



GISBIR

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 ;



TURKISH SHIPBUILDERS' ASSOCIATION

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.



TURKISH SHIPBUILDERS' ASSOCIATION

HISTORY



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

- * Largest shipyards in the world
in 16th Century



Major Change in 1982

GOLDEN HORN



TUZLA





TURKISH SHIPBUILDERS' ASSOCIATION

TURKISH SHIPYARDS

Marmara Region (Tuzla, Yalova)





TURKISH SHIPBUILDERS' ASSOCIATION

TURKISH SHIPYARDS

Eregli, Canakkale and others





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Turkish Shipbuilding Industry





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NEW BUILDING





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**



TURKISH SHIPBUILDERS' ASSOCIATION

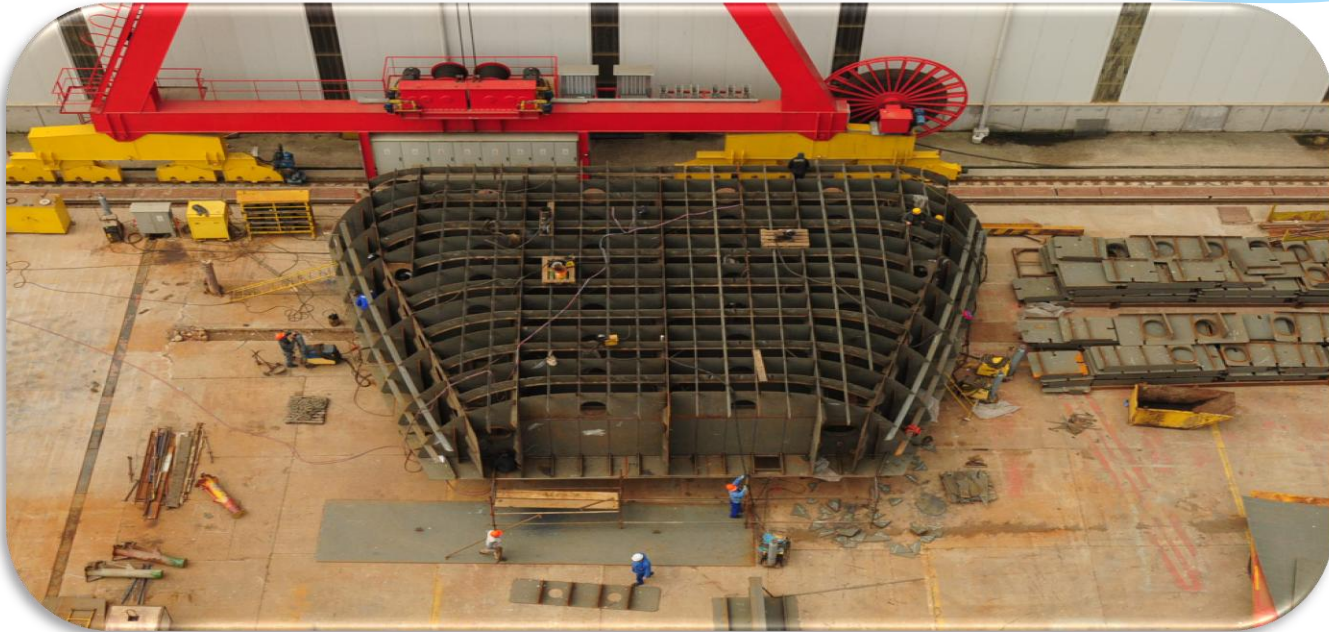
Turkish Shipyards





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What Is Our Capacity?



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

Shipyards Project Capacities 2002-2013 (DWT)

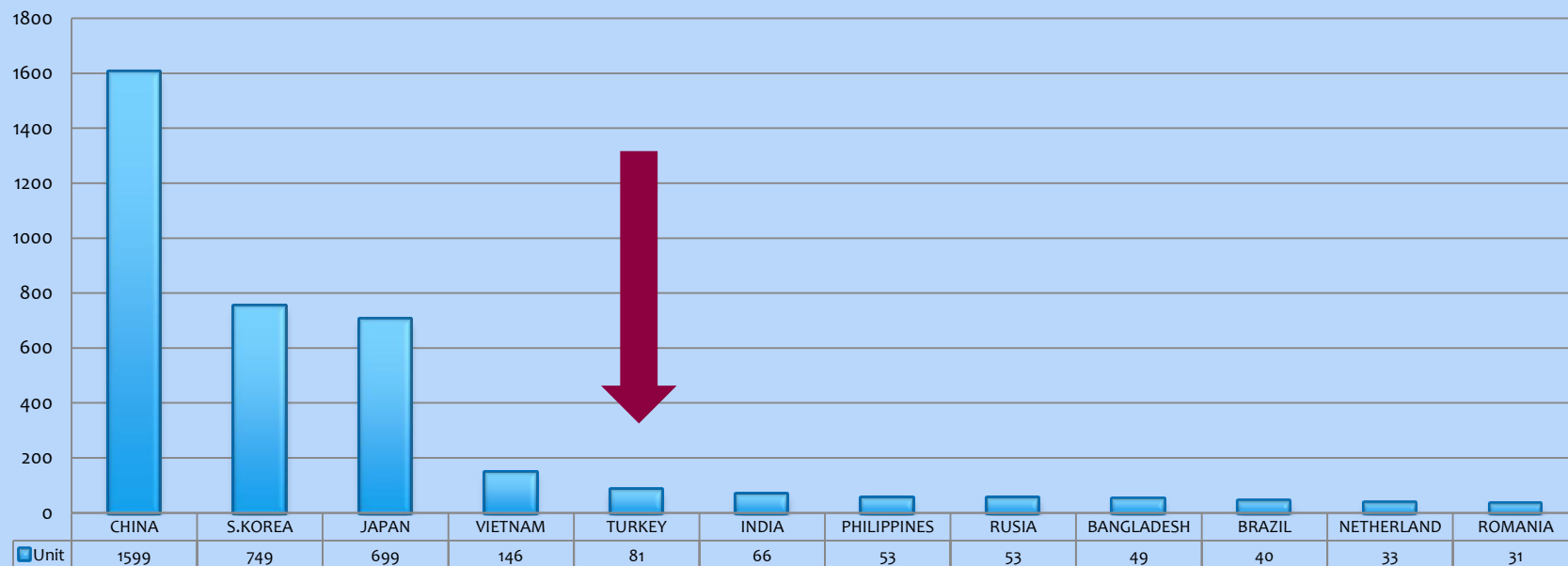


Source: Ministry of Transport, Maritime Affairs and Communications Turkey



Order Book by Builder Country (Unit)

SHIPS ON-ORDER BY COUNTRY OF BUILD JUNE 2013





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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

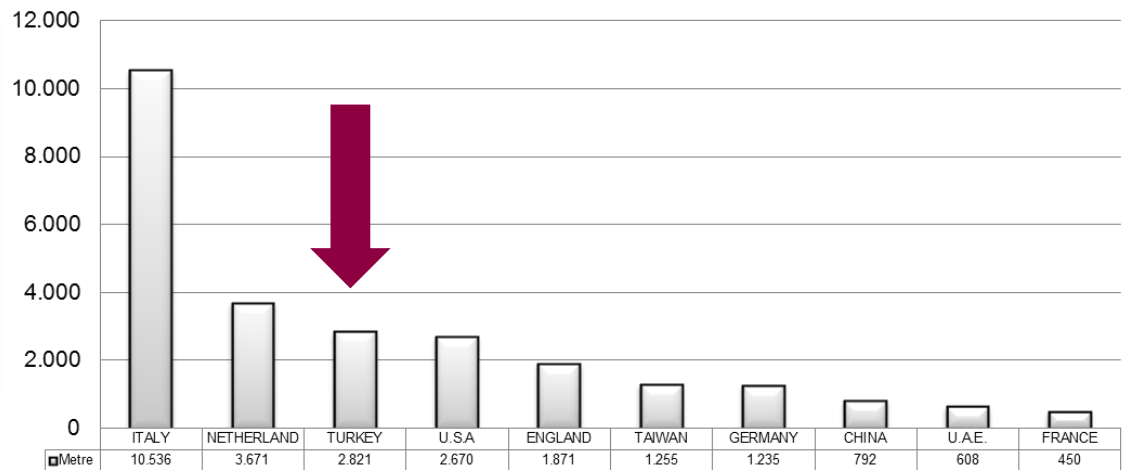


Turkish Megayacht Building

* Annual volume of 300 million euros



Order Book Yachts According to Meter in 2012





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Perini Navi Istanbul-Yıldız Shipyard

MALTESE FALCON





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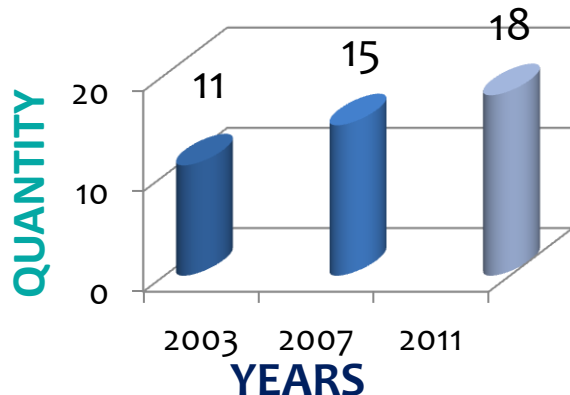
Repair and Maintenance



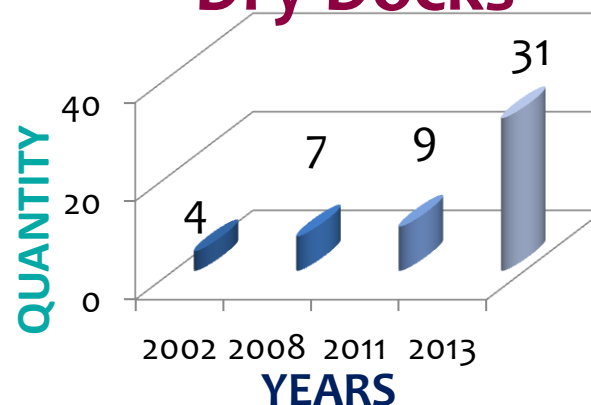
15 million DWT capacity

Dock Capacities

Floating Docks



Dry Docks



Prestigious conversion, grounding damage and platform repair projects

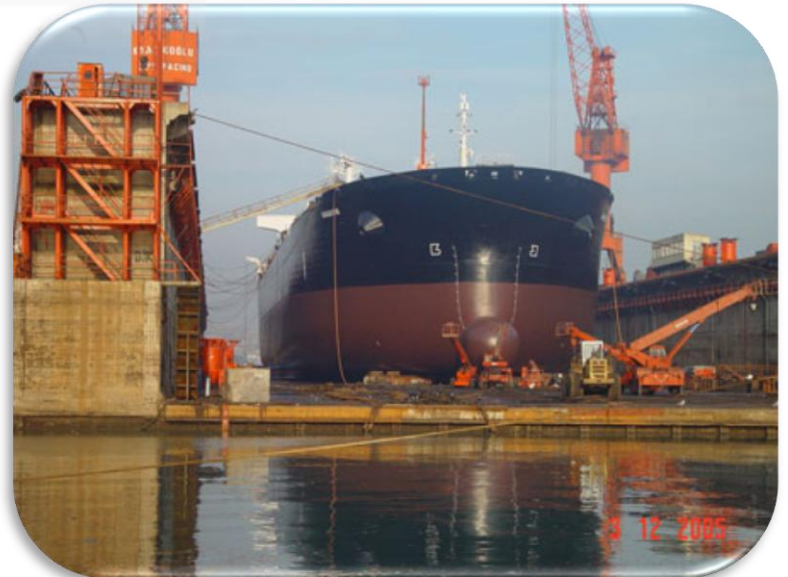




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One of the biggest floating docks in the world
(350 x 65 m)

TUZLAshipyard

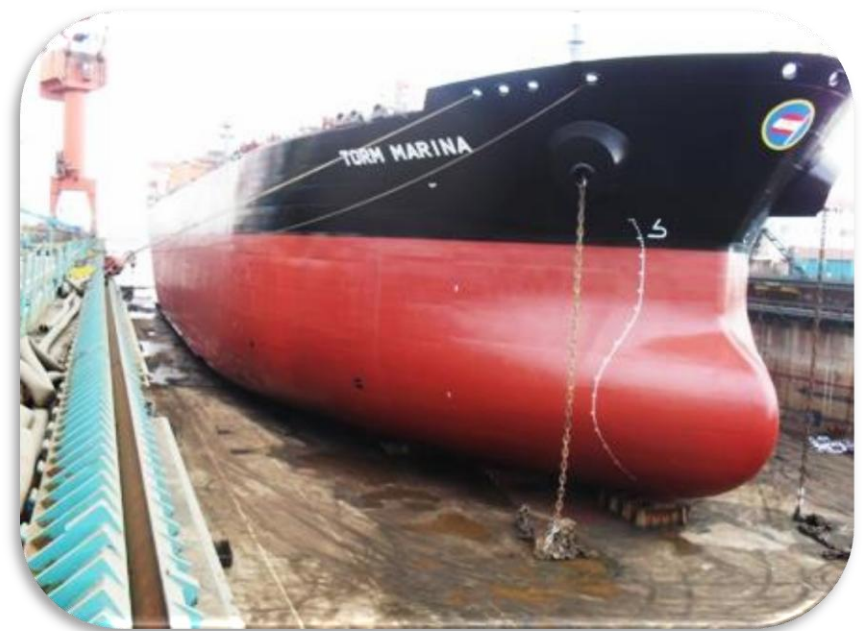


Repair Works with Pictures

Before



After





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Repair Works with Pictures

Before

After



Repaired within 25 days



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OFFSHORE VESSELS





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Saipem

Scarabeo-7



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



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TUZLAshipyard

Etesco Millennium



Semi-submersible Accommodation Platform



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Songa
Offshore

TUZLA shipyard

Songa Saturn



Shipshape Drilling Unit
Refurbishment and Re-certification



TURKISH SHIPBUILDERS' ASSOCIATION



Saipem



Scarabeo-6



- * Special Periodic Survey
- * Maintenance
- * Upgrading



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OCEAN RIG



Leiv Eiriksson



BEŞİKTAŞ SHIPYARD



TURKISH SHIPBUILDERS' ASSOCIATION

OFFSHORE PLATFORMS





TURKISH SHIPBUILDERS' ASSOCIATION

Navy & Coast Guard Projects





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Navy & Coast Guard Projects

Coast Guard Search & Rescue Ships





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Navy & Coast Guard Projects

MILGEM - Class Corvettes





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New Type Patrol Boats



DEARSAN SHIPYARD





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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



Istanbul
Shipyard





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Landing Platform/Dock (LPD)





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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



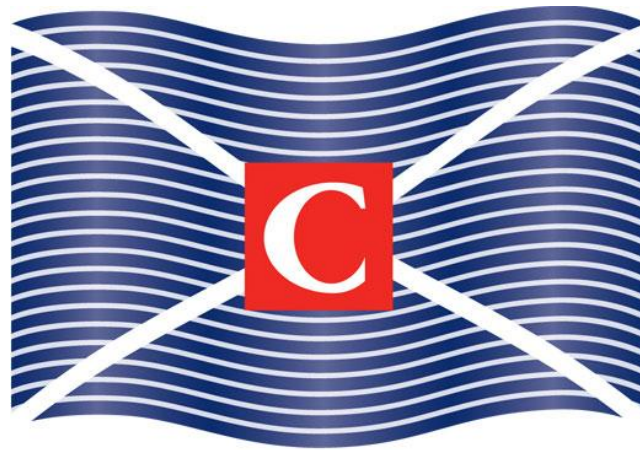
Drivers for Shipbuilding

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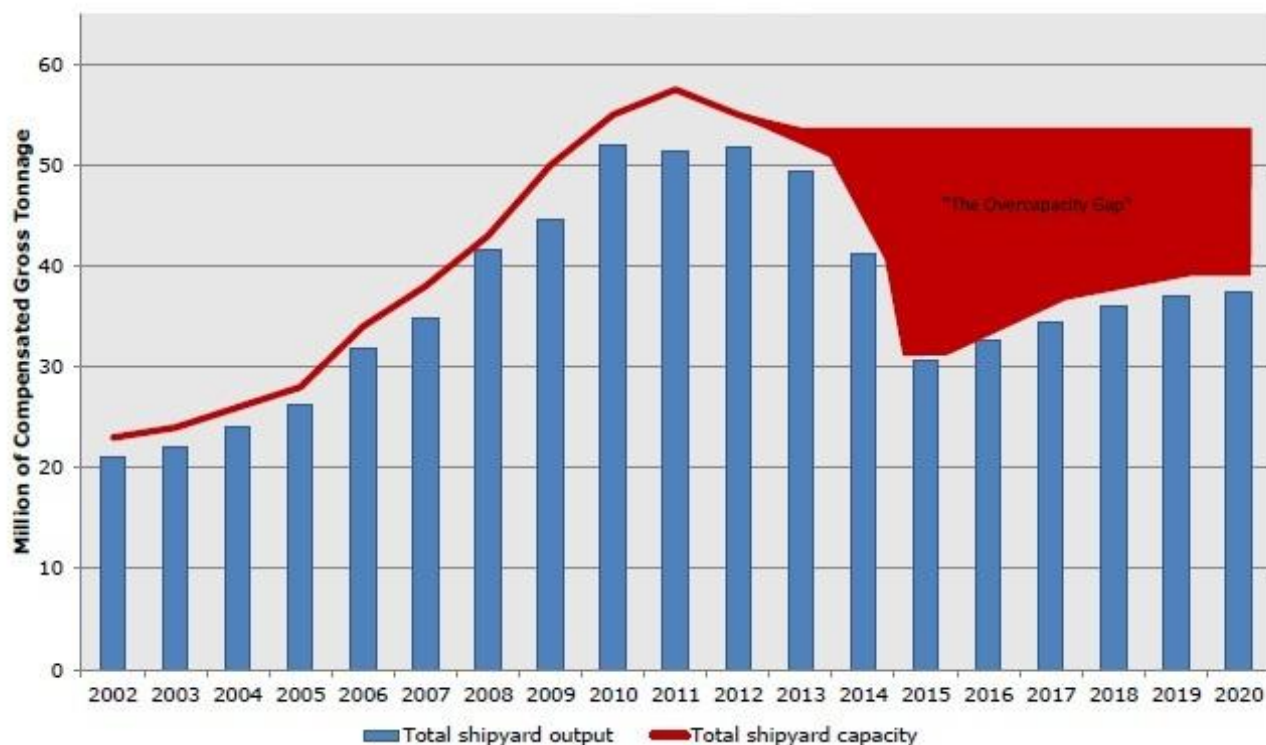
Oversupply WORST ever
30% too many bulkers in the water



CLARKSONS

Shipyard Overcapacity

The shipyard industry "The Overcapacity Gap"

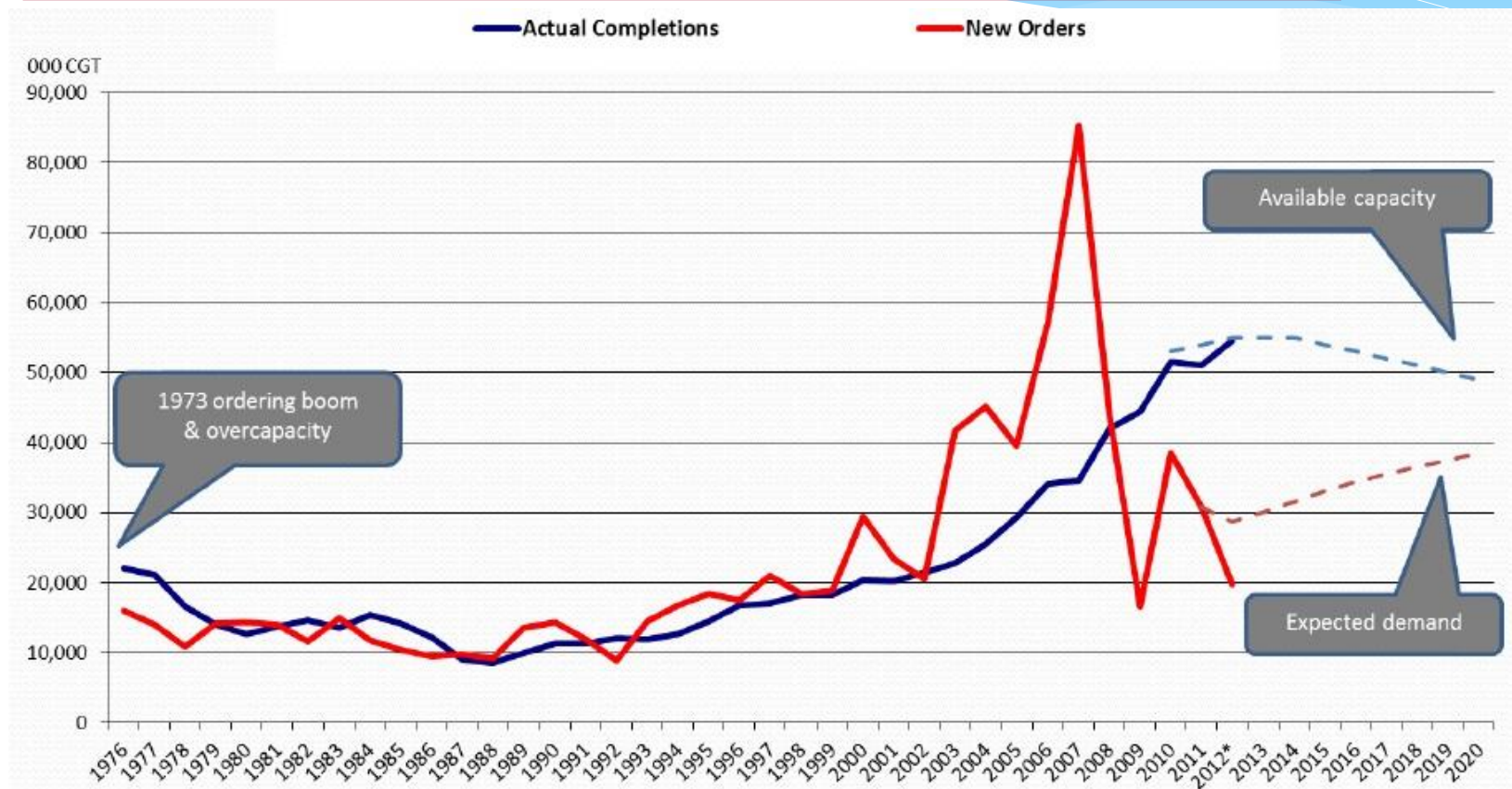


Source: BIMCO, IHS Fairplay, CRSL



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World Shipbuilding Supply and Demand

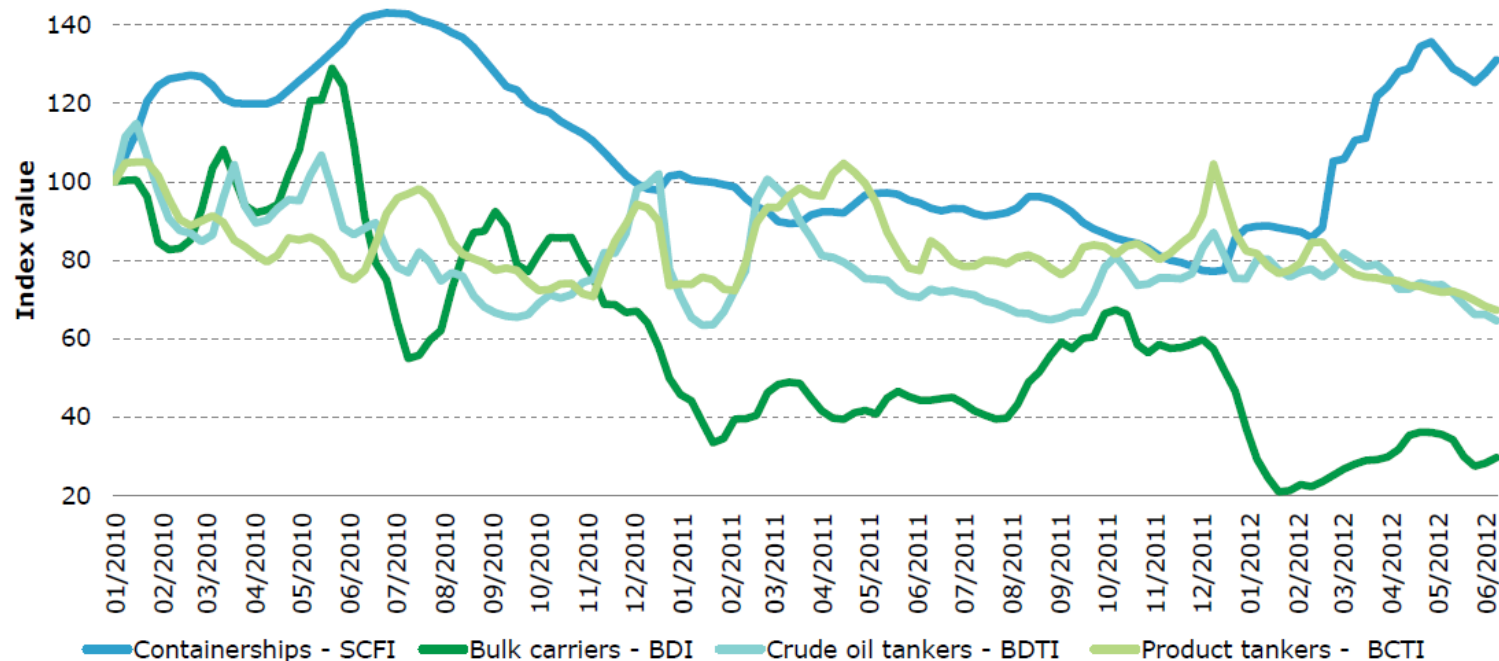


Source: Actual IHS Fairplay, forecast CESA



The Shipping Market

Freight rate developments, 2010-2012

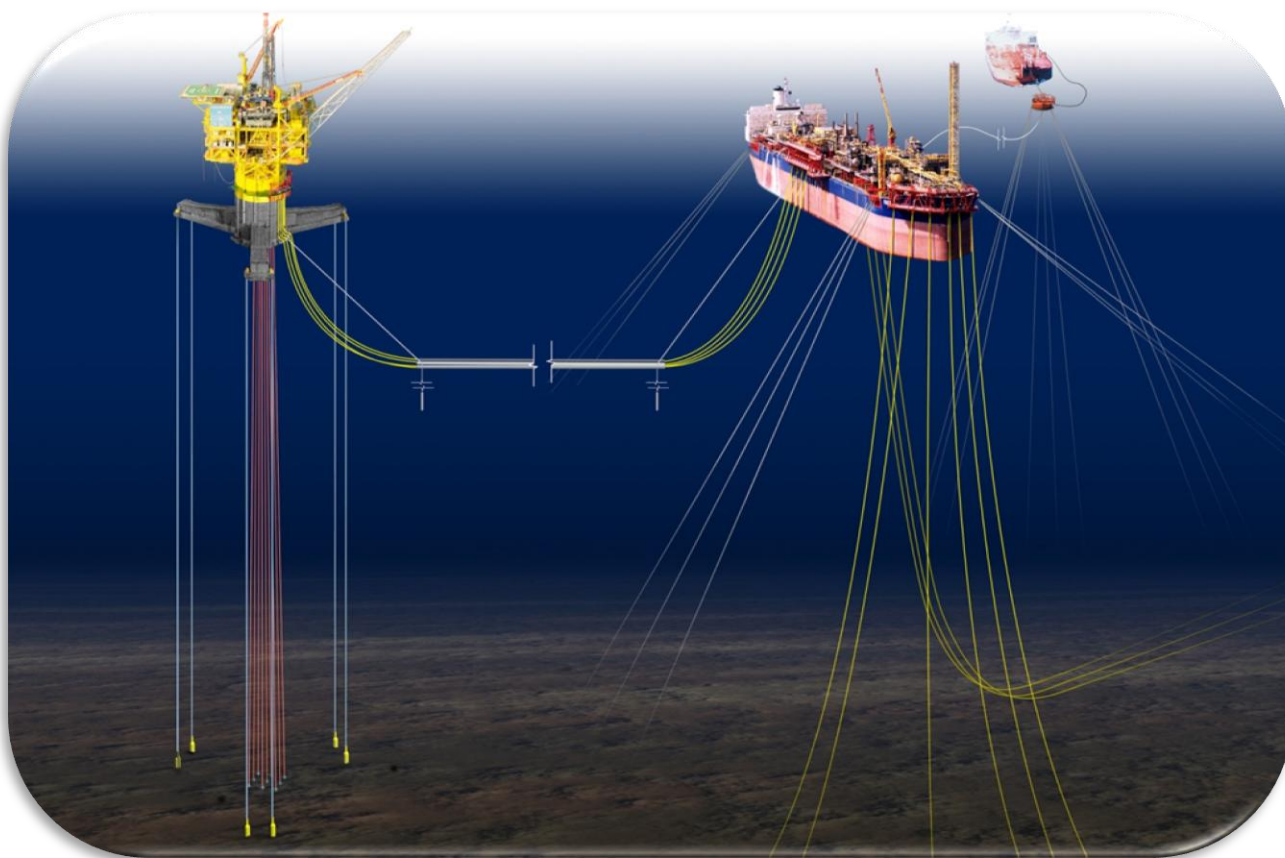


Source: BIMCO, Baltic Exchange, Shanghai Shipping Exchange



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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

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...