



PRESIDENCY OF
THE REPUBLIC OF TÜRKİYE
**INVESTMENT
OFFICE**

LOGISTICS AND TRANSPORTATION INDUSTRY IN TÜRKİYE

April 2024

[INVEST.GOV.TR](https://invest.gov.tr)



AGENDA



WHY INVEST IN TÜRKİYE



LOGISTICS INDUSTRY
IN TÜRKİYE



TRANSPORTATION INDUSTRY
IN TÜRKİYE





10 reasons to invest in Türkiye



ROBUST
ECONOMY



DOMESTIC
+ ACCESSIBLE
MARKETS



STRATEGIC
LOCATION



FAVOURABLE
DEMOGRAPHICS



SKILLED
AND
COMPETITIVE
LABOR FORCE



CONTINUOUS
REFORM PROCESS



BUSINESS-FRIENDLINESS



LUCRATIVE
INCENTIVES



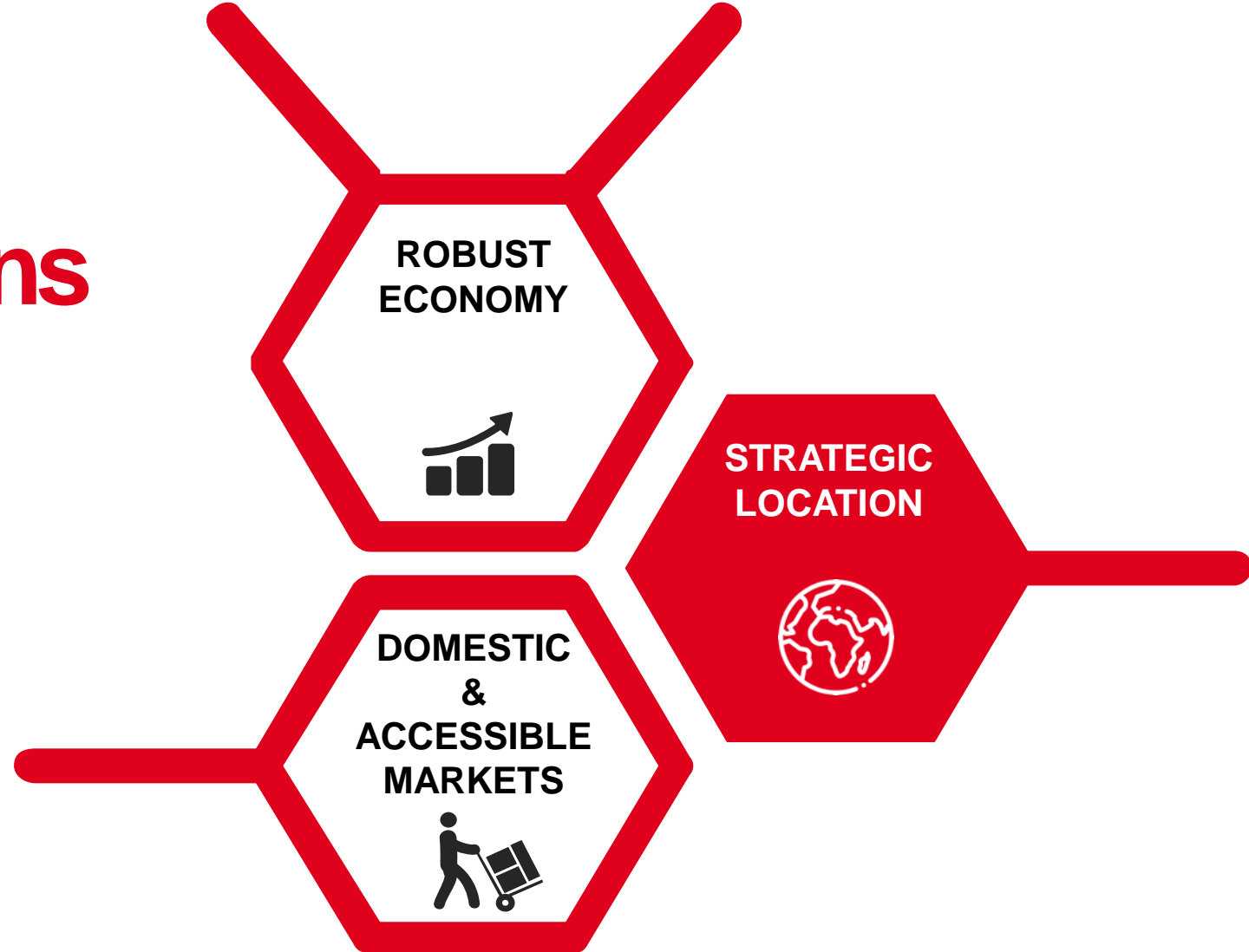
BENIGN R&D
ECOSYSTEM



SECTORAL
OPPORTUNITIES



3 main reasons to invest in Logistics





11th largest economy in the World

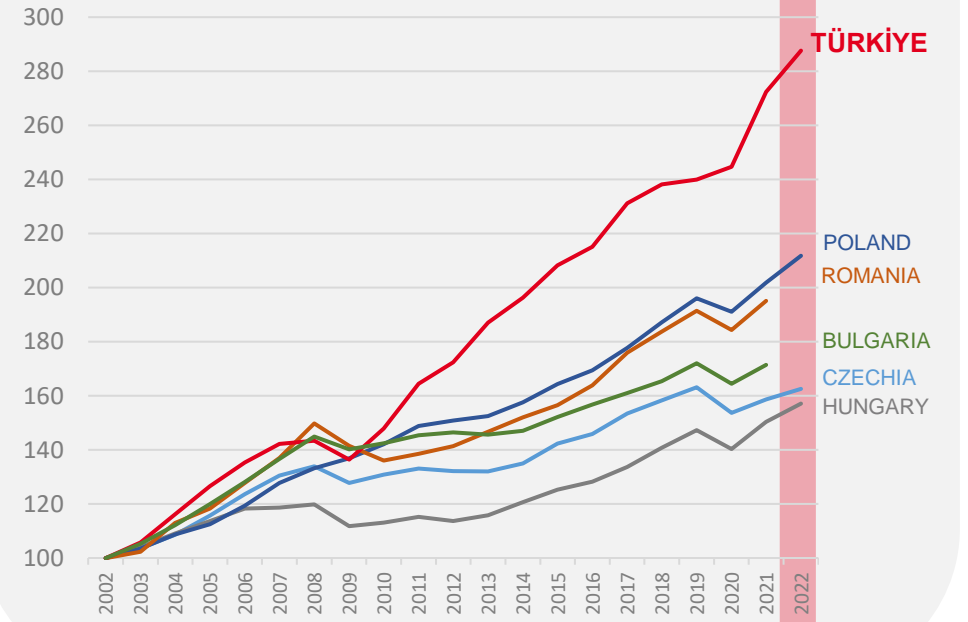
RANKING OF ECONOMIES BY GDP AT PPP

2003	2019	2022
1. USA	1. CHINA	1. CHINA
2. CHINA	2. USA	2. USA
3. JAPAN	3. INDIA	3. INDIA
4. GERMANY	4. JAPAN	4. JAPAN
5. INDIA	5. GERMANY	5. GERMANY
6. RUSSIA	6. RUSSIA	6. RUSSIA
7. FRANCE	7. INDONESIA	7. INDONESIA
8. UK	8. BRAZIL	8. BRAZIL
9. BRAZIL	9. UK	9. UK
10. ITALY	10. FRANCE	10. FRANCE
11. MEXICO	11. MEXICO	11. TÜRKİYE
12. INDONESIA	12. ITALY	12. ITALY
13. SPAIN	13. TÜRKİYE	13. MEXICO
14. CANADA	14. S.KOREA	14. KOREA
15. S.KOREA	15. SPAIN	15. CANADA
16. S.ARABIA	16. CANADA	16. SPAIN
17. IRAN	17. S.ARABIA	17. S.ARABIA
18. TÜRKİYE	18. IRAN	18. EGYPT

AVERAGE ANNUAL GDP GROWTH (%) 2002-2022



REAL GDP GROWTH (INDEX: 2002=100)



STRATEGIC LOCATION

HUB FOR MULTINATIONALS TO MANUFACTURE,
EXPORT AND MANAGE



Working Hours Intersect with 16 Time Zones



66 countries



Microsoft

70 countries



Production base for MENA



Its largest production facility worldwide



89 countries



GE Healthcare

22 countries



RENAULT

Exporting 75% of its production



80 countries



Exporting 85% of its production



Exporting 87% of its production



SANOFI

14 countries



30 countries

DOMESTIC + ACCESSIBLE MARKETS

DOMESTIC MARKET + EU MARKET + FREE TRADE AREA



IMPRESSIVE ECONOMIC GROWTH LEADING TO A SIZEBLE MIDDLE CLASS WITH INCREASING PURCHASING POWER



\$ 10,998

2002



\$ 39,301

2022

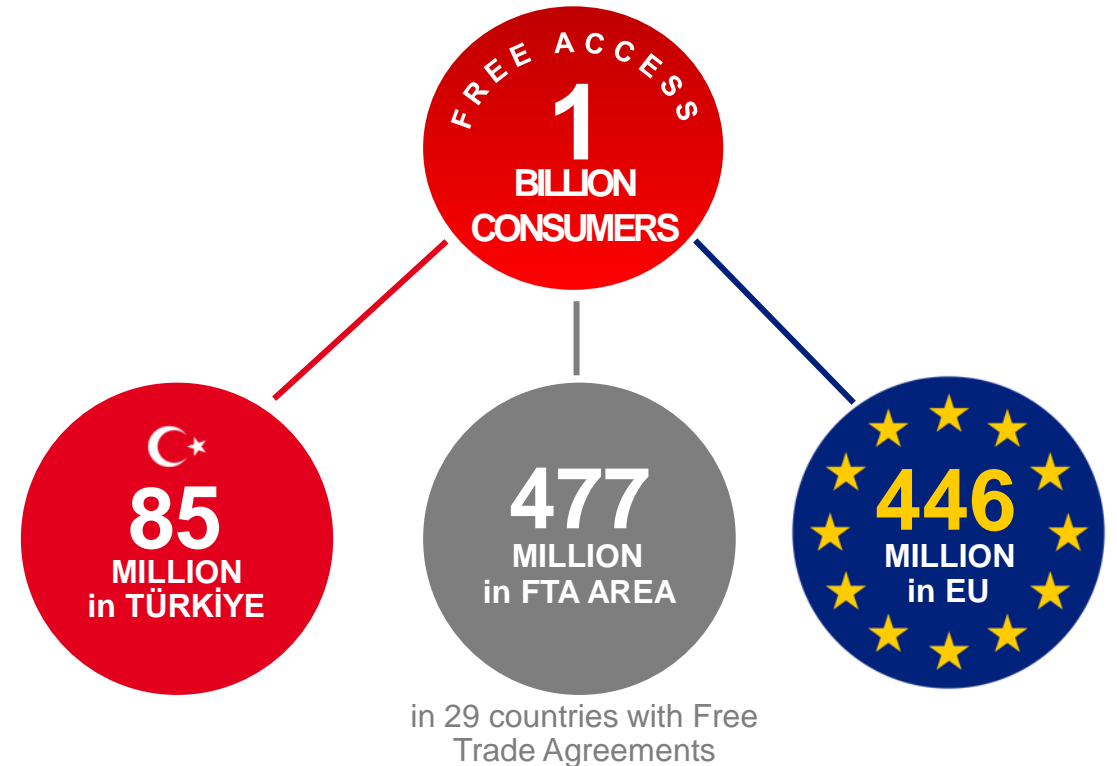
DOMESTIC MARKET FURTHER SUPPORTED BY EMERGING URBAN CENTERS



24 urban centers
With Populations
over 1 million

DOMESTIC MARKET + EU MARKET + FREE TRADE AREA

Customs Union with the EU allows direct access to the market



AGENDA



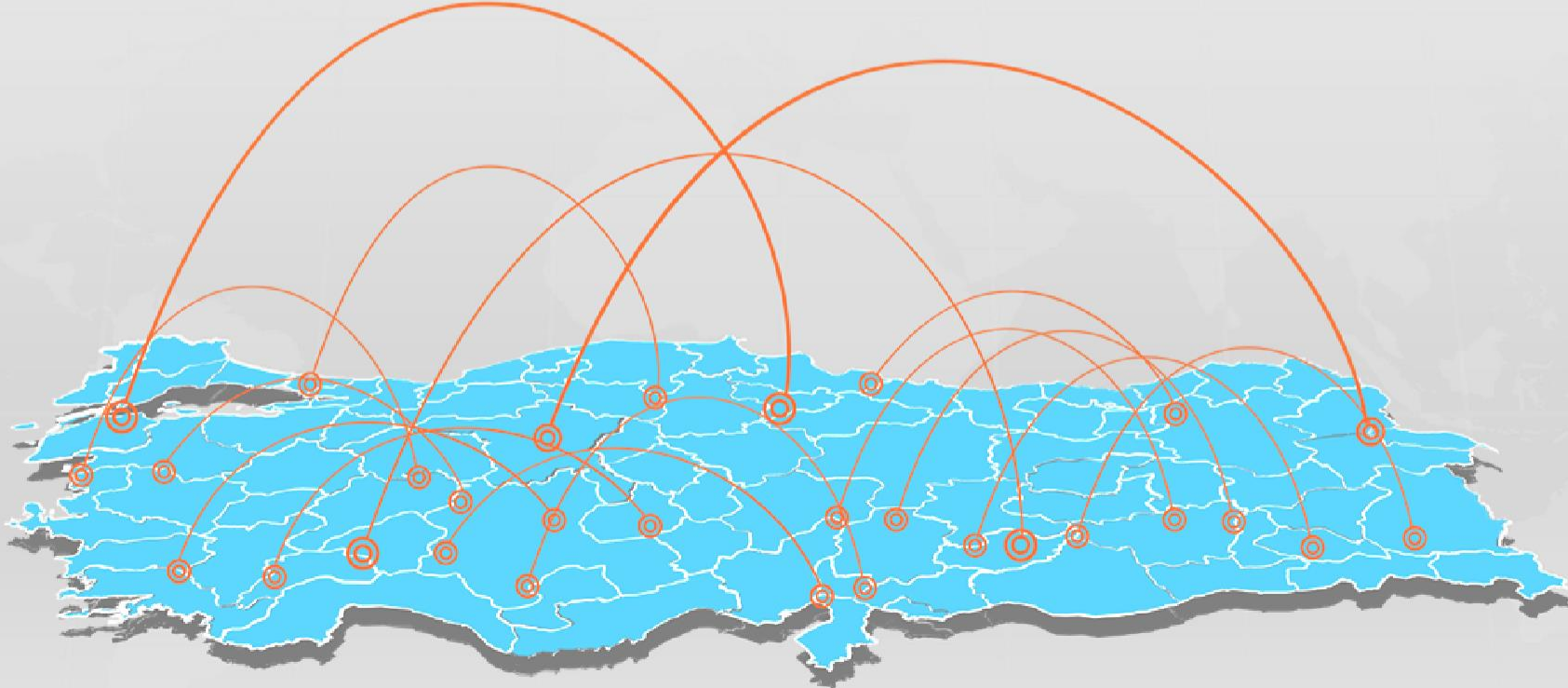
WHY INVEST IN TÜRKİYE



**LOGISTICS INDUSTRY
IN TÜRKİYE**

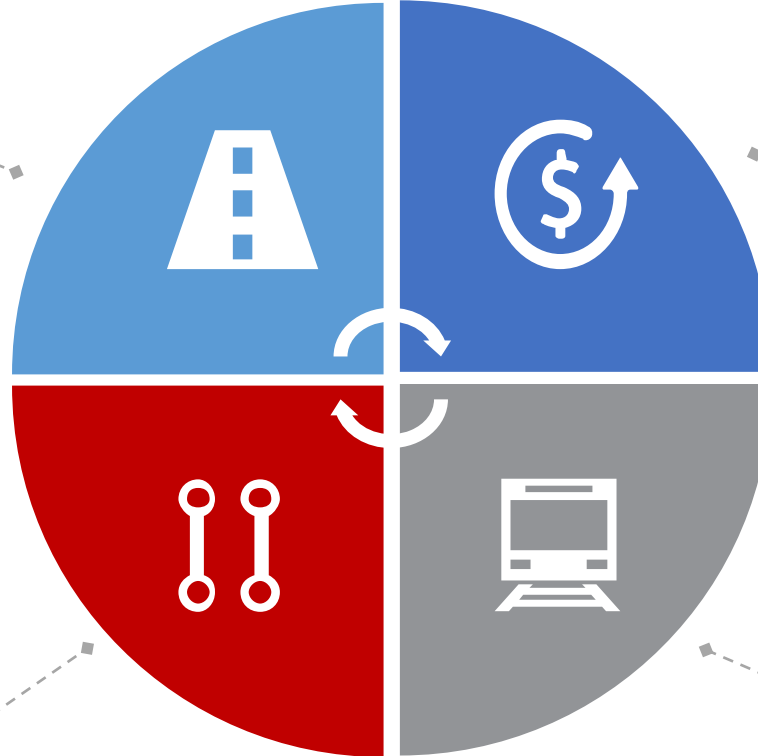


TRANSPORTATION INDUSTRY
IN TÜRKİYE

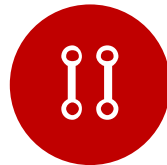




Making Türkiye regional logistics hub by attracting transit cargo to Türkiye



Decreasing logistics costs



Directing resources to productive investments and prioritizing

Increasing logistics maturity, improving technology and human capacity

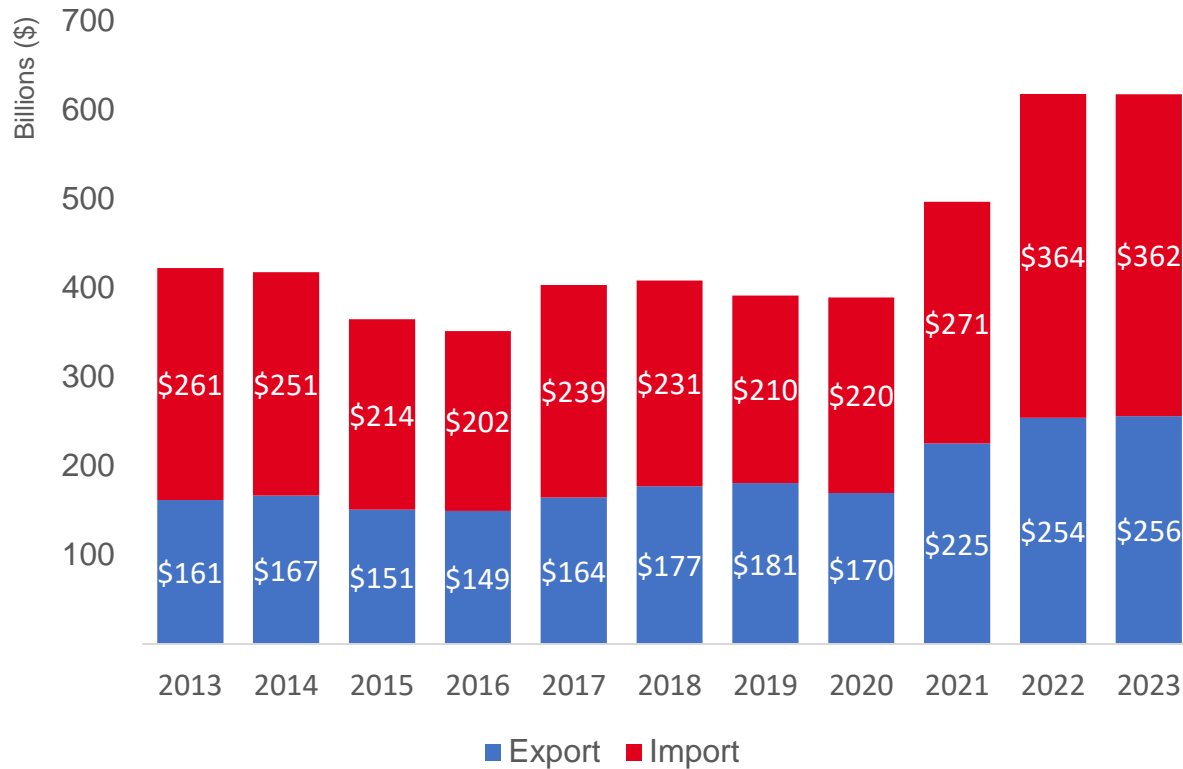


LOGISTICS ACTIVITY IN TURKEY

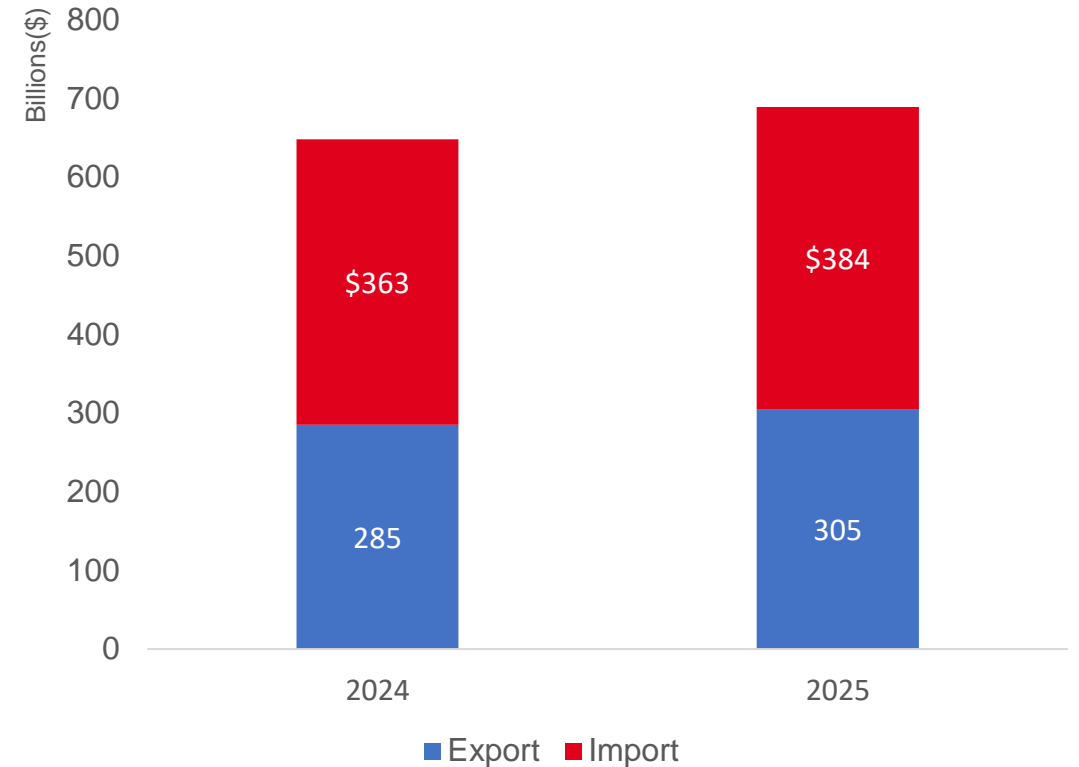
FOREIGN TRADE IS MAIN DRIVER OF LOGISTICS SECTOR



Foreign Trade Statistics, 2013-2023



Foreign Trade Growth Estimate, 2024-2025

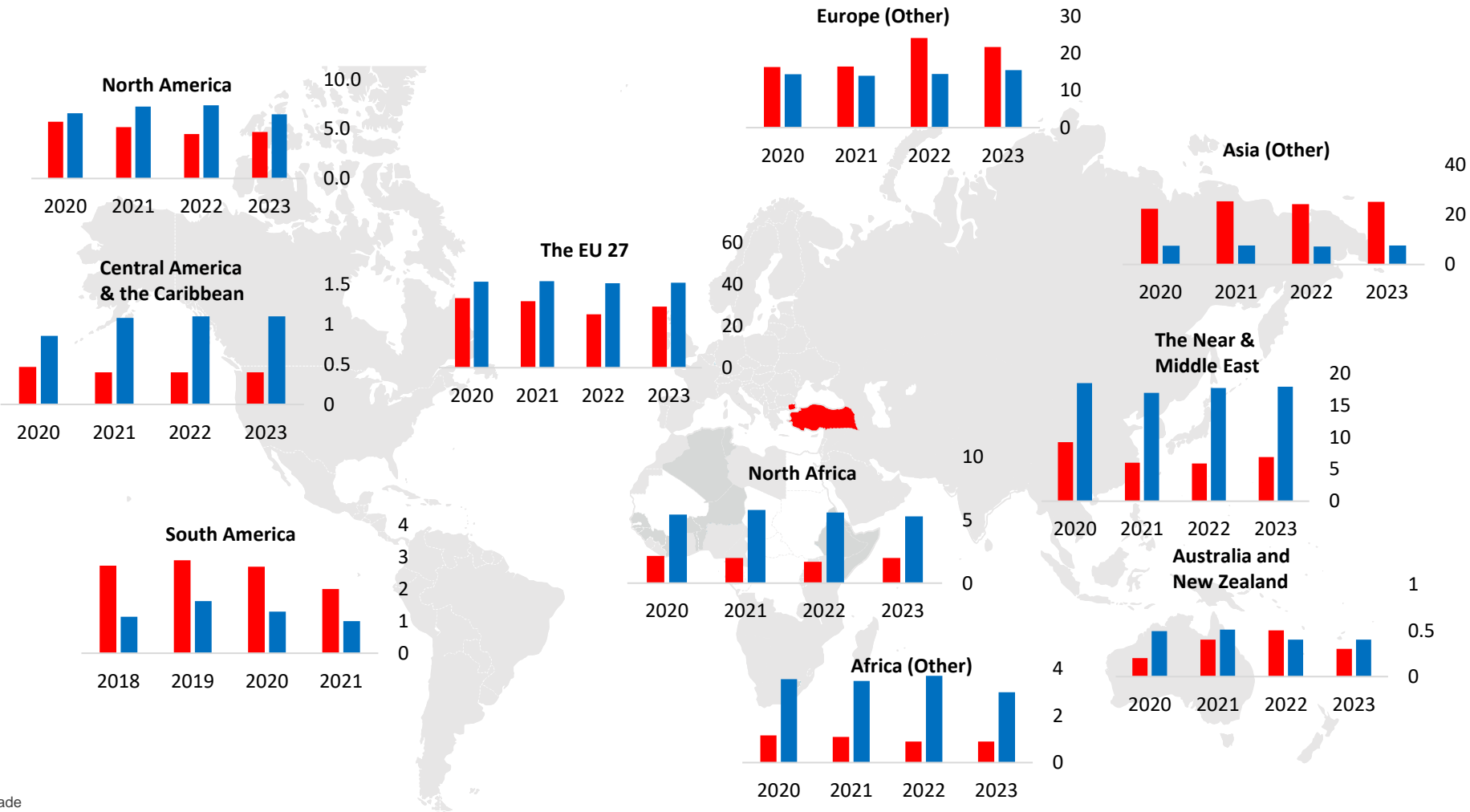


TRADE ACTIVITY WITH COUNTRY GROUPS

UPGRADED LOGISTIC INFRASTRUCTURE
INCREASED FOREIGN TRADE ACTIVITIES
ACROSS THE GLOBE



- ❖ Main export partners of Türkiye: Germany, the USA, the UK, Iraq and Italy.
- ❖ Main import partners of Türkiye: China, Russia, Germany, the USA and Italy.



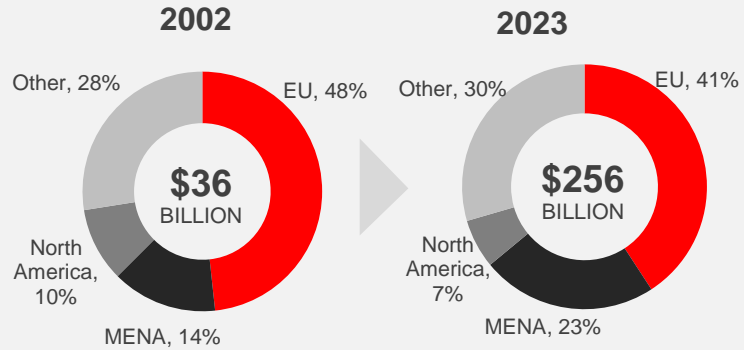
Source: Turkstat, Ministry of Trade
*Shares in Total

STRATEGIC LOCATION

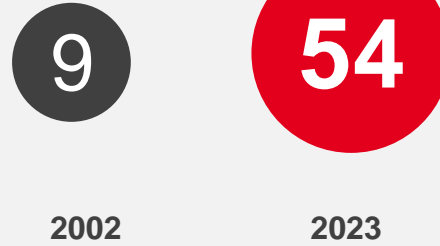
STRATEGIC LOCATION AND ENHANCED PRODUCTION CAPABILITIES ATTRACTING MULTINATIONALS TO INVEST FOR EXPORT



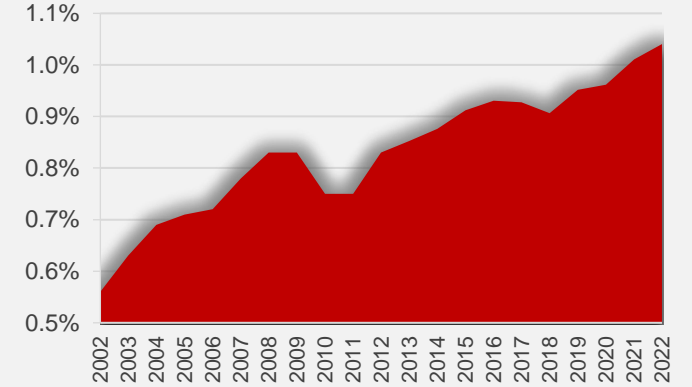
MERCHANDISE EXPORTS BY GEOGRAPHY



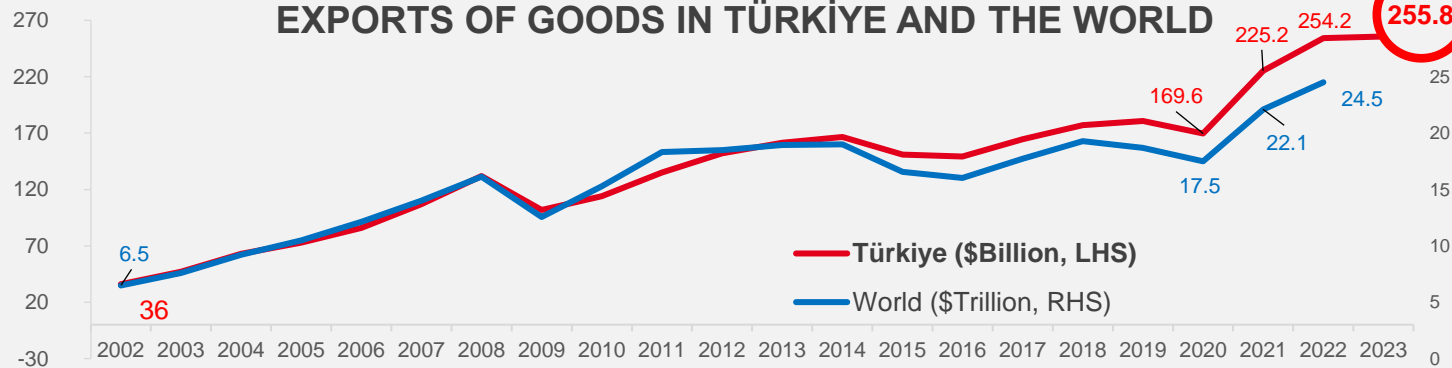
NUMBER OF EXPORT PRODUCTS OVER USD 1 BILLION



TÜRKİYE'S SHARE IN GLOBAL EXPORTS OF GOODS



EXPORTS OF GOODS IN TÜRKİYE AND THE WORLD



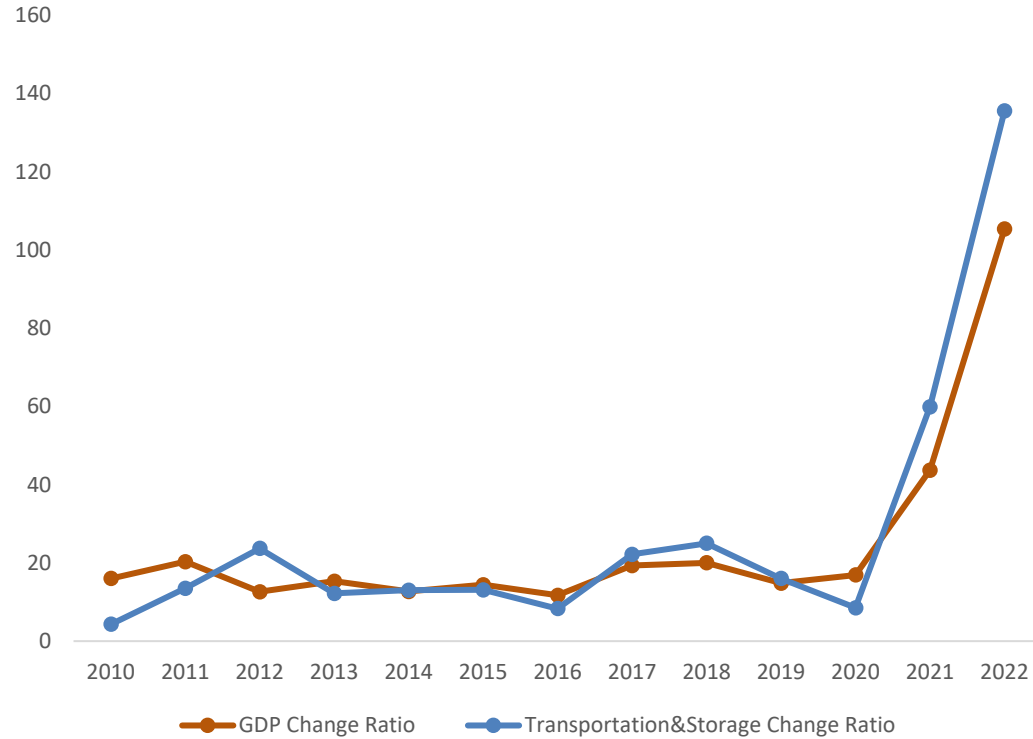
Türkiye Records All-Time High Exports in 2023

ANNUAL AVERAGE GROWTH OF EXPORTS (2002-2022)

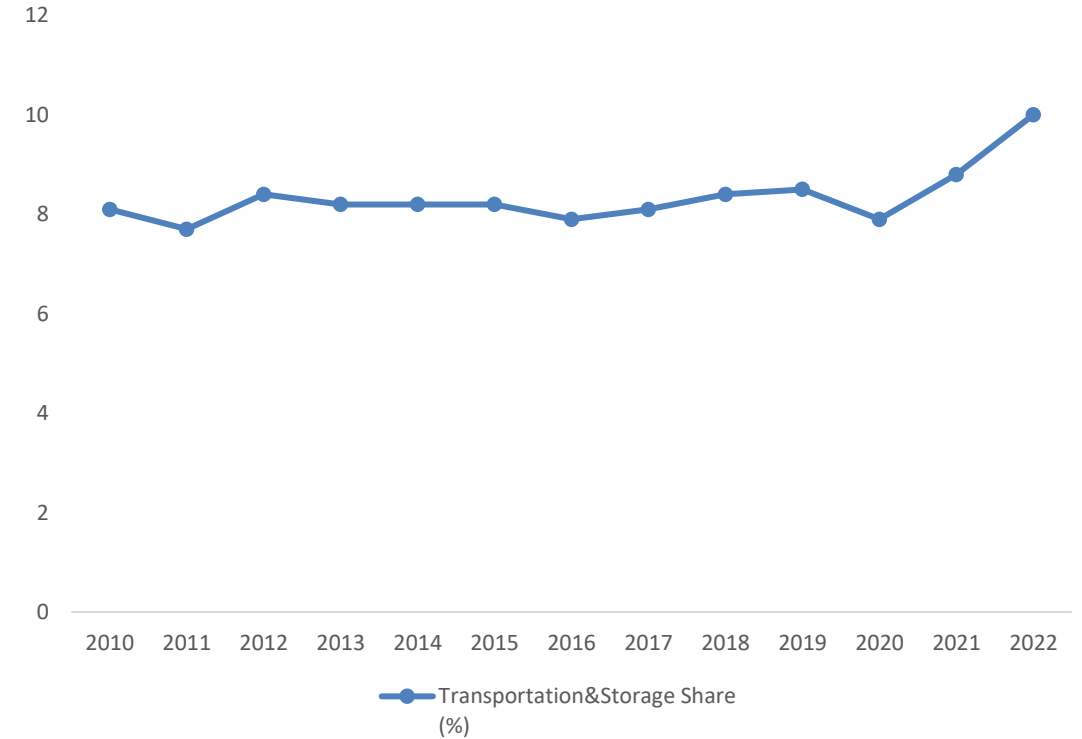




Change Ratio of GDP and Transport and Storage (%)

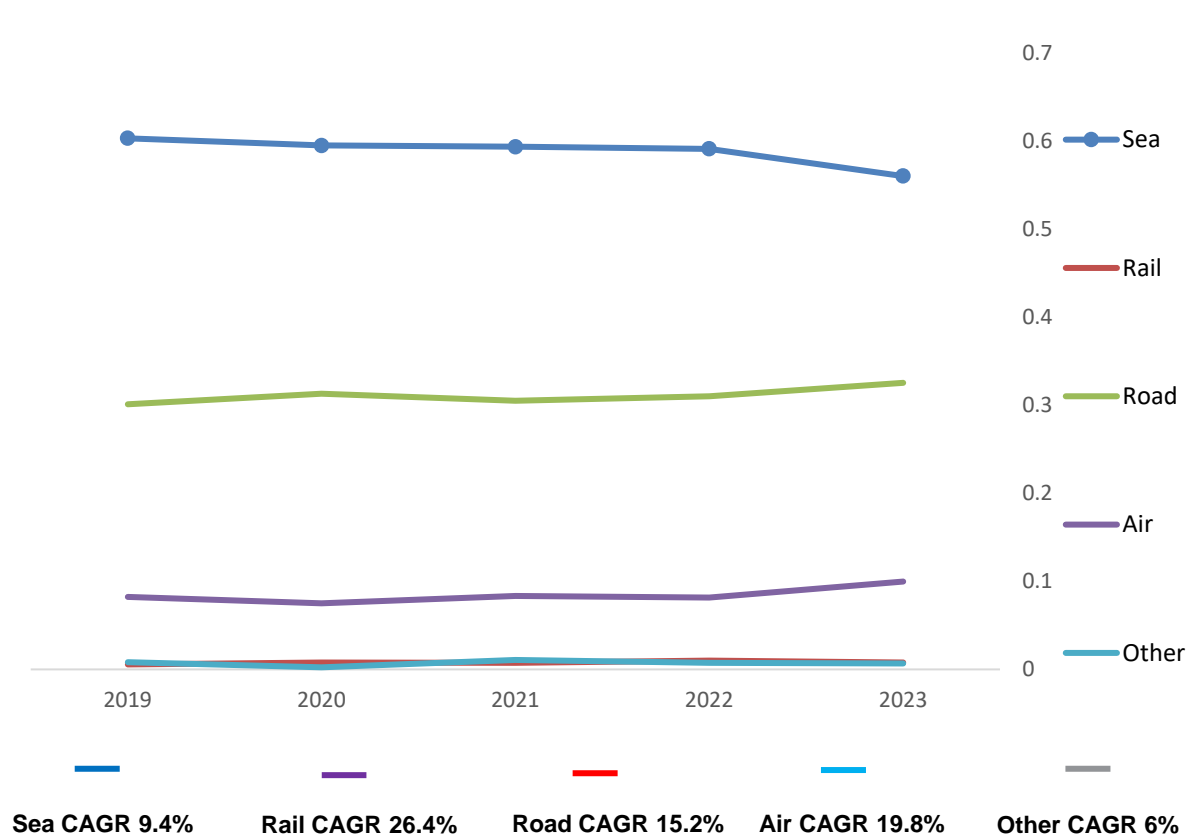


Share of Transport and Storage in GDP (%)

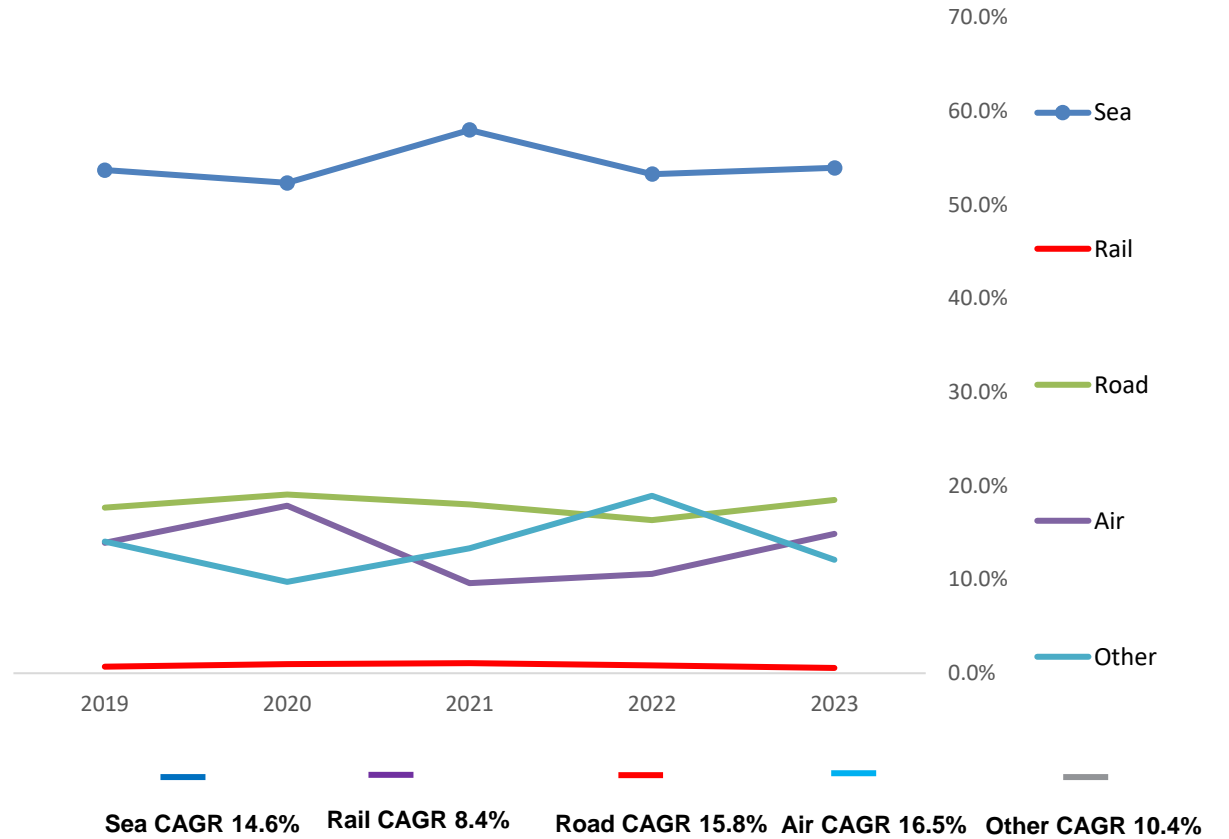




EXPORTS BY MODE OF TRANSPORTATION, 2019-2023

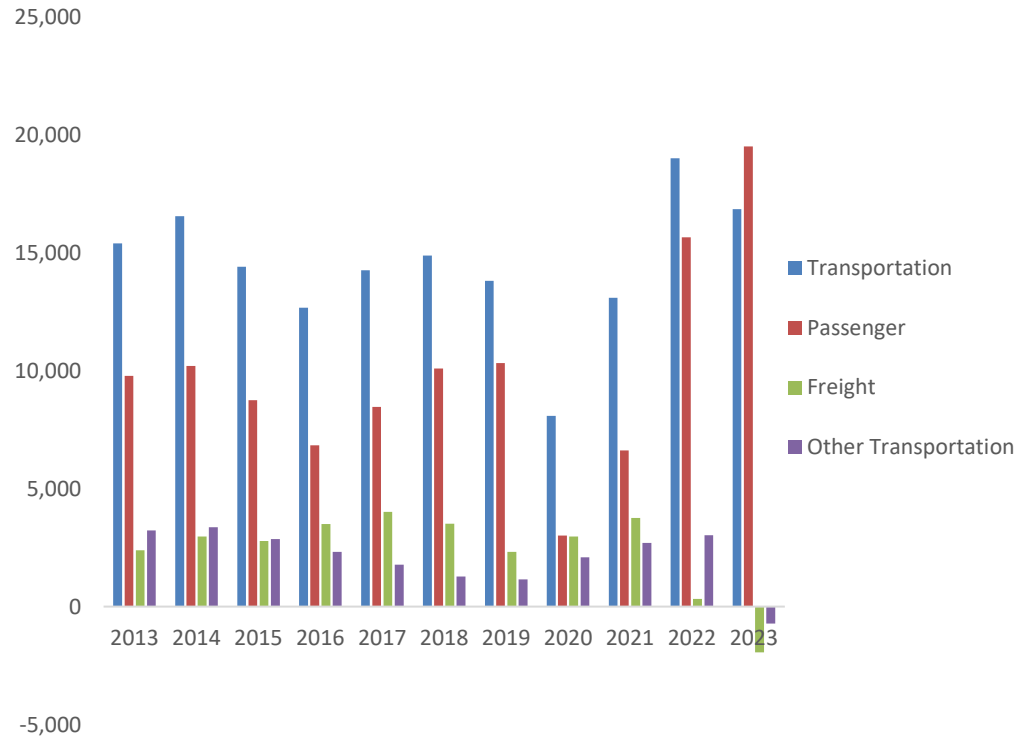


IMPORTS BY MODE OF TRANSPORTATION, 2019-2023

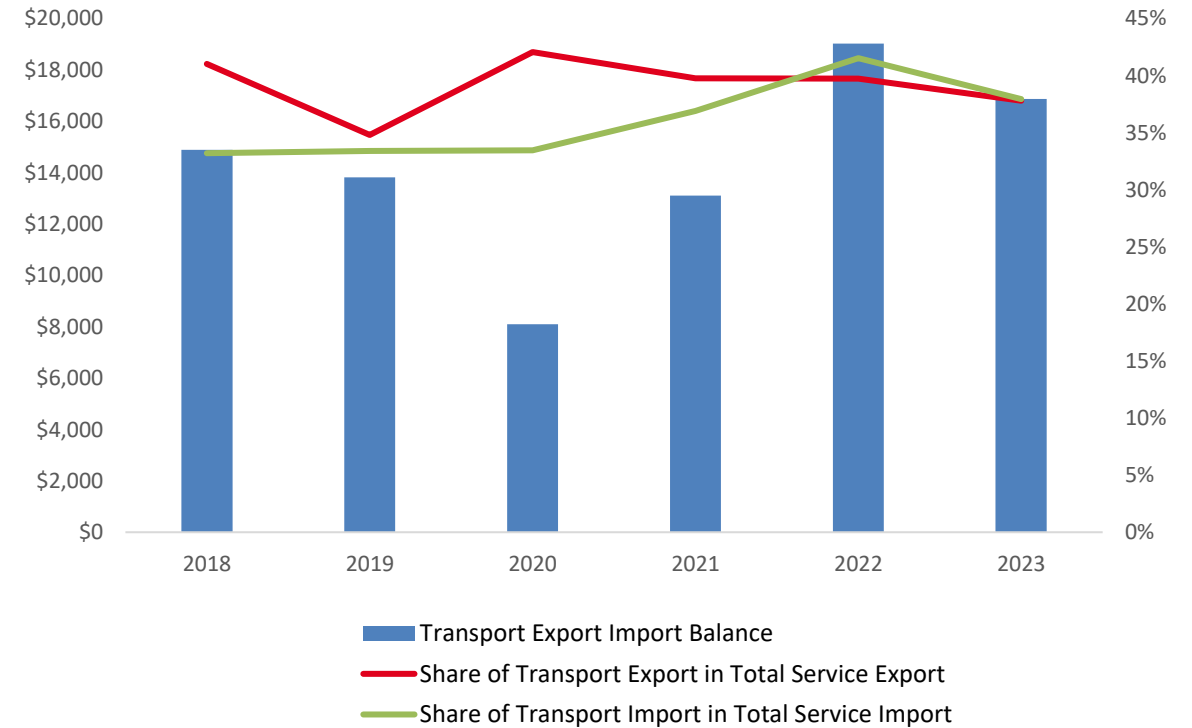




Transport Activities in Balance of Payments (Million \$) (2013-2023)



International Service Trade Statistics (2018-2023) (Travel excluded)





Logistics Performance Index(LPI) Ranks 2018-2023



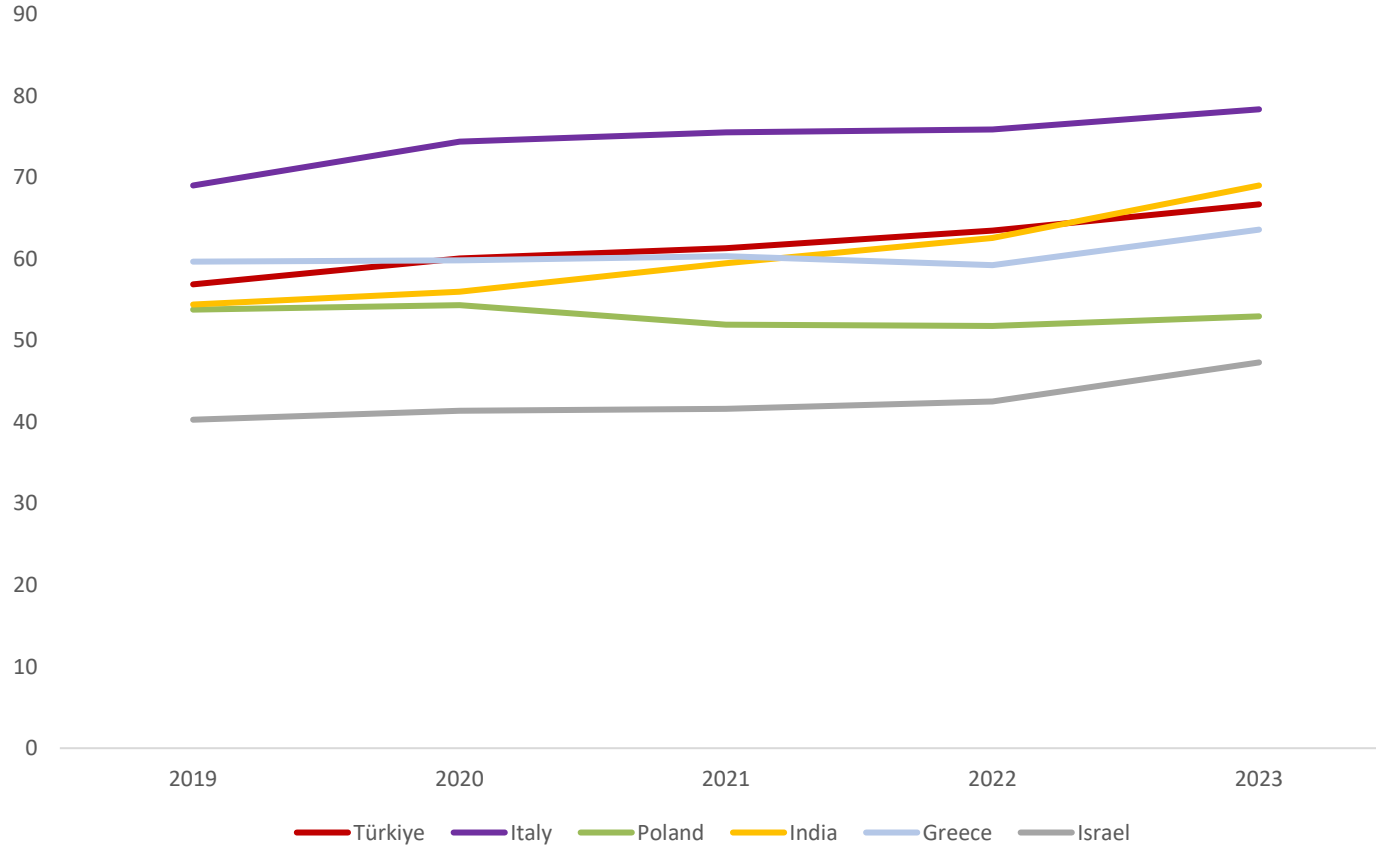
Türkiye is ranked as the **38th** best country in logistics out of 139 economies.

Score
3.4





Liner Shipping Connectivity Index (LSCI)



The Six Components of LSCI

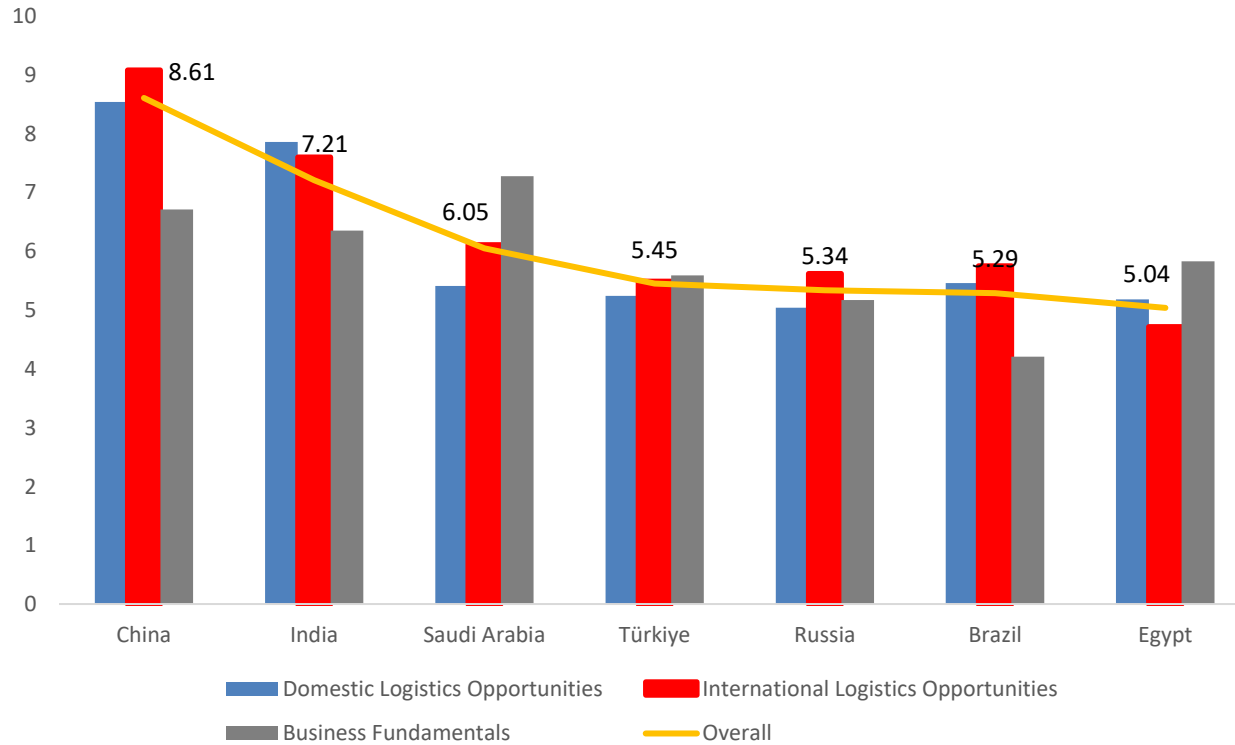
- 1 The number of scheduled ships
- 2 The total deployed annual capacity in TEU
- 3 The number of regular liner shipping services from and to the country
- 4 The number of liner shipping companies that provide services from and to the country
- 5 The number of other countries that are connected to the country through direct liner shipping services
- 6 The average size in TEU of the ships deployed by the scheduled service

LOGISTICS INDEX

TÜRKİYE OFFERS A STABLE ENVIRONMENT AND FAST GROWTH FOR THE LOGISTICS INDUSTRY AS A WHOLE



Agility Emerging Markets Logistics Index 2023



Türkiye is ranked as the **11th** best country in logistics out of 50 emerging markets

Score

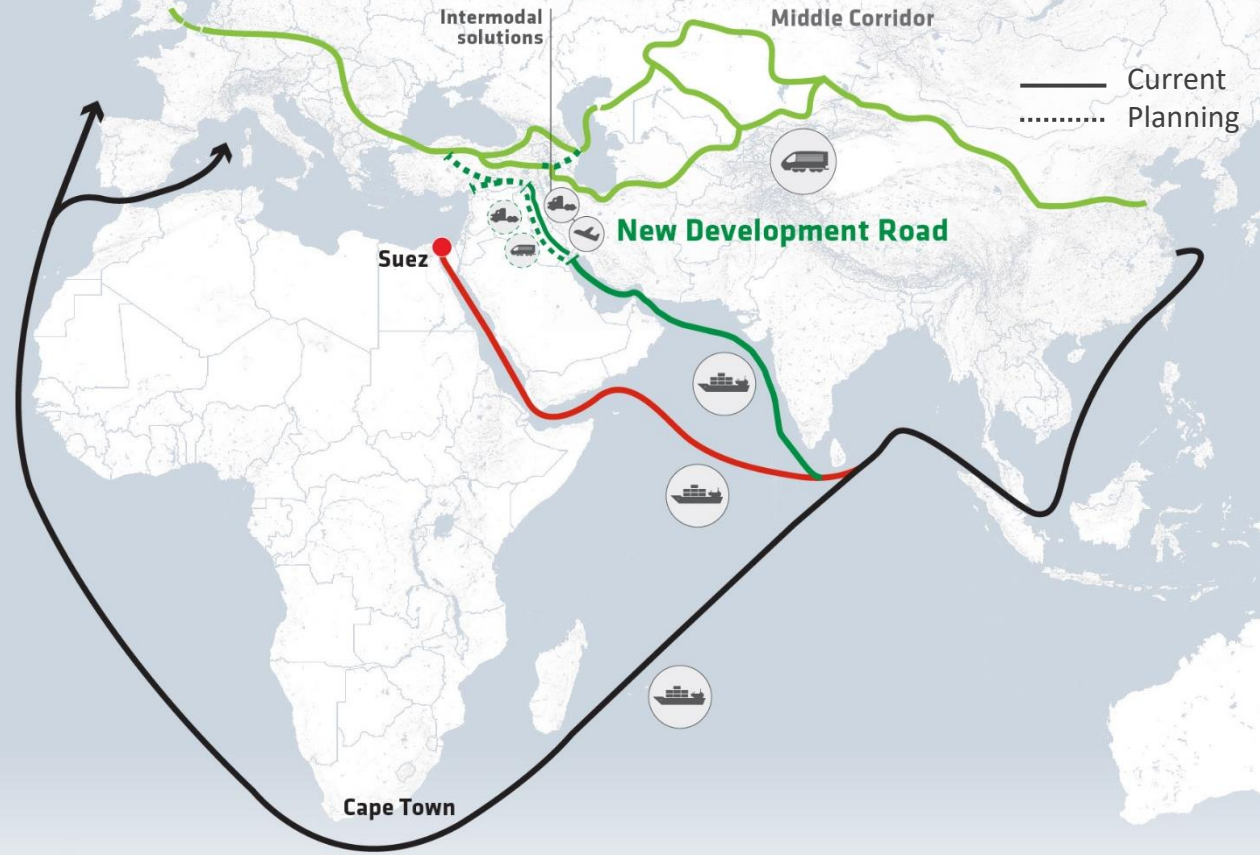
5.45



TÜRKİYE'S LOGISTICS ADVANTAGES

TÜRKİYE; YOUR RESILIENT PARTNER, PROVIDING DIVERSE ROUTES THROUGH EVERY CRISIS

Drewry WCI: Shanghai to Rotterdam



SUEZ CANAL ROUTE

18.250 KM

25.5 Days

THE CAPE ROUTE

25.000 KM

34 Days

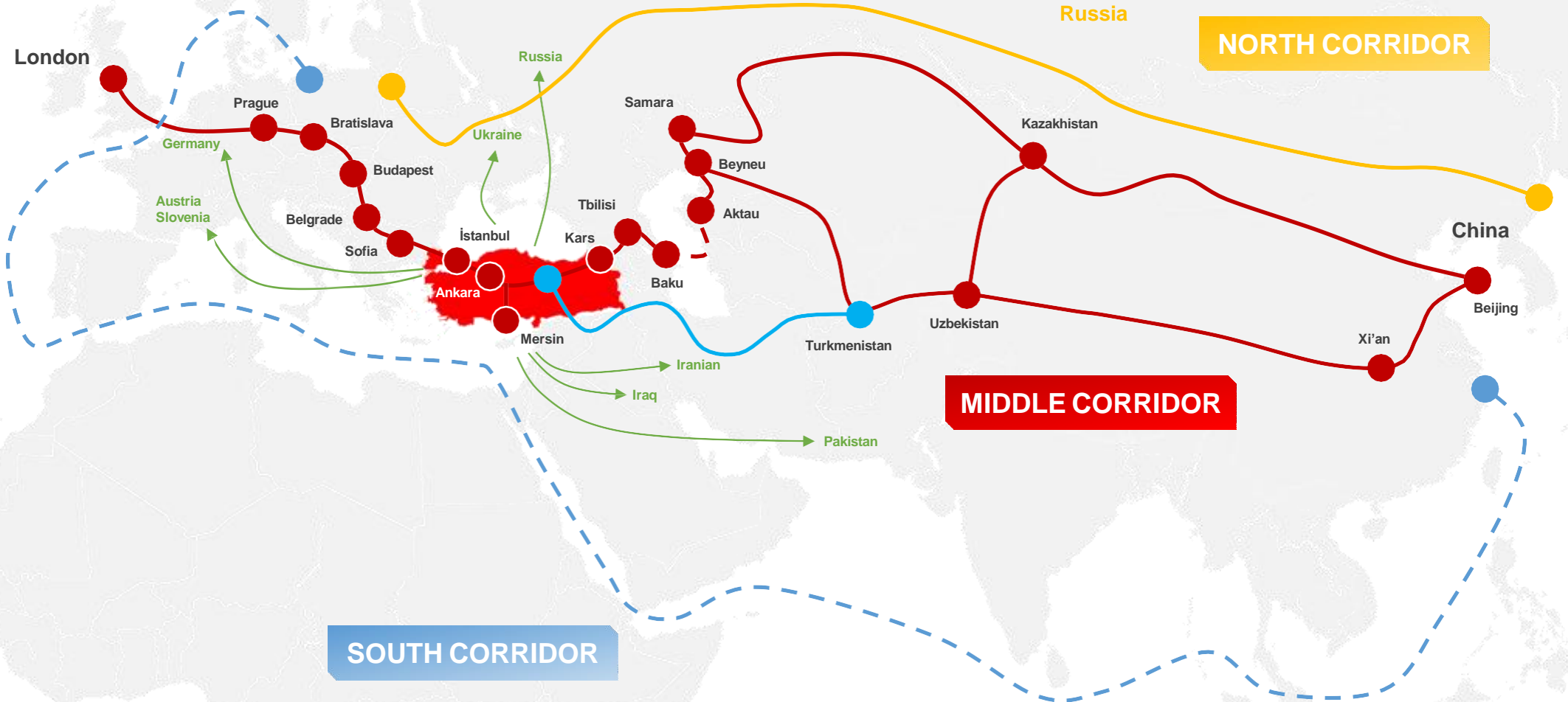
MIDDLE CORRIDOR

11.500 KM

12 Days

LOGISTICS ADVANTAGES OF TÜRKİYE

THE MIDDLE CORRIDOR IS MORE ECONOMICAL AND FASTER COMPARED TO THE NORTHERN CORRIDOR



LOGISTICS ADVANTAGES OF TÜRKİYE

ON 7TH NOVEMBER 2019, FREIGHT TRAIN DEPARTED CHINA AND WENT CENTRAL EUROPE BY PASSING BELOW THE BOSPHORUS VIA ISTANBUL'S MARMARAY TUNNEL FOR THE FIRST TIME.



Route of First Train (11,500 km)

Xi'an(China)-Kazakhstan-Türkiye-Azerbaijan-Georgia-Bulgaria-Serbia-Hungary-Slovakia-Czech Republic (Prague)

LOGISTICS ADVANTAGES OF TÜRKİYE

DEVELOPMENT ROAD THAT WILL TRANSPORT THE CARGO COMING TO IRAQ VIA INDIA, EAST ASIA AND THE PERSIAN GULF TO EUROPE.





LOGISTICS CAPABILITIES OF TÜRKİYE

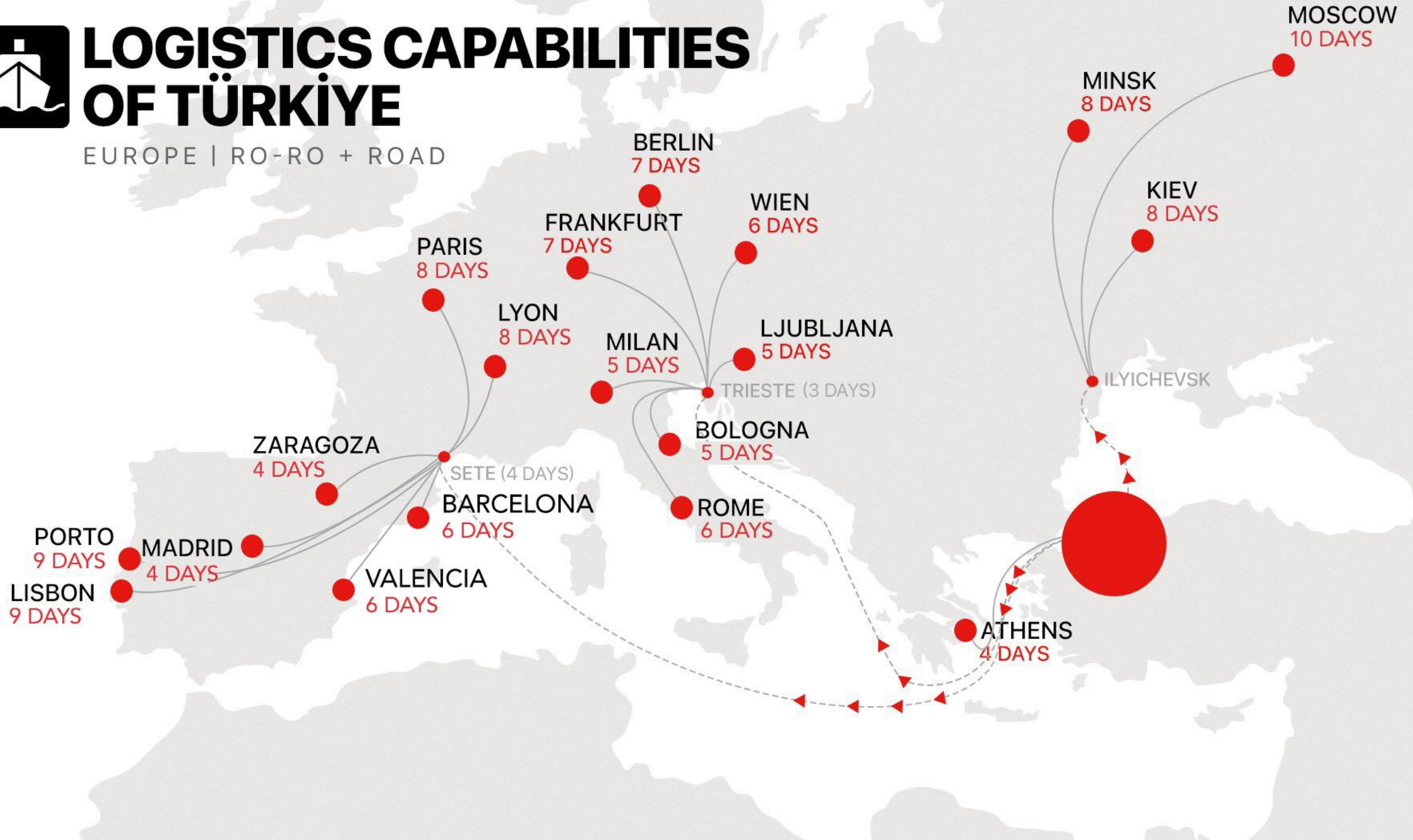
EUROPE | SEA / EXPORT





LOGISTICS CAPABILITIES OF TÜRKİYE

EUROPE | RO-RO + ROAD





LOGISTICS CAPABILITIES OF TÜRKİYE

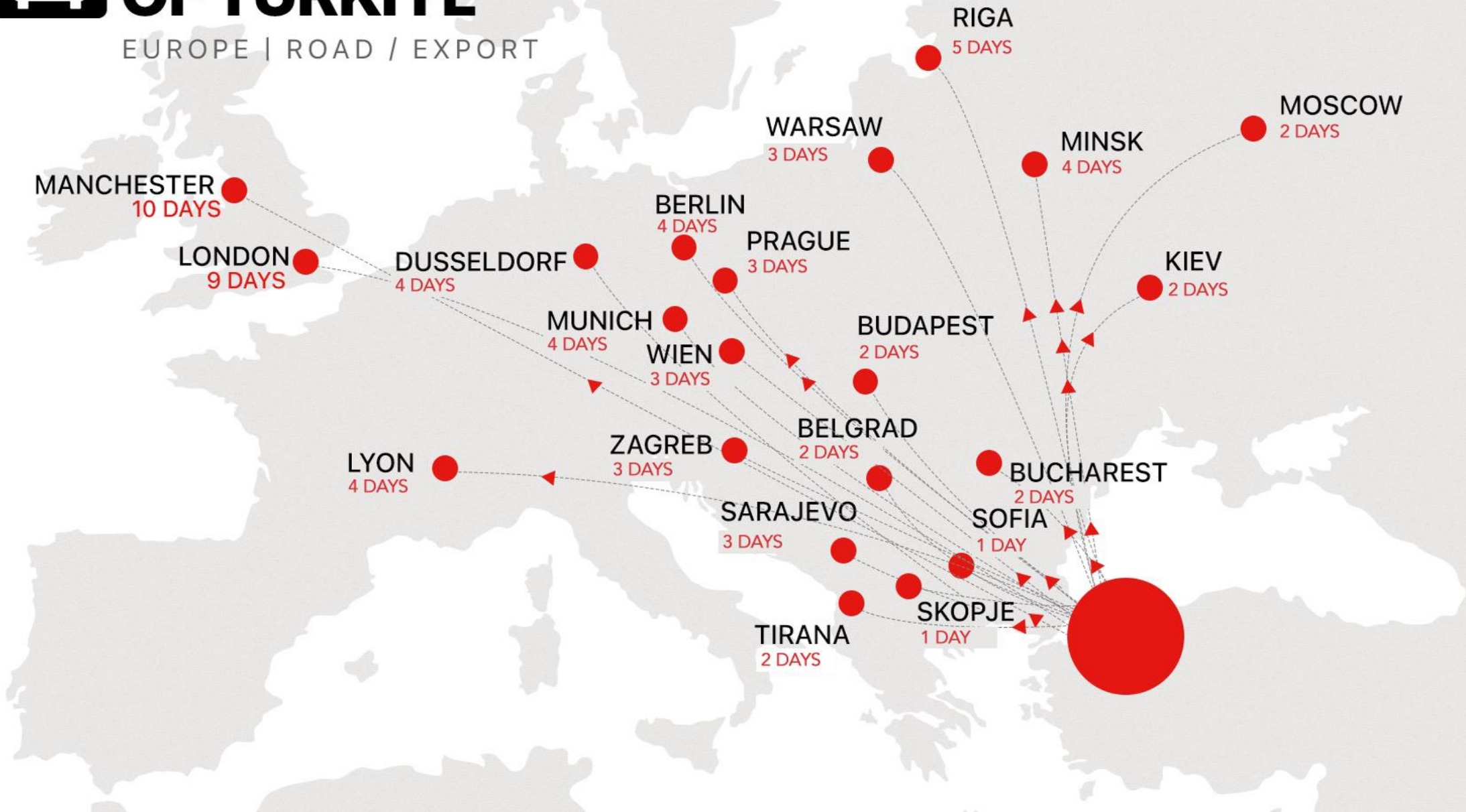
EUROPE | RO-RO + BLOCK TRAIN





LOGISTICS CAPABILITIES OF TÜRKİYE

EUROPE | ROAD / EXPORT





LOGISTICS CAPABILITIES OF TÜRKİYE

ASIA | SEA / IMPORT



HAIFA
6 DAYS

KING ABDULLAH PORT
9 DAYS

DUBAI, JEBEL ALI
17 DAYS

NHAVA SHEVA
17 DAYS

HO CHI MINH
28 DAYS

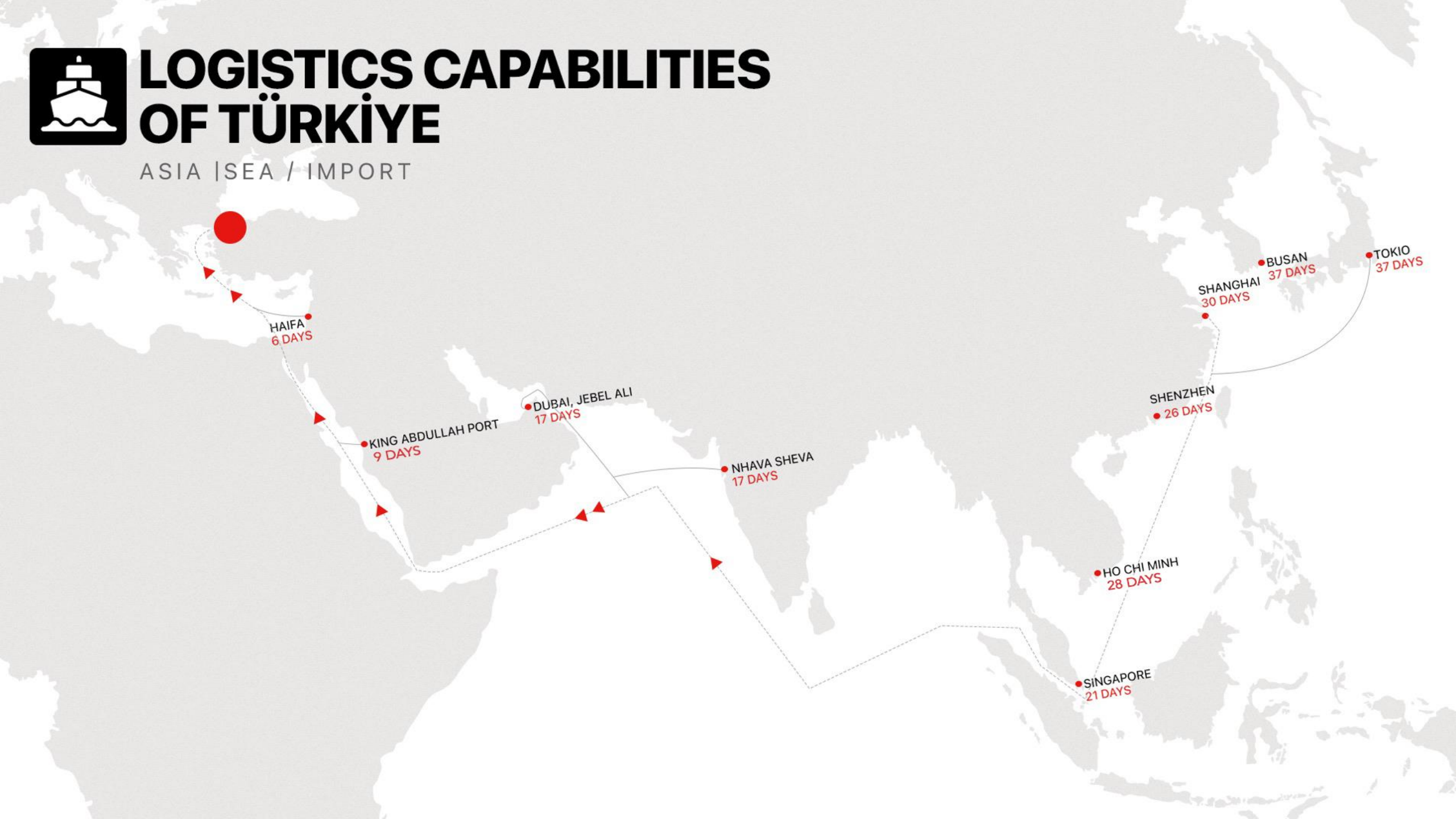
SINGAPORE
21 DAYS

SHENZHEN
26 DAYS

SHANGHAI
30 DAYS

BUSAN
37 DAYS

TOKIO
37 DAYS



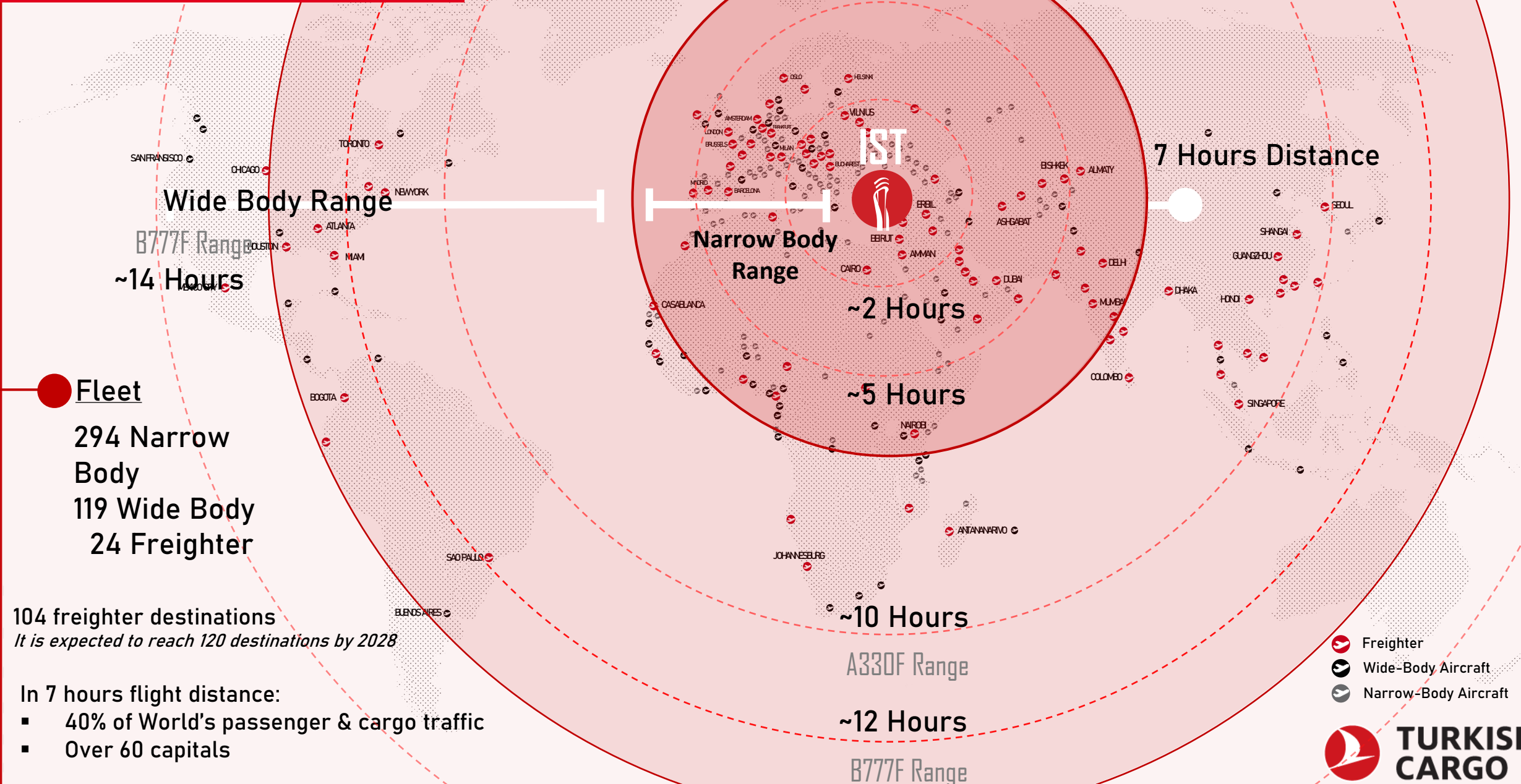


LOGISTICS CAPABILITIES OF TÜRKİYE

EUROPE / N. AFRICA | SEA / IMPORT



ISTANBUL AS A MEGA HUB



Fleet

294 Narrow Body
119 Wide Body
24 Freighter

104 freighter destinations
It is expected to reach 120 destinations by 2028

- In 7 hours flight distance:
- 40% of World's passenger & cargo traffic
 - Over 60 capitals





Türkiye will be more lucrative location for three reasons



NEW LOGISTICS MASTER PLAN

SIGNIFICANT CONTRIBUTIONS IS EXPECTED FROM LOGISTICS MASTER PLAN



AGENDA



WHY INVEST IN TÜRKİYE



LOGISTICS INDUSTRY
IN TÜRKİYE



**TRANSPORTATION INDUSTRY
IN TÜRKİYE**

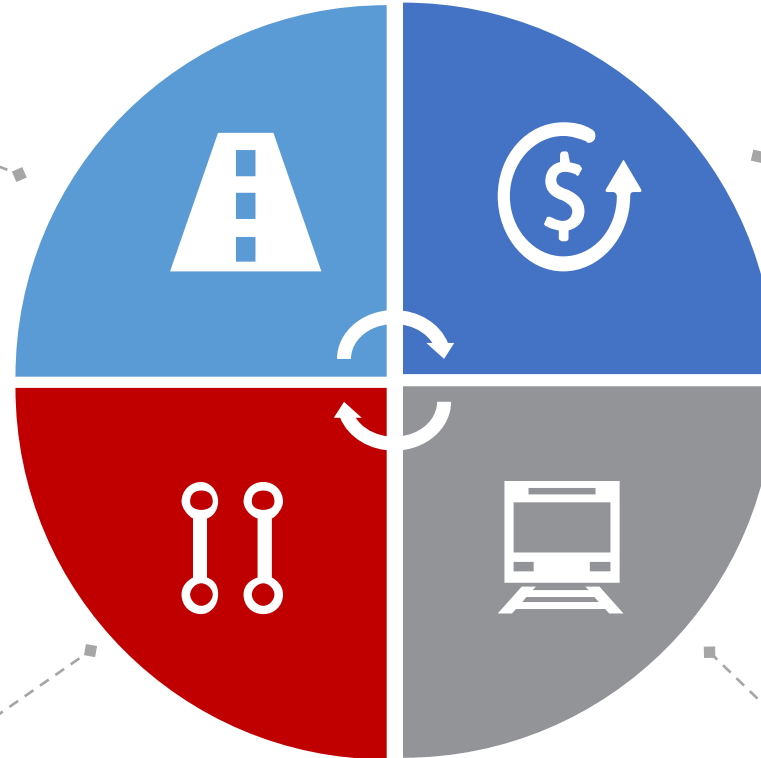


TRANSPORTATION POLICIES

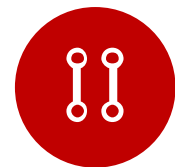
PILLARS OF TRANSPORTATION POLICIES



Creating a sustainable transportation infrastructure



Providing alternative financing for realization of transport projects by utilizing PPP and External Credit public investment models



Prioritizing transportation investments with the corridor approach and strengthening international connections


Supporting multimodal and balanced transportation by increasing rail freight and passenger transportation

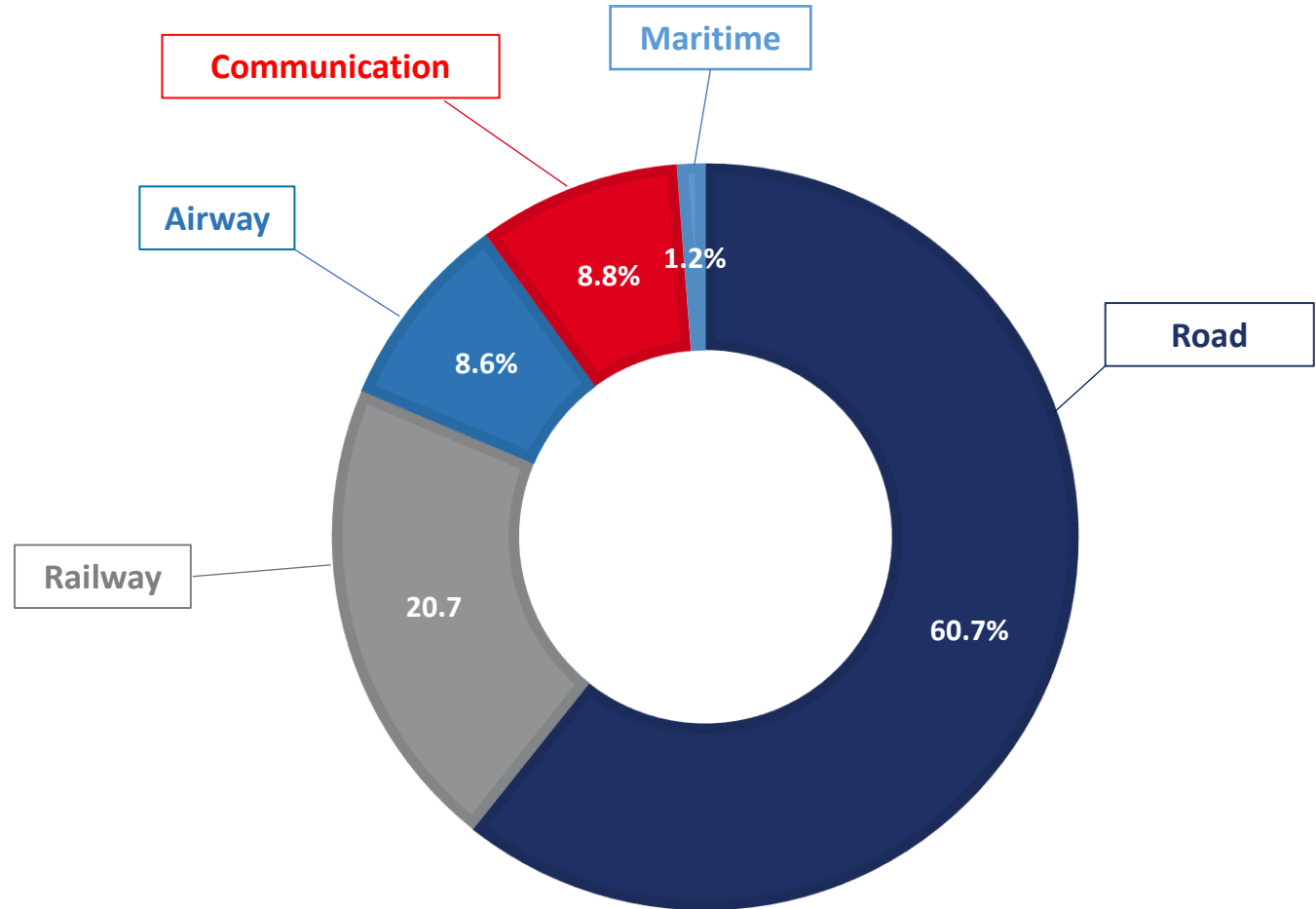


INVESTMENTS IN TRANSPORT

SECTORAL SHARE OF INVESTMENTS IN TRANSPORTATION AND COMMUNICATION (2003-2022)

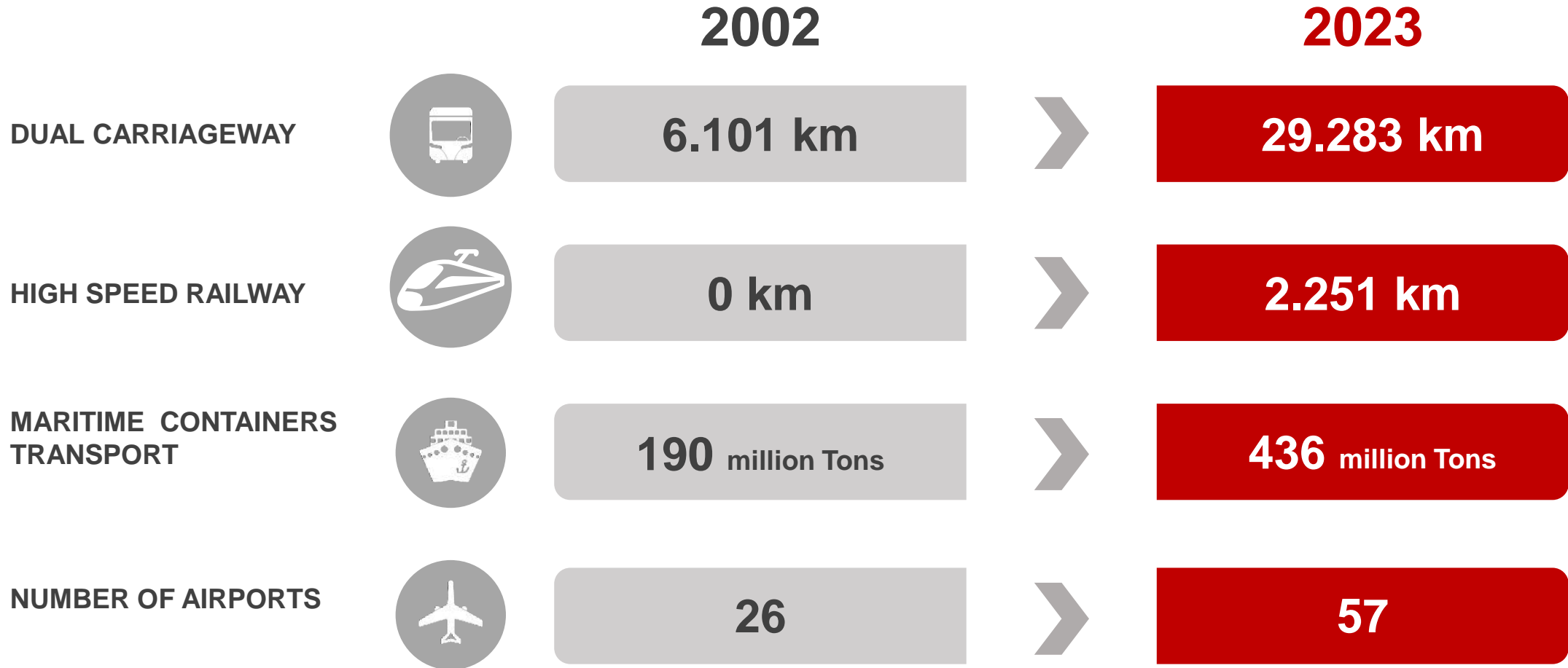


Sectors	Billion \$
Road 	151.7
Railway 	51.7
Airway 	21.4
Maritime 	3.1
Communication 	22.1
Total	250



INFRASTRUCTURE INVESTMENTS IN TRANSPORT

INVESTING IN TRANSPORTATION HAS REMARKABLY TRANSFORMED TÜRKİYE'S INFRASTRUCTURE LANDSCAPE YET TÜRKİYE IS DETERMINED TO IMPROVE IT FURTHER

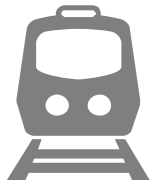
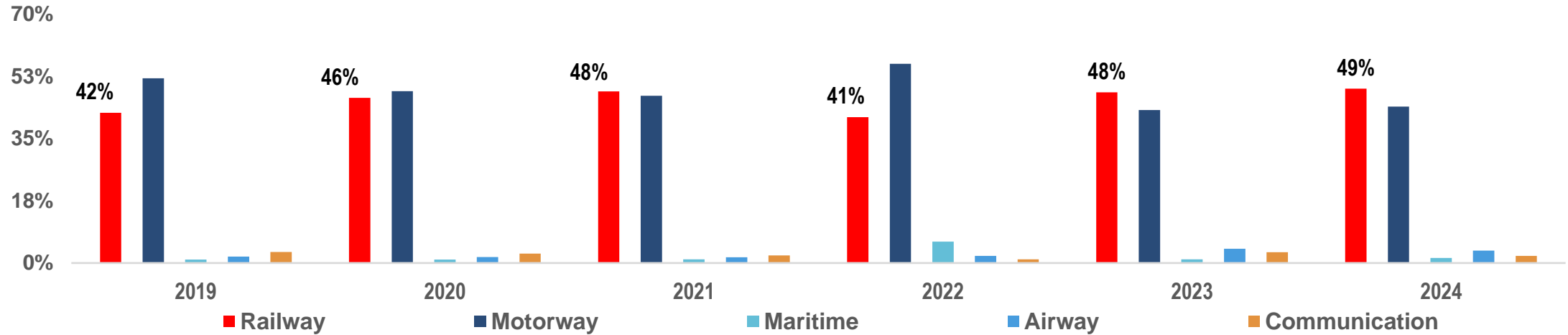


INVESTMENT IN RAIL NETWORK

THE SHARE OF RAIL IN TRANSPORT INVESTMENTS CONTINUE TO RISE



Investment Budget Percentages of Transport Subsectors



Investment
Billion \$

2035
(Long Term)

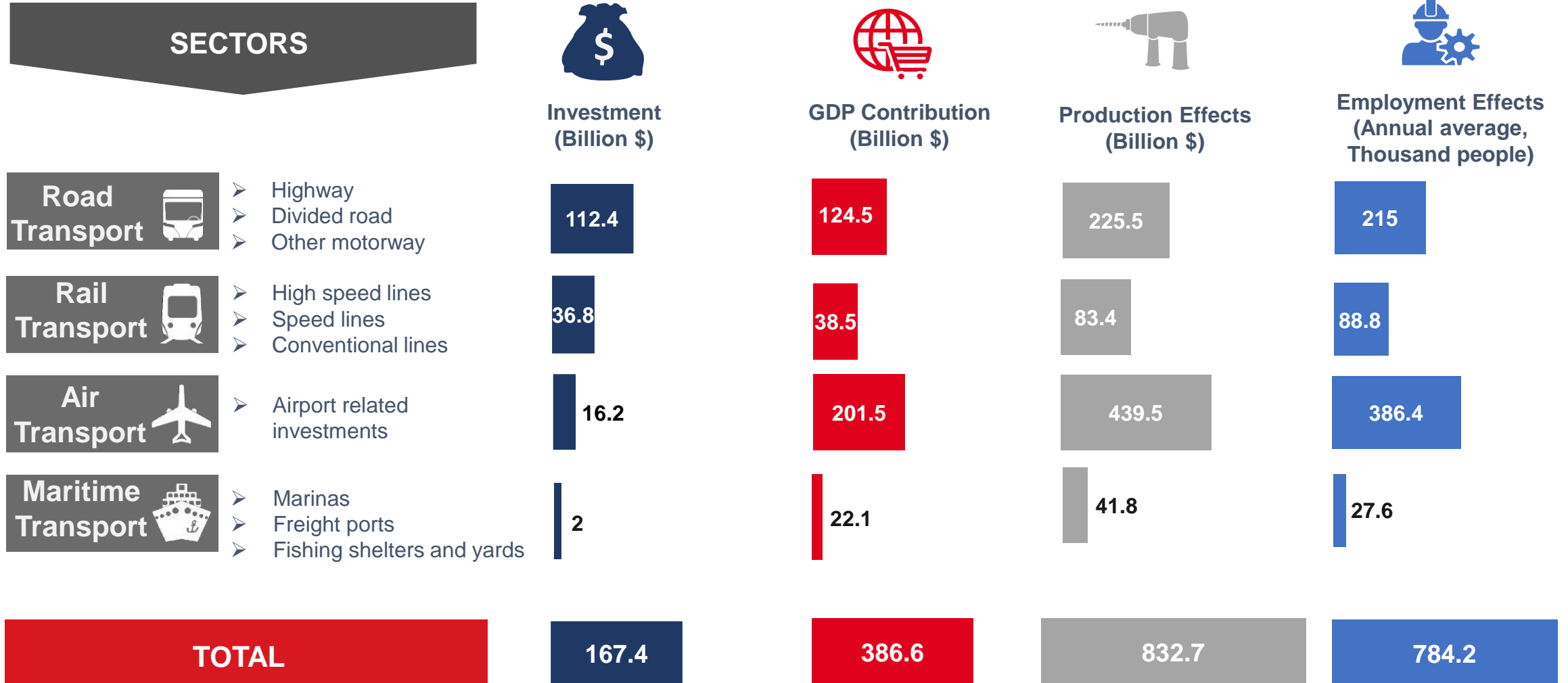
77

2053
(Vision)

82

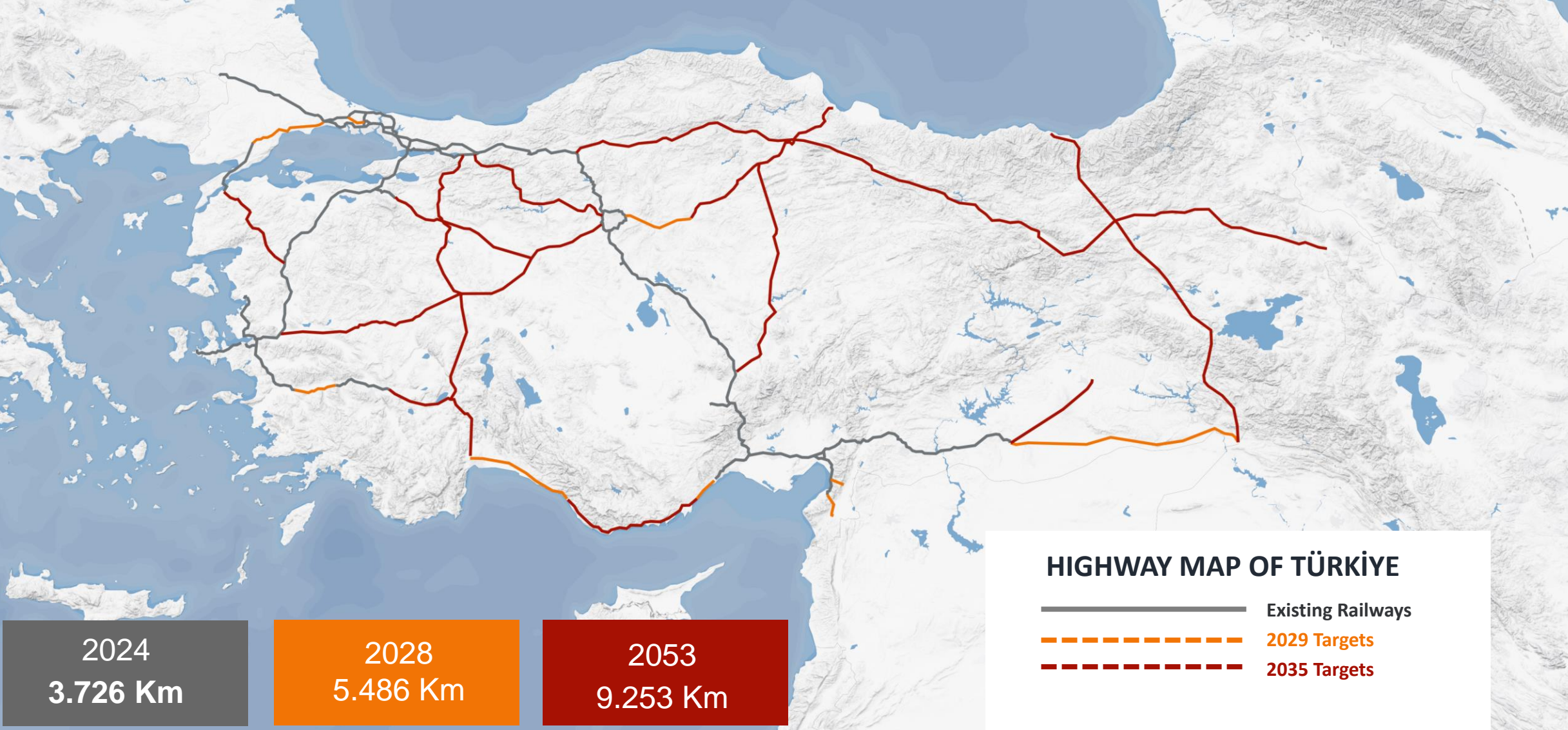
INVESTMENTS IN TRANSPORTATION

ECONOMIC BENEFITS OF TRANSPORTATION INVESTMENTS (2003-2022)



OPPORTUNITIES IN TRANSPORTATION

MOTORWAYS (TOLL ROADS) ARE KEY TO TÜRKİYE'S ROAD TRANSPORTATION. AROUND 4,000 KM IS IN THE PIPELINE OFFERING SIGNIFICANT PPP OPPORTUNITIES



HIGHWAY MAP OF TÜRKİYE

- Existing Railways
- 2029 Targets
- 2035 Targets

OPPORTUNITIES IN TRANSPORTATION

TÜRKİYE IS COMMITTED TO TRANSFORMING
ITS RAIL TRANSPORT INFRASTRUCTURE FROM
CONVENTIONAL TO HIGH SPEED



2024
13.919 Km

2028
17.011 Km

2053
28.600 Km

RAILWAY MAP OF TÜRKİYE

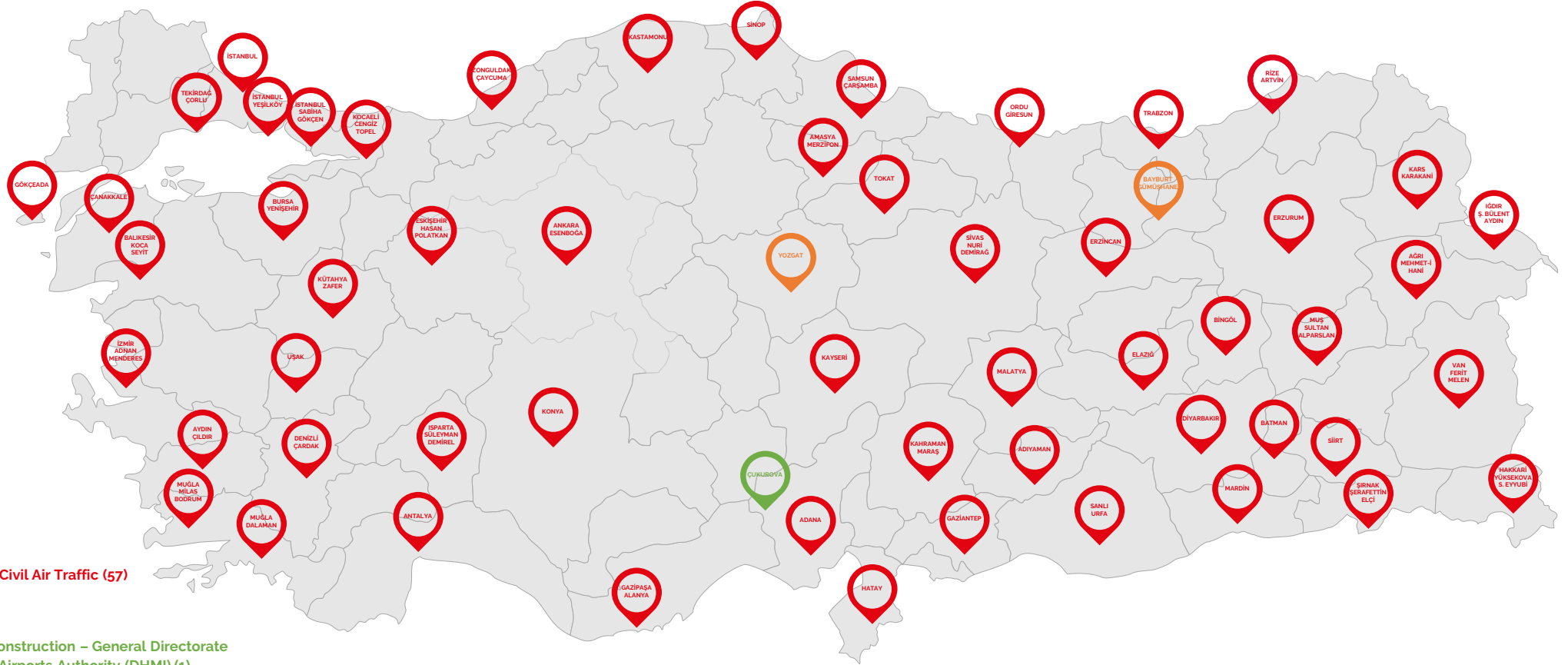
- Existing Railways
- 2028 Targets
- 2035 Targets
- 2053 Targets

OPPORTUNITIES IN TRANSPORTATION

TÜRKİYE HAS SIGNIFICANTLY IMPROVED AND UPGRADED ITS AIRPORT INFRASTRUCTURE AND CONTINUES TO INVEST IN AIRPORTS



AIRPORT MAP OF TÜRKİYE



Open to Civil Air Traffic (57)

Under Construction - General Directorate of State Airports Authority (DHMI) (1)

Under Construction - General Directorate of Infrastructure Investments (AYGM) (2)

OPPORTUNITIES IN TRANSPORTATION

LOGISTICS IS AN INTEGRAL PART OF TÜRKİYE'S TRANSPORT INFRASTRUCTURE. TÜRKİYE HAS ESTABLISHED INTERMODAL LOGISTICS CENTERS ALONGSIDE THE TRANS-ASIAN RAILWAY NETWORK TO LOWER COSTS AND INCREASE EFFICIENCY OF LOGISTICS NETWORKS



LOGISTICS CENTERS



27 logistics centers



73.2 million tons additional transport capacity



19 million m² container storage and handling area



In Service and Completed (14)



Planned (7)



Under Construction (4)

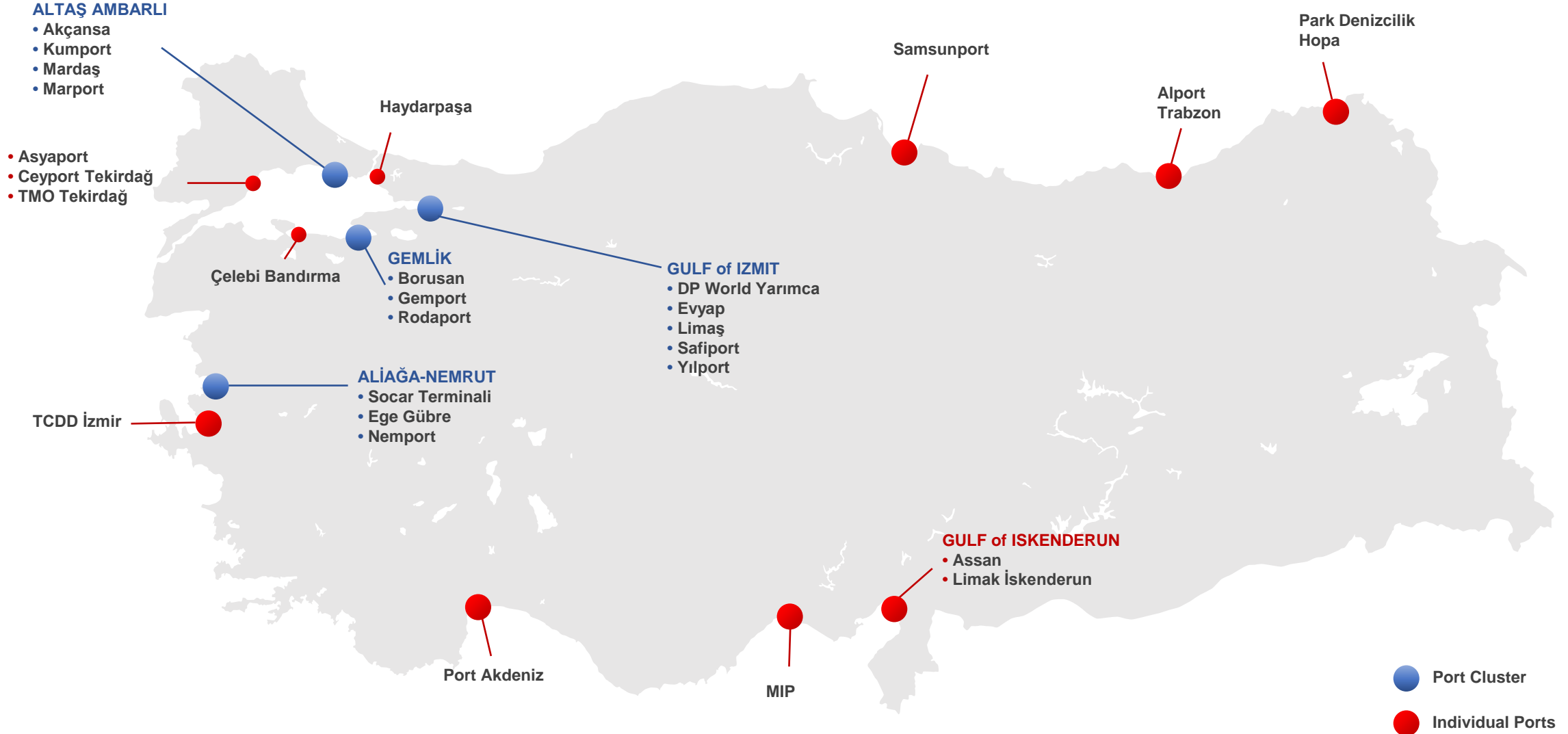


In Tender Stage (2)



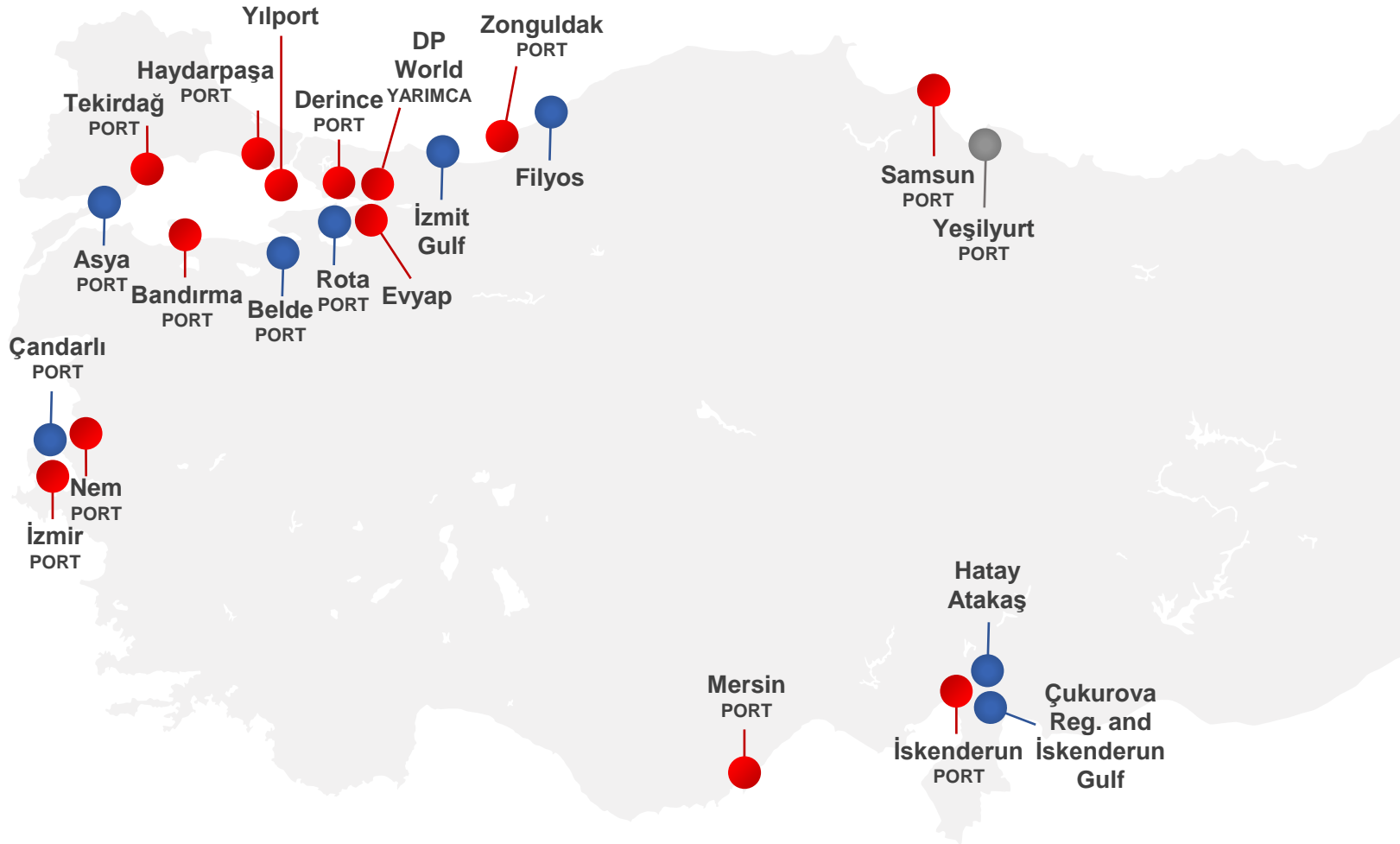
CONTAINER PORTS IN TÜRKİYE

PORT CLUSTERS PROVIDES SIGNIFICANT
TRADE OPPORTUNITIES



JUNCTION LINES CONNECTED TO PORTS

JUNCTION LINE INVESTMENTS CONTINUE FOR PORTS, WHICH ARE OF GREAT IMPORTANCE FOR INTERNATIONAL TRADE.

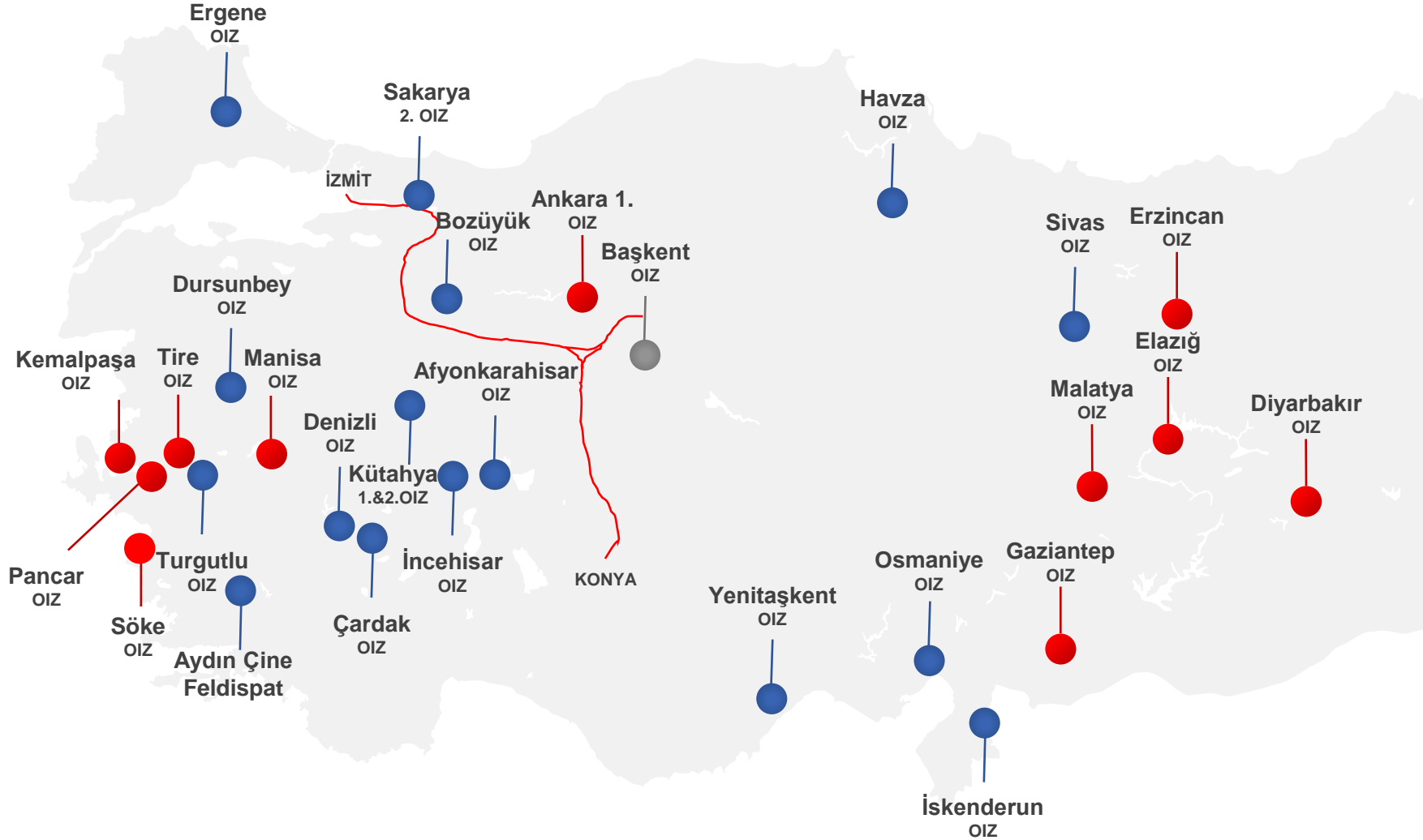


EXISTING LINES	Km	UNDER CONSTRUCTION	Km	PLANNED	Km
H. Paşa	2.5	Samsun Yeşilyurt Gelemen	6.76	Belde Port	1
İzmir	5.3			Rota Port	1.5
Nemport	3.4			Hatay Atakaş	3
Bandırma	5.1			Asyaport	4
Mersin	13.8			Çukurova Reg. and Iskenderun Gulf	36
Samsun	14.6			Filyos Port	12
İskenderun	19.0			İzmit Gulf Industrial Centers	10
Derince	7.5			İzmir Çandarlı	7
Tekirdağ	1.6				
Zonguldak	1.7				
Yılport	0.2				
Evyap	1.9				
DP World Yarımca	1.0				
Kozlu Pier	4.3				
Ekinciler Pier	3.3				
Gübretaş Pier	0.3				
İsdemir Pier	3.0				

- EXISTING 13
- PLANNED 8
- UNDER CONSTRUCTION 1

JUNCTION LINES CONNECTED TO OIZS

THE SHARE OF RAILWAYS IN COMBINED TRANSPORTATION APPLICATIONS IS INCREASED WITH THE JUNCTION LINES CONSTRUCTION IN ORGANIZED INDUSTRIAL ZONES, WHICH HAVE A HIGH SHARE IN FREIGHT TRANSPORTATION.



EXISTING LINES	KM	UNDER CONSTRUCTION LINES	KM	PLANNED LINES	KM
Ankara 1. OIZ	8.6	Başkent OIZ	3.75	Havza OIZ	3.45
Pancar OIZ	1.25			Sivas 2. OIZ	1
Tire	0.62			Yenitaşkent OIZ	16
Kemalpaşa	27.8			İskenderun OIZ	4.2
Manisa	7.6			Afyonkarahisar OIZ	12
Erzincan OIZ	9.11			İscehisar OIZ	12
Elazığ OIZ	1.41			Çardak OIZ	2.3
Diyarbakır OIZ	4			Denizli OIZ	4
Malatya OIZ	0.87			Aydın Çine Feldispat OIZ	7
Gaziantep (Başpınar) OIZ	9			Turgutlu OIZ	1.5
Söke (OIZ)	1.27			Dursunbey OIZ	4
				Osmaniye OIZ	19.8
				Çorlu Ergene 2. OIZ	9.6
				İzmir Asım Kibar OIZ	6
				İzmit Aslanbey OIZ	5
				Konya 2. OIZ	10
				Akhisar OIZ	3.5
				Bozüyük OIZ	4
				Kütahya 1.& 2. OIZ	3
				Sakarya 2. OIZ	26

- EXISTING 11
- PLANNED 21
- UNDER CONSTRUCTION 1



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