom Bounded Warehouse	1440 m ²
Parking Area	5.000 m ²
CFS Area	50.000 m ²
Outside Warehouse	6.729 m ²
Outside Terminal	0 m ²

Berth-Pier Dimensions

Length	1.147 m
Maximum Draft	9,50 m

Equipment	Number	Capacity (ton)
MHC	8	40 - 150
Excavator	9	5 - 15
Stacker	6	45
Side Lifter	2	8
Mini Loader	3	1,4 m ³
Last. Loader	2	2,5-5,5 m ³
Forklift	35	3-5-10-16-33

CONTACT DETAILS

Related Persons	Hüseyin SİPAHİOĞLU
Address	Liman Mh. Liman Cad. 07130 Konyaaltı / ANTALYA
Telephone	0(242) 259 13 80
Fax	0(242) 259 11 83
E-mail	hsipahioglu@QTerminals-Antalya.com
Website	www.QTerminals-Antalya.com



RİPORT LİMAN İŞLETMESİ A.Ş.



PORT FEATURES

Administrator	Riport Liman İşletmesi A.Ş.
Coordinates	41°02'47"N & 40°34'20"E
Handled Cargo	General Cargo, Dry Bulk Cargo

Handling Capacity

Container (TEU/Year)	10.000 ton/year
Dry Bulk Cargo General Cargo (Ton/ Year)	3.000.000 ton/year
General Dry Cargo Loading Capacity	350 tons/hour
Mineral Concentrate Shiploader Capacity	300 tons/hour
Ro-Ro (Ton/ Year)	4000 vehicle/year
Total Port Area	181.335,42 m ²
Warehouse Area (Open)	30.000 m ²
Closed Storage Area	14.348,62 m ²
General Warehouse	1.000 m ²
Temporary Storage Area	3.360,62 m ²
Semi-Enclosed Storage Area	11.542 m ²

Rıhtım ve İskele Özellikleri

Length	557,50 m
Maximum Draft	11 m

Equipment	Number	Capacity (ton)
TUG BOAT "ALİBABA" (offshore tugboat)	1	32 Ton
TUG BOAT "Riport Pilot"	1	760 BHP (12 Ton)
RİPORT-1 PALAMAR BOAT "mooring boat"	1	260 BHP (5 Ton)
Tractor (NEW HOLLAND) (sweeping vehicle)	1	10 TON
Forklift (LİNDE)	1	5 Ton
Sweeping Vehicle	1	
Mobile Crane (COLES)	1	
210 KWA Generator	1	
Electronic Scale	1	80 Ton

CONTACT DETAILS

Related Person	Asım ÇİLLİOĞLU
Address	Rize Liman İşletmesi Yatırım A.Ş. Riport Plaza Menderes Bulvarı - Rize Limanı / Rize
Telephone	0464 223 53 53
Fax	0464 223 55 55
E-mail	asimcillioglu@riport.com
Website	www.riport.com.tr



RODA PORT

PORT FEATURES

Administrator	Roda Liman Depolama ve Lojistik İşletmeleri A.Ş.
Coordinates	40°24 " N & 29 °32 " E
Handled Cargo	Container, General Cargo, Bulk

Handling Capacity

Container (TEU/year)	200.000
Bulk and General Cargo (Ton/year)	3.000.000
Total Port Area	111.437 m ²
Terminal Closed&Semiclosed Warehouse	11.500 m ²
Total Custom Bonded Warehouse (Open)	95.536 m ²
Total Customs Unbonded Warehouse (Open & Closed)	67.797 m ²
Roda Logistics Center A type Warehouse	26.492 m ²
Roda Logistics Center Free Warehouse	16.800 m ²

Berth-Pier Dimensions

Length	1.200 m
Maximum Draft	-14,5 m

Equipment	Qty.	Capacity (ton)
Mobile Harbour Crane (MHC)	5	100
Mobile Harbour Crane (Excavator)	5	10-25
RTG	2	40
Reachsteaker (Full)	5	45
Reachsteaker (Empty)	1	10
Terminal Track	19	Kalmar & Mercedes
Trailer	29	Cont.&Platfom&Tipping&Hrdx
Loader	1	19 ton - 6 m ³
Portal Crane	2	30-35
Heavy cargo forklift	4	16-32
Light cargo forklifts	16	2-7
Overhead crane	17	5-35
Narrow corridor stacking mach.	2	1,5
Wide corridor stacking mach.	1	1,6
Electric pallet truck	3	2,5
Mini loader	6	2,5/3,5

CONTACT DETAILS

Related Persons	Y. Ahmet YAVUZ
Address	Ata Mah. 146 No.lu Sokak No:5 16600 Gemlik/BURSA
Telephone/Fax	0.224.519 0030/0.224.519 0031
E-mail	info@rodaport.net
Website	www.rodaport.com



SAMSUNPORT

PORT FEATURES

Administrator	Samsunport - Samsun International Port Management Inc.
Coordinates	41° 18'00" N - 36° 22'00" E
Handled Cargo	Container - General Cargo - Project Cargo - Bulk Cargo (Solid/Liquid) - Ro Ro - Train Ferry - Passenger - Livestock - Yacht - Trailer- Transit Truck

Handling Capacity

Container (TEU/year)	300.000
General and Bulk Cargo (Ton/Year)	14.500.000
Liquid Bulk Cargo (Ton/Year)	100.000
RoRo/Passenger	100.000/20.000
Total Port Area	445.000 m ²
Closed Warehouse	70.000 m ²
Silo (Ton)	84.000

Berth-Pier Dimensions

Length	1.756 m
Maximum Draft	-11,00 m

Equipment	Number	Capacity (ton)
Crane	15	5 - 124

CONTACT DETAILS

Related Persons	Vedat KAMSIZ
Address	Haçerli Mah. Sahil Yolu Sk. No:35 55100 İlkadım - SAMSUN
Telephone	0362 445 14 00
Fax	0362 445 14 08
E-mail	info@samsunport.com.tr
Website	www.samsunport.com.tr



SOCAR TERMINAL

PORT FEATURES

Administrator	SOCAR Aliğa Liman İşl. A.Ş.
Coordinates	38° 46' 44" N & 26° 55' 51" E
Handled Cargo	Container, General Cargo

Handling Capacity

Container (TEU/year)	1.500.000 TEU
Total Port Area	420.000 m ²
Closed Warehouse	1.754 m ²
Shed	699 m ²
Customs Warehouse (Open)	400.000 m ²
Truck Parking Area (Pre-gate)	30.000 m ²

Berth-Pier Dimensions

Length	700 m (Container) / 150 m (General Cargo)
Maximum Draft	-16 m (Container) / -10 m (General Cargo)

Equipment	Number	Capacity (ton)
STS	3	70
RTG	10	45
Reach Stacker	3	45
Empty Container Handler	3	8
Terminal Tractor	26	50

CONTACT DETAILS

Related Persons	Esra GÜNDÜZ
Address	Siteler Mahallesi Kardeşlik Caddesi No:16 35800 Aliğa-İZMİR
Telephone	+90 (0) 232 455 65 55
E-mail	izmir@socarterminal.com
Website	www.socarterminal.com



SOLVENTAř

PORT FEATURES

Administrator	Solventař Teknik Depolama A.ř.
Coordinates	40° 46" 0,34' N 29° 32" 40' E
Handled Cargo	Liquid Bulk, Dry Chemicals

Handling Capacity

Liquid Bulk (Ton/year)	4.000.000
Total Port Area	24.000 m ²
Closed Warehouse	1.579 m ²
Customs Area (Open)	24.000 m ²

Berth-Pier Dimensions

Length	Jetty1: 270 m	Jetty2: 235 m
Maximum Draft	11 m	

CONTACT DETAILS

Related Persons	Serhan CİLENGİR
Address	Dilovası Organize Sanayi Bölgesi 1. Kısım Tuna Cad. No: 7 41455, Dilovası - Kocaeli
Telephone	+ 90 262 648 27 00
Fax	+ 90 262 648 27 95
E-mail	serhan.cilengir@aryholding.com
Website	www.solventas.com.tr



TBH PORT ADANA

PORT FEATURES

Administrator	SANKO Petrokimya Mamulleri Sanayi ve Ticaret A.Ş.
Coordinates	36°50' 22" N - 35°53' 53" E
Handled Cargo	Container - General Cargo - Project Cargo - Bulk Cargo

Handling Capacity

Containers (TEU/year)	250.000
Bulk and General Cargo (Tons/year)	8.000.000
Total Area	1.300.000 m ²
Temporary Storage Area	250.000 m ²
Covered Warehouse	45.000 m ²
Bonded Open Area	330.000 m ²
Non-Bonded Open Area	105.000 m ²

Berth-Pier Dimensions

Length	1.297 m
Maximum Draft	18 m

Equipment	Brand	Capacity	Quantity
Cable Mobile Harbour Crane	Liebherr	154	1
Cable Mobile Harbour Crane	Liebherr	144	1
Cable Mobile Harbour Crane	Liebherr	124	1
Crawler Mobile Harbour Crane	Sennebogen	30	1
Crawler Mobile Harbour Crane	Sennebogen	50	1
Forklift	Doosan	7	3
Telehandler	Mst	3,5	1
Forklift	Doosan	9	4
Reach Stacker	Hyster	46	2
Reach Stacker	Kalmar	45	2
Forklift	Doosan	16	1
Empty Container Handling Machine	Hyster	8	1
Forklift	Doosan	3	2
Forklift	Doosan	5,5	1

CONTACT DETAILS

Related Persons	Erhan OĞLAKÇI, Seyhan KARAÇAY
Address	Sugözü, 01682 Yumurtalık/Adana
Telephone/Fax	0322 675 23 50, 0322 675 23 55
E-mail	info@adanaport.com
Website	www.adanaport.com



TFS - TURKISH FUEL SERVICES



PORT FEATURES

Administrator	TFS Akaryakıt Hizmetleri A.Ş.
Coordinates	41°18'48.12"N - 28°47'19.71"E
Handled Cargo	JET A-1

Handling Capacity

Liquid Bulk (Ton/year)	10.000.000
Total Dolphin Area	841.713,420 m ² 318.574,820 m ²
Closed Warehouse	-

Berth-Pier Dimensions

Length	320 m
Maximum Draft	18 m

Equipment	Quantity	Capacity (ton)
Tank	10	300.000 m ³
Loading Arm	3	1x16" + 2x12"
Quick Release Hook	8	2x150 t (triple) + 6x100 t (double)

CONTACT DETAILS

Related Persons	B.Fatih DEMİR R.Bayram GÖKTAŞ
Address	Yeniköy Mah. Hezarfen Ahmed Çelebi Caddesi No:4/1 34277 ARNAVUTKÖY - İSTANBUL
Telephone	444 7 837
Fax	0212 891 35 35
E-mail	bfatih.demir@turkishfuel.com bayram.goktas@turkishfuel.com
Website	www.turkishfuel.com


TOROSPORT

TOROSPORT CEYHAN



PORT FEATURES

Administrator	Toros Tarım Sanayi ve Ticaret A.Ş. (Ceyhan Terminal)
Coordinates	West Jetty (Shore/Sea Side) 36 55 00 N-35 58 54 E, 36 54 24 N - 35 59 06 E East Jetty (Shore/Sea Side) 36 55 12 N-35 59 18 E, 36 58 53 N-35 59 03 E
Handled Cargo	General Cargo, Dry Bulk Cargo, Project Cargo, Liquid Bulk

Handling Capacity

D.Bulk and G.Cargo (Ton/year)	14.400.000
Liquid Bulk (Ton/ year)	13.500.000
Total Port Area	750.000 m ²
Open Warehouse Area	550.000 m ² - open warehouse area
Closed Warehouse	40.480 m ³ - chemicals tanks 60.751 m ² - dry bulk warehouse
Customs Warehouse	189.500 m ³ - tanks 20.250 m ² - closed grain warehouse 57.650 m ² - open dry bulk warehouse
Parking Area	30.000 m ²
Equipment Parking Area	10.000 m ²

Berth-Pier Dimensions

Length	1.465 m
Maximum Draft	15,50 m

CONTACT DETAILS

Related Persons	Mehmet PUSAT
Address	Sarımazı Mahallesi, Ceyhan/ADANA
Telephone	+90 322 634 22 22 (Dahili: 241)
Fax	+90 322 634 23 23
E-mail	mehmet.pusat@toros.com.tr
Website	www.torosterminal.com.tr



TOROSPORT

TOROSPORT SAMSUN



PORT FEATURES

Administrator	Toros Tarım Sanayi ve Ticaret A.Ş. (Samsun Terminal)
Coordinates	36° 27' 24" E, 41° 15' 02" N
Handled Cargo	Genel General Cargo, Dry Bulk Cargo, Project Cargo, Liquid Bulk

Handling Capacity

D. Bulk and G. Cargo (Ton/year)	4.608.000
Liquid Bulk (Ton/ year)	3.650.000
Total Port Area	1.189.000 m ²
Warehouse Area	223.000 m ² - open warehouse area
Closed Warehouse	96.825 m ³ - chemicals tanks 40.951 m ² - closed dry bulk warehouse
Parking Area	3.215 m ²
Equipment Parking Area	1.000 m ²

Berth-Pier Dimensions

Length	408 m
Maximum Depth	19 m

CONTACT DETAILS

Related Persons	Halil ŞAHİN
Address	Yamanevler Mahallesi, Ahmet Tevfik İleri Caddesi, 4B Plaza, No: 22-26, İç Kapı No: 48, Kat: 12-13 34768 Ümraniye - İstanbul
Telephone	+90 212-357 02 02
Fax	+90 212-357 02 31 - 32
E-mail	halil.sahin@toros.com.tr
Website	www.torosterminal.com.tr



ULUSOY ÇEŞME PORT

PORT FEATURES

Administrator	Ulusoy Çeşme Liman İşletmesi A.Ş.
Coordinates	38° 19' 30" N 26° 17' 44" E
Handled Cargo	Vehicle, Passenger
Total Port Area	80.000 sqm

Piers

1-Main pier	322.0 mt x15 mt.(1 dolphin) Depth:8.0-16mt
2- Ro-Ro pier	213.0 x 8,60 mt.(5 dolphin) Maximum Draft: -16 m
3- Small pier	50.0 mt x 5 mt. Maximum Draft: -7.0 m

CONTACT DETAILS

Related Persons	Celal ULAŞ
Address	Musalla Mah. 1107 Sokak No:2 ÇEŞME/İZMİR
Telephone	(0232) 712 87 49
Fax	(0232) 712 04 27
E-mail	cesmeport@ulusoysealines.com
Website	www.ulusoysealines.com



YALOVA RO-RO TERMINAL



PORT FEATURES

Administrator	Yalova Ro Ro Terminali A.Ş.
Coordinates	41° 41' 25" N 29° 25' 52" E
Handled Cargo	Ro-Ro Cargo Units

Handling Capacity

Container (TEU/year)	0
Bulk and General Cargo (Ton/ year)	0
Liquid Bulk (Ton/ year)	0
Ro-Ro (Vehicle/ year)	150.000
Total port area (Customs)	135.000 m ²
Closed Warehouse	14.000 m ²
Parking Area	100.000 m ²

Berth-Pier Dimensions

Length	300 metre Pier 300 metre Dolfen, Total 3 Ramps
Maximum Draft	10m

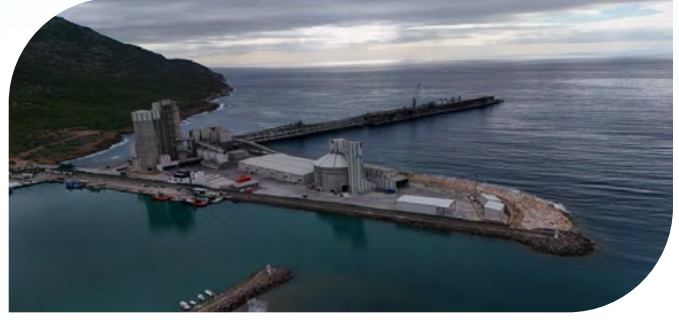
Equipment	Number	Capacity (ton)
Waste Reception Facility	7 Tank	450m ³
ADR'li Tanker	1	36m ³
Terminal Tractors	14	60
Reach Stacker	3	45
Mooring Boat	1	-

CONTACT DETAILS

Related Persons	Mehmet Akif KARAMEHMETOĞLU, Mustafa Özlen ATÇEKEN
Address	Taşköprü Merkez Mah. Yalova-Kocaeli Yolu Cad. No:4/1-2 Çiftlikköy/Yalova
Telephone	0226 815 8000
Fax	-
E-mail	mustafa.atceken@yalovaroro.com, mehmetakif.karamehmetoglu@yalovaroro.com
Website	www.yalovaroro.com

medcem PORT

YEŞİLOVACIK LİMAN İŞLETMELERİ A.Ş.



PORT FEATURES

Administrator	Yeşilovacık Liman İşletmeleri A.Ş.
Coordinates	36.10747 N 33.39042 E
Handled Cargo	Bulk Cargo, General Cargo
Total Bulk and General Cargo	10.000.000 mt/year
Total Port Area	57.000 m ²
Cement/Clinker Silo	58.000 mt / 55.000 mt
Closed Warehouse	6.000 m ²

Berth-Pier Dimensions

Length	772 m
Maximum Draft	-21m

Equipment	Number	Capacity
Liebherr LPS 420	1	124 ton
BEDESCHI Shiploader	3	1.300 mt/h
ARTEK Shiploader	1	500 mt/h

CONTACT DETAILS

Related Persons	Seçkin KARACA
Address	Atatürk Mah.Ertuğrul Gazi Sk. Metropol İst.St.C2 Bl.Ap.2A/28 Ataşehir - İstanbul
Telephone\Fax	0324-7475110/ 0324-7475190
E-mail	medcemport@medcem.com.tr
Website	www.medcemport.com.tr



YEŞİLYURT PORT

PORT FEATURES

Administrator	Yeşilyurt Demir Çelik End. ve Liman İşl. A.Ş.
Coordinates	45° 15' 14" N, 36° 26' 66" E
Handled Cargo	General Cargo, Dry Bulk Cargo

Handling Capacity

Dry Bulk Cargo (Ton/year)	8.000.000
General Cargo (Ton/year)	
Total Port Area	206.000 m ²
Customs Bonded Warehouse	44.000 m ²
Bonded Closed Area (Warehouse)	14.000 m ²
Warehouse	115.000 m ²
Closed warehouse	33.000 m ²
Silo Trucks (10 Units)	35.000 m ²

Berth-Pier Dimensions

Length	950
Maximum Draft	-20

Equipment	Number	Capacity (ton)
MHC	13	15-180 Ton
Forklift	7	5-17 Ton
Excavator	5	130-240 HP
Loader	13	80-270 HP
Tracks	26	25-150 Ton

CONTACT DETAILS

Related Persons	Salih CENGİZ Port Manager
Address	Organize Sanayi Bölgesi Kutlukent / SAMSUN
Telephone, Fax	(+90 362) 266 43 55 / (+90 362) 266 55 62
E-mail	salihcengiz@yesilyurtliman.com
Website	www.yesilyurtliman.com


YILDIZ ENTEGRE

YILDIZ ENTEGRE PORT



PORT FEATURES

Administrator	Yıldız Entegre Ağaç San. Tic. A.Ş.
Coordinates	40° 43,071 N & 029° 53,423 E
Handled Cargo	General Cargo, Bulk Cargo, Liquid Bulk

Handling Capacity

Bulk and General Cargo (Ton/ year)	1.000.000
Liquid Bulk (Ton/ year)	200.000
Total Port Area (Customs)	9.721 m ²

Berth-Pier Dimensions

Length	275 m
Maximum Draft	18,50 m

Equipment	Number	Capacity (ton)
Sennebogen 6200	1	64
Liebherr LHM 500	1	140
Liebherr LH 40	1	5
Atlas 350 TM	1	6
Sennebogen 835 M Special	1	8
Sennebogen 835 D Special	1	8
Sennebogen 835 R Special	1	8
Volvo L 120 Loder	1	
Volvo L 150 Loder	1	
Kalmar DCD 320 – 12 Forklift	1	32
TCM Forklift	1	10
Hyster Forklift	1	5

CONTACT DETAILS

Related Persons	R. Emre YAZICI / M. Yasin UYGUN
Address	Sepetlipınar mah. Yavuz Özer Cad. No:19 41275 Başiskele / KOCAELİ
Telephone	0262 280 79 00
Fax	0262 280 79 10
E-mail	emre.yazici@yildizentegre.com.tr, mahmut.uygun@yildizentegre.com.tr
Website	www.yildizentegre.com



YILPORT GEBZE

PORT FEATURES

Administrator	YILPORT Gebze Konteyner Terminali ve Liman İşletmeleri A.Ş.
Coordinates	40° 46' 3.76 N" ; 29° 31' 57.02" E
Handled Cargo	Container, General Cargo, Dry Bulk Cargo

Handling Capacity

Container (TEU/ year)	1.000.000
General Cargo (Ton/year)	5.000.000
Total Port Area	345.000 m ²
Warehouse	1000 m ² bonded temporary storage area 2000 m ² unbonded warehouse
Customs Bonded Warehouse	4400 m ² Type A temporary storage area 2000 m ² unbonded warehouse
Customs Area (Open)	237.000 m ²
Customs area warehouse(unbounded)	95.000 m ²

Berth-Pier Dimensions

Length	1.455 m
Maksimum Depth	30 m

Equipment	Number	Capacity (ton)
STS	8	70
RTG	31	41
REACH STACKER	7	45
EMPTY HANDLER	3	8

CONTACT DETAILS

Related Persons	Remzi Cem GÖKTAŞ, Okan ÖZAY
Address	Dilovası Organize Sanayi Bölgesi 1.Kısım Gökusu Cd. No:18 Dilovası 41455 KOCAELİ
Telephone, Fax	(262) 679 7600
E-mail	rcem.goktas@yilport.com, okan.ozay@yilport.com
Website	www.yilport.com



YILPORT KÖRFEZ

PORT FEATURES

Administrator	Rota Liman Hizmetleri Sanayi A.Ş.
Coordinates	40° 46' 16" N; 29° 43' 23" E
Handled Cargo	General Cargo, Dry Bulk
Handling Capacity	4.000.000 Ton/year
Total Port Area	126.416 m ²
Closed Warehouse	22.575 m ²
Customs Warehouse (Open)	29.211 m ²
Open Area	62.254 m ²
Duty-free Indoor Area	12.376 m ²

Berth-Pier Dimensions

Length	745 m
Maximum Draft	18 m

Equipment	Number	Equipment	Number
Linde Forklift (2,3,5,6 Ton)	15	Volvo L120 Loader	1
Clark Forklift (13.5 Ton)	1	Caterpillar 307 Excavator	2
Kalmar Forklift (20 Ton)	1	Caterpillar D4 Dozer	1
Bobcat Telehandler	1	Siwertell Halmstad Unloader (600 T/Hour)	1
Caterpillar 908 Loader	1	Siwertell Mega Unloader (400 T/Hour)	1
Caterpillar 914 Loader	1	Siwertell 10.000 S Unloader (350 T/Hour)	1
Caterpillar 930 Loader	2	Liebherr CBG Crane (30 M/30 Ton)	1
Volvo L110 Loader	1		

CONTACT DETAILS

Related Persons	Remzi Cem GÖKTAŞ Serhat YİĞENLİ
Address	Atalar Mah. Sahil Cd. Liman Mevkii Rota Limanı 41740 Körfez- KOCAELİ
Telephone	0 (262) 528 10 07
Fax	0 (262) 528 6199
E-mail	rcem.goktas@yilport.com serhat.yigenli@yilport.com
Website	www.yilport.com



ZEYPORT ZEYTİNBURNU LİMAN İŞLETMELERİ



PORT FEATURES

Administrator	Zeyport Zeytinburnu Liman İşlt. San.ve Tic. A.Ş.
Coordinates	40° 58,8' N 028° 53,9' E
Handled Cargo	Ferry/Passenger, Ro-Ro, General Cargo

Handling Capacity

Ro-Ro Transportation	180 Truck/Day
Ro-Ro (vehicle/year)	65.700/Year
Total Port Area	44.770 m ²
Warehouse Area	552,48 m ²
Closed Warehouse	936,62 m ²
Customs warehouse (Temporary storage)	552,48 m ²
Customs Area	14.876 m ²

Berth-Pier Dimensions

	5 X 112 m
	3 X Ro-Ro ramp
Length	112 m
Maximum Draft	Maks. 7,00 m. Safe Berth: 6,00 m.

Equipment

MHC cap: 15 M/T	Forklift cap: 3 M/T (1 pcs)
Mobile Crane: 40 TON (1 pcs)	Forklift cap: 5 M/T (2 pcs)
Stack Machine: 3 TON (1 pcs)	Electric Pallet Truck: 1 TON (2 pcs)

CONTACT DETAILS

Related Persons	H. Muzaffer ERMİŞ, Recep DÜZGİT
Address	Sahil Kennedy Caddesi Liman Sokak No:1 Zeytinburnu / İSTANBUL
Telephone	0212 679 90 01
Fax	0212 679 90 00
E-mail	operation@zeyport.net
Website	www.zeyport.net

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