TURKISH SHIPBUILDING INDUSTRY AND ITS FUTURE CHALLENGES

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GENERAL DIRECTORATE OF SHIPYARDS AND COASTAL STRUCTURES
SHIPYARDS UNDER OPERATION

Source: General Directorate of Shipyards and Coastal Structures
Project Capacity of Active Shipyards (Million DWT/Year)

- 2003: 0.55
- 2012: 3.60

Number of Active Shipyards

- 2003: 37
- 2012: 71

Source: General Directorate of Shipyards and Coastal Structures
<table>
<thead>
<tr>
<th>No</th>
<th>Country</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>China</td>
<td>1,713</td>
</tr>
<tr>
<td>2</td>
<td>S. Korea</td>
<td>762</td>
</tr>
<tr>
<td>3</td>
<td>Japan</td>
<td>711</td>
</tr>
<tr>
<td>4</td>
<td>Vietnam</td>
<td>158</td>
</tr>
<tr>
<td>5</td>
<td>Turkey</td>
<td>83</td>
</tr>
<tr>
<td>6</td>
<td>India</td>
<td>79</td>
</tr>
<tr>
<td>7</td>
<td>Philippines</td>
<td>57</td>
</tr>
<tr>
<td>8</td>
<td>Russia</td>
<td>54</td>
</tr>
<tr>
<td>9</td>
<td>Bangladesh</td>
<td>49</td>
</tr>
<tr>
<td>10</td>
<td>Brazil</td>
<td>47</td>
</tr>
</tbody>
</table>

Source: Fairplay 11/2012
### EMPLOYMENT IN SHIPBUILDING INDUSTRY (PERSON)

<table>
<thead>
<tr>
<th>SECTOR</th>
<th>2003</th>
<th>2007</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shipyard</td>
<td>14.000</td>
<td>33.480</td>
<td>23.000</td>
</tr>
<tr>
<td>Sub-Industry</td>
<td>42.000</td>
<td>100.440</td>
<td>65.000</td>
</tr>
</tbody>
</table>

Source: General Directorate of Shipyards and Coastal Structures
SHIPBUILDING INDUSTRY DELIVERIES

WORLD SHIP DELIVERIES

15%

2003 2004 2005 2006 2007 2008 2009 2010 2011

SHIP DELIVERIES IN TURKEY

31%

2003 2004 2005 2006 2007 2008 2009

Source: Platoa Report
SHIP RECYCLING IN TURKEY

ALIAGA/IZMIR
SHIP RECYCLING REGION

Source: General Directorate of Shipyards and Coastal Structures
GOVERNMENT PERSPECTIVE FOR THE SHIPBUILDING INDUSTRY

✓ IMPORTANT GENERATOR OF EMPLOYMENT
✓ NATIONAL ECONOMIC PERFORMANCE
✓ NEW INVESTMENTS
✓ SUPPORTER OF INDUSTRIAL CAPABILITIES
✓ DEVELOPMENT OF TECHNOLOGICAL CAPACITY
✓ STRATEGIC INDUSTRY (SECURITY & DEFENCE)
✓ VEHICLE TO SUPPLY INDUSTRY
✓ PILLAR OF REGIONAL DEVELOPMENT
THE GOAL OF NATIONAL POLICY FOR THE SHIPBUILDING INDUSTRY

✓ SUSTAINABLE DEVELOPMENT OF SHIPBUILDING INDUSTRY IN ALIGNMENT WITH INTERNATIONAL RULES
✓ INCREASE IN EMPLOYMENT CAPACITY
✓ FOCUS ON MORE SPECIALIZED VESSEL TYPES
✓ ESTABLISHMENT OF ORGANISED INDUSTRIAL ZONES
✓ DEVELOPMENT OF MEGA YACHT CONSTRUCTION
✓ CAPACITY INCREASE IN MAINTENANCE & REPAIR
✓ INCREASE IN DOMESTIC PRODUCTION OF SHIP MATERIAL & EQUIPMENT
✓ INCREASE IN MARITIME SAFETY
✓ FAIR COMPETITION IN SHIPBUILDING
WHAT SHOULD BE THE GOAL OF INTERNATIONAL POLICY FOR THE SHIPBUILDING INDUSTRY?

- SUSTAINABLE DEVELOPMENT OF WORLD SHIPBUILDING
- ESTABLISHMENT OF NORMAL COMPETITIVE CONDITIONS
- MONITORING MARKET DISTORTING PRACTICES
- PROMOTION OF GREEN SHIPYARDS
- CONSTRUCTION OF MORE ENVIRONMENTAL FRIENDLY SAFE VESSELS
- COORDINATION OF THESE ACTIVITIES (OECD WP6, IMO)
Grand Canyon is a 125 meters long, 25 meters wide electric propulsion offshore vessel with a helicopter deck, DP III notation, 6 pcs of Side Maneuvering Thrusters and accommodation for 108 persons.
New Type Patrol Boats

• Patrol Turkish coasts and channels
• Explore possible threats
• Support other navy vessels to defend the navy bases.
Assigned for Search & Rescue Missions as well as patrol in Turkish waters for Pollution Prevention.
Increase the capability of the Turkish Underwater Attack Teams.
LCT – Landing Craft Tanks

Anadolu Shipyard

Landing craft of 80 m. for amphibious operations & natural disaster relief
LST – Landing Ship Tanks

Anadolu Shipyard

Landing ship of 140 m. for amphibious operations & natural disaster relief
Submarine Rescue Mother Ship (MOSHIP)

- provide the crew of a damaged submarine with life support
- rescue them (up to 600 m. depth) in maximum 72 hours
- handle rescue and salvage operations for surface ships
- provide subsea repair works and wreck removal
Tasked with 2D/3D seismic research in order to conduct the research and with sampling studies regarding the hydrography, oceanography, hydroacoustic, geology and earthquakes.
Landing Platform/Dock (LPD)

- Amphibious warfare ship that embarks, transports and lands the elements of a landing force for expeditionary warfare missions.
- Designed to transport the troops into a war zone by sea, primarily using landing craft, although invariably they also have the capability to operate transport helicopters.
Karadeniz Energy Group in Turkey has developed a project named "Power of Friendship", which aims to supply electricity to shortage-stricken countries in the Middle East, Northern Africa and Southern Asia.

Between 144 – 260 megawatt installed power per ship generated by heavy fuel or natural gas.
Turkish Mega Yacht Building

Order Book Yachts According to meters in 2011

• Number 3 in world ranking
• Annual volume of 300 million euros

Source: Boat International
THANK YOU FOR YOUR ATTENTION