

# Regional market overview of maritime trade and container traffic outlook, trends & opportunities

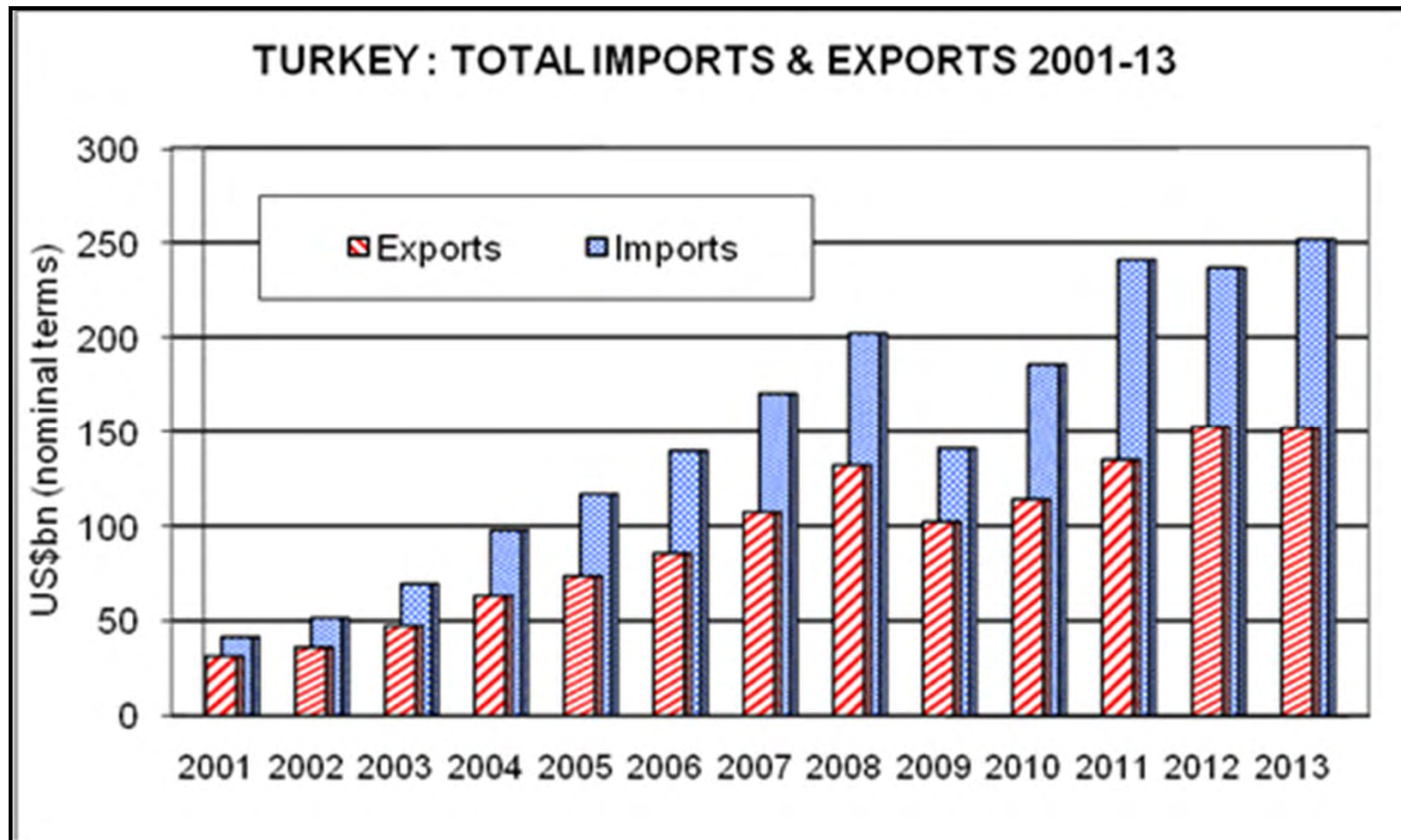
*Roy van Eijssen*

*Managing Director Royal HaskoningDHV Turkey*

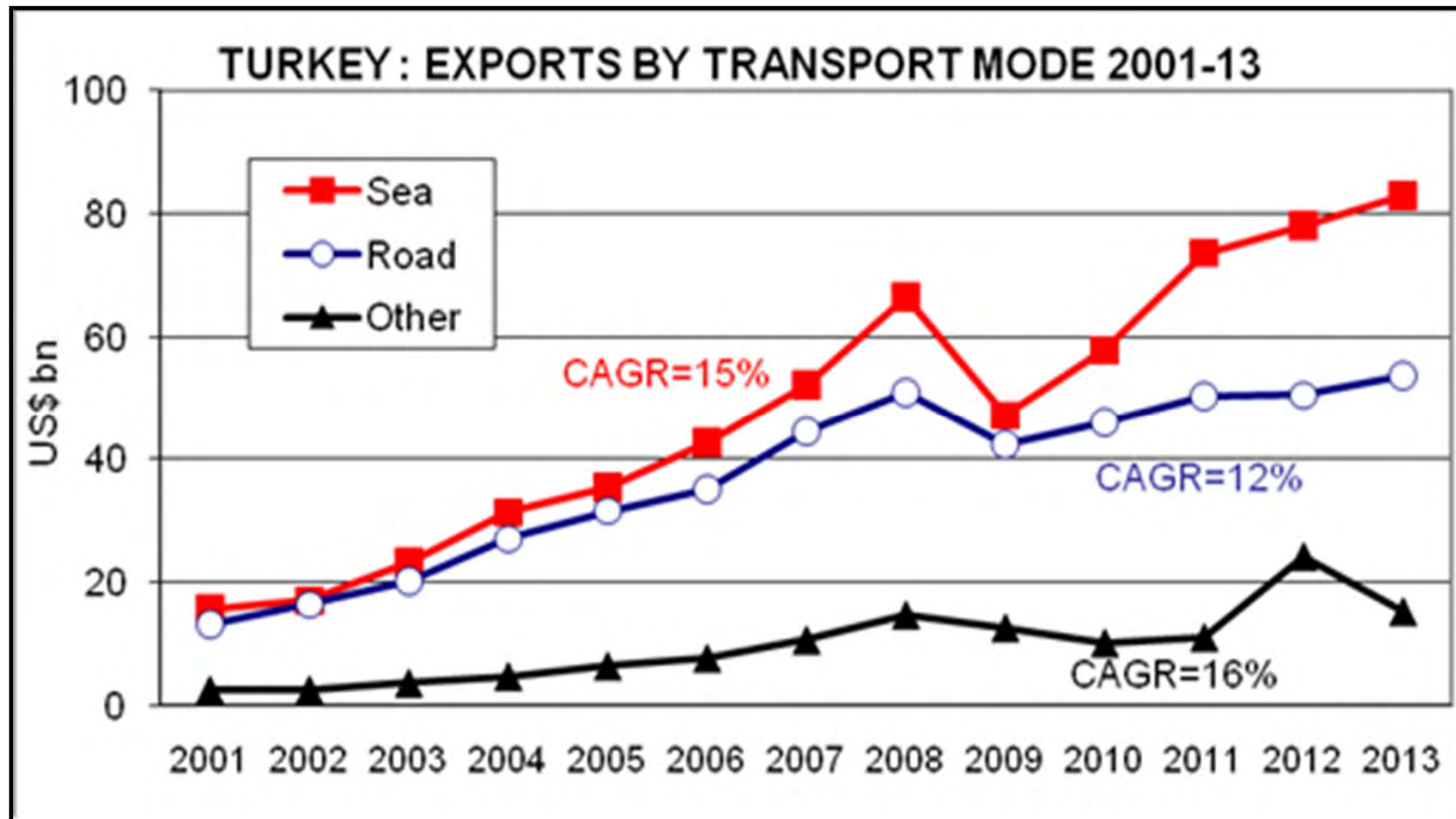
# Structure

- Trade Growth & Main Factors
- Overall Volumes
- Main Ports
- Industry Trends
- Turkey Market : Future Prospects
- Conclusions

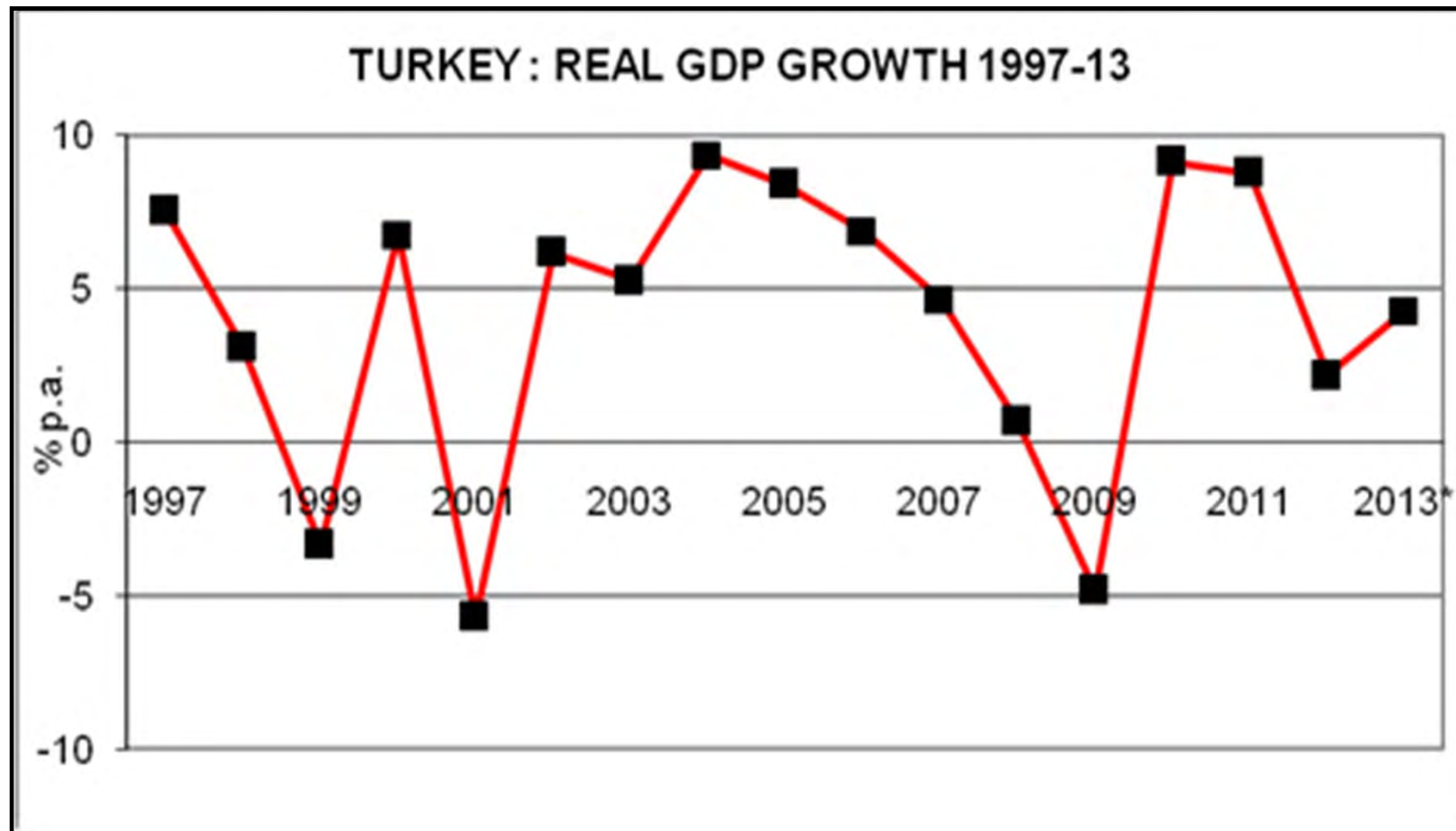
# Turkey – Trade Growth



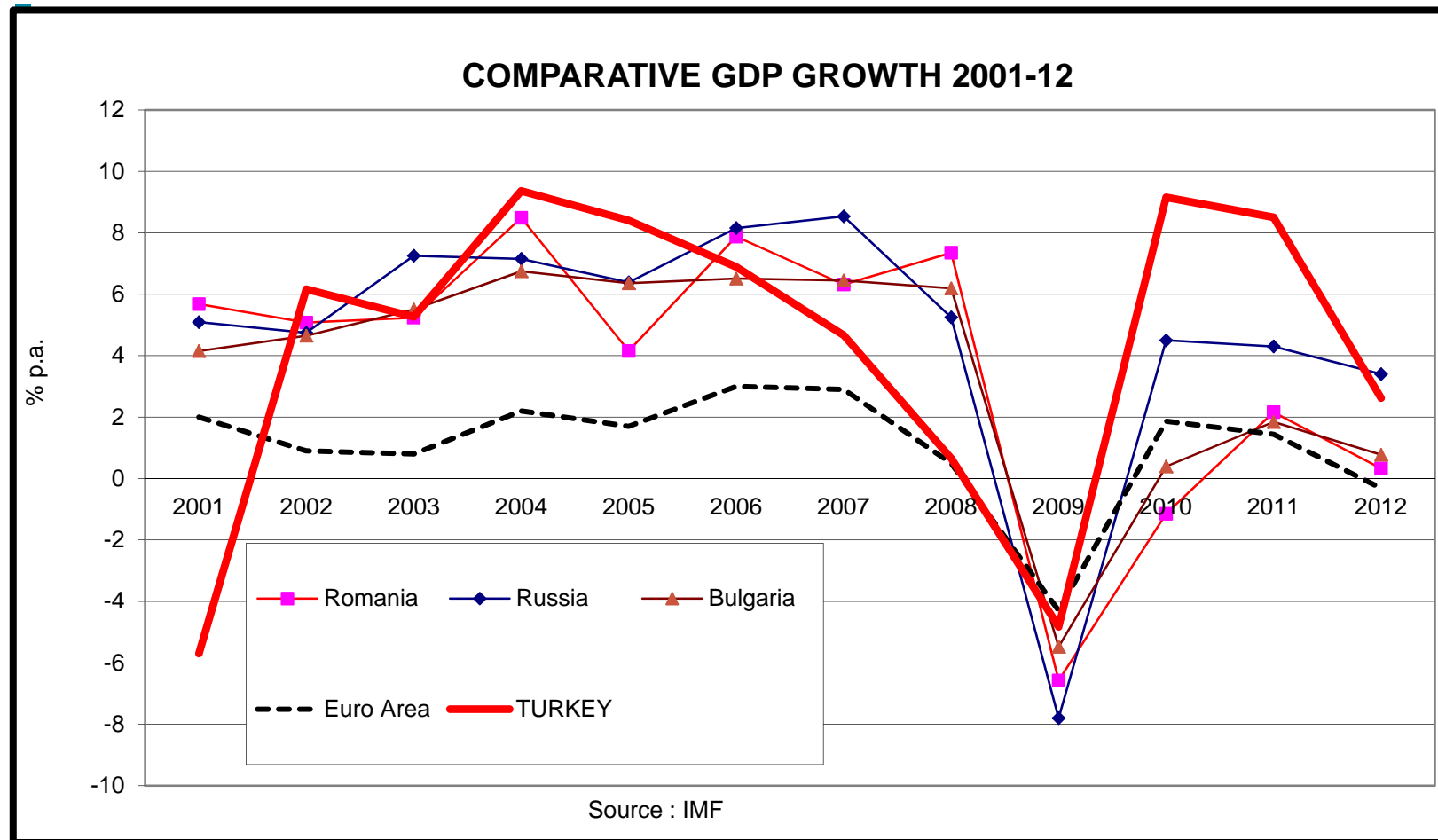
# Turkey – Sea Trade Growth



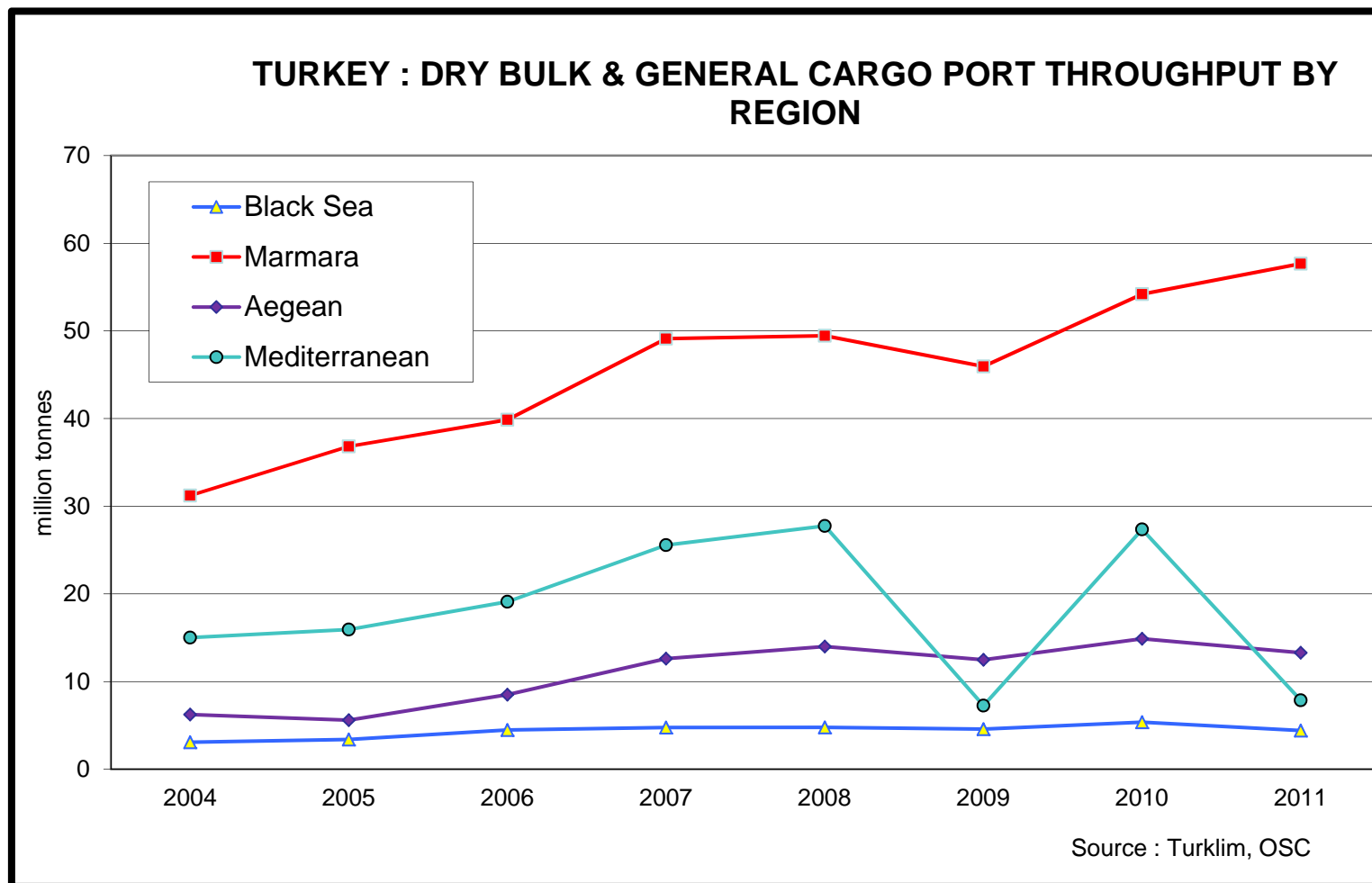
# Turkey : Economic Growth



# Selected Black Sea States : GDP Growth 2001-12

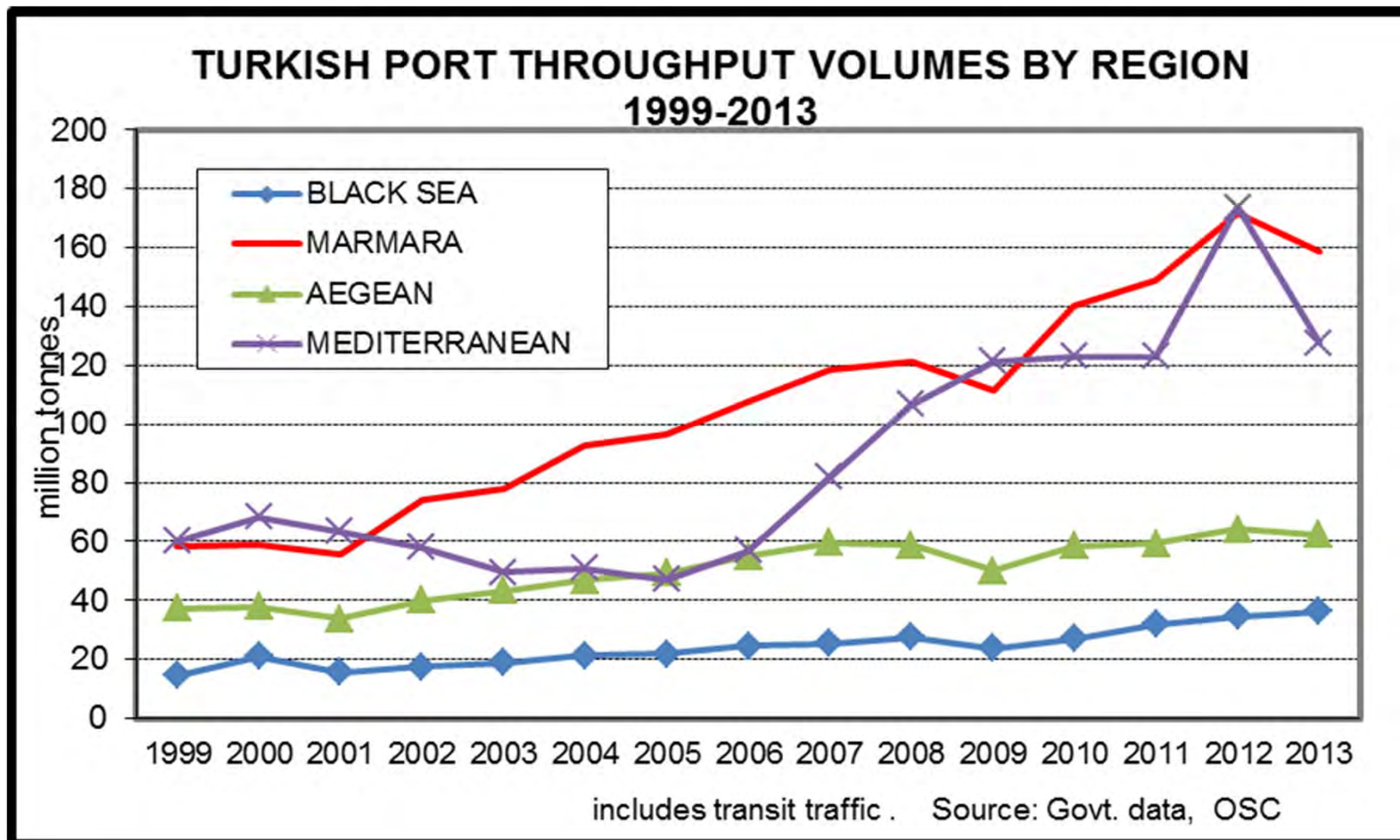


# Turkey – Dry Bulk & Gen.Cargo Volumes



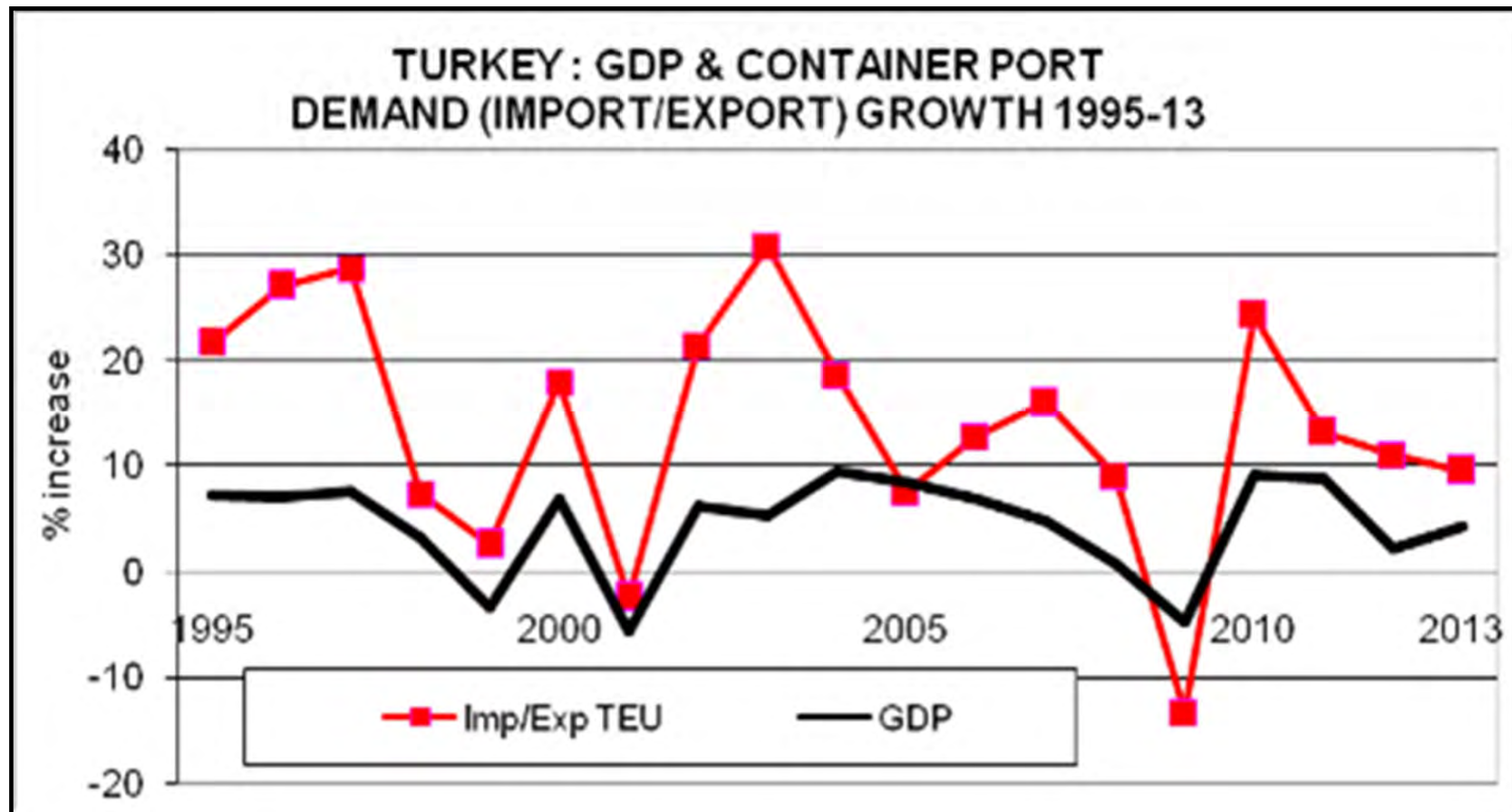


## **\*\*Turkey – Port Throughput Volumes\*\***

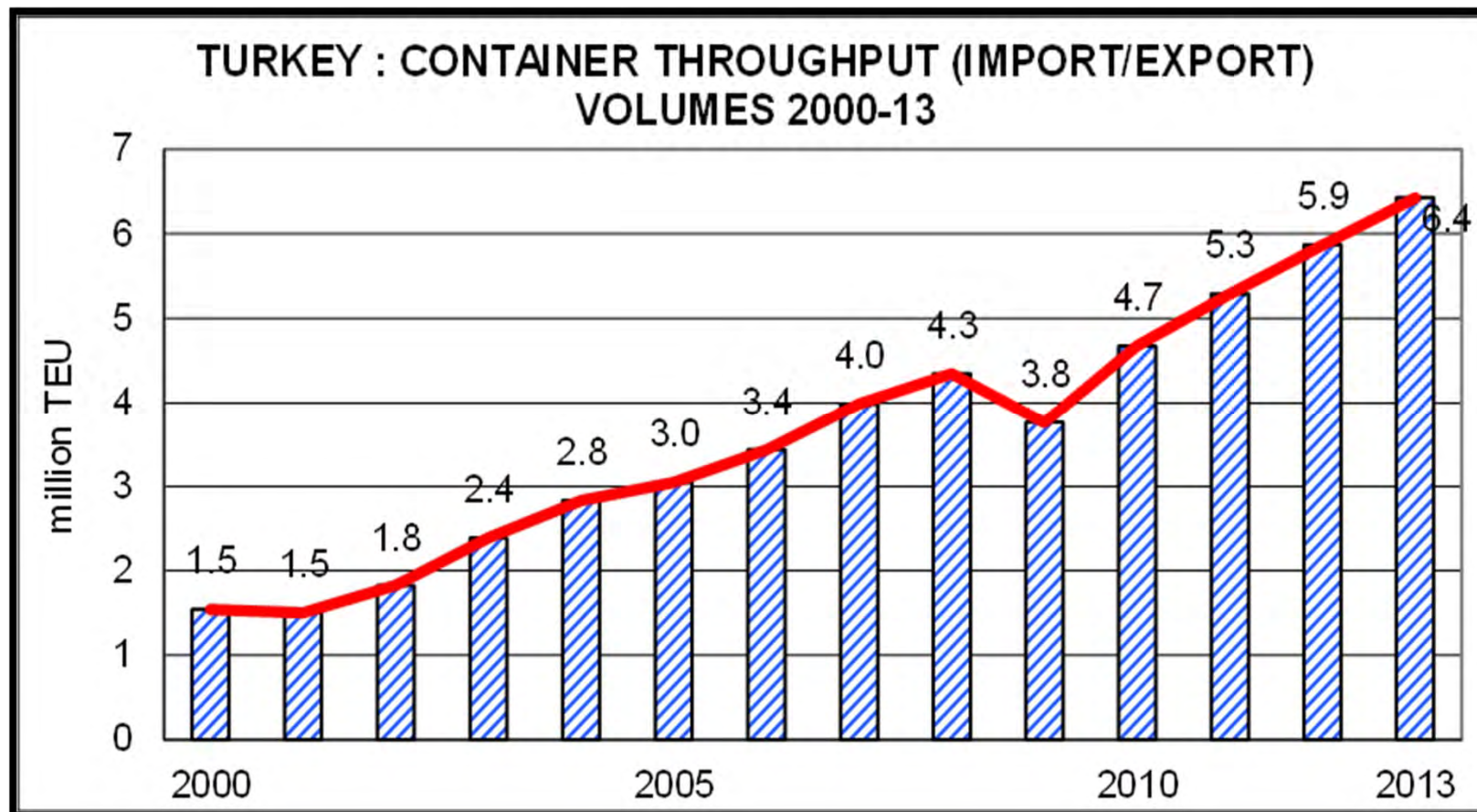




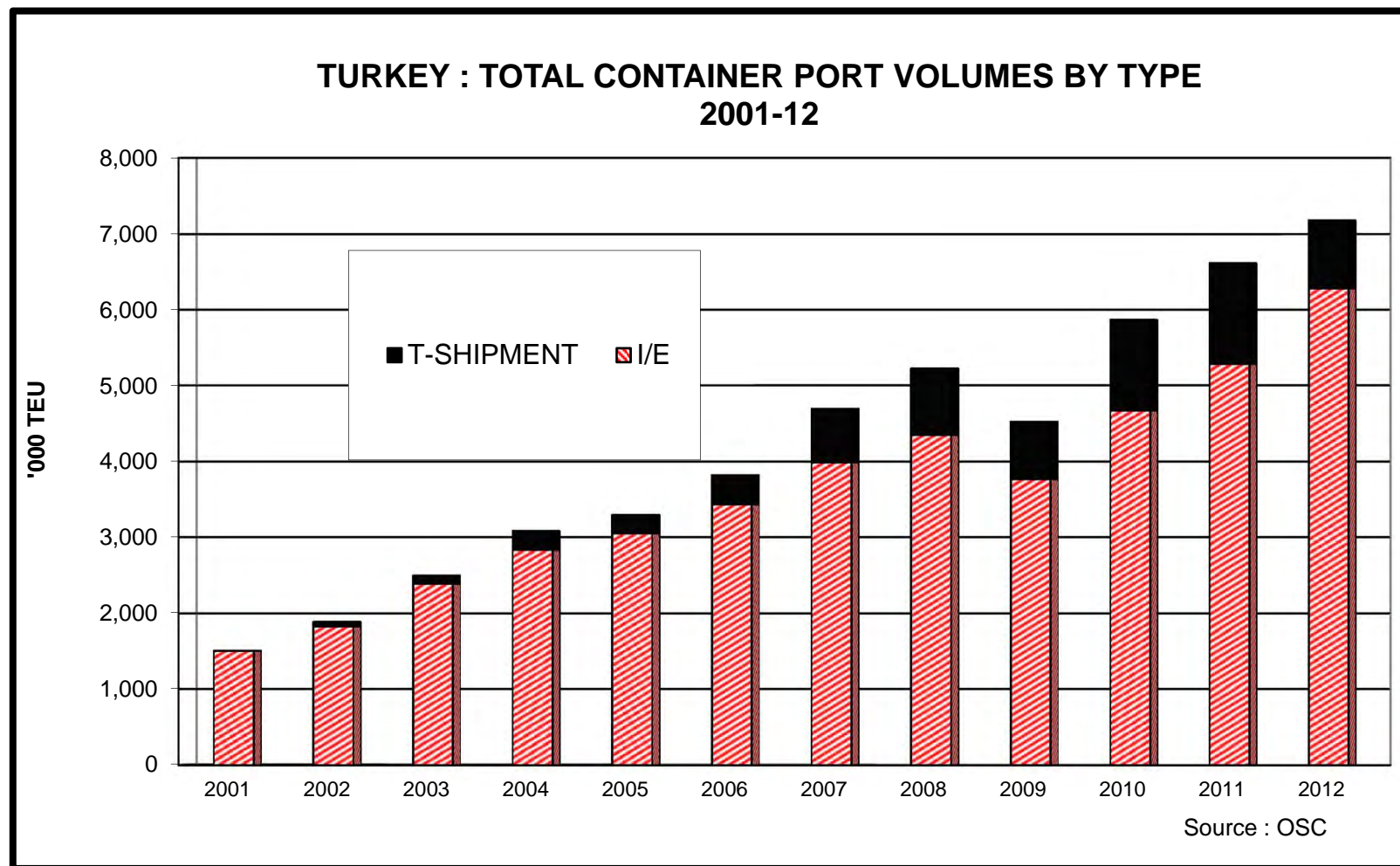
# Turkey – GDP & Container Trade Growth



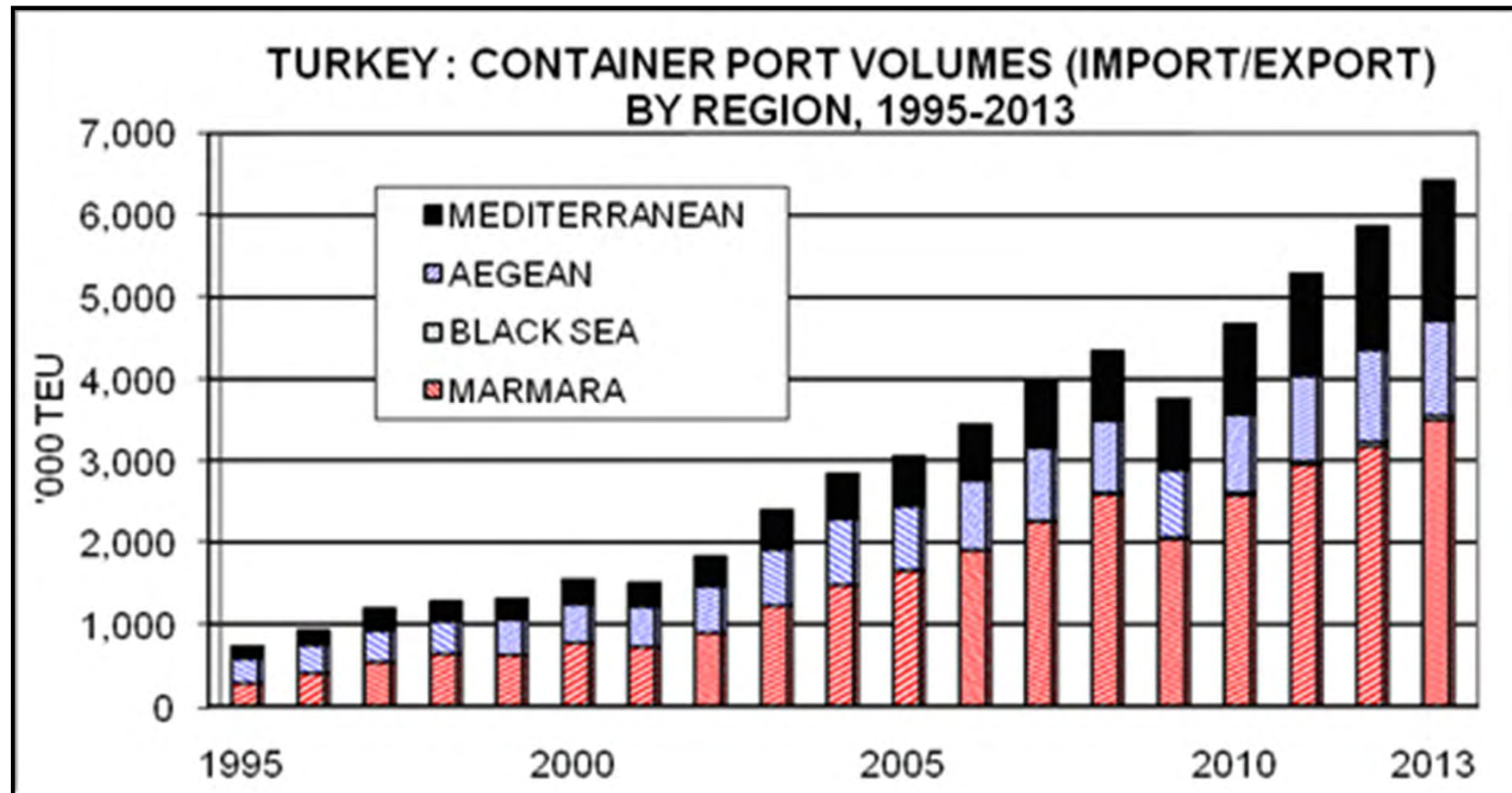
# Turkey : Container Volume Growth



# Turkey : Total Container Volume Growth

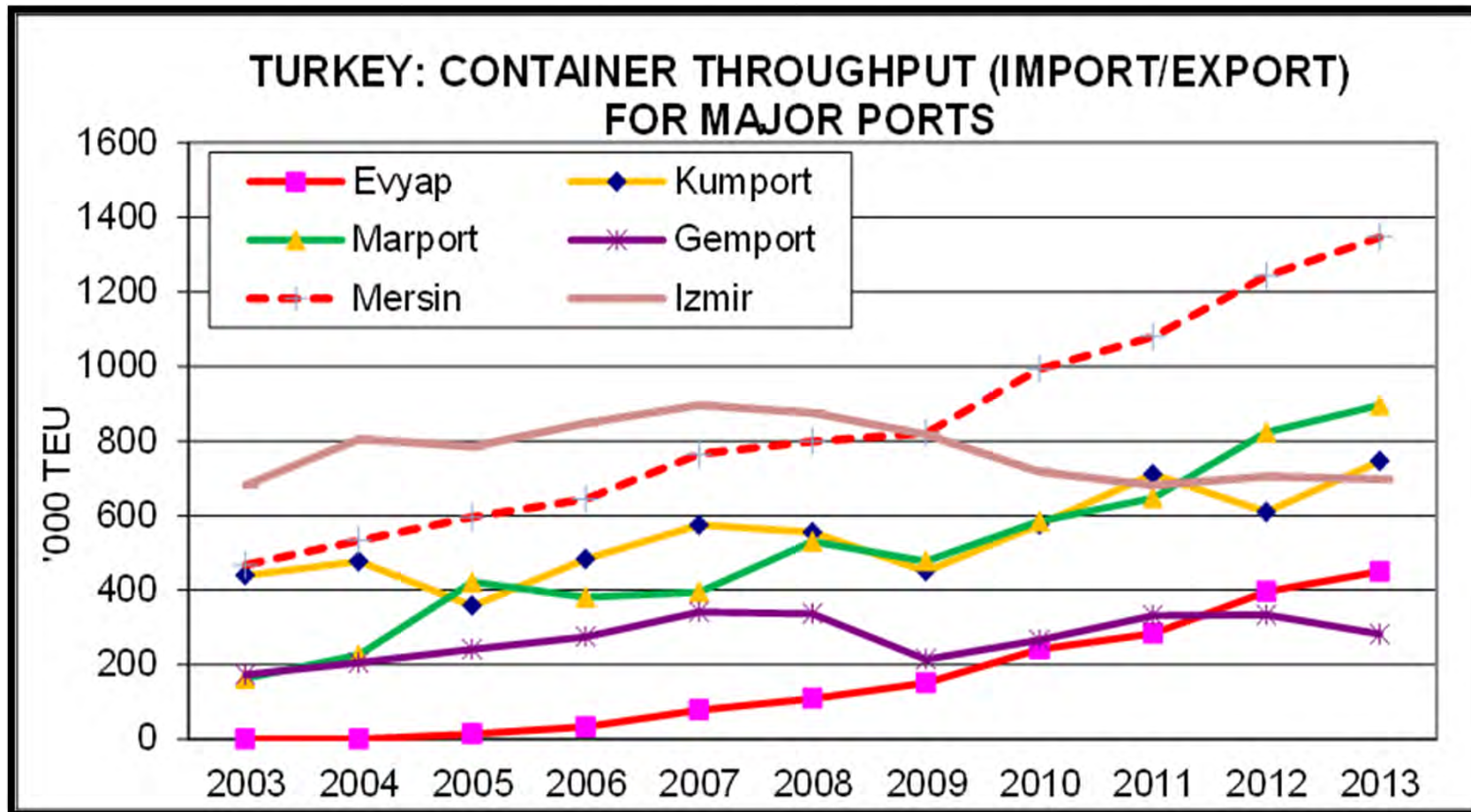


# Turkey : Regional Container Growth





# Turkey : Container Port Growth



# What is Happening to the Container Fleet?

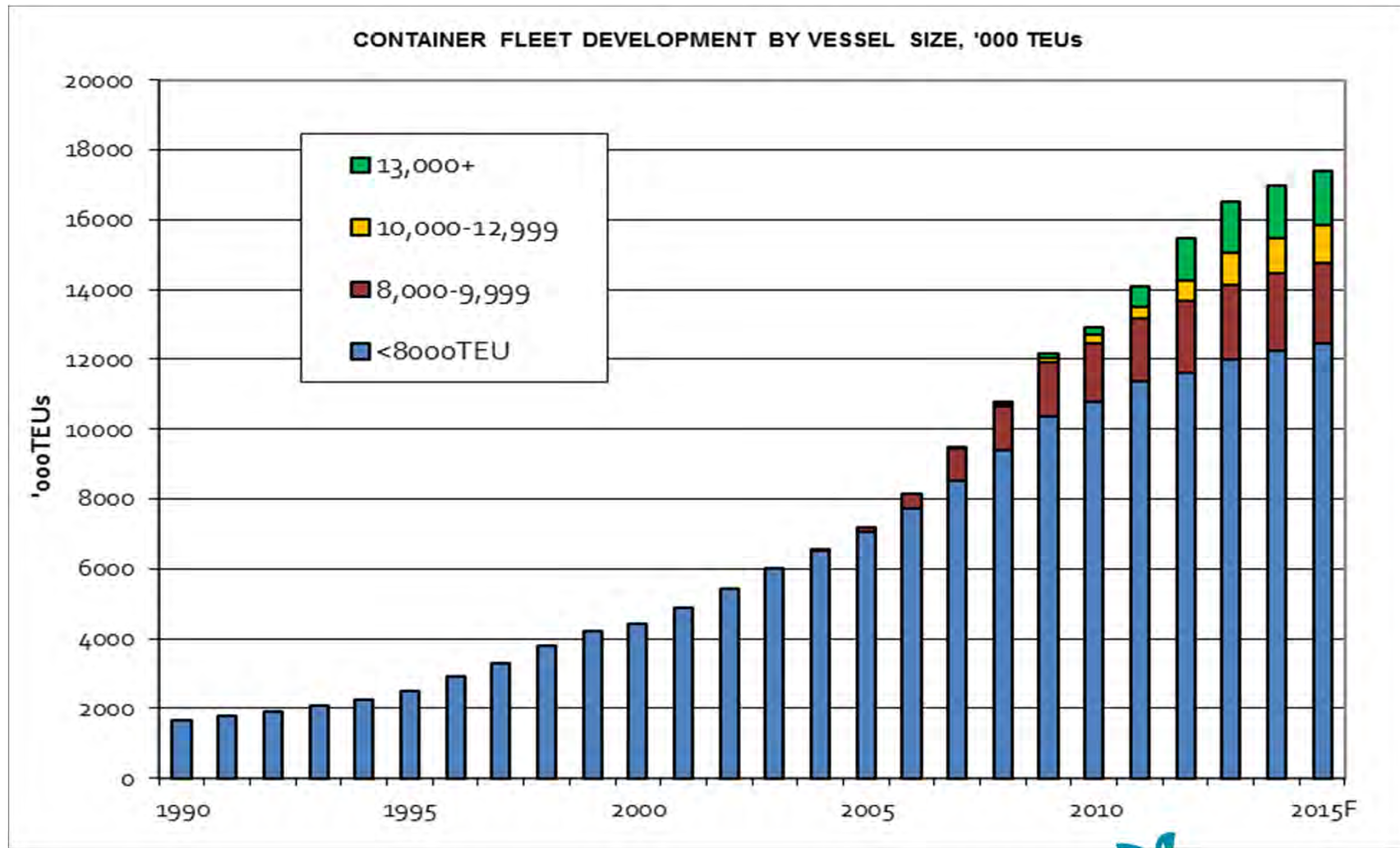
- The role of 10,000TEU+ vessels has increased dramatically, driven by scale economies and competitive pressures
- Massive ordering for ULCS and New Panamax vessels
- Transpacific and Asia-Europe trades will absorb most of this tonnage - but also 'cascade' on other routes
- At the same time fuel is much more expensive - there are pressures to slower steaming and dropping port calls
- The overall effect will be further concentration and greater transshipment activity, which is likely to benefit East Mediterranean ports



# Larger Vessel Sizes - a continuing process

- Current size-based revolution for container ships
- Not just in the arterial trades - much larger vessel sizes are expected in north-south trades and for feeders
- The economic drivers are clear - lines that don't move up will see their competitive position undermined
- Already 18,000TEU+ vessels are a reality, with talks on 20,000+TEU ships
- Panama Canal expansion is a key factor. This will accelerate penetration of larger vessels into the Atlantic
- Ports will have to respond

# A Ship Size Revolution is Underway



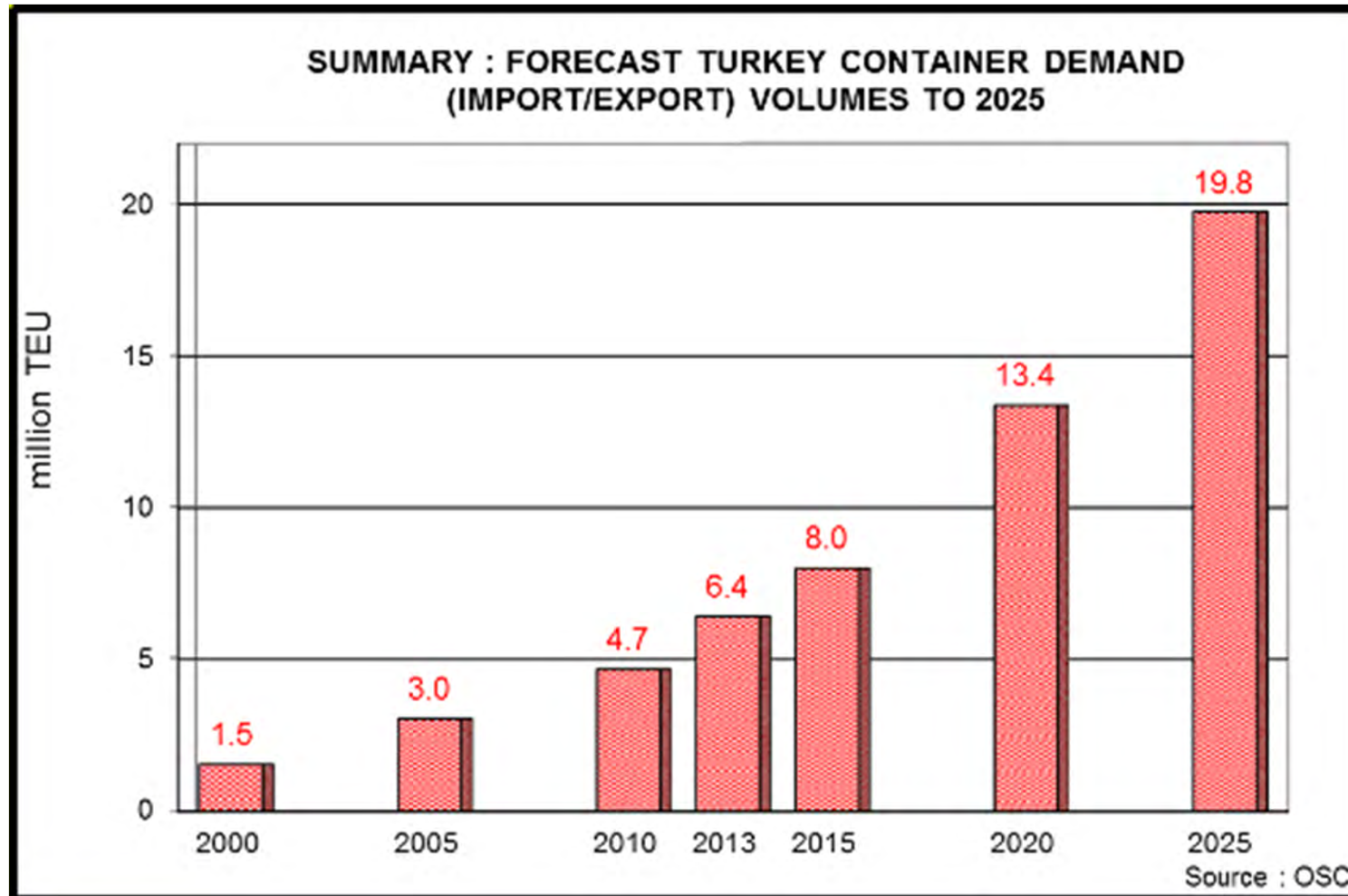
# Implications for Container Terminals

- In order to handle much larger vessels and consignment sizes, terminals must expand and make better use of existing facilities
- These increases will be noted in all major front rank ports
- Terminal productivity has increased - especially volume per berth metre - but there remain wide differences
- Terminals which do not lift productivity will see market share decline
- There is scope for considerable further improvement

# Conclusions

- Ship sizes are on the increase worldwide
- Leads to cascade of larger tonnage into secondary services
- Direct calls sooner than anticipated at some ports and size of vessels increase sooner than expected due to increase in its volumes
- Volume is the critical criteria for direct calls, but not all lines have the critical mass to warrant making such calls
- Consolidation of ship sizes
- Deep water is the key issue for terminals
- Expect increase of vessel sizes on direct calls and on feeders

# Future Growth



# Summary: Future Demand Outlook

- GDP Growth Recovery
- Return to Healthy GDP Rates
- Increasing Trade Intensity
- Further Container Penetration
- Under-Developed Port Sector
- Low Shipping Costs



# Container Port Feasibility Criteria

- Location
- Local Demand
- Hinterland Links
- Capacity
- Waterdepth
- Cost Competitiveness

# Conclusions

- Recent Volume Growth
- Port Development
- Close Links with GDP Growth
- Demand Growth Prospects
- Future Port Expansion
- Growth Area for Future

# Recent Major Port Projects in Region by our team





**Roy van Eijsden**

**Royal HaskoningDHV**

**roy.van.eijsden@rhdhv.com**

**+90 530 040 9344**