



**TURKISH SHIPBUILDERS' ASSOCIATION**

**Süheyl DEMİRTAŞ**  
**Secretary-General**



TURKISH SHIPBUILDERS' ASSOCIATION

**Founded on 07 July 1971**

**85 Members**



TURKISH SHIPBUILDERS' ASSOCIATION

## MISSION STATEMENT

- \* Promoting and protecting the interests of members and improving the quality and standards of Turkish shipbuilding industry;
- \* supporting and encouraging research and development activities associated with the shipbuilding industry;
- \* assuring safe and healthy working conditions for employees to encourage and foster the education of them and broaden the range and improve the standards ;



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## MISSION STATEMENT

- \* providing a forum for free and full exchange of ideas, views and proposals on all matters related to shipbuilding industry, supporting and co-operating with other organizations sharing similar objectives.
- \* representing the industry on national and international platforms and developing marketing and promotion programs.

# HISTORY



- \* Largest shipyards in the world in 16th Century

- \* 600 years old tradition
- \* 1390- First Shipyard
- \* 1455 - Haliç Shipyard



# Major Change in 1982

**GOLDEN HORN**



**TUZLA**



# TURKISH SHIPYARDS

Marmara Region ( Tuzla, Yalova )





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# TURKISH SHIPYARDS

Eregli, Canakkale and others



# Turkish Shipbuilding Industry





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# NEW BUILDING





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# What Can We Build?

- \* **Oil Tankers**
- \* **Chemical Tankers**
- \* **Bulk Carriers & Containers**
- \* **Heavy Lifting Ships**
- \* **Multipurpose Vessels**
- \* **Platform Supply Vessels**
- \* **War Ships & Coast Guard Boats**
- \* **Tugboats**
- \* **Mega Yachts & Yachts**
- \* **Fishing Boats**

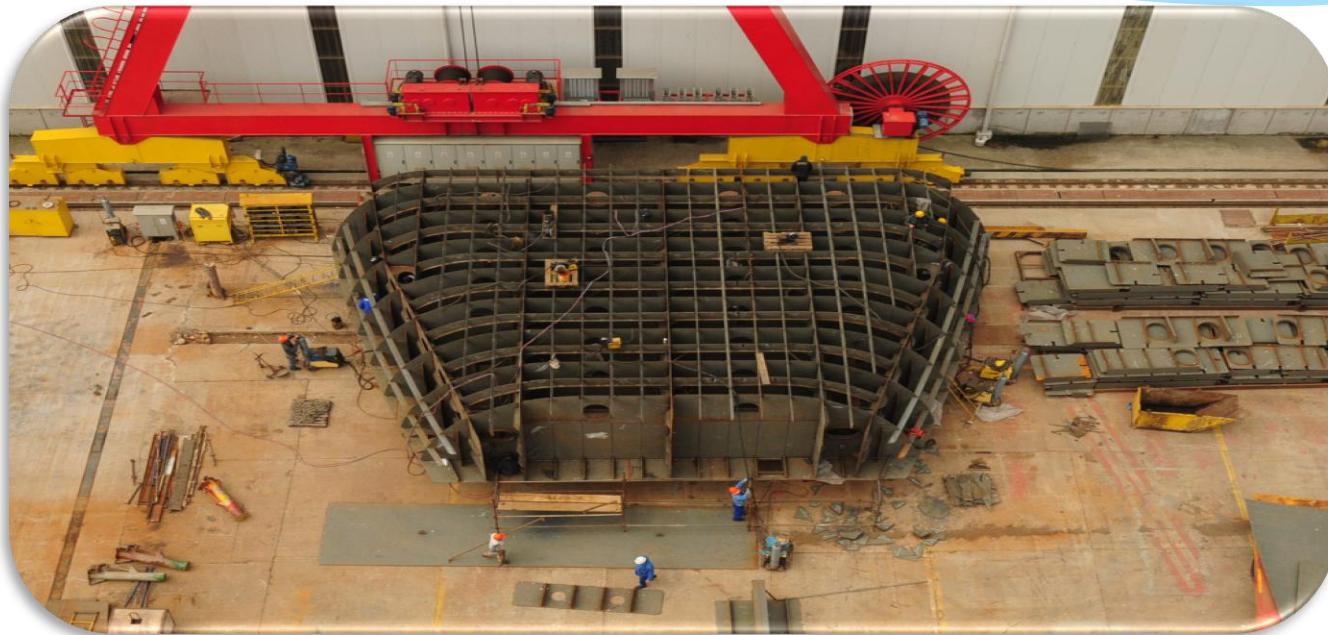


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# Turkish Shipyards

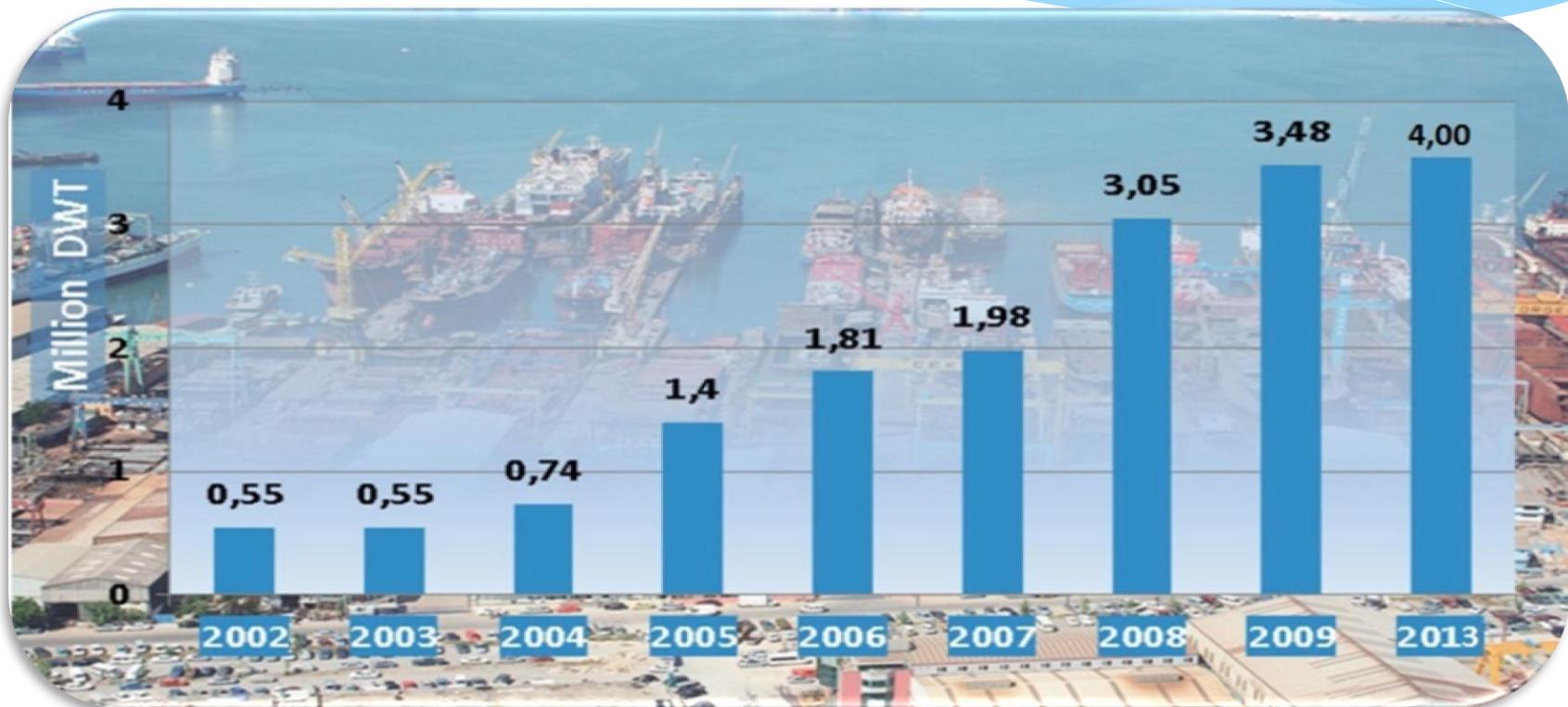


# What Is Our Capacity?



- \* 700.000 tons steel processing
- \* 4 million DWT shipbuilding

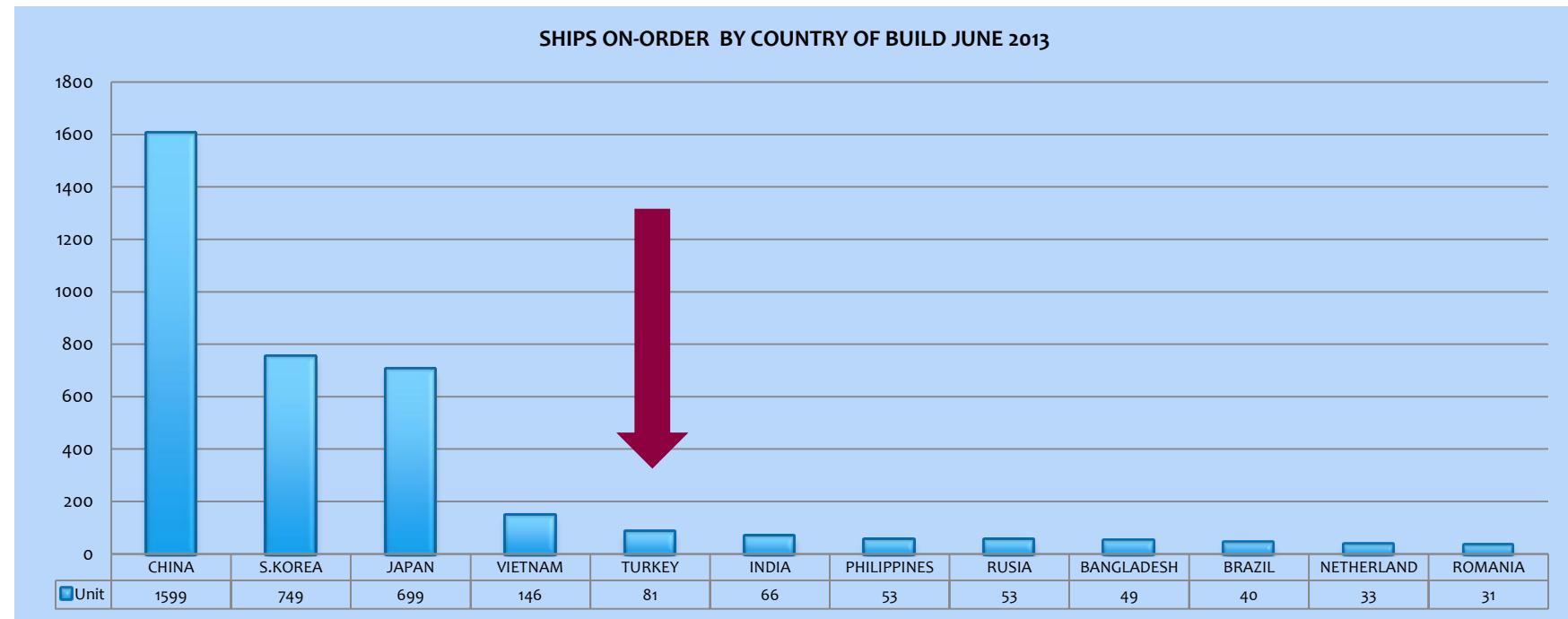
## Shipyards Project Capacities 2002-2013 (DWT)



Source: Ministry of Transport, Maritime Affairs and Communications Turkey

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## Order Book by Builder Country (Unit)





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# Turkish Shipyards



2006 - 59 Shipyards

2013 - 71 Active Shipyards

56 Shipyards Under Construction

Source: Ministry of Transport, Maritime Affairs and Communications Turkey

## Export income (New building)

- \* 2008 – 2,8 Billion USD
- \* 2012 – 1 Billion USD
- \* 2013 September – 0,81 Bn USD





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**Number One in Construction of Small  
Tonnage Chemical Tankers**

**Nr. 1**





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## Number Three in Mega Yacht Building

Nr. 3

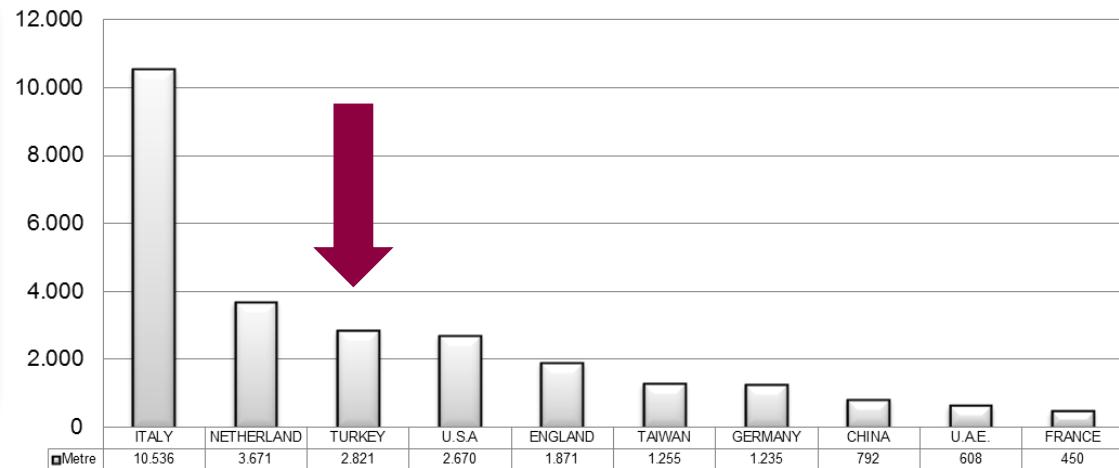


## Turkish Megayacht Building

- \* Annual volume of 300 million euros



### Order Book Yachts According to Meter in 2012





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## Perini Navi İstanbul-Yıldız Shipyard

### MALTESE FALCON





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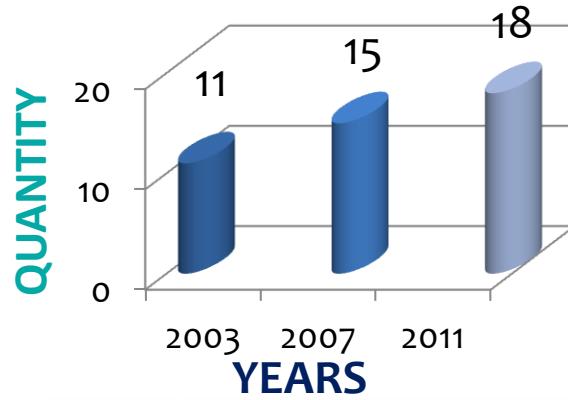
## Repair and Maintenance



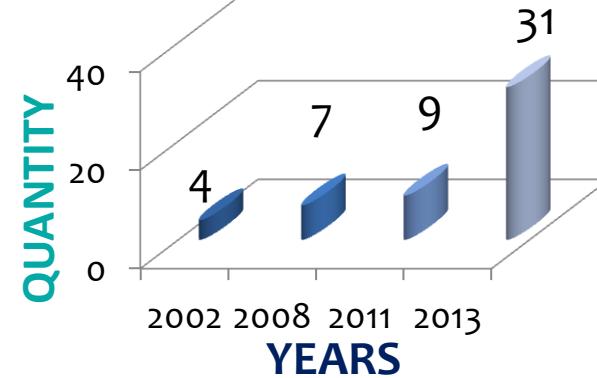
15 million DWT capacity

## Dock Capacities

### Floating Docks



### Dry Docks



## Prestigious conversion, grounding damage and platform repair projects



One of the biggest floating docks in the world  
(350 x 65 m)



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## Repair Works with Pictures

Before



After





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## Repair Works with Pictures

Before



After



Repaired within 25 days

## OFFSHORE VESSELS





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**Tuzla** shipyard

**Saipem**

**Scarabeo-7**



- \* Significant amount of steel works
- \* Installation of additional legs and drilling tower
- \* Integrated piping and machinery works



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**Tuzla** shipyard

**Etesco Millennium**



**Semi-submersible Accommodation Platform**



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**Songa  
Offshore**

**Tuzla** shipyard

**Songa Saturn**



**Shipshape Drilling Unit  
Refurbishment and Re-certification**



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Saipem



Scarabeo-6



- \* Special Periodic Survey
- \* Maintenance
- \* Upgrading



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OCEAN RIG



Leiv Eiriksson



BEŞİKTAŞ SHIPYARD

## OFFSHORE PLATFORMS





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## Navy & Coast Guard Projects



## Navy & Coast Guard Projects

### Coast Guard Search & Rescue Ships





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## Navy & Coast Guard Projects

### MILGEM - Class Corvettes



## New Type Patrol Boats



## Coast Guard Boats & Ultra Fast Boats

**YONtech**



**Yonca-Onuk JV**





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## LCT – Landing Craft Tanks



Anadolu  
Shipyard





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## LST - Landing Ship Tank



Anadolu  
Shipyard





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# Submarine Rescue Mother Ship (MOSHIP) & Rescue and Towing (R&T) Ship



İstanbul  
**Shipyard**





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## Landing Platform/Dock (LPD)



## Why Turkish Shipyards ?



- \* Quality Production
- \* Experienced and Flexible Work Force



## Why Turkish Shipyards ?

### Location

- \* Istanbul - Shipping Center and major transit hub
- \* 95% located in the same bay near Istanbul (35 km)
- \* One-day trip for European shipowners
- \* Favorable climate conditions for shipbuilding





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## Why Turkish Shipyards ?

- \* Authorized Makers
- \* Classification Societies





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## World Shipbuilding Industry Today



Difficult Times



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## Drivers for Shipbuilding

1. World economy / trade volumes
2. Economics of shipbuilding / ship operation
3. Changes to trades / types of vessels needed
4. Cost of fuel / energy efficiency
5. Regulatory drivers e.g. environment – double hulls, ballast water, SOx, NOx, BW
6. Availability and cost of alternative fuels e.g., gas
7. Scrutiny by stakeholders



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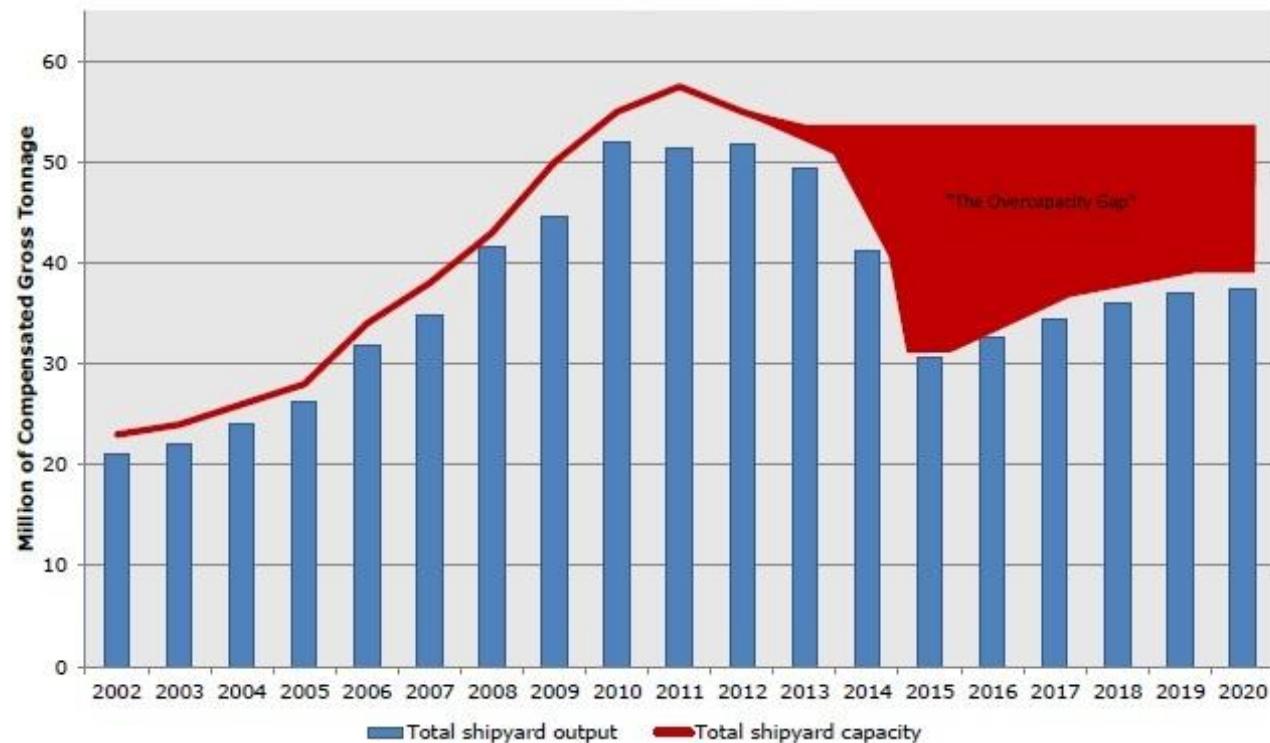
**Oversupply WORST ever**  
**30% too many bulkers in the water**



CLARKSONS

## Shipyard Overcapacity

The shipyard industry "The Overcapacity Gap"



Source: BIMCO, IHS Fairplay, CRSL

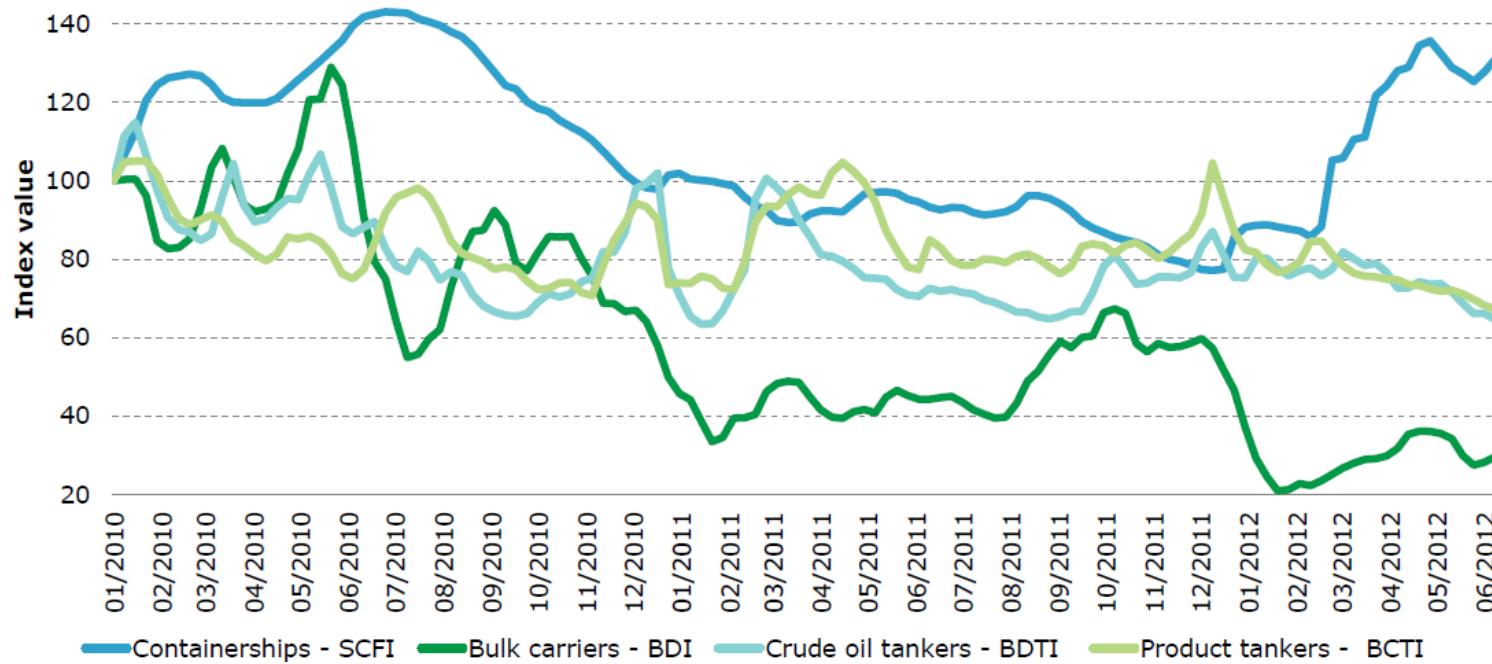
## World Shipbuilding Supply and Demand



Source: Actual IHS Fairplay, forecast CESA

## The Shipping Market

Freight rate developments, 2010-2012

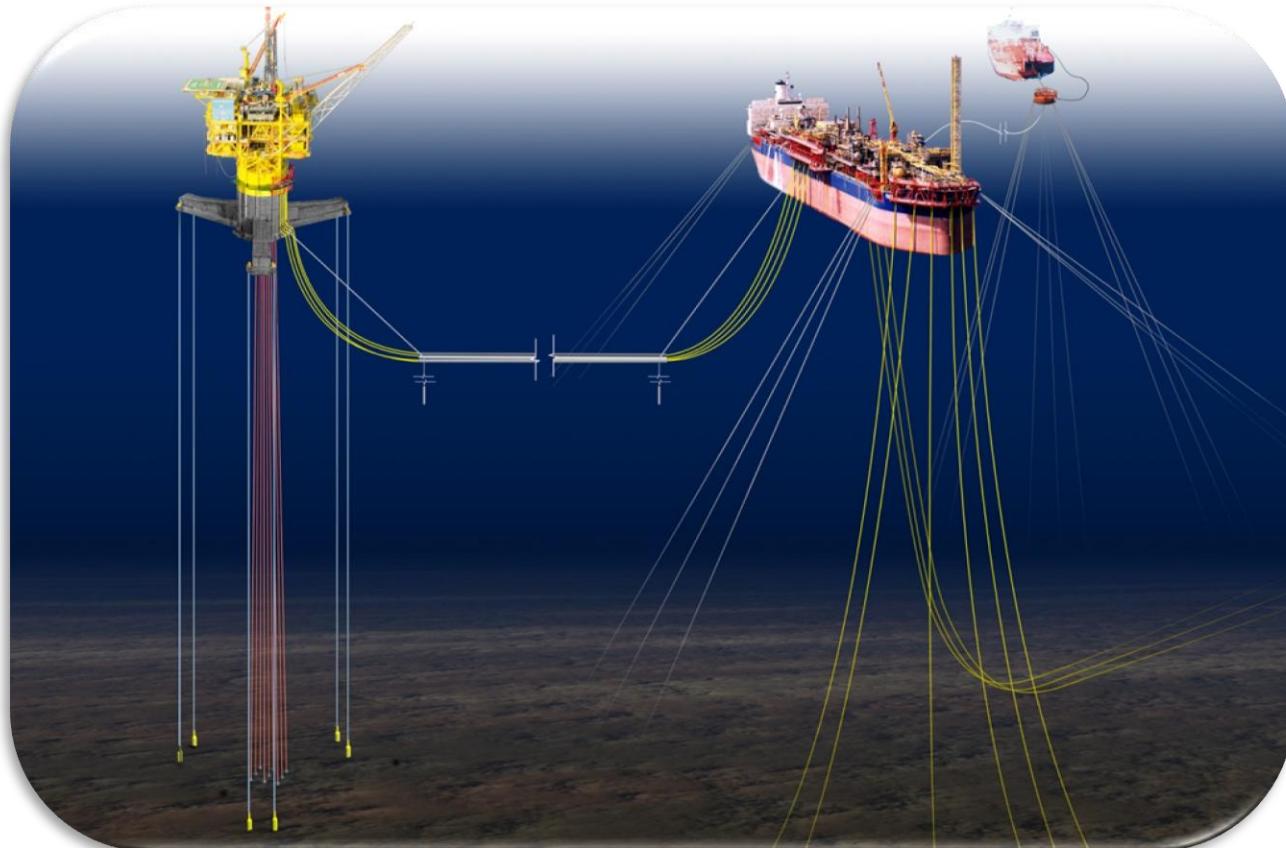


Source: BIMCO, Baltic Exchange, Shanghai Shipping Exchange



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## Offshore Segment Lifesaver for the Shipbuilding Industry





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## Latest News



IHC Merwede secures  
pipelayer orders worth **\$1.3bn**



Asian Shipyards run for  
Awilco's **\$1.8bn** rig deal



Subsea 7 signs **\$1.6bn** deal  
for 3 PLSVs



Vard bags four PLSVs  
worth **\$1.1bn**



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# Co-operation



# Ocean of Opportunities



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**Thank you...**