

Turkish Transport News

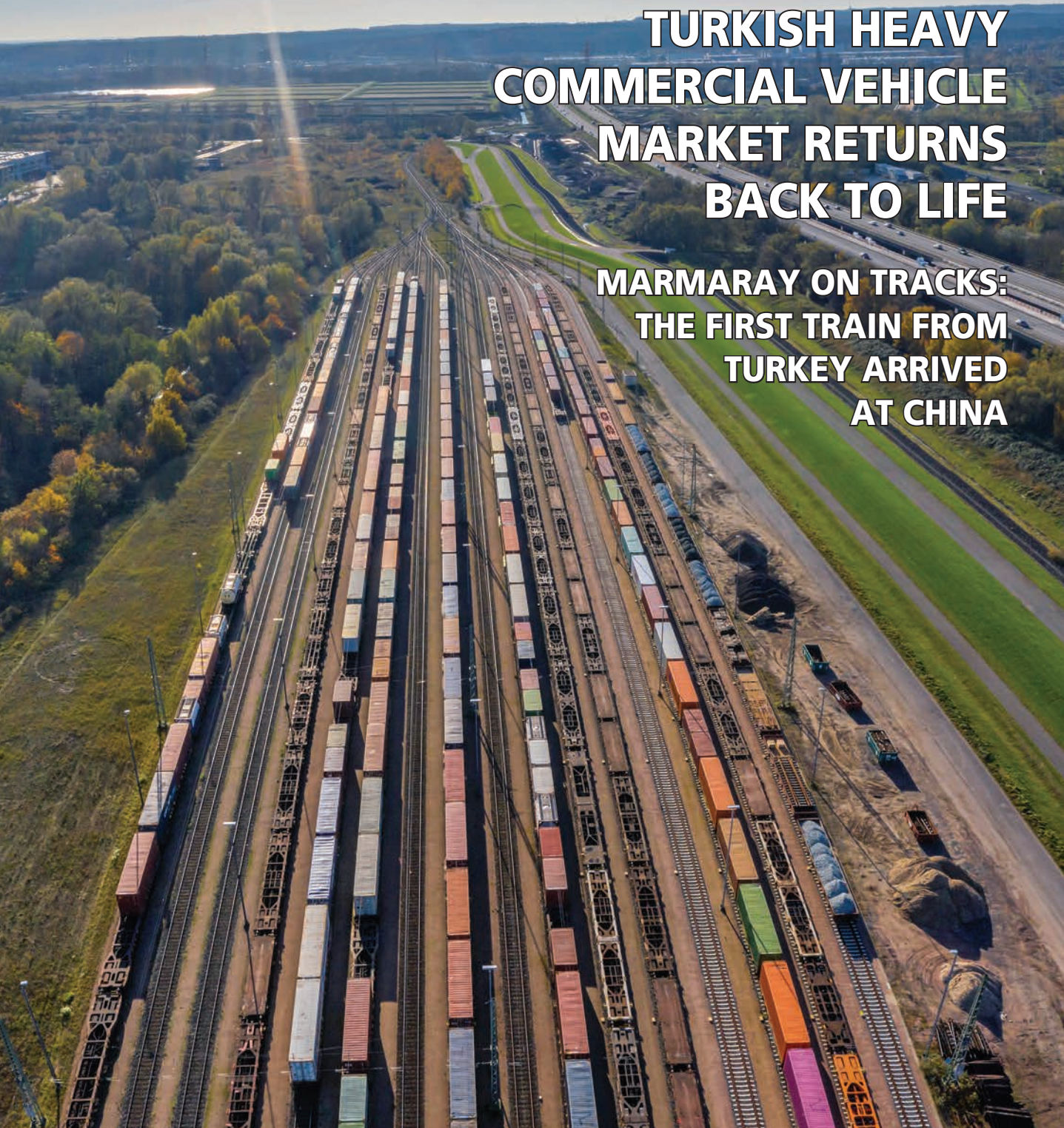
INTERMODAL

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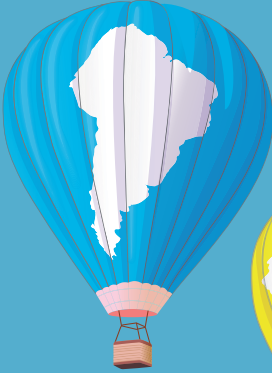
Issue 32

**TURKISH HEAVY
COMMERCIAL VEHICLE
MARKET RETURNS
BACK TO LIFE**

**MARMARAY ON TRACKS:
THE FIRST TRAIN FROM
TURKEY ARRIVED
AT CHINA**



**BEYOND
EXPECTATIONS**



November 10-12, 2021
Istanbul, Turkey

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I WISH THERE HAD BEEN NO PANDEMIC

I wish there had been no pandemic and the logistics sector had not displayed this much success. But the entire world has observed what a huge contribution the logistics sector had in the struggle against the pandemic that turned the entire world upside down. While the people stayed at home, the logisticians were on the roads to ensure the flow of life. During this period, each one of the truck drivers, captains and other crew members, train drivers and pilots transporting cargo even on passenger flights were all heroes. They served the people and put themselves at risk in order to ensure the continuation of the life despite the pandemic risk.

The pandemic has revealed the capacities of the countries in different fields. The countries have fast differentiated during this process in terms of its spread, finding solutions, and continuation of social and economic life. They also had the chance to assess their logistics capacity, being the solution for the continuation of life. Turkey might not have provided support to the SME's and their employees at the same level with the countries with stronger economies. However, its logistics opportunities showed that Turkey has an important power to ensure the business and life cycle.

Contactless transportation examples have been developed with the pandemic for all transportation modes, storage, port operations and handling. A great number of steps have been taken for the intermodal transportation operations. During this period, goods have been transported to Europe with an uninterrupted train journey. The first train carrying exports goods has set off to China. The companies have taken some self-sacrificing measures for both their customers and employees. We can add more to these examples but again I wish there had been no pandemic and we did not have these examples at hand... Hundreds of millions of people lost their job across the world, the poverty has increased and some lines of business have been destroyed.

In the meanwhile, despite the pandemic process, Turkey has decided to establish Foreign Logistics Centers at 6 different places on the world with a surprise resolution, in addition to the domestic infrastructure investments. Announcing a serious initiative package for this purpose, the government has appointed the most important three non-governmental organizations of the Turkish business world as the main partners of this initiative.

Extending its goals in the logistics sector from within Turkey to abroad, Turkey continues to attract the logisticians across the world and industrial investors thanks to the logistics opportunities and initiatives it provides. ■

Altınay Bekar
Editor-in-chief

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Editor-in-chief

Altınay Bekar

Features Editor

Necmi Çelik

Editorial Staff

Dr. Çağla Gül Şenkardeş
Gülbin Bektaş
Ali İrfan Alcan
Ekin Seren Ünsaç
İlker Sergeren A.

Advisory Board

Prof. Dr. Stefan Iskan

P&R Manager - Advertising

Selma Altun

Graphic Design

Ertan Altun

Multimedia

Sinan Göral

Subscription

Zeynep Ön

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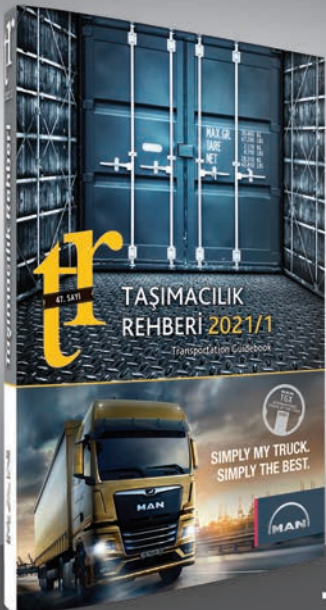
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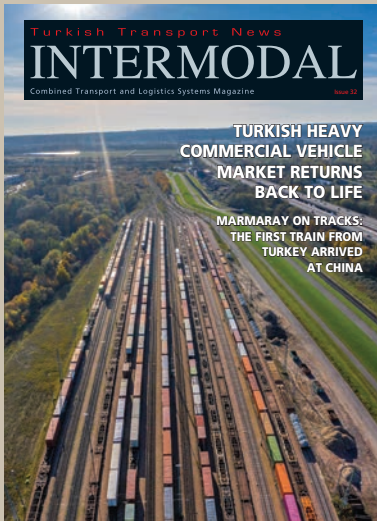
Transportation Guidebook

Transportation Guidebook comprises useful information about vehicles and transportation, national and international associations and contact information of their members and a glossary.

Finding the details of any transport company in Turkey becomes very convenient by the Guidebook.



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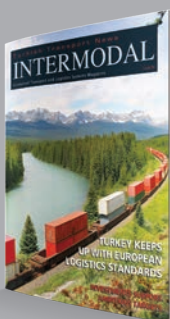
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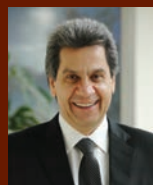
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Ministry
Minister of Transport and
Infrastructure of Republic of Turkey



Çetin NUHOĞLU
Chairman
UND



Emre ELDENER
President
UTİKAD



Şekib AVDAGIÇ
President
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TURKEY CONTINUES TRANSPORT INVESTMENTS NON-STOP

Adil KARAİSMAİLOĞLU
Ministry



► Following the general elections held in 2002, Turkey has begun a new transformation process with Justice and Development Party (AK Party). Firstly, Turkey has materialized comprehensive economic reforms after the lessons drawn from its economic crisis in 2001. A sound macroeconomic strategy in combination with fiscal policies and major structural reforms in effect has integrated the Turkish economy into the globalized World. The structural reforms have paved the way for extensive changes in several areas. The main objectives of these efforts were to increase the role of the private sector in the Turkish economy, to enhance the efficiency and resiliency of the financial sector, and to place the social security system on a more solid foundation.

As a natural bridge in between Europe, Asia and Africa and homeland of significant civilizations throughout the history, our country is now located at the heart of the growing production and consumption centres of the world as being an important industry and finance centre.

With this geographical location, Turkey has the potential of entering a market of 39.5 trillion dollars with 1,6 billion population where Europe, Asia, Caucasus, North Africa, Middle East and Russia is also located.

In order to raise Turkey's standards in transportation and communication, to make our country an international transit point and logistic hub, we have allocated more than 910 billion Turkish Liras investment in transport and communications in the last eighteen years.

In this term, we completed huge prestigious projects such as Yavuz Sultan Selim Bridge,

Osmangazi Bridge, İstanbul Airport, Eurasia Tunnel, Marmaray, intercontinental rail line, and smart motorways, such as İstanbul-İzmir, Ankara-Niğde and Northern Marmara Motorways...

Our network of divided roads, which was only 6 thousand 101 kilometres by 2003, has reached to 28 thousand kilometres. Hence, Turkey attained an uninterrupted transport quality on the Asia-Europe road transport corridor.

Railway sector has been handled as a state policy since 2003 and we have launched a new railway mobilization to improve the sector. Construction of Ankara-İstanbul, Ankara-Eskişehir and Ankara-Konya high speed train lines, establishment of a national railway industry, making Turkey a logistic base through construction of logistic centres and realization of Silk Railway have been regarded as prioritized railway projects completing each other. In this scope, we have realized Marmaray and Baku-Tbilisi-Kars Railway as two of the largest infrastructure projects of the world. With these projects Turkey became a centre for "Iron Silk Road" which covers a vast area from East Asia to West Europe, from Beijing to London.

Thanks to the transformation process that we had launched in civil aviation sector, we have succeeded to raise the number of passengers from 36 million to more than 209 million in 2019. We have increased the number of active airports from 26 to 56. İstanbul Airport is one of the most important airports we have built. The construction will be completed in four phases. The first phase was finalized when three runways and a terminal with a passenger capacity of 90 million were commissioned.

Once complete, the airport will host flights to more than 300 destinations with an annual capacity of 200 million passengers. With İstanbul Airport, İstanbul will become one of the most important transfer points of the world, also rendering Turkey as a regional centre for Middle East, Europe, and North Africa.

Turkey is surrounded by sea on its three sides and we are constructing large mercantile ports on the coasts of all side. We are constructing Filyos Port and İyidere logistics Port on the Black Sea shore, Mersin port in the Mediterranean Region and Çandarlı Port in the Aegean region. Furthermore, we have made substantial investments in shipbuilding sector and increased the number of shipyards from 37 to 84. Turkey's rank in new ship building orders across the world has risen to 6th on unit basis and 3rd rank in yacht orders.

Within the framework of our 2023 investment plans we aim to complete our huge infrastructure projects like 1915 Çanakkale Bridge and Malkara Highway, Aydın-Denizli Highway, Çukurova and Rize-Artvin Regional Airports, Ankara-Sivas and Ankara-İzmir High Speed Train Lines... Undoubtedly, transportation investments have great role in the success of our country. These investment projects contributed to Turkey's economic growth by providing cost reducing and time saving benefits in production, marketing, and distribution processes.

Therefore, we are going to keep making transport and communication investments without giving pause. ■



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MORE CHALLENGE, MORE WORK, BETTER FUTURE

Çetin NUHOĞLU
Chairman



► The pandemic has clearly shown the vital importance of the logistics sector. Despite the borders closing one after the other and restrictions and the risks, the sector firms, professionals and drivers have continued to cover long distances and to transport materials of vital importance to those in need of them and have become the heroes of 2020 and the pandemic. We, as UND, took action to prevent unjust suffering of our vehicles and drivers at the borders and provided support to establish buffer zones in close communication with our drivers and their companies and direct contact with the responsible authorities thanks to the "crisis desk" we established from the first moment when the pandemic started to affect Turkey. We worked hard to ensure that our trade activities with the "Contactless Trade" model. We should extend our gratitude to the Turkish logistics sector during this process. The sector has been struggling against major difficulties for long years. No investment could be made for the business in the last 4 years. As the phrase goes, the sector was tired. The long waitings before the border gates for days, decreasing revenues and the disadvantages in competition have significantly decreased the power of the sector. Things got more difficult with the pandemic. However, big challenges create great heroes. The logistics sector has managed to get better under these

conditions. Therefore, we cannot thank the logistics sector and all its employees enough.

We witness that Turkey gets higher ranks as a choice in the search for new alternatives by the global production and supply chains which have entered into a serious transformation process with this new era. As Turkey increases its effectiveness in various supply chains in Europe, the exports to Europe are also on the rise.

The recent solution provided to the road transit problem caused by Hungary thanks to the great efforts and attempts of all responsible institutes and institutions including especially the Ministries of Transport and Infrastructure, Trade and Foreign Affairs means the elimination of a status quo in terms of our trade activities with Europe. The initiative provided by Hungary which has caused a serious bottleneck regarding the delivery of exports of around 46 billion US dollars made to the target companies by road due to the discriminatory restrictions imposed on the Turkish transporters has marked 2020 as a revolutionary commercial diplomatic success of Turkey.

Evaluating the "transit freedom", one of the fundamental rules of the world trade (World Trade Organization), in terms of the "the risk of famine and vital losses caused by the interruptions in the supply chains" due to pandemic,

we can foresee that the principles of "making border checks faster and easier" set by the European Union with the "Green Lines" concept will become the biggest supporter of the sustainability of supply chains in the new era.

We as UND plan to launch the project "A New Road Transportation Cooperation between Turkey and EU: Expectations and Possibilities" as of April 2021 in cooperation with ABKAD (EU and Global Researches Association), International Association of Road Transport of Poland (ZMPD) and the European Neighborhood Council (ENC) based in Brussels. The international network of NGOs to be established with this project will contribute to the efforts for ensuring full alignment between Turkey and EU in terms of logistics and for eliminating the obstacles. As the international road goods transportation industry, we have always worked with great effort and devotion for our country. Despite obstacles put before us - such as visas, quotas, we have set a remarkable competitiveness example. We have proven once more that we are ready to transport the Turkish export goods under any condition whatsoever. We will continue to work for our country and people. This industry, transporting more than 40 percent of the Turkish exports will continue to take Turkey to a better future. ■

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Emre ELDENER
President

CHALLENGE AND CHANGES IN 2020 - WHAT WE EXPECT FROM 2021

► 2020 was an extraordinary year for the logistics industry on a worldwide basis. Lack of containers, increased prices, lack of space on cargo aircrafts, clogged borders due to quarantine requirements as well as testing for drivers were only a part of all the many things that we experienced. In addition to all of these, brand new commodities such as gowns, gloves and masks flew in large quantities and once the stocks reached a certain point, this traffic was diverted to trucking, intermodal and also sea freight. As these new commodities emerged, some others nearly disappeared or drastically reduced in volume; for example, tourism related goods (hotel towels, suitcases, etc.), shoes, fashion goods. We have witnessed sea freight rates quadrupling in some regions and still no equipment was available. In Turkey, as Utikad, the Turkish Forwarders Association, we have created a Covid-19 information board on our official website where the information is upgraded daily and for each and every country. The detailed and updated information given on the website has become a reference point for the whole industry in Turkey. I believe this is probably the one and only information board globally on Covid-19 related logistics issues. On the FIATA level, this service was much praised.

Considering the contactless transport modes becoming more and more popular nowadays, rail and intermodal shipments have become the transport of choice. Not only is it safer, but also the rates are favorable and can be fixed for longer periods of time compared to trucking. Covid-19 has taken its toll on the trucking mode, as in some countries the borders were clogged and in some other places there were not enough drivers to move the goods due to quarantine requirements.

2020 has also forced us to enter into a more digitized style of working and this is not only valid for companies but also for governments. A style which is independent of a person's geographic location has come into effect and it seems to be working well in many cases. Therefore we can easily say that the way logistics services are handled has started to change at a very rapid pace.

What will happen from today on? We expect the containers which are stuck in some parts of the world will find their way back to where the goods are waiting to be exported by March 2021. This will follow a normalization on the transport rates and the traffic will slowly normalize. Of course, this is subject to the fact that another version of Covid-19 does not take over the world once again. ■



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TURKISH LOGISTICS SECTOR HAS PROVEN TO BE ACCUSTOMED TO CRISES DURING COVID-19 PANDEMIC

Şekib AVDAGIÇ
President



► During its history of 8 thousand and 500 hundred years, İstanbul has always been a prominent economic and logistics hub as the city with the most important “waterway” of the world. Moreover, being a commercial transfer hub between Asia and Europe and the Black Sea countries and Mediterranean countries, İstanbul has always maintained its strategic importance. Accordingly, Turkey has a great transportation experience strengthened by its geographical location. This experience has been further strengthened with Turkey’s integration into the international system. This is proven by Turkey’s having been ranked as 47th under the “The Logistics Performance Index 2018” report. Significant investments are made in the international arena in order to turn Turkey’s logistics advantages into permanent income. During the period from 2003 to 2018, 319 billion liras have been invested in road transportation, 93.2 billion liras in railways, 44.9 billion liras in communication, 52.5 billion liras in airports and 5.9 billion liras in maritime transportation. Moreover, Turkey has established international logistics centers in addition to the Trans-Asian Railway Network in order to decrease the costs of and increase the efficiency of logistics networks. Turkey has another advantage in terms of logistics. She is a regional and continental transfer center. This feature has to be supported with major investments in ports with no financing problems and with completed construction process. With these investments, our potential in the logistics sectors will further improve. The “intermodal” transportation plays a major role in increasing this potential. The use of railway transportation instead of the road in the intermodal transportation brings the railway

investments to the forefront. We believe that the completion of the Belt and Road Initiative of China and the Baku-Tbilisi-Kars Railway Line and the “logistics centers” that will be integrated with the railways networks in Turkey will make a serious contribution in Turkish exports. We have seen the concrete examples of this with the first export train on the Baku-Tbilisi-Kars railway and the first goods train setting off from China and destined for Europe via Marmaray. The Ministry of Transport and Infrastructure has announced that 5.1 million tons of combined exports goods and 4.9 million tons of combine import goods have been transported in 2019. Moreover, the Ro-Ro operations of Turkish State Railways at İzmir Alsancak Port have been re-launched during the pandemic process. The Turkish Government has concluded combined transportation agreements with Azerbaijan, Georgia, Turkmenistan, Ukraine, Uzbekistan, Belarus, Kazakhstan and Moldova by taking into consideration the opportunities and major potential in the logistics and especially the intermodal transportation. The transportation agreements planned to be concluded and the ongoing construction of the railway logistics centers in various cities are expected to increase the share of railways in exports, 55 percent of which are carried out via maritime transportation and 35 percent via road transportation. 11 out of 25 logistics centers planned to be established by the Ministry of Transport and Infrastructure have been put into operation. The construction of the logistics centers in Konya Kayacık and Kars is currently ongoing. The completion of the construction of these logistics centers will provide the Turkish logistics sector an additional transportation opportunity of around

35.6 million tons per year and an open space, storage space, container inventory and handling field of 12.8 million square meters.

Despite this great potential of Turkey and the positive developments, the corona virus pandemic has remarkably affected the logistics sector in 2020. However, the Turkish logistics sector has proven to be sector which finds its solutions even during problematic periods and is accustomed to crises. For instance, many logistics companies have fully switched to remote working system, appointed representatives and officers to cities, thus extending the employment across Turkey.

The European countries have preferred closer countries for their supply chains and this has created a great opportunity for Turkey and the logistics sector has focused on the goal of extending the logistics market. We believe that Turkey will get a higher share than China in the new logistics market to be established after the pandemic.

Lastly, the domestic supply chain and logistics have hardly been interrupted under the pandemic conditions. Even though the online sales have increased and the burden on the sector has been significantly higher, the interruptions have been kept at a minimum. I would like to emphasize that the Turkish logistics sector will never be the same as before after the pandemic. Businesses will be more digitalized in order not to lose their online customers and ensure that their supply chains keep up with this digitalization. This will in turn increase logistics movements after the pandemic. Thus, the logistics sector should get prepared for the post-pandemic period without forgetting the change in the domestic and international market is permanent. ■



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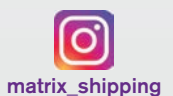
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2021 IS GOING TO BE OUR FLAGSHIP YEAR FOR EXPORTS

İsmail GÜLLE
Chairman



► Our sectors, which achieved record export success in a year when global trade has decreased and the world economy has shrunk, renewed confidence by demonstrating their production and supplier power. By rapidly adapting to unusual conditions, we have made a V-type recovery in exports and the economy. Despite all the difficult conditions of the pandemic, our exports in 2020 were 169 billion 514 million dollars, which was above the export target of 165.9 billion dollars within the scope of the 'New Economy Program 2020'. In December, our exports reached 17 billion 844 million dollars, an increase of 16 percent despite pandemic conditions, making it the highest monthly export figure in the history of the Republic. With our exports of 51.2 billion dollars in the last quarter, we reached the highest quarterly figure in the history of the Republic. We will continue to strengthen the "Made in Türkiye" brand all around the world. We transferred our jobs to digital platforms and made many firsts in this period. First Virtual Fair, first Virtual Trade Delegation, we have implemented. We successfully carried out our new generation trade delegations with 35 virtual trade delegations in 5 continents and 43 countries in total under the coordination of our Ministry of Commerce.

In 2020, 6 Sectors Set a Record On an Annual Basis

Cereals with exports of 7 billion 301 million dollars, Furniture with 5 billion 567 million dollars, Cement with 3 billion 760 million dollars, Fresh Fruit Vegetables with 2 billion 731 million dollars, Carpet with 2 billion 605 million dollars and Fruit and Vegetable Products with 1 billion 684 million dollars were the sectors that broke the record. While the automotive sector, which exports 25 billion 549 million dollars in 2020, maintains its leadership; The chemical sector, which reached 18 billion 263 million dollars, came second, and the garment industry, which reached 17 billion 143 million dollars, came third. We started 2021 with a record. In January, exports of Türkiye reached 15 billion 48 million dollars, an increase of 2.5 percent compared to the same month last year, despite the coronavirus pandemic, making it the highest January export figure in the history of the Republic. This year, our target is 184 billion dollars in exports. We believe that we will achieve this goal as the pandemic slows down and the restrictions are lifted during the year with the effect of vaccination. We need to increase our market diversity and share in global trade to exceed

this target and then the 200 billion dollars threshold. I hope this year will be our star year in exports. Our goal is Türkiye, which gives foreign trade surplus! In 2021, it will be possible to further our current achievements by implementing supports that will protect our exporters from possible fluctuations by saying "Strong financing for strong exports". The new trade routes in the center of our country allow us the opportunity to take an important role. Türkiye is one of the countries that play an important role in the logistics sector due to its geopolitical position. It is of special importance for each of the land, air, iron, and sea transportation. Located in the transit corridor of Asia, Europe, and the Middle East, Türkiye is also a very advantageous country in the logistics sector. It has been more clearly understood by countries that it is possible to take the lead against their competitors with adaptations to logistics activities and comprehensive logistics strategies. Both the developments related to the Silk Road and the economic weight of Asia-Pacific countries and their reflections on the West give Türkiye the role of a more important country in geostrategic terms than before. ■



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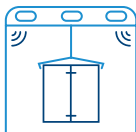
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THE ADVANTAGES TURKEY OFFERS IN THE CROSSROADS OF THE CONTINENTS

Turgut ERKESKİN
Chairman, Logistics Business Council at DEİK



► Although logistics came to be one of the most vital sectors during the pandemic period it has suffered heavily as countries closed their borders. While all main modes of international transportation were affected badly, air freight took most of the hit. As logistics is a significant driver of development any obstacles getting in the way should be removed, especially in these hard times. As COVID-19 took its toll in trade, countries saw that dependency on just China for raw materials and by-products is not reasonable in terms of production. For this reason, many firms are willing to diversify their suppliers and Turkey would be one of these countries. Using its significant geopolitical position, Turkey should try to maintain its position as a supplier and it should seize the opportunities through East-West axis in the logistics sector.

To strengthen Turkey's position in trade we are working on the innovation of Turkish overseas logistic centers developed by Ministry of Trade. These centers will ensure sustainable export growth by penetrating products to the international supply chains at low costs and provide rapid flow of exports. One of the most drastic changes that came with COVID-19 was the intensification of the e-commerce sector. So we believe that these logistic centers will also strengthen our country's position

in the e-commerce field, too. We are initially considering the countries in Sub-Saharan Africa for the said logistics centers to be set up. The main reason is that, these countries suffer from significant bottlenecks in logistic infrastructure but also have great market potential. Countries with developed logistic systems like US are also being considered for the logistic centers. On top of being cost advantageous, these logistic centers will also be beneficial in terms of timing especially in the e-commerce area.

At a global glance, near-shoring or re-shoring comes to fore as a new theme. Reshoring represents the opposite of sprawling global supply chains. Moving production and labor back to business's home countries or where the actual demand for a product lies, has become a necessity as global supply chains ground to a halt. As the pandemic's effects seem to be long lasting, it is expected that the global supply chain will shorten and producers will gravitate to local markets. With its geographical and manufacturing competencies Turkey has an available structure to turn the shortened supply chain into an advantage. In the short, medium and long term Turkey should focus on strengthening its position in the supply chain, providing services in different areas and investing in new industries. China's recovery from pandemic is far

beyond its peers. With the advantage of rapid recovery, Belt and Road initiative which aims to promote the development of infrastructure and economic integration of countries located around the route will become more significant than expected in global business in short term. Turkey needs to benefit from transit trade and exploit the upcoming opportunities. To strengthen its position in trade, Turkey continues to invest in important projects. With the Baku-Tbilisi-Kars railway, ports in the Mediterranean and the Black Sea will be able to serve transit freight traffic. Through these ports it is possible to make rapid transit freight transport to ports in the Mediterranean and target markets in North Africa. Road transportation is an effective method to deliver goods that arrive by rail or sea to their final destinations. In addition to these, İstanbul airport and the freight operations of Marmaray are among the most important developments in the recent period. In this respect, obtaining the highest efficiency from infrastructure investments is only possible with the correct design of the digitalization and the implementation of the regulation in the field. Transit transportation is included as an important topic in Turkey's Logistic Master Plan. We believe that the cargo transit that goes through Turkey will increase the country's income in service exports. ■

OVER 40 YEARS

of growth turns a small multipurpose vessel company into a world-leading maritime logistics and transportation company



Liner Service Routes: • North America • Iskenderun, Turkey • Middle East • India • Far East

2021 EVALUATION FOR RAILWAYS INDUSTRY

Ali Ercan GÜLEÇ
Chairman of Board



► 2020 has been a year with great impacts on the entire world, all industries and our lives. Both the logistics sector and railways have got their shares from these impacts. As the world has shifted towards contactless trade, the importance of railways and the number of railway transports have increased and the virus obstacle has been tackled with the railways. The export transportations in Turkey have also significantly increased. We estimate that the interest in the railways and the number of railway transportations will increase during these first days of 2021 and afterwards. This increase can only be achieved with the launch of strategic plans, projects and investments made for this purpose. All existing plans such as 11th Development Plan, Turkish Logistics Master Plan, 2021 Annual Presidency Programme and Turkish State Railways Strategic Plan reveal that necessary actions should be taken urgently in terms of legislation, investments, projects and human resources to improve the railway transportation in Turkey. Within the scope of these strategic plans, efforts to increase the shares of railway and maritime transportation and to establish fast, flexible, safe, secure, predictable and integrated logistics and transportation system are ongoing. The efficiency and competitiveness of the railways is planned to be increased by focusing on goods transportation, developing railways-sea transportation infrastructures at proper places and scales, expanding intermodal transportation and decreasing logistics costs. Moreover, the share of railway transportation is planned to be increased in goods transportation with the completion of the construction of junction lines and logistics centers to serve

major goods centers including petro-chemical facilities, automotive production facilities, ports, organized industrial zones and mining sites in order to expand intermodal transportation and increase the competitiveness of the industry. To this end, the draft "Regulation on Principles and Procedures Regarding Project Design, Construction and Operation of Junction Lines" has been submitted to the opinion of the related stakeholders. The junction lines are of critical importance to increase the efficiency of railway transports but are not sufficient in terms of line length and number of service stations. As of 2019, 281 junction lines of 433 kms in total are available and if it is taken into consideration that around 55 percent of the goods transported on railways in Turkey are transferred to the main lines via junction lines, the new junction lines to be constructed have a major potential to increase the share of the railways goods transportation. The ratio of the railways cargo transported from ports with railways connection to the port cargo is around 7.5 percent. In order to increase the traffic on the existing railway network and to ensure that the railways get a higher share from goods transportation, bottlenecks on the main lines will be resolved, the single line railways identified based on traffic volume will be re-constructed as double line railways and signalization and electrification investments are planned to be completed. According to 2018 data, the share of railways in domestic goods transportation was 4.6 percent while the EU-27 average was 18.7 percent and the share of railways in domestic passenger transportation was 1 percent

while the EU-27 average is 8.4 percent. These data indicate a strong potential to establish a well-balanced and efficient transportation system by shifting the high demand in goods transportation by roads to the railways. 50 percent of the existing railway transportation network runs on signaling system while 45 percent on electrified system and with the projects to be completed in 2020 and 2021, the length of lines with signaling and electrified systems are expected to increase significantly. Secondary legislation is also expected to be completed to promote railways operation and liberalization of railways during this period. Within the scope of all these strategic plans, the national railways infrastructure network should be developed and geometrical changes should be made to increase efficiency in the existing infrastructure. Railway connections should be established for the ports and organized industrial zones with no railway connections and the railway transportation should be made more attractive by carrying out activities that increase the customer satisfaction and railway transportation speed and decrease costs and investment incentives introduced for the railway sector in order to transfer some of the goods transports from the road to railway transportation. Integration should be ensured with European and Asian countries to ensure passing of international transportation corridors through Turkey, to make more attractive the alternative transportation corridor (Central Corridor) passing through Turkey and to increase the share of international goods transportation. We wish a healthy, productive and successful 2021 to the entire world, Turkey and our sector. ■



NAKHCHIVAN CORRIDOR: WILL THE HISTORICAL DREAM COME TRUE?

► After the 44-day long military operation in Nagorno-Karabakh, it is a matter of great interest that how the agreement between Russia, Azerbaijan and Armenia will be implemented. This agreement includes terms for establishing a new corridor connecting Azerbaijan and Nakhchivan and connecting Turkey and Azerbaijan via roads with the corridor leading to the Armenian territories near the Iranian border. According to the article 9 of the agreement, the obstacles on the

economic and transportation connections of the region are planned to be eliminated and transportation and communication lines are planned to be established between the Nakhchivan Autonomous Republic and the western parts of Azerbaijan. The corridor on Megri expected to connect the western cities of Azerbaijan to Nakhchivan is of great importance since it is a direct road connection to Azerbaijan and it creates an important connection strip with the Turkic republics with which Turkey has important historical and economic connections. The implementation of this article which is expected to strengthen the economic position of Turkey may provide the Turkish transporters and exporters with major advantages both in road and railways transportations. Today longer and high costing transportation

operations are carried out to Azerbaijan and Turkish republics such as Uzbekistan, Tajikistan, Kazakhstan and Kyrgyzstan over Iranian and Georgian routes. A new road connection may create important opportunities for the Turkish transporters both in terms of transportation times and costs. These advantages may also create important opportunities for Turkey in railways as well as roads. Accessing the region via Baku-Tbilisi-Kars Railway, Turkey can have new alternatives to access to the Caspian Sea and to the Turkic republics from there via intermodal opportunities. Providing Turkey with a more advantageous position for both the central and southern corridors of the One Belt - One Road Initiative, one of the biggest projects of the millennium, Nakhchivan Corridor is also expected to create new opportunities for the energy lines. ■



PANDEMIC AND LOGISTICS

İlker ALTUN
Managing Director - Aysberg Group



► When it was first seen in China, nobody even the World Health Organization predicted the current situation we are in. Having entered into Europe first from Italy, then followed by UK, Spain and France, the Covid-19 pandemic has assigned everybody with the task of examining their lives closely. Many people lost their lives and the remaining faced fear and daily life problems and while people were looking for similar cases in the history, they were after the comfort of 'if they did end, then this will end, too.' This is of course a crisis and it will end. However, if it does not end, then it is not a crisis and is the 'new normal'.

The pandemic forcing everyone to act together turned the world into an indoors concert held on fire where everyone steps on one another while fleeing the fire. The countries have turned their back to, stolen the masks of, confiscated the medicines of one another and left people outside their borders. The humanity subjected to a very bad test during this pandemic. The international humanity values earned throughout the history have been violated by the USA and even some of the EU countries. Some western countries have turned into lands where the survivors are determined upon selection and where the death was all around.

The importance of accessing to food and the logistics processes has become remarkably prominent. Accommodation, one of the fundamental needs of the people, has turned into hell due to a close contact or infected family member. Even though education is tried to be provided online, it has mostly stopped. The security concerns were experienced with the dilemma of between a rock and a hard place in an atmosphere where the death was all around. However, nutrition as a human demand which should be continued in full despite small limitations on

consumption has brought the logistics to the forefront. The logistics meant bread. The logistics meant health. The logistics meant industry, trade, agriculture or animal breeding. While the science focused on the vaccine works, the national governments and local administrations focused on logistics solutions after the initial daze.

Even though the pandemic has affected each sector differently, it told the logistics industry literally to 'stand up and do your job'. All logisticians in the world worked devotedly during this period. The global logistics networks, large operators, over-the-scale hubs and thousands of small businesses transported bread from ovens. They also transported medicine to the pharmacies, masks to the hospitals and even body bags to the morgues.

Focusing her goals more on the logistics thanks to the recent infrastructure investments, Turkey has significantly benefited from this. The level of development, technology usage habits of and investments made into the digital infrastructure by the logistics companies have also turned into advantages. During the chaos of the first days, the queues on the gates, customs and roads, driving, transit and delivery problems, visa problems and quarantines for the drivers have nearly stopped the works. However, the strong road transportation infrastructure, company and personnel capacity of and the services provided by Turkey have provided great benefits not only for the foreign trade companies but also for the partner companies. Continuing with her investments in railways, Turkey has delivered goods to her neighbors with solutions for extraordinary conditions such as changing wagons after pushing them through the borders. The cargo trains started to use Marmaray. Experiencing delays and queues due to the working duration restrictions on the ports

used frequently for sea transportation, the Turkish logisticians have made significant contributions against the container crisis where the container demand cannot be satisfied. Creative initiatives have been taken also in the field of air cargo. Any supply of provisions including especially health and food products has been delivered to many countries by Turkish operators with passenger flights where the cargo flights are not sufficient. New developments have been made in line with the spirit of this new area, from office, goods and storage operations software where the most development examples of intermodal systems are used to tracking software and devices. The public sector has done its bit and taken many facilitating measures on roads, customs and gates.

Thanks to its logistics infrastructure and production capacity, Turkey has proven during the pandemic that it is ready to respond to the requirement for shortening the procurement roads which has emerged as a new trend across the world due to the pandemic. Turkey is ready for a closer cooperation with the EU countries including especially Germany, being the main trade partners, and the UK after the Brexit during the new period and has a qualified industry capacity where most of the companies already invest and manufacture together with global brands and also a great logistics potential.

Today Turkey has the legal and physical infrastructure for an effective operation in the transportation and logistics service fields. Turkey is also ready for supplying anything consumed in the continental Europe - from automotive to textiles, from food to chemicals. The cooperation opportunities and synergy to be generated by this readiness will be the most important benefit to be yielded by the global logisticians interested in Turkey after the pandemic. ■



MARMARAY ON TRACKS: THE FIRST TRAIN FROM TURKEY ARRIVED AT CHINA

► The first train carrying export goods from Turkey to China set off for its journey from İstanbul on December 4. The train has reached the Chinese borders on December 17.

Giving a speech at the ceremony organized for the first train from Turkey to China, the Minister of Transport and Infrastructure Adil Karaismailoğlu said that: "Our train leaving from Çerkezköy station will cover 8 thousand and 693 kms in total and will take its cargo to China in 12 days after passing through 2 continents, 2 seas and 5 countries. Turkey has become the most strategic connection point of the central corridor extending from Peking to London and the Silk Road Railway extending from Kazakhstan to Turkey."

Minister Karaismailoğlu said that the train will have an uninterrupted journey from İstanbul to Xi and continued her words as follows: "I would like to remind once more that we have opened Baku - Tbilisi - Kars line and set into operation Samsun-Sivas line, the largest modernization project of Turkey connecting the Black Sea and Anatolia in the recent months."

Considering the "Belt and Road

Initiative" aiming to establish an infrastructure and transportation network connecting China, Asia, Europe and the Middle East as an important project, Minister Karaismailoğlu told that: "The first train from Baku to Kars operating on Baku - Tbilisi - Kars Railway Line which has become operational with the cooperation between Turkey, Azerbaijan and Georgia has given a new direction to the global railway transportation". Karaismailoğlu added that this line which started its operations on October 30, 2017 has started a new area in the railway cargo transportation between Asia and Europe.

Karaismailoğlu further commented as follows: "Thanks to this line, Turkey has become the most strategic connection point of the central corridor extending from Peking to London and the Silk Road Railway extending from Kazakhstan to Turkey. The cargo transportation between China and Turkey will take 12 days instead of 1 month thanks to Baku - Tbilisi - Kars Railway. Moreover, with the integration of Marmaray, the project of the century, the transportation duration between the Far East and the Western Europe has decreased to 18 days."

White appliances have been transported in 42 containers loaded on the first train from Turkey to China.

First Domestic Cargo Train Also Passed through Marmaray

The first domestic train has also passed through Marmaray with 1,200 tons of cargo in 16 wagons carrying 32 containers. Minister Karaismailoğlu told that: "From now on, the cargos will be transported from Asia to Europe via an interrupted journey on Marmaray. The domestic cargo trains will also start using Marmaray as of this evening."

Noting that "Samsun-Sivas line connecting the Black Sea to Anatolia has become operational. Railway investments across Turkey continue to progress at a high speed", Karaismailoğlu continued his words as follows:

"A precious journey has been made on Marmaray located at the center of the central corridor extending from Peking to London. Marmaray stands on an important location connecting Asia and Europe without any interruption requiring transits. Turkey will soon become a logistics center. Marmaray stands on the center and has a gold-like value." ■

FOREIGN LOGISTICS CENTERS TO RECEIVE SUPPORT THANKS TO A PRESIDENTIAL DECISION



Presidential Decision on Supporting Foreign Logistics Centers (FLC) entered into force in October upon publication in the Official Gazette.

► The presidential decision on FLCs governs the principles for providing support to the logistics center operating abroad for their expenses from the Support and Price Sustainability Fund in order to ensure fast and comprehensive flow of exports as well as to establish infrastructure opportunities for a sustainable export performance for Turkey in major international markets. According to the decision, the establishment, investment including informatics, license and permit expenses for putting FLCs into

operation will be covered up to 70 percent and maximum 5 million US dollars per FLC. The total support period will be maximum 10 years.

Applications to be filed to the Ministry of Trade

The inclusion of FLCs into the scope of the provided support requires an application filed to and the approval of the project by the Ministry of Trade. The logistics centers covered by the scope of support will be subject to the coordination and oversight of the office of the

commercial counselor, attaches or the ministry representative. The related support will be provided to maximum 6 FLCs. If a FLC is excluded from the scope of the support before its term, the Ministry can include a new FLC into the scope of the support. The FLCs will only provide logistics services to the Turkish export products. This initiative aims for increasing the competitiveness of the export companies residing in Turkey and encouraging their expansion into new markets. ■



85 LOCATIONS IN 13 COUNTRIES IN 31 YEARS



Ekol provides innovative solutions to its partners thanks to its new services in a range of domains from e-commerce to maritime transportation.

► Marching towards its goal of becoming 'the best', Ekol Logistics made a strong start into 2021 with new services despite the COVID-19 pandemic, which shook the global economy to its core. Having managed to generate sustainable growth by overcoming numerous crises with investments and services since its inception 31 years ago, Ekol is an integrated logistics company that currently provides impeccable service in 13 countries. Ekol helps its partners' growth thanks to its exceptional services in transport, contract logistics, foreign trade and supply chain management. Ekol offers integrated solutions that the new economy needs thanks to its

distribution centers with cutting edge technology and its young and eco-friendly fleet. The company creates tailored solutions in various business areas - namely automotive, FMCG, food, health, retail, textile, industry and technology, with attention to their specific business needs. Ekol Logistics operates at 85 self-owned locations in Turkey, Germany, Italy, Greece, France, Ukraine, Romania, Hungary, Spain, Poland, Czechia, Slovenia and Sweden, and supports its customers with solutions it provides through its agencies in over 900 locations in more than 150 countries.

The company offers integrated, flexible, interconnected and

innovative solutions through its distribution centers, unit trains that enable intermodal transport with 52 runs per week, and a 6 thousand-unit strong vehicle fleet.

In addition to its distribution capabilities, Ekol leverages its human resources to keep its promises to its customers. Ekol's diverse international workforce of more than 8 thousand employees work hard to provide excellent customer satisfaction.

Investment for Yalova Ro-Ro Terminal's second stage has been one of Ekol's most important projects. The second stage was planned with Turkey's rising foreign trade volume in mind and has reached 80 percent

completion. The second stage will add approximately 50 thousand square meters of parking space and the capacity to serve three ships simultaneously with the addition of a second 300-meter pier. Removing more than 100 thousand trailers from Istanbul's traffic, the Yalova Ro-Ro Terminal is capable of housing 500 trailers on 80 thousand square meters of floor area.

A New Ro-Ro Line from Izmir to Spain Opens

As maritime transportation accounts for 80 percent of the worldwide freight volume, Ekol continues to expand its intercontinental smart logistics solutions with new routes. Ekol is opening a new line which connects Izmir's Port of Alsancak with Spain's Tarragona.

One of the world's biggest marine and logistics solution providers, Danish DFDS Group is to operate the line while Ekol will handle a considerable amount of its capacity. 'FAT AYSHE' ro-ro vessel will serve at the Alsancak-Tarragona line and shorten the time between Izmir and



Tarragona to 60 hours. Shipments can be delivered to anywhere in Turkey and Spain within 96 hours and to anywhere in Portugal within 144 hours. In the meantime, Ekol plans a restructuring in Morocco, a country included in its services network. This route will provide faster travel to Europe, allowing Ekol to create an efficient service triangle.

Ekol's Micro Speedy Breathes New Life into E-Commerce

With e-commerce at the center of its growth strategies, Ekol Logistics

has launched Micro Speedy this year, an expedited service for micro export shipments via ground freight. Ekol offers an alternative to air transport and supports its customers with its Micro Speedy service for export shipments that include an e-Commerce Customs Declaration (ETGB), weigh less than 300 kilograms and are limited to 15 thousand Euros. With Micro Speedy, Ekol claims to provide a transportation service that is less costly than airline transportation and much faster than conventional ground transportation. This feature of Ekol's Micro Speedy is expected to help SMEs, who are selling their products on e-commerce platforms, by providing them a huge advantage.

Another project that Ekol aims to implement in the future is "E-Commerce Fulfillment Center." Under this project, Ekol plans to organize warehousing and shipping activities on behalf of customers from a single point. Having a swift start to 2021 with a new fleet, technology infrastructure and services, Ekol will continue its projects towards increasing the storage capacity of its existing facilities and fleet renewal while also seeking investment opportunities. ■



Lars Hoffmann
Head of
DFDS Business Unit
Mediterranean

DFDS ONCE AGAIN BECOMES THE STRONG SOLUTION PARTNER OF TRANSPORTERS

DFDS Business Unit Mediterranean has ensured the continuity of supply chains in imports and exports during the pandemic by implementing the measures taken at the border gates and customs offices in Turkey in cooperation with the authorities.

► DFDS Business Unit Mediterranean has been one of the most active operators during the pandemic. The ship personnel have worked with minimum contact with other people abroad and ensured loading of trailers with minimum contact. Commenting on their operations during the pandemic, Lars Hoffmann, the Head of DFDS Business Unit Mediterranean, said: "We have started to accept drivers to the ships on all lines as of June 11, 2020. During this period, we have all observed how crucial logistics is for satisfying the health, food and fundamental needs. Regarding the performance, the Ro-Ro business has lost 4 percent of its market share as compared to the road transportation during the first 7 months of the year. However, the market has mostly re-shifted to Ro-Ro as of July." Hoffmann added that they require all drivers to submit a negative Covid-19 PCR test before boarding the ships as a passenger.

Focusing on the corporate social responsibility projects during the pandemic, DFDS has launched a "Support Campaign for Distance Learning" to ensure students with poor economic conditions to continue receive education. DFDS has also provided accommodation support for Tuzla State Hospital personnel at a hotel near to the hospital. Lars Hoffmann told that they have launched 'Kadın için Taşıyoruz' (We Carry for Women) project in order to encourage the women to take part in the business life and to have more presence in the social life and to contribute to the exports they make. 108 women entrepreneurs from different cities of Turkey have applied to the project carried out with the Women Entrepreneurs Association of Turkey (KAGİDER). Commenting on the project,



Hoffmann told that: "We will provide free transportation support for the export products of 50 women entrepreneurs for two containers per entrepreneur for 1 year within the scope of the project. We have already started to transport the export products of 7 women entrepreneurs to Europe and the North Africa. The transported goods are from the defense, textiles, food and enamel sectors." Hoffmann added that the products of the women entrepreneurs will be transported free of charge on the transportation line of DFDS from Pendik, Yalova and Mersin and the project will be valid for the ship and train lines. DFDS Business Unit Mediterranean has allocated a budget of 250 thousand Euros to the project. 24 international transportation companies support the project. DFDS Business Unit Mediterranean also plans in future to bring together AIDDA member Italian women entrepreneurs with women entrepreneurs in Turkey to create new business opportunities, also in cooperation with KAGİDER. DFDS Business Unit Mediterranean has yielded the benefits of its investments in this period when all sectors should accelerate their digital transformation and innovations. Commenting on the digital transformation, Lars Hoffmann said: "The Information Technologies Software Center of DFDS Business Unit Mediterranean having started its operations in December 2018 has 3 development teams to satisfy the software needs regarding the operations processes of DFDS". Hoffmann added that the third

Information Technologies R&D Center of DFDS in İstanbul also exports software.

Hoffmann has also commented on the use of intermodal transportation during the pandemic: "The number of our customers using intermodal transportation has increased by 45 percent. We as DFDS Business Unit Mediterranean already have strong connections and an intermodal infrastructure but we also cooperate with the railway operator primeRail aiming to maximize mobility with innovative, environmentally friendly and cost-effective intermodal transportation solutions. We have decided to establish a new 'Intermodal Transportation Competence Center' in Cologne. Thanks to our cooperation, we have proven that we continue to extend our intermodal transportation activities with the new Trieste - Nurnberg line which became operational on November 5, 2020. We plan to increase the frequency of the trips on this line soon. We will make our sustainable supply chain services stronger thanks to the Nurnberg - Trieste railway connection opened in cooperation with Çobantur Boltas, one of the major intermodal goods transportation operators between Europe and Turkey. Intermodal transportation has a share of 35 percent in our transportation activities. This corresponds to 60 percent of the vehicles setting off from Trieste." DFDS continues to work on increasing the frequency of trips on Cologne and Wels lines and estimates a 2 or 3 percent increase in 2021 as compared to the 3rd and 4th quarters of 2020. Stating that "We aim to maintain our position as the best supplier in the unit cargo trade between Turkey and Europe in 2021", Lars Hoffmann told that they aim to shorten the transportation durations as much as possible. ■

ROADRAILLINK FOR THE EUROPEAN NETWORK

The European transport market consists of more than 1.5 million trailers, of which only 5-6 percent are cranable by themselves. The market place seems enormous for a rapid spread of the roadrailLink adapters by VEGA all over the continent.

- The climate target of the European Commission are demanding urgent action to shift more cargo trailers from road to rail in order to achieve Co2 Savings.

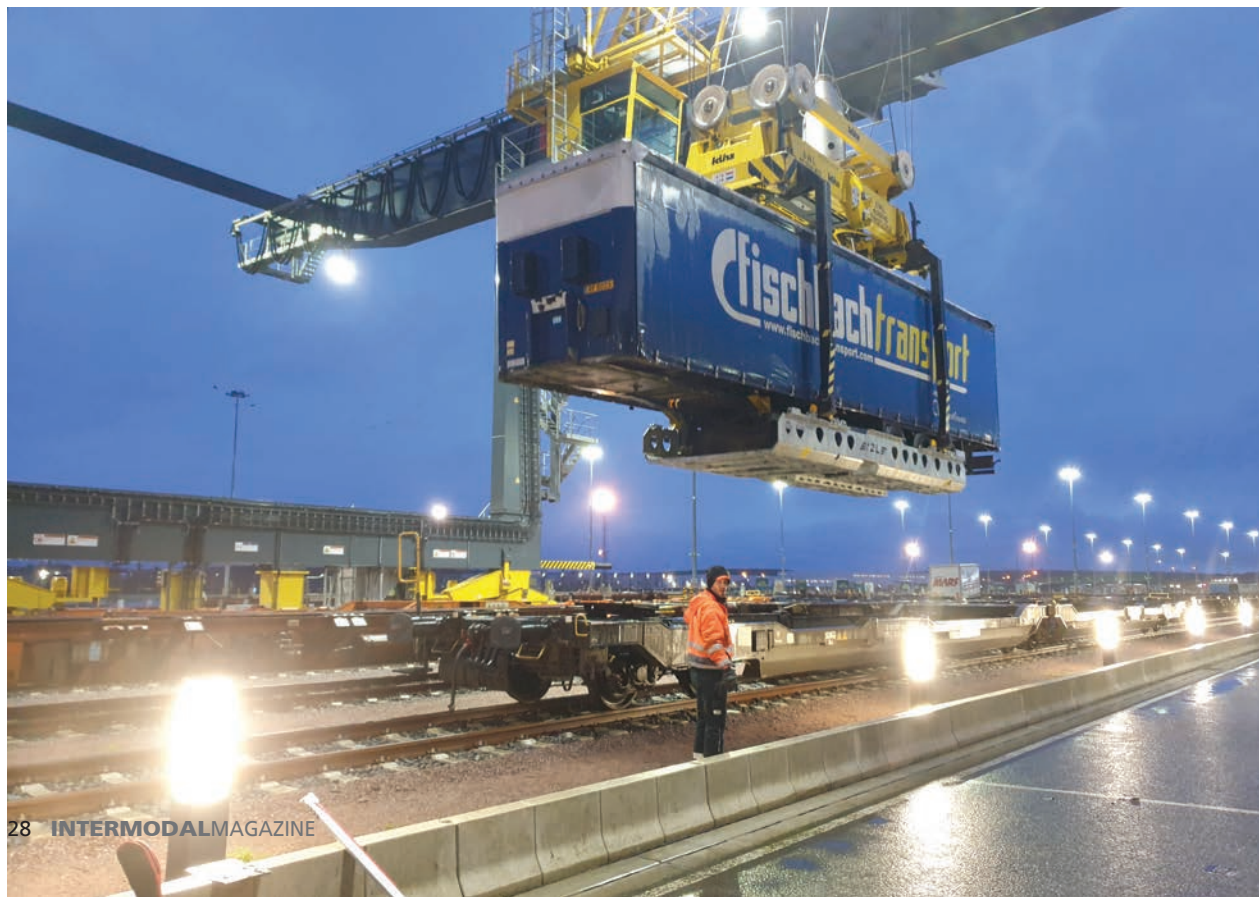
VEGA Logistics company with headquarter in Salzburg/Austria and a strong sister company in Istanbul/Turkey has always been aware of

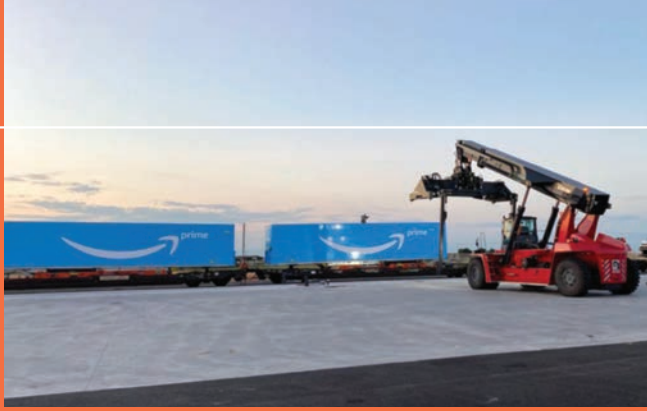


the challenges to combine reliable logistic chains for the commercial vehicle industry with a thoughtful

utilization of natural resources. The company, as partner of all truck and trailer manufacturers has used its long term experience out of the market place to develop a device which enables to shift any kind of trailers from road to rail with its roadrailLink trailer-use adapters.

The adapters are available for all kind





of rail bag wagons in the market and can shift most of the trailers from road to rail, therefore the adapters developed can be regarded as the missing Link between the two modes of transport. The potential of Co2 saving is said to be huge as each adapter can reduce the Co2 footprint of land logistic by 200 t/year - a very significant amount as the saving can be realized right now.

The first company who understood this potential is announced to be the Danish Company DFDS, the owner of former UN RoRo, who rented 55 adapters for their rail lanes from Trieste to Bettembourg and for further on carriage to Lyon and Rostock. New lanes like Cologne or Zeebrugge are heralded to be added soon.

The easy operation of loading non craneable trailers into the pockets within less than 2 minutes directly in front of the waggon is the key factor for the success of roadrailLink transport technique as the terminals are short in time and space.

VTG, the biggest rail equipment company in Europe, has signed a frame agreement with VEGA in order to equip their pocket wagon fleet with the adapters and the first units are already delivered to them and are running on different lanes between the Netherlands and Poland as well as between Lithuania and Germany.

In total there are already more than 300 adapters in the rail network with the potential Co2 saving of 60



thousand tons a year and the number is said to grow significantly in 2021/2022 as the climate targets are getting more and more challenging. The European transport market consists of more than 1.5 million trailers, of which only 5-6 percent are craneable by themselves, so the market place seems enormous for a rapid spread of the roadrailLink adapters all over the continent. Just recently VEGA was invited to a wagon manufacturer in Spain, who should develop a pocket wagon

for the particular Spanish rail track and the wagon holder checked the specifications of the wagon so that it could load roadrailLink adapters as they would be needed for the Moroccan trailers coming via Algeciras to Europe.

While intermodality will be the name of the game for the next decades to achieve climate goals and rail will play a major part in this important shift between road and rail, VEGA has developed the right tool for it by building roadrailLink. ■

Joeri Westendorp
VP Business Development

FLEETGO CONTINUES TO INCREASE INVESTMENTS IN TURKEY

Constantly improving products and services globally and making new investments, FleetGO's future plans include producing more services, especially for electric light and heavy commercial vehicles with solutions that will evolve according to the needs in this area.

- FleetGO is a fast-growing European telematics company, headquartered in the Netherlands, with offices in Germany, France, Italy, Spain and the UK. End-to-end solutions that are used for Tachograph Download & File Management, Tachograph Data Analysis, Driving Time Management, Driver Behaviour Monitoring, Fuel Usage and Real-time GPS Tracking solutions offered by FleetGO provide significant improvement in efficiency, reduction in costs and the minimization of risks.

Joeri Westendorp, the VP Business Development of the company describes their role, "We're driven by technology and our R&D team and team of engineers develop applications that provide not only the highest level of efficiency and usability, but also commit to the highest industry standards on security and privacy protection."

In many companies, vehicles are a big part of daily operations. Providing essential information about vehicles and drivers helps companies increase efficiency and reduce costs. As a fast-growing tech company, FleetGO keeps investing mainly in their technology and their European expansion. One of the highlights of 2020 was the opening of their office in Turkey. "We usually don't talk about 'investing', more about 'building the company'. Turkey was a chance that crossed our path, so we took it. We are working for the necessary innovations to meet the needs here efficiently. These enhancements may bring a new product line or features," explains Mr. Westendorp about their entrance into the Turkish market and continues; "In Turkey, we're just starting up. For 2021 I hope that we have our first full successful year without the hassle of getting things up and running. We continue to increase our investments in Turkey each passing day. We use our experience in the global market to meet our customers'



fleet management needs in Turkey. Thus, we ensure the widespread use of smart fleet management by cooperating with the biggest and best companies in the sector. In 2021, we will keep our focus on Europe; lots of opportunities and challenges here! We are constantly improving our products and services globally and making new investments. Our future plans include producing more services, especially for electric light and heavy commercial vehicles. Of course, our solutions will also evolve according to the needs in this area."

With a basic role of providing reliable prompt service for their clients, pandemic situation was a challenge to overcome for the smooth flow of their business as well as their clients'. Mr. Westendorp explains what the preliminary measures they took for these challenges: "The global economy was negatively affected by the pandemic. We have seen that many brands that do not have financial stamina or the opportunity to rapidly digitize are going through hard times. The epidemic period we went through while returning to the "New Normal" has been a guide for businesses to determine what they need technologically. As FleetGO, we observed better the advantages of our strong technological infrastructure during this period. As a tech company, we've been digital from day one. Our technology infrastructure is the key to our success. By offering an end-to-end solution, we develop, own, and operate our complete infrastructure, from hardware to the cloud platform. In a post-Covid-19 world, we believe that you need to be agile enough and have the resilience to stand and

offer real innovative and competitive solutions. This completely facilitates the adaptation process when conditions change, as is the case today."

In addition to keeping the company activities running smoothly, FleetGO had the mission to help their clients to get used to these 'New Normal' circumstances. And they managed to assist them 'just as usual' as Joeri Westendorp describes it: "We kept our personal approach in place and we saw that we would spend some more time on social talks with our customers. Everybody is in the same weird situation and we saw that people needed to talk about that. We fully understand and support that. Our real-time and remote monitoring capability provides an overview of the real-time location and travel history of our customers' vehicles and drivers. International shipping companies, their vehicles; Real-time location, tire pressure, fuel, and temperature monitoring values were monitored in real-time, predicting potential malfunctions and taking action easily. Thus, they retained their control over their fleet. We provided tracking and control advantage to our customers in the COVID-19 process with instant notifications and warnings. Loss of time and energy in fleet management processes was replaced by efficiency."

Mr Westendorp thinks 2020 showed our vulnerability as people and as world; "I hope we all learn from this and that our behaviour will change. We should realise that all our actions today have consequences tomorrow, or the next generation. That the world became so small the last decades maybe great for a lot of things, it has some very clear downsides we know all know. I honestly hope that we'll be more conscious about this and that we won't use planes as hop-on-hop-off-buses to go around the globe just for fun. That's a start in the right direction," he wishes. ■

Erhan MUCO
Managing Partner
Commercial and Operations

GREENLOG UNDERTAKES A VITAL ROLE TO STABILIZE INTERMODAL MARKET IN TURKEY

"At the start of our journey at Greenlog Intermodal, just as the name of our company implies, our aim was to always create sustainable logistics solutions. We strive to provide a greener transport model and play our part in leaving a greener and healthier world to the future generations."

► Established in 2016 with the aim to create greener and more sustainable transport solutions by utilizing intermodal connections for linking Turkey with Europe, Greenlog has grown into one of the most reliable intermodal transport companies in Turkey. While the company's services matured, the geographical reach has expanded from Europe to China. Erhan Muco, the Managing Partner of the company, responsible from Commercial and Operations, explains, "Our routes and lines have increased steadily and our client portfolio have diversified making our company financially healthier than ever. We connect Turkey with Europe via 2 main intermodal routes." The first route is the continental route by direct train from Turkey to Austria with a further reach to Germany, Belgium, the Netherlands and the UK. The second route is the RORO connections between Turkey, Italy, Greece and France. To by-pass the congestions at the port of Trieste in Italy, Greenlog has also introduced Bari as an alternative gateway into their network. "Our team of experts chooses the best route for our customers based on commodity, capacity, frequency of departure, geographical area, transit time requirements and price elements. Every industry has different needs and we combine the best routes and modes of transport for a tailored made model to clients' specifications," says Mr. Muco and he adds: "We have enlarged our fleet of intermodal containers and currently represent one of the largest fleets in Turkey and Europe. Via direct investment and partnerships, our fleet has grown from 2600 units in 2017 to 4200 units by the end of 2020. Besides offering 2400 x 45'HCPW standard intermodal units we also offer 1800 x 45'swapbody units which can be

loaded from the top and side, similar to a tilt trailer. The number of our swapbodies is by far the largest fleet in Turkey. Due to this factor, we have entered in partnerships with direct customers but also with many other logistics companies in Turkey which have entrusted us with their business. We have learned to value the business of our fellow partners and with an open agenda we continuously thrive to develop the intermodal connections together. We are experts in our line of work but we still develop our services every day in partnership with other logistics companies in Turkey. We believe that opening our agenda, network and services to fellow logistics companies will make way for a faster development of intermodal industry in the country. And that, in return, will benefit our economy."

2020 and Beyond

2020 was a very challenging year for Greenlog as well, given the COVID-19 measures that countries had to take. "From a logistics point of view," says Mr. Muco, "we suddenly started to feel the presence of new regulations, most notably the difficulties that road freight industry was facing - lack of drivers and huge delays at the borders. New consumer habits and production alterations started to put pressure on current logistics networks. It was during that time that the logistics industry truly felt the value of intermodal transport. Intermodal transport model was the least affected mode by the restrictions and regulations. It was a way of relief to bypass the border controls and congestions by sending hundreds of driverless and engineless units from Turkey to Europe and vice versa. This is what sustainable transport solution really stands for - safer, healthier and a greener transport model." Mr. Muco believes that, after 2020



there will be an increase of interest in intermodal transport in Turkey. Investment towards intermodal systems, terminals, hinterland connections, intermodal equipment and intermodal-compatible trucking fleets will highly increase. This will put pressure on equipment suppliers as they will need to increase production capacity of containers, swapbodies and wagons produced in Turkey. Accordingly the company has made long term commitment with different suppliers and foresee no shortages on this area.

"We might not be the first company to start intermodal transport between Turkey and Europe. This transport model has been existent for more than 30 years in Turkey. But we are proud to be one of the first companies to think outside the box and introduce new routes which did not exist before, the first company to have a GPS tracking unit inside every single container as well as play a vital role in stabilizing the intermodal market in Turkey. Still having an unpredictable year ahead, we are now better equipped and prepared than we were in 2020. Our short-term goal is to increase our capacity between Turkey and Europe to cope with the high demand shifted towards intermodal transport. Also having started intermodal transport between China and Turkey our aim is to work towards stabilising our service and offering increased capacity to our customers," comments Mr. Erhan Muco about the current and future business of the company. ■



MATRIX SHIPPING STRONGER WITH BAHRI RO-RO LINE



In addition to RO-RO shipments, Matrix Shipping carries out Project Cargo transportations and Chartering operations. The company also provides special mafi trailer service in order to load oversized static cargo on board of RO-RO vessels, so that decreases the freight costs for the customers. In 2019, Matrix Shipping has been appointed as the Commercial agent of BAHRI RO-RO Line in Turkey.

► Being one of the leading companies in Turkey in the field of vehicle logistics, Matrix Shipping has an international organization and achievements especially for transporting heavy vehicles and

construction equipment. Mr. Onur Kirazpınar, Member of Board of Matrix Shipping, has explained us that Matrix Shipping has been set-up as only a department inside the mother company

Matrix Logistics when it has started its operations in 2009. But, with a very fast growth, just in two years period, it has turned into a company. Noting that Matrix Shipping has been appointed as the Commercial agent of BAHRI RO-RO Line in Turkey in 2019, Kirazpınar further added the following: "The department established in 2009 with 4 persons, has grown up fast and turned into a company in 2011, only in two years. As a result, our company has been active as Matrix Shipping Co. for 10 years and keeps on growing. Telling that "Thanks to the supports of the mother company Matrix Logistics, today our company has become the first company comes to the mind of clients when subject is RO-RO shipments in/out Turkey, and has proven itself in this field. We are fully committed to the principle



of a high level of customer satisfaction since our establishment", Kirazpinar added that they had the chance to work with several new companies just with the help of recommendations of highly satisfied clients and further commented as follows: "Our transportation concept focuses on generation of creative and ever-innovative solutions for difficult destinations. We are proud of increasing the export volumes of our customers by decreasing their freight costs and contributing to the development of Turkey."

Matrix Shipping is specialized in the international transportation of the cargos on-the-move such as trailers, construction equipment, trucks and buses and becomes more and more recognized in this field. Telling that "RO-RO shipments is of great importance in terms of the nature of the vehicles transported. As we load very valuable products such as construction equipment, trailers, trucks and buses, our port captains always accompany the operations in Turkish and foreign ports", Onur Kirazpinar said that thanks to their experience and expertise, they can foresee any problem during the operations and immediately intervene and solve the problem. The company provides solutions for difficult destinations in especially Africa at affordable costs in the recent years and their customers appreciate these solutions. Therefore, the exports to these destinations have been increasing. Kirazpinar added following regarding Multimodal Transports: "By using Multimodal Transport solutions with combining Trucking and Shipments, we organize door-to-door deliveries for all kind of vehicles and equipment thanks to Matrix Logistics and our partners in Europe. This type of delivery is a sensitive subject for especially the construction equipment. We have a busy workload in Europe in this respect. The deliveries made from the ports we serve in Europe to the doors of end users provide great convenience for our customers and increase the trust in our company.

We mostly provide services to the entire Europe, Africa, the Red Sea and the Middle East ports. We also provide worldwide services to many other ports on earth by connecting transshipment services." Noting that "The exports of trailers and superstructure vehicles manufactured in Turkey continue on a regular basis even though they have been affected due to Covid-19. It is clear that Turkey has become an important player in the trailer and bus manufacture and exports. We can easily point out that the share of trailer cargo on our ships has increased significantly comparing to other cargo types", Kirazpinar said that competitive prices and the quality of Turkish manufacturers are accepted across the world. Kirazpinar added the following: "As long as the



quality of Turkish products get higher and higher, we wholeheartedly believe that this will increase the exports. This is also the same case for the exports of the new construction equipment manufactured in Turkey. On the other hand, due to the market shrinkage in the local construction sector, the second-hand construction equipment fleet in Turkey has also been exported recently with international sales. The imports in these product groups have a significant decreasing trend as compared to the previous years."

"Our achievements in the multimodal transport solutions are a great source of pride for our company. The inland transportations in Turkey can be handled

from the customer address to the loading port thanks to the trailer fleet of Matrix Logistics."

Matrix Shipping also provides door-to-door delivery service in Europe for every type of cargo thanks to the reliable partners. "Since we have full control over door-to-door deliveries, we have the chance to plan in advance and monitor every step and this optimizes the delivery times and ensures that the entire operation is handled by one hand single point with a properly organized and prearranged way and this increases customer satisfactions" said Kirazpinar.

In parallel to its approved success in the market, last year Matrix Shipping has been appointed as the Commercial Agent of BAHRI RO-RO LINE in Turkey. BAHRI

Logistics is the National Shipping Company of Saudi Arabia, and one of the leading shipping companies in the world for last 40 years. It has regular shipping services from/to Turkey by using Iskenderun Limak Port. BAHRI Liner service has regular port calls of Iskenderun, Alexandria, Jeddah, Djibouti, Sohar, Jebel Ali, Abu Dhabi, Dammam, Shanghai, USA, and when required inducement calls enroute. BAHRI Logistics performs its activities using six ROCON vessels with all uniquely designed to carry RO-RO, Project, Break Bulk (heavy lift) and container cargo in a single voyage. The company views itself as a carrier focusing in optimal cargo mix whilst specializing in "underdeck" storage capability. ■



CAMCO TECHNOLOGIES TO FURTHER DEVELOP TERMINAL AUTOMATION BUSINESS IN TURKEY

► Mr. Erkan Belek is quite confident of the strategic location of his market. "Turkey is at the crossroads connecting the east and the west. With a total coastline of 8,333 kilometers, Turkey links the Balkans, the Black Sea, Caucasian, the Caspian, Central Asian, Middle Eastern and the Northern African countries. It is really no surprise that there are almost 200 ports. And 27 of Turkish ports are classified as container ports. Currently, the country is building three ports in three big seas, including Çandarlı Port in İzmir on the Aegean Sea, Filyos Port in Zonguldak in the Black Sea and the Taşucu Container Port in Mersin on the Mediterranean Sea". Erkan Belek is looking beyond COVID-19 "A lot of investments have been put on hold, but with the pandemic finally starting to get

under control, we expect projects to kick off again from the second-year half, not only in the maritime container transport, but also in the intermodal business".

Erkan Belek
Country Manager Turkey



Intermodal Growth

For Erkan Belek, the Trans-Caspian East-West-Middle Corridor Initiative also known as the Middle Corridor will also revive the ancient Silk Road." This initiative will create new transport routes to connect East Asia to Europe. With the Turkey Logistic Master Plan, the government aims at increasing the share of railway transportation, which is more economical and reduces the time of transportation of the final products to the consumption market. Finally, Turkey is also building 21 logistics centers, of which 10 have been completed, that will serve to lower the costs of transportation by offering various modes of transportation connecting these centers. From all these initiatives, we see that the Turkish

“With more than 230 container terminal references in all continents, Camco is a leader in the automation of the container handover process. The Camco gate automation as well as AI-technology based truck, rail and crane OCR solutions are globally acknowledged among the best performing on the market.” Mr. Erkan Belek, Country Manager Turkey, explains the region’s strategic role in the expansion of Camco Technologies.

government is committed to invests in transport infrastructure and achieve growth in the logistics sector. Also, the major logistics associations are developing strategies for sustainable growth. Many parties are involved, so investments are not dependent on a single party”

Improving Operation Efficiency Through Automation

The growth of private as well as public investments in the logistics industry offers multiple opportunities for Camco Technologies. Erkan Belek: “With an enviable track record of more than 230 references in terminal automation, we are convinced our insights and automation solutions can create shareholder value. Our gate automation systems which include our truck photo gate and terminal access kiosks have become one of the cornerstones of terminal automation: registering all in- and outbound traffic of trucks, containers and trailers provides the core dataset for the Terminal Operator System to control terminal access and organize terminal operations. This is usually the first step in an automation upgrade of an existing process, providing quick wins and a clear view of what comes in and goes out. Depending of the organization of the yard processes, we then offer LSTP kiosk solutions for the container transfer zones where containers are being transferred from the truck to the stacking cranes or vice versa. In deep sea container terminals, our Ship-to Shore crane OCR solutions register every box when loaded or unloaded on a container vessel. With



the best exception rates available on the market, our BoxCatcher crane OCR system combines speed with accuracy.

Faster Gate Turnaround With VBS

In Intermodal terminals, our Vehicle Booking System, gate automation, RMG crane OCR and rail OCR are meeting automation demands of the increasing container traffic by rail & road. The Vehicle Booking System is beneficial for the terminal, trucking companies as well as the truck drivers. By applying the VBS or truck appointment system, the terminal is able to gather visit data upfront and better organize gate flow, avoiding gate congestion during peak hours. The VBS offers less hassle for the trucking companies allowing a better management of the fleet. For the driver the VBS allows to speed up the registration process at the gate, improving truck turn around. VBS and gate automation are really

intertwined. The rail OCR portal is another value creating technology. The rail OCR allows a fast inventory of complete in- and outbound trains. The portal not only registers the containers and semi-trailers, but also railcars. Each hardware solution comes with an intuitive exception handling application which can be used remotely.”

Technology For Improved Customer Experience

Camco Technologies offers a holistic approach to terminal automation. Erkan Belek: “With a thorough understanding of the terminal processes, and based on the expertise from terminals across the globe, we are able to improve terminal efficiency, impacting customer satisfaction and ultimately bottom-line. We are convinced our solutions will contribute to the competitiveness of Turkish terminals, just as it does know for many years at the Atlas Ambarli Liman Terminal.” ■

MINISTER OF TRADE: “THIS PROCESS HAS TAUGHT US TO PLACE IMPORTANCE ON ALTERNATIVE MODES”



Ruhsar Pekcan
Turkish Republic Minister of Trade

Meeting with the members of the Eurasian and Sectoral Work Councils of the Foreign Economic Relations Board (DEİK), the Minister of Trade Ruhsar Pekcan shared important data on the Turkish Economy.

- Noting that “Covid-19 has affected the health and the economic life in the world alike”, Minister Pekcan told the following:

“One of our most important stakeholders during the pandemic was the logistics sector. We will continue to work in close cooperation with the logistics sector players both during and after the pandemic. Thanks to electronic customs practices introduced in addition to on-site, pre-arrival and non-paper customs clearance practices, the companies carrying out external trade operations can perform their customs clearance transactions without physically visiting a customs office. We have accepted the ATR origin certificates from Europe on the electronic environment. We were ready to accept them but the EU used to tell us that their systems were not ready yet. They have not accepted our shipment documents electronically even if they have a QR code on them and are extremely secure. They have accepted these documents during this period and our business people did not need to visit a customs office. Our goal is to ensure that this is continued after the pandemic. I have brought this on the agenda of the meetings held with the EU ambassadors.



This process has taught us how much we should focus on the alternative logistics modes. Our trade activities focus on the road transportation. With the closing of the border gates, we have launched contactless trade practices. We have reached around one thousand and 500 vehicles on Habur border gate. This number was 7 vehicles in the first days, then increased to 300 vehicles in one week and we increased it up to one thousand and 576 vehicles like our average of one thousand and 600 vehicles before the pandemic, thanks to contactless trade and vehicle-driver-trailer change. We launched the same practice in Kapıkule border gate. We have implemented this for the vehicles with Turkish license plates in the trailer park and for the vehicles with foreign license plate in the buffer zone. We did not have a buffer zone in Kapıköy border gate for our trade with Iran. We made our shipments via railway transportation by pushing the wagons from our side with a locomotive and pulling them from the other side. The average number of wagons was 280



in January and February and this increased to one thousand and 800 wagons in April in Kapıköy. During this period, we have started to use Baku - Tbilisi - Kars railway more efficiently. We have increased the transportation volume from 121 wagons and 4 thousand and 200 tons to 443 wagons and 27 thousand and 113 tons in April. We cooperate with our stakeholders in order to eliminate the transit fees and quota problems by using Baku - Tbilisi - Kars railway line more efficiently on especially the Eurasian geography. We have met the Ministers of Trade of the Turkish Council on May 6 and shared our opinions. We should focus on our railway trade. We have increased the number of train trips on Çerkezköy-Plovdiv (Bulgaria) line two per day, which used to be one per day. We have added Karasu-Köstence RO-RO trip for Romania. Our RO-RO trips with no men and trailer to Italy and France have continued during this period. We have also extended the validity period of the inward processing permits. We have provided additional facilitations to

the companies which are authorized economic operators. Caucasasia, Northern Black Sea, Caspian and the Central Asia regions have a total population of around 300 million over an area of 25 million square meters. The total national income of these countries is 2.2 trillion US dollars and they have a foreign trade volume of around 1 trillion US dollars. Unfortunately, neither can they utilize this trade volume to the fullest extent among them nor our trade volume for them is not as high as we aim for. Turkey has been founded at the center of the Eurasian geography and on the region where the civilizations sharing this geography intersect and has acted as a bridge between different cultures throughout the history.

We have an important potential on Baku - Tbilisi - Kars line

The biggest problem in the Eurasian countries is the logistics problem. Since they do not have any coast on any sea other than the Caspian Sea, this requires the use of road transportation instead of

sea transportation which is more affordable in terms of freight. The additional transit costs, quotas, transit fees and the increase in the Caspian transit fee are all obstacles before our trade. We have a very important potential on Baku - Tbilisi - Kars line. We increased our transports to 5 thousand tons per day and we aim to increase them to 6 thousand tons. Another line can be established, if necessary. We also have simplified customs line practices. We have signed an agreement regarding them with Azerbaijan and made the same offer to the countries that are a member of the Turkish council. This system only runs on the principle of voluntarism. We always emphasize that the quotas and transit fees for road transportation should be eliminated and a full liberalization should be ensured and we will continue to request it. We continue to hold negotiations to eliminate the non-tariff obstacles before the exports. We also hold negotiations regarding the reference fee practices on Ukrainian, Moldavian, Russian Federation and Kyrgyzstan customs. We believe that the countries that successfully struggle against the pandemic and get ready for the post-pandemic process will take the lead in this process. We also believe that this process will create new opportunities for some sectors such as health tourism despite all the challenges it has brought. Turkey steps forward for many investments from the Far East which will affect the distribution of international investments across the world thanks to her location, being a reliable supplier, her industrial infrastructure and labor force capacity. We should utilize these opportunities well and render Turkey the center of investments.” ■

TURKISH HEAVY COMMERCIAL VEHICLE MARKET RETURNS BACK TO LIFE IN 2020

► The transporters who have started to make their long awaited investments at the end of 2019 have faced the impacts of COVID-19 in March 2020. The investments continuing for the first three months decreased to the lowest levels in April and May but then started to increase fast with the strong production starting after June called as the New Normal. Thanks to the decrease in the Bank interest rates and increase in the demand for transportation, both the domestic freight forwarders and the international transporters started to renew their fleets in summer months. These investments have significantly affected the sales of Mercedes Benz and Ford Trucks manufacturing in Turkey and left a positive impact on the sales of the brands as imported goods. According to TAİD statistics, the trailer sales increased by 212 percent to 10 thousand and 982 as compared to the previous year during the period from January to December 2020. The truck sales in Turkey have also increased by around 47 percent to 7 thousand and 325 as compared to the

previous year.

In terms of brands, Mercedes Benz maintained its leading position in the trailer segment by purchasing 4 thousand and 55 trailers including 76 off-road trailers. Mercedes Benz also remained as the leader of truck segment with 2 thousand 877 truck sales including 1529 off-road trucks. The second largest brand of the market is Ford Trucks which also manufactures in Turkey. Ford Trucks sold 647 trailers and 1719 trucks in

2019 and especially increased its market share in the trailer segment. Ford Trucks sold 2 thousand and 416 trucks and 2 thousand and 900 trailers in 2020 and strengthened its position.

The Automotive Distributors' Association (ODD) published its Automobile and Light Commercial Automobile and Vehicle Market Evaluation Report for 2020.

The total automobile and light commercial vehicle market of Turkey





The Turkish heavy commercial vehicle market being on a low trend for years has achieved great growth as compared to the previous period despite the global pandemic. The total number of vehicles sold during the period from January to December 2020 is 18 thousand and 307.

grew by 61.3 percent as compared to the previous year. According to the evaluation report, 772 thousand and 788 vehicles were sold in the Turkish total automobile and light commercial vehicle market in 2020 as compared to 610 thousand and 109 vehicles sold in 2019. Thus, the sales increased by 61.3 percent.

Light commercial vehicle sales increased by 77.2 percent

The light commercial vehicle market increased by 77.2 percent to 162 thousand and 679.

In December, the automobile and light commercial vehicle market grew by 15.2 percent, the automobile market by 14 percent and the light commercial vehicle market by 19.8 percent.

The increase in the total market is 15.2 percent according to the result of comparison of December 2019 to

December 2020.

On the other hand, the automobile and light commercial vehicle market decreased by 17.9 percent as compared to the average sales in December in the last 10 years.

In terms of the body type of the vehicles in the light commercial vehicle market, the van body type is the most preferred body type with a share of 76.9 percent and 125 thousand and 38 vans. The truck body type takes the second place with a share of 11.5 percent and 18 thousand and 708 trucks and the pick-up body type the third with a share of 6.7 percent and 10 thousand and 972 pick-ups.

Heavy commercial vehicle group production increased by 8 percent

The capacity utilization ratios by vehicle group were 66 percent for light vehicles (automobiles + light

commercial vehicles), 46 percent in heavy commercial vehicles and 51 percent in tractors.

The commercial vehicle production decreased by 8 percent in 2020 as compared to the previous year. While the light commercial vehicle production decreased by 9 percent, the heavy commercial vehicle group production has increased by 8 percent. The total commercial vehicle market increased by 78 percent, the light commercial vehicle market by 77 percent and the heavy commercial vehicle market by 82 percent in 2019. In terms of basis impact, the commercial vehicle market results in 2020 are 30 percent lower than the results in 2017. 57 thousand and 315 commercial goods and passenger vehicles and 4 thousand and 983 tractors have been produced in December alone. ■



THE YEAR FINAL FOR THE SECTOR: ATLAS LOGISTICS AWARDS CEREMONY

Atlas Logistics Awards are presented to the winners for the 11th time with a digital ceremony due to the global pandemic.

► 11th Atlas Logistics Awards were held online for the first time due to the pandemic. Republic of Turkey Deputy Minister of Trade Rıza Tuna Turagay, FIATA Senior Assistant Chairman Turgut Erkeskin, UTİKAD Chairman Emre Eldener, UND Business Development Chairman Fatih Şener from the sector and Turkish Exporters Assembly (TİM) Deputy Chairman, İstanbul Apparel Exporters' Association (İHKİB) Chairman Mustafa Gültepe, Turkish Flour Industrialists Association Chairman Eren Günhan Ulusoy, Automotive Manufacturers

Association (OSD) Logistics Chairman Savaş Öztörün, Economy Journalists Association (EGD) Chairman Celal Toprak and Organization Committee Chairman İlker Altun from the business world attended the ceremony. 228 people watched the ceremony online.

Starting his words as "We were aware of the importance of the sector before the pandemic but the pandemic has reminded us once more how important the logistics is" in his speech at the ceremony, Turagay added that: "This crisis has



The presentation of the award was made by Serhat Baş.

once more underlined and taught us how important the logistics and transportation are for ensuring the sustainability of the trade and especially the exports for Turkey." Turagay further commented as follows:

"While the decrease of carbon emissions is discussed on one hand, there are talks on the European Green Deal. In fact, these pose a threat against the road transportation in the future. We have a very good fleet. We have a quality team. We have friends who are well-trained and specialized in the logistics sector. We have university departments. But the most important of all, the pandemic has taught the world that: Choose your suppliers



wisely in order not to experience any problem in your supply chain. Do not choose suppliers from the far places. Choose the countries that can deliver the goods on time as your suppliers, to the extent possible. This presents a very big opportunity for Turkey.” Noting that “The most crucial purpose of this competition is to create motivation while its most important reason is to raise sectoral awareness”, Logistics Award Competition founder and manager İlker Altun told that: “We want to bring to the forefront the achievements in the logistics field and have them applauded in order attract attention on the logistics. We already knew it but everybody developed more awareness on the logistics during the pandemic.”

Atlas Award Winners for Exports are Together with the Logistics Sector

Then the award ceremony started and the first awards were announced by UTİKAD Chairman Emre Eldener. 11 companies won the awards in this group as extending gratitude in the name of the sector for the business potential that the companies operating in the fields of furniture, plastics, automotive, electric home appliances, textiles, packaging, agricultural equipment, food and drinks have created for the transportation and logistics sector thanks to their domestic and foreign trade activities.

Emre Eldener UTİKAD Chairman



TİM Deputy Chairman and İHKİB Chairman Mustafa Gültepe: Words will not be enough to tell how important the logistics is for especially the ready-made and textiles sectors. Logistics brings Europe closer to us.



Mustafa Gültepe TİM Deputy Chairman and İHKİB Chairman

During the pandemic, everybody once more understood how important the logistics is and how online sales are valuable.

TürkTraktör Logistics and Foreign Trade Manager-OSD Logistics Committee Chairman Savaş Özturun: We try to support our farmers both for exports and for the domestic transportation thanks to the annual production volume of 50 thousand. The pandemic is a very challenging and tiring process but we have taken urgent decisions and have not stopped production thanks to the supports of our logistics business partners.



Savaş Özturun TürkTraktör Logistics and Foreign Trade Manager-OSD Logistics Committee Chairman

Turkish Flour Industrialists Federation Chairman Eren Günhan Ulusoy: Our company operates in the food sector and Turkey is the world leader and the first in the exports in our sector. It is clear how important logistics sector for us, we work together and during the pandemic, we have delivered not only the bread to the people of Turkey but the flour - the raw material of the bread - needed by everybody in the world to the entire world. Turkey has performed this holy duty together with you.

Eren Günhan Ulusoy Turkish Flour Industrialists Federation Chairman





Turkish Cargo is the Best Logistics Company of the Year

4 thousand and 453 votes are given in the online voting process. Based on the voting results, the best road, air, sea and warehouse managers and the best company of the year are awarded.

Toprak: "Nothing will be achieved without the logistics"

The awards in the award group for the logistics sector companies which carry out operations as a member of the sectoral non-governmental organizations have been announced by Economy Journalists Association Chairman Celal Toprak. Telling that 'You can do everything online but you cannot deliver a product online'

Celal Toprak

Economy Journalists Ass. Chairman



in his speech before announcing the results, Toprak further commented as follows: 'Today the logistics sector is the flag carrier of Turkey in the international arena. Nothing will be achieved without the logistics sector.'

Şener: "I extend my congratulations to the competition team"

Evaluations have been made in 5 categories in this award group. Giving a speech while announcing the results, Fatih Şener told that: 'I extend my congratulations and gratitude to this team organizing an important event like logitrans for organizing this award winning competition despite all the disadvantages.'

Fatih Şener

UND Business Development Chairman



Dazzling Projects

The last award group - the Jury's Special Awards - is awarded based on the evaluation of the logistics projects by the jury. 7 projects won an award in this award group based on the evaluation made on criteria such as being environmentally friendly, equality of opportunities, training, and contribution to employment, investment and economic sustainability. 3 of these projects have attracted attention as they emphasize the digital solutions which reflect the spirit of the pandemic period. The awards in this group have been announced by FIATA Senior Assistant President Turgut Erkeskin. ■

Turgut Erkeskin

FIATA Senior Assistant President



COMPANIES WINNING LOGISTICS CONTRIBUTION AWARDS

The "Best" of the Year Award Winners

The Best Warehouse
Manager of the Year



The Best Road Logistics
Manager of the Year



The Best Sea Logistics
Manager of the Year



The Best Air Logistics
Manager of the Year



The Best Logistics
Company of the Year



Award Winners by Professional Membership



Mersin Liman İşletmeleri
in the category of Port
Operators



Sarp Intermodal in the
category of Railway
Transporter Forwarders



Medlog Logistics in the
category of Railway
Transporter Operators



Origin Logistics in the
category of Int. Sea
Transporter Forwarders



MSC Gemi Acenteliği in
the category of Int. Sea
Transporter Ship Owners



Globelink Unimar
Logistics in the category
of Air Trans. Forwarders



Turkish Cargo in the
category of Int. Air
Transporters

Award Winners by Certificate of Activity Type

Domestic Transportation Works
Organizers Holding a R 1 and TIO
Certificate



NGL Logistics

International Transportation
Works Organizers Holding a R 2
and TIO Certificate



İMS Logistics

Domestic Logistics Operators
Holding a L 1
Certificate



Ceynak Logistics

International Logistics Operators
Holding a L 2
Certificate



Omsan Logistics

International Commercial
Goods Carriers Holding a C 2
Certificate



Arkas Logistics

Jury's Special Awards



Ahmet Cora for his book
Lojistik Notları
(Notes on Logistics)



Hareket Proje
Taşımacılığı for
Transporting the
Heaviest Cargo in Turkey



İETT İşletmeleri for
Electric Vehicle Project
in Prince's Islands



Satko Teknoloji for
Digital Tachograph
Data Archiving and
Analysis Platform



Select Bilişim
for Software for
Transformation into An
E-Logistics Company



Sinoz Kozmetik for End
Point Delivery Project
during Pandemic



SOFT İş Çözümleri for
Soft Web CRM Project

Companies Awarded for Contribution to Logistics



Erciyes Anadolu
Holding



Fırat Plastik
Kauçuk San.



İnci Holding



Mey İçki Sanayi
Tic. A.Ş.



Senur A.Ş.
(Arnica)



Talu Tekstil
San. Tic. A.Ş.



Tebplast Plas.
San. Tic. A.Ş.



Toyota Türkiye
Paz. ve Satış A.Ş.



Türk Traktör



Ulusoy Un A.Ş.

DEPUTY MINISTER OF TRADE RIZA TUNA TURAGAY: THE IMPORTANCE OF THE LOGISTICS IS CLEARER NOW

► The logistics sector is important not only for us but also for the world. We were aware of the importance of the sector before the pandemic but the pandemic has reminded us once more how important the logistics is. We have faced many problems such as problems in the supply chain, closing of the border gates and cancellation of flights and economies which stagnate in an instant throughout 2020.

This crisis has taught us to become digital. This crisis has once more underlined and taught us how important the logistics and transportation are for ensuring the sustainability of the trade and especially the exports for Turkey. What is the status of Turkey? Turkey is literally in a position to become a logistics hub. If we look at the infrastructure and transportation investments made in the last seventeen years, we see that we have spent around 145 billion US dollars. In other words, we try to base the infrastructure and transportation on strong foundations to the extent possible. We have launched liberalization efforts. Significant liberalization has been made on the



ports. We can see the advantages they provide. We try to do our best to develop the logistics sector.

Turkey is located on the central corridor in the One Belt - One Road project. The Caspian Corridor has become operational with Baku - Tbilisi - Kars railway. We have completed the construction of Marmaray. İstanbul Airport may become one of the most important cargo logistics centers of the world. Yavuz Sultan Selim bridge may become one, too. We try to support the infrastructure of the logistics sector to the extent possible with many investments and activities. What are the most important problems of our transporters?

The transit certificates. The transit

certificates pose a problem every year. The problems experienced with Hungary and the long queues before Kapıkule will not be eliminated in one day. While the decrease of carbon emissions is discussed on one hand, there are talks on the European Green Deal. In fact, these pose a threat against the road transportation in the future.

We have a coastline of 8 thousand and 400 kilometers and a good number of ports. We should use these ports in the best possible way. We should do our best to use RO-RO and RO-LA in the best possible way. We should work on alternative routes. The Chinese own most of the highly operational ports of the world. In terms of its location, Turkey is an important center not only between Asia and Europe but also on the Western-Eastern and Northern-Southern corridors. Turkey has features to become an important transfer hub.

We will increase our growth speed to high levels as of the second half of the year. You will see it. When we do this, we should utilize this in the best possible way. We have a very good fleet. We have a quality team comprised of well-trained members. Many universities have departments focusing on the logistics sector. We have friends who are specialized in the logistics sector. The most important of all, the pandemic has taught the world that: Choose your suppliers wisely in order not to experience any congestion, any problem in your supply chain. Do not choose suppliers from the far places and choose the countries that can deliver the goods on time as your suppliers, to the extent possible. ■





AYSBERG ADMINISTRATIVE DIRECTOR- ATLAS AWARDS ORGANIZER İLKER ALTUN: **LOGISTICS SECTOR BRINGS LIFE TO HOME**

► We organize a competition which has proven to be prestigious. Why do we do this? Because we as Aysberg Basın Yayın Group and its products KargoHaber, Intermodal, Kasa, Taşımacılık Rehberi etc. together with other logistics sector publishers especially focusing on our sector are companies that try to be the display of the transport and logistics sector, to be the voice,

breath and face of the sector, to develop sectoral concepts, to fill in these concepts, to keep records of the sector and light its way up to the extent possible. This is of course a serious responsibility. We also want to bring to the forefront the achievements in the logistics field and have them applauded in order place more attention on the



logistics. We already knew it but everybody developed awareness on the logistics. The keyword here is the awareness... The most crucial purpose of this competition is to create motivation while its most important reason is to raise sectoral awareness. ■

TİM DEPUTY CHAIRMAN, İHKİB CHAIRMAN MUSTAFA GÜLTEPE: **WE ARE STRONGER WITH LOGISTICS**

► Words will not be enough to tell how important the logistics is for especially the ready-made and textiles sectors. One of the most important features of us in the competition against other countries is the logistics. We show how strong we are with the logistics and take every chance to voice it. Of course, the production is important. But let's say you have produced something but how you

will transport it? With the pandemic, everybody once more understood how important the logistics is and how online sales are valuable during the pandemic. As the Deputy Chairman of TİM and the Chairman of İHKİB, I try to support the logistics sector on every platform together with the organizations I represent. We should render Turkey to be a more



competitive, larger and stronger country in the international markets by utilizing its geopolitical position. ■

THE NEW LOGISTICS MARKETING - TRANSPORT LOGISTIC FAIRS WORLDWIDE

► In crises, there are always winners. In the past 12 months, the logistics sector has shown just how closely the roles are interrelated. While air traffic and air freight slumped at the beginning of the corona pandemic, this was the sector that very quickly regained its footing. Similarly, parcel services and logistics services in online retailing are in greater demand than ever before.

In this respect, the dependence on services in the production sector becomes clear once again. If demand for cars declines, this also means a decline in downstream industries. However, logistics is used to thinking in alternatives and dealing with events in the supply chain. Logistics is and will remain the solutions industry. And so new business is

always being acquired in production logistics as well.

But to acquire, neutral meeting places are needed. Dr. Robert Schönberger, the Exhibition Group Director of transport logistic at Messe München comments, "The internet can provide such a meeting place, but - as we have also experienced in the past 12 months - it cannot replace it. For



centuries, therefore, there have been performance and product fairs at the important crossroads of relevant trade routes. Today, this also includes Internet nodes and thus product presentation on the web. However, some aspects fall by the wayside - including high-quality chance encounters and matchmaking with relevant stakeholders. Communication is usually too one-dimensional." The lack of multidimensionality makes the current lack of physical industry meetings even more painful. The logitrans in Istanbul, as the meeting point of the Eurasian logistics community and a strong link to Europe, could not take place due to the pandemic, important congresses and conferences were canceled and now the world's

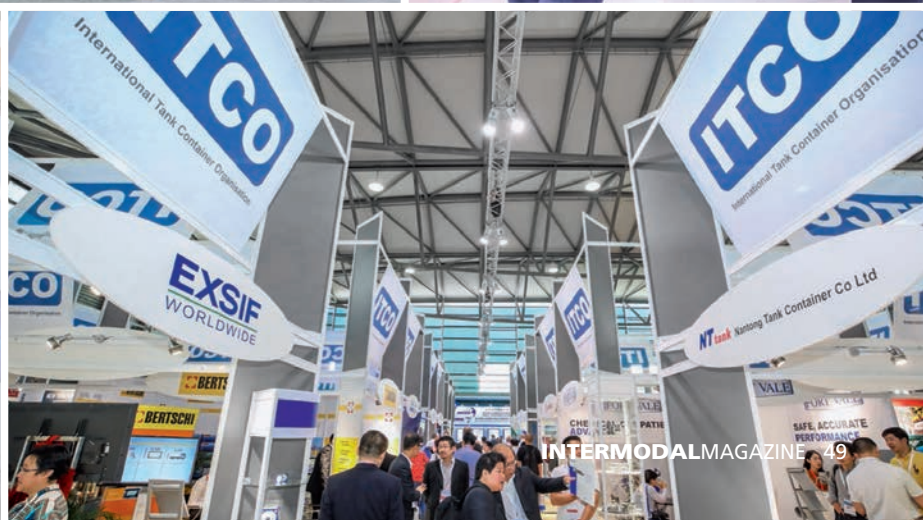
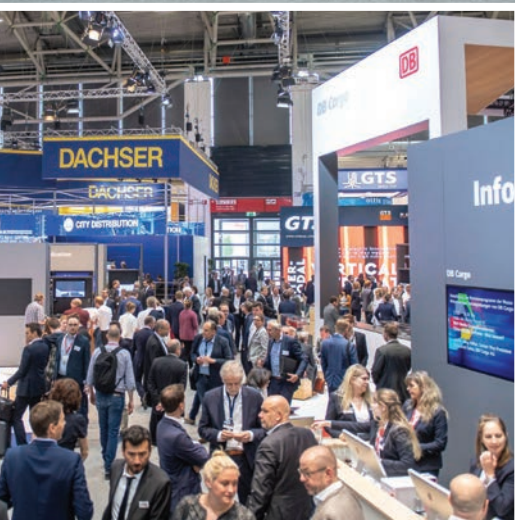
largest logistics trade fair in Munich in May 2021 cannot take place either.

What are the organizers working on, what are the meeting places of the future?

The general chorus agrees: There will be no like before! But is that so? Another learning of the last 12 months shows: Virtual booths, meeting rooms on the net - all good approaches. But they get boring quickly and don't bring people together. Disappointment on all sides.

What is transport logisitc doing now for the planned trade fair date? "It also goes online and takes place in the internet. But with a clearly tailored character: There is an online

TRADE FAIRS





Dr. Robert Schönberger
the Exhibition Group Director of
transport logistic at Messe München

conference. Strong topics, presented by strong partners, with exciting speakers. Probably the most comprehensive program ever for logistics online. And apart from that: No frills. Companies

can also present themselves in exclusive sessions. Otherwise, the focus is on content," informs Dr. Schönberger. For the next live events, however, it is not enough to wait and see for the

return of the sorely missed. It is also clear that trade fairs, conferences and congresses are important sales and distribution platforms. The longer this does not exist, the longer a significant business opportunity will be cut off. The basic idea of events will not change. But the experience will become more digital. Participation options from the office or home office will become normal, the on-site experience even more customer-centric and efficient. That doesn't necessarily mean hybrid; there are just more options. "People need appointments and fixed dates," says Dr. Robert Schönberger and he concludes, "Be it Bayram, Christmas or Thanksgiving - and trade fairs, too. We love these dates because we get together with our private or business family." ■





TRADE FAIRS



The transport logistics exhibitions including logitrans cover 10 different events in 3 continents and 5 countries:

transport logistic Munich, Germany	May 4,6, 2021	transport logistic the leading exhibition
air cargo Europe Munich, Germany	May 4,6, 2021	air cargo EUROPE exhibition and conference
Transport logistic Americas Forum & TIACA Executive Summit - USA	September, 21-24, 2021	transport logistic AMERICAS supply chain forum
International logitrans Transport Logistic Exhibition - Istanbul, Turkey	November 10-12, 2021	logitrans TURKEY international transport logistics exhibition
air cargo Turkey Istanbul, Turkey	November 10-12, 2021	air cargo TURKEY exhibition and conference
air cargo India Mumbai, India	February 22-24, 2022	air cargo INDIA exhibition and conference
transport logistic China Shanghai, China	June 15-17, 2022	transport logistic CHINA
air cargo China Shanghai, China	June 15-17, 2022	air cargo CHINA exhibition and conference
transport logistics Americas USA	November 08-10, 2022	transport logistic AMERICAS
air cargo forum Miami Miami, USA	November 08-10, 2022	air cargo FORUM • MIAMI exhibition and conference powered by TIACA
air cargo Africa Johannesburg, South Africa	February 21-23, 2023	air cargo AFRICA



TRANSPORT LOGISTIC EXHIBITIONS START GLOBAL WEBINAR DAY - FIRST GLOBAL, DIGITAL MEETING POINT FOR THE LOGISTICS INDUSTRY

The transport logistic exhibitions, the transport logistic and air cargo cluster of Messe München and partners including EKO MMI, the organizer of logitrans Istanbul, have successfully organized a new, purely digital and worldwide platform with the Global Webinar Day. On November 12, more than 1.800 international logistics experts exchanged views on current developments at the six transport logistic / air cargo locations.

► Due to the worldwide corona pandemic, it was not possible to organize the events of the transport logistic network of Messe München and its partner companies in 2020. With the Global Webinar Day, industry representatives were offered a digital substitute to virtually meet and exchange knowledge in one day across all time zones. Various webinars were held on November 12, 2020 at the six transport logistic / air cargo locations around the world. During the webinars, decision-makers and experts from the logistics industry had the opportunity to share current assessments and provide valuable market insights. In addition, they were available to participants to answer questions interactively and discuss opportunities and challenges in the market.

Broad range of topics with regional focus

Each 90-minute webinar focused on a specific region. China started with the topic: "Chinese logistics for a growing e-commerce market". This was followed by the organizers in India with the question "When will India become a formidable power in the global air cargo market?". Representatives from Turkey discussed "What are the chances for Turkey to be the logistics hub of the Eurasian Region?". From South Africa, participants could learn interesting facts about "Future forward - what does it take for Africa to create a competitive landscape for air cargo?" In Europe, "A six months outlook - how are economy and supply chains developing?" was discussed. The

USA concluded the transport logistic exhibitions Global Webinar Day 2020 with an outlook on "Trends that will shape the growth of air cargo business in the Americas post pandemic". The event languages were all English with the exception of the webinar in China. Virtual visitors had the opportunity to register for as many sessions as they wished according to their individual interests and all registered participants also had access to the recordings afterwards.

Cooperation and exchange are more important than ever

Messe München, its subsidiaries and partners are satisfied with the Global Webinar Day. "Due to the worldwide corona pandemic, all foreign events of the transport logistic network had



STRENGTHENING THE INDIAN AIR FREIGHT MARKET

► In India, the organizers discussed the question "When will India become a leading power in the global air freight market? Here Sanjeev Gupta, CEO of SpiceX-press, demanded that Indian airlines should wake up and face the challenge of moving international freight and thus become an air cargo hub between East and West. Only in this way could the goal of ten million tons of cargo



handled by 2027 be achieved. The experts agreed that all players in the industry, such as airports, airlines and shippers, but also the government, must work together to strengthen the location. They should concentrate more on strengthening a few hubs and expanding digital processes.

Gautam Mandal, Director Products, Car-go Flash Infotech, pointed out particularly great potential in the use of block-chain for the global air freight industry. ■

to be cancelled since March. With the Global Webinar Day, we have therefore created a new platform for the exchange of ideas and experiences in the international logistics industry. The webinars were very well received. This shows us once again how important exchange within the industry is. We are therefore looking forward to the coming trade fair year with general optimism," said Gerhard Gerritzen, Member of the Management Board of Messe München GmbH, and at the same time thanked all the partner companies who helped organize the event. Messe München had involved EKO MMI, MM Shanghai, MM India and MM South Africa as well as the STAT Media Group in the planning. ■

THE PANDEMIC IS CHANGING THE AFRICAN AIR FREIGHT LOCATION

► Experts from South Africa provided insights into how the changes by the corona pandemic have also brought opportunities for the airfreight market in Africa. Peter Musola, Manager, Cargo Commercial at Kenya Airways, explained to the interested audience that many foreign airlines had withdrawn from the market, which initially caused capacity bottlenecks. However, Kenya Airways seized the opportunity and completed more than 1,000



cargo flights from April 2020 to date. However, a clear legal framework was needed to further strengthen the location. Sanjeev Gadhia, CEO & founder of Astral Aviation, also said: "There must be resilient strategies. Africa is still the most expensive air freight market due to high taxes and the infrastructure needs to be further developed". However, AFRAA is working closely with TIACA and IATA to further liberalize the air freight sector in Africa. ■



EUROPE - SUPPLY CHAIN SYNCHRONIZATION CONTINUES

► At the European location, the experts gave an outlook on the development of supply chains and the economy for the next six months. Prof. Dr. Dennis Ostwald, Managing Director of the WifOR Institute in Darmstadt, predicted that the GDP in Europe would fall by 7.5 percent this year. In his opinion, the current crisis is a much bigger one than in 2009. According to Jan C. Fransoo, Professor of Operations and Logistics Management, Tilburg School of Economics and Management at Tilburg University, there will be

considerable fluctuations in the next four months due to the lockdowns in many European countries. However, governments are ensuring that there is liquidity and that unemployment rates remain moderate. As a result, people would continue to be willing to consume, but this would result in a sharp drop in inventories. Prof. Fransoo said that the individual transport companies had to be flexible and should not look at the long-term contracts. Felix Herzog, Associate Partner for Aerospace OEM & Supplier at Porsche Consulting,

pointed out that the recovery time for the aerospace industry will be at least 24 to 36 months due to Covid-19. "The industry must find a way to adjust production rates to reflect local markets. With supply chains no longer under pressure, this is an excellent time for manufacturers and logistics providers to rethink business models and service portfolios. We need to use the time now to optimize production lines and supply chains for the reviving business," he appealed to the audience. ■

MAJOR UPSWING IN E-COMMERCE AND PHARMACEUTICALS

► America concluded the transport logistic exhibitions Global Webinar Day 2020 with an outlook on "Trends that will shape the growth of the airfreight business on the American continent after the pandemic". Steve Townes, Chairman and CEO of ACL Airshop, said that the Covid-19 pandemic is the worst crisis in the entire air freight industry. Airlines defied the situation by establishing so-called "preighters" to transport vital goods. Efficient ULD



management is particularly important due to the continuing uncertainties. Not only ACL Airshop noticed this, but also other international specialists for ULD management such as Jettainer or Unilode. Robert Fordree, Executive Vice President Cargo at Menzies Aviation, also said that they had experienced a significant upswing in pharmaceuticals and e-commerce around the world. Despite the pandemic, 580,000 e-commerce transactions per second

were made on Single Day in China alone. As a ground handler, the company saw enormous fluctuations from massive peaks to a sharp drop in activity, so it faced the challenge of planning for this. Fordree warned that the world had neither the infrastructure nor cold chains to meet the temperature requirements and especially the freezing of vaccines everywhere. All experts agreed that close cooperation between all players was needed to meet the challenge. ■



MORE EFFICIENCY THROUGH DIGITIZATION IN TURKEY

► During the webinar with the title “What are Turkey’s chances of becoming the logistics hub for Eurasia?” the experts from Turkey also saw great opportunities in digitization for the logistics industry. According to Turhan Özgen, Chief Cargo Officer of the Turkish carrier, although Turkish Airlines had lost almost 95 percent

of its belly capacities due to the Corona pandemic, the company was able to significantly accelerate its digital initiatives. Özgen predicted that Turkey would be a global air cargo hub by 2024. Emre Eldener, President of the Association of International Freight Forwarding and

Logistics Service Providers (UTIKAD), also said: “The digitalization of customs clearance procedures will simplify processes with regard to transit freight, so that the Turkish logistics industry will be even more efficient in three years’ time”. ■



UTIKAD (ASSOCIATION OF INTERNATIONAL FORWARDING AND LOGISTICS SERVICE PROVIDERS)

PRESIDENT EMRE ELDENER:

PANDEMIC WILL SPEED UP THE CHANGE

► “The customs officers deal with a lot of different people because of the paperwork exchange is predominantly physical. And we have learned the hard way that digitization and paperless operations, not only in the customs but in all transport, procedures are essential in order to save the lives of people. That is not a commercial decision anymore. So, the Customs

Administration of Turkey has taken a big step to digitize the whole procedures. The digitization of customs and procedures will also bring us additional efficiency in terms of transit cargo.

Turkey is in the south corridor of the One Belt One Road Project. We are actually established now in the south corridor from China to Europe by including the Marmaray and now the



trains have started going underneath the Bosphorus using the tunnel and then delivering cargo to Europe. If we can create a little bit more efficiency in terms of transit times on that route, the Chinese cargo can also be moved via Turkey into Europe.” ■

TURKISH AIRLINES CHIEF CARGO OFFICER TURHAN ÖZEN:

TURKISH CARGO INCREASED MARKET SHARE IN THE SHRINKING MARKET

- "When we look at the outcome; our market share by the volume in terms of chargeable weight was around 4.1 percent of the global worldwide air cargo market at the beginning of the year. By June-July 2020, we reached up to 5 percent. We were very quick to consult to our civil aviation authorities and started to operate passenger freighters for the use of cargo. And by 20th of March we started to operate around up to 150 to 200 passenger freighter flights per week. So, the total number until September reached more than three thousand. That means we -

at least partially - have overcome the capacity shrinkage that appeared due to passenger aircrafts being parked. That's when we also speeded up



in some of our digital initiatives, especially in robotic process automation initiatives. As early as we were able to launch four of our RPAs' - robot colleagues, named Charlie, Bravo, Delta and Alpha, they started to run the standard operations while our teams, engineers, specialists and experts were working at home on deviations or analyzing evaluated inputs." ■

**UND (INTERNATIONAL TRANSPORTERS' ASSOCIATION OF TURKEY)
CHAIRMAN OF THE EXECUTIVE BOARD
ALPER ÖZEL:**

SHOULD THE POLITICAL CLIMATE WITH EU CHANGE TURKEY WILL BECOME AN ATTRACTIVE HUB



- "Turkey is the best location to invest in logistics in the region because we have connections to all ways: to North, to Russia, to South, to Europe, to the Middle East and to Central Asia. But the political climate disrupts this picture a little bit we must avoid this climate. Turkey is one of the best locations to make investment, because we have the same regulations like the European Union. It's easy to invest in Turkey and it also beneficial." ■

UNIVERSITY OF APPLIED SCIENCES LUDWIGSHAFEN AM RHEIN GERMANY PROFESSOR STEFAN ISKAN:

THE BOOK ON 'CORONA IN GERMANY'

- "I would like to share some insights with you because I am definitely convinced that most of that findings could be also of interest on a global perspective and for you in Turkey as well. That book is written from an interdisciplinary perspective. And, what is very interesting is that in our industry sector, our transportation and logistics industry, we are all the time under having pressure from our customers all over the globe. But the corona pandemic showed that for a lot of people, our industry has gained systemic importance from a military perspective, from



an economical perspective, etc. When it comes to the supply of the society and the nations, the systemic importance is a very good story for our industry leaders to give the message to the people that we will also be the job engine in future, in times of industry 4.0." ■



WHAT IS EXPECTED?

Commenting on the logistics requirements for the vaccines, ABI Research Freight Transportation and Logistics Principal Analyst Susan Beardslee stated the following: "Early vaccine candidates require ultra-low temperatures, as much as -70 degrees Celsius or -94 Fahrenheit. The lack of adequate storage capacity for these new types of Messenger RNA (mRNA) vaccines is a major problem. The containers to store and transport them are not widely available and not required for common vaccines. Constant temperature control is needed from the manufacturing site to the inoculation and according to known criteria, people will require two vaccines from the same manufacturer within 21-28 days. That equates to at least 662 million doses in the United States and approximately 1.5 billion across the European Union."

Much of the focus until today has been on fulfillment centers and modal capacity for air. Another concern is the need to seamlessly track temperatures and provide alerts for any out-of-spec loads. This involves integrated software, sufficient compute and sensor capabilities throughout, and the cooperation of both public and private entities across multiple modes and likely competitors. Beardslee further added the following to her comments: "The scale of technology, strategy, and operations excellence needed will require transparency, flexibility, and scale never seen, and will take efforts beyond the actual vaccine development and approval."

2021 TO BE MARKED AS THE YEAR OF COLD CHAIN LOGISTICS

- ▶ While the world focuses on the approval and distribution of Covid-19 vaccines, the worldwide freight industry is gearing up for a goal of transporting an average of 271 million ultra cold and cold doses per month (9 million doses per day). Early modeling by global tech market advisory firm ABI Research shows that at least 857 temperature-controlled trucks will leave Pfizer and Moderna manufacturing facilities or distribution centers each month. If AstraZeneca also receives approval, these numbers will be significantly increased. Distribution and delivery will continue to grow and get more complicated after the large urban and suburban areas are covered.

Global Supply Chain Not to Return to the Pre-Pandemic Level in 2021

Beardslee also made the following explanations: "Although goods transportation has seen a promising rebound from the spring, problems continue, from increasing insurance costs and lower profits to driver and container shortages and carrier bankruptcies. Further digitization and integration of systems will provide greater visibility, flexibility, and return on investment to supply chain participants that can improve economic performance, but likely after 2021 on a broader scale." ■



THE PANDEMIC CONTINUES TO AFFECT CONTAINER TRANSPORTATION

The container crisis leaves its mark on the last months of 2020 during which the production has slowed down and consumption habits have changed due to the pandemic.

► The container transportation undergoes a difficult era due to the pandemic and the freights increasing due to the crisis maximize the impact of the crisis. The process continuing with the increase in waiting times at the ports due to the pandemic has tragically changed the global import-export balances. The businesses operating on the

ocean line have taken serious measures and adopted an aggressive strategy for the European and USA exports. The temporary suspension of the reservations by the sea transportation companies seems to put at ease the Asian countries which need this the most. However, the container deficiency at the important ports of Europe such as Hamburg,

Rotterdam and Antwerp has reached record breaking levels. This is the same in other large economies such as Canada, USA, Brazil and India.

Freight Increases at Record Breaking Levels

The costs of global container usage with an annual capacity of 30 million TEUs have increased by 100 to 300

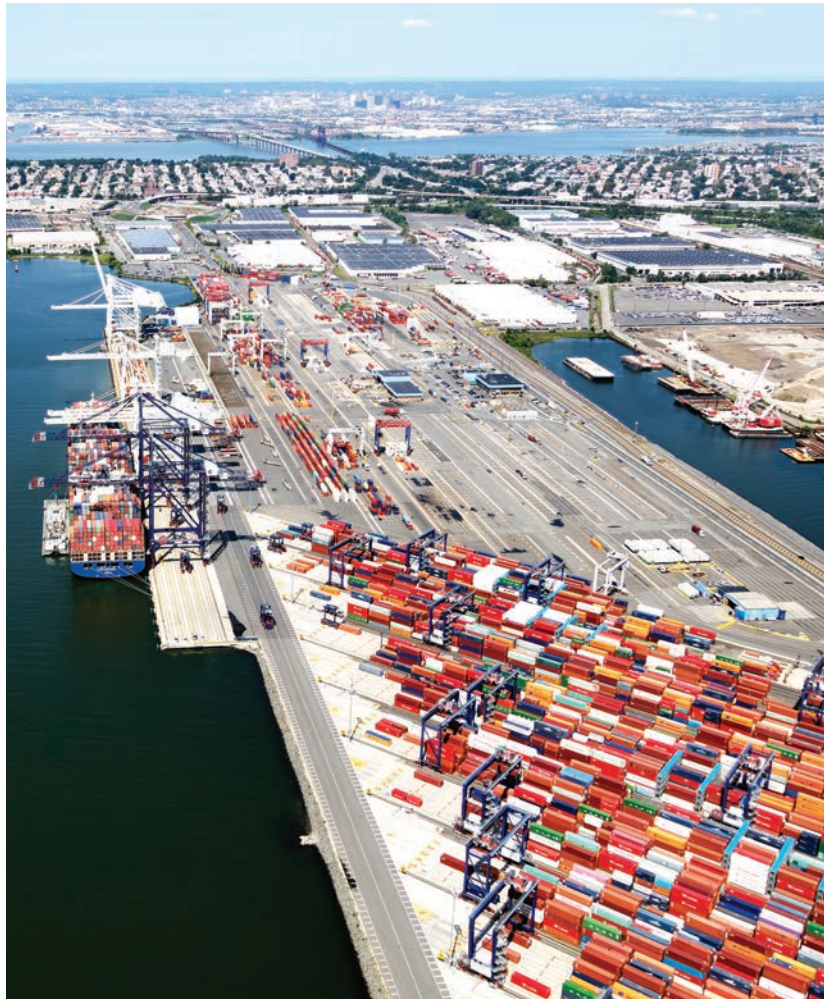
percent as compared to the previous year on different lines and even by more than 500 percent on some lines. According to the Shanghai Containerized Freight Index, the costs have increased by 194 percent on the Mediterranean lines. The cost increase for the Asian trade ports is around 450 percent as compared to the previous year.

Even though the increase in the transportations from Asia to Europe in the recent weeks seems to balance the competition playfield for the containers between two trade zones, the impacts of the crisis on Turkey are still ongoing.

Commenting on the global container crisis and its impacts on Turkey for Intermodal Magazine, Emre Eldener, the Chairman of the Association of International Forwarding and Logistics Service Providers (UTİKAD), told that: "The decrease in the restrictions has increased the exports. However, the imports are at a stagnation point due to the fast increase in FX. The number of incoming ships and containers has decreased remarkably. This, in turn, caused an empty container crisis.

We can say that the sea container transportation has a share of around 80 percent in the sea transportation. This figure increased by 4 percent every year in parallel with the growth in the trade volume. Thus, the global container capacity increased to 30 million TEUs per year and around 6 thousand and 200 container ships are loaded." Eldener further commented as follows:

"The equipment need of China has increased faster than estimated. The increase in the equipment need on the Eastern-Western axis due to the new year has caused all major lines to position their empty equipment especially on the Chinese ports. If we take into consideration the fact



that the North America alone needs around 900 thousand TEUs in average per month, we can understand how big a movement this is.

Another important problem is caused by the decrease in the number of personnel at the ports, excess waitings and capacity imbalance. Another reason of the equipment problems is that the import of the full equipment reaching the destination port now takes longer and therefore, the equipment need for the exports cannot be satisfied on time. The decrease in the number of port personnel in the ports of some countries due to the pandemic and

especially the part-time employment of or not working for a certain period of time of the crane operators needed for the containers have caused delays in unloading of ships.

Moreover, the transfer of the incoming containers to the interior parts of the United States of America used to take 1 to 2 days before the pandemic. However, now, due to the decreasing work force caused by the pandemic, non-operational trailers and insufficient chassis capacity, the return of empty equipment to the ports and warehouses takes up to 1 week. This has caused imbalances in the equipment supply and demand." ■

FUTURE OF EUROPEAN LOGISTICS AND GLOBAL LEADERSHIP UNDER DISCUSSION



'The European Union has faced many crises from 2008 economic crisis to Brexit, all of which have left its future unknown. The recent developments have challenged many industries in Europe.'

► Italian, Sweden and European Union (EU) representatives have discussed the geopolitical future of Europe at the online seminar organized with the theme Geopolitical Future of Europe. The seminar was moderated by Nail Olpak, the President of the Foreign Economic Relations Board (DEİK) with the Former European Union Foreign Affairs Minister and High Representative of the Union for Foreign Affairs and Security Policy Catherine Ashton, Former Switzerland Prime Minister and Foreign Affairs Minister Carl Bildt and Former Italian Foreign Affairs Minister and EU Commission Vice President Responsible for Justice, Freedom and Security Franco Frattini as speakers. Nail Olpak stated: 'The European Union has faced many crises from 2008 economic crisis to Brexit, all of which have left its future unknown. The recent developments have challenged many industries in Europe.'



'The USA Has Not Claimed to Be a Global Power'

Starting her speech by noting that 'Turkey will be a major actor forming the future of European Union and ensuring economic stability and improvement of the welfare level will continue to be an agenda item', Catherine Ashton told: 'The era after the Covid-19 pandemic will be crucial for utilizing the opportunities of cooperation and working together'. Ashton added that: 'The USA has waived from its claim to be a global power due to the recent developments.'

Carl Bildt also questioned the global leadership position of the USA and told that 'COVID19 Pandemic can be considered as the first biggest crisis of the global order led by America. It is the first time that the USA has not claimed global leadership during this period.' Bildt made the following remarks: "Despite the rumors that

China might become a global leader, China has problems, including especially related with reliability. I do not think China will come to the forefront regarding global leadership during this period. Likewise, I do not expect the European Union to come to the forefront due to the slowness in its slow maneuverability. Taking into consideration the crises it had with the Saudi Arabia and Ukraine, I do not believe that Russia will become a real power on the global scale."

'The Pandemic Can Be Seen as the Third World War'

Stating that 'The European Union should continue its ideal to maintain its existence and improve its welfare level', Franco Frattini commented as follows: 'Due to the developments during the Covid-19 Pandemic process, the expectations of the member states from the European Union unfortunately could not be satisfied.

The cooperation between the member states was not at the expected level. Italy has experienced many disappointments before and after the pandemic.' Frattini told that 'I believe that the European Union has missed a major opportunity during the term of USA presidency of Trump. I hope that the European Union can utilize the opportunities after Covid-19 in the best way,' and added the following: "Taking into consideration the other super powers on the world stage, the cooperation and solidarity between the EU member states in their relations with countries such as the USA, China and India is of great importance and it is impossible to think otherwise. During this process, the European Union Central Bank and the European Commission should be strengthened. Covid-19 Pandemic can be seen as the third world war. We are all on the same front. Cooperation and solidarity are crucial concepts in this period." ■

AIR CARGO 2020 - THE LARGEST DECLINE SINCE 1990

Strong variations were evident in the regional performance of air cargo in 2020. North American and African carriers reported an annual gain in demand in 2020, while all other regions remained in negative territory compared to 2019.

- The International Air Transport Association (IATA) released data for global air freight markets showing that demand for air cargo decreased by 10.6 percent in 2020, compared to 2019. This was the largest drop in year-on-year demand since IATA started to monitor cargo performance in 1990.

According to IATA figures:

- Global demand in 2020, measured in cargo tonne-kilometers (CTKs*), was 10.6 percent below 2019 levels (-11.8 percent for international operations).
- Global capacity, measured in available cargo tonne-kilometers (ACTKs), shrank by 23.3 percent in 2020 (24.1 percent for international operations) compared to 2019. This was more than double the contraction in demand.
- Due to the lack of available capacity, cargo load factors rose 7.7 percent in 2020. This contributed to increased yields and revenues, providing support to airlines and some long-haul passenger services in the face of collapsed passenger revenues.
- Improvements towards yearend were demonstrated in December when

global demand was 0.5 percent below previous-year levels (-2.3 percent for international operations). Global capacity was 17.7 percent below previous-year levels (20.6 percent for international operations). That is much deeper than the contraction in demand, indicating the continuing and severe capacity crunch. With the stalling of the recovery in passenger markets, there is no end in sight for the capacity crunch.



- World goods trade fell by around 6 percent in 2020, better than air cargo. While an inventory restocking cycle has started in the later part of the year, benefiting air cargo, capacity constraints are still hampering a fuller recovery.
- International CTKs declined in all the main regions except Africa (up 1.9 percent year-on-year) in 2020.

"2020 saw air cargo become a vital source of revenues"

"Air cargo is surviving the crisis in better shape than the passenger side of the business. For many airlines, 2020 saw air cargo become a vital source of revenues, despite weakened demand. But with much of the passenger fleet grounded, meeting demand without belly capacity continues to be an enormous challenge. And, as countries strengthen travel restrictions in the face of new coronavirus variants, it is difficult to see improvements in passenger demand or the capacity crunch. 2021 will be another tough year," said Alexandre de Juniac, IATA's Director General and CEO.

A robust end in 2020

Air cargo experienced a robust end of 2020, as industry-wide cargo tonne-kilometres (CTKs) declined by only 0.5 percent year-on-year in December, the best growth performance since November 2019. This confirms the positive trends already seen in recent months, despite a large decline in November 2020 (6.2 percent) relative to the same month in 2019.



Indeed, seasonally adjusted (SA) CTKs continued to increase at a robust pace, gaining 3.6 percent compared to the previous month. This places SA CTKs only 2 percent below levels seen during the previous peak, in November 2019. During the year as a whole, industry-wide CTKs fell by 10.6 percent in 2020 versus 2019. This is the fastest rate of decline in IATA series started in 1990, slightly worse than 2009 (9.7 percent) but considerably better than passenger traffic.

Air cargo underperformed global goods trade in 2020

In 2020, global trade of goods has declined at a slower pace (6 percent year-on-year) than air freight. Air cargo typically underperforms other modes of transport during downturns, but the reverse occurs during upturns. Growth in global goods trade & CTKs In the early part of the year, lockdowns and other control measures have led to significant disruptions in supply chains and a general fall in economic activity, impacting both trade and air cargo. Manufacturing activity and consumer demand were

able to rebound strongly when most lockdowns were lifted in May. This recovery has continued until the year-end, despite some volatility when renewed COVID outbreaks forced some markets to implement new restrictions. This rebound is well illustrated by global new export orders, with the corresponding Purchasing Managers Index (PMI) crossing the 50-mark in September and remaining above it since then (51.1 in Dec). Global industrial production has also recovered and was close to last year's value in November.

A 'mini' cycle in the inventory-to-sales ratio...

The inventory-to-sales ratio - historically strongly correlated with CTKs - offers more colour on the underperformance of air cargo. In March and April, supply chain congestion and lockdowns led to a spike in the ratio. With elevated stocks, shippers did not need to rapidly turn to air freight when demand rose again. This has benefitted ocean trade and other slow modes more than aviation

(Chart 3). Chart 3: Growth in inventory-to-sales ratio and CTKs Towards the later part of 2020, inventories started to be depleted. This typically happens at the start of an upturn, and normally leads to strong air cargo performance as businesses need to rapidly refill stocks to avoid shortages. But during this cycle, available air cargo capacity has been too low to satisfy the raising demand. While ocean transport capacity also suffered from the crisis, this was not to the same extent. This effect is arguably the main culprit for the underperformance of air freight, and offsets positive factors such as the need to turn to air travel for PPE and vaccine shipments.

...which is truncated by insufficient cargo capacity

Indeed, industry-wide available cargo tonnekilometres (ACTKs) fell by 23.3 percent year-on-year (yoy) in 2020 overall. In December, the same metric declined by 17.7 percent yoy. It has been improving at a slow but consistent pace since Q2 -2020. The lack of capacity has been caused



International demand fell in all regions with the exception of Africa which posted a 1.9 percent increase in 2020 compared to the previous year. For many airlines, 2020 saw air cargo become a vital source of revenues, despite weakened demand.

by schedule reductions and aircraft grounding in the passenger market. Prior to the crisis, the bellyhold of passenger aircraft accounted for 60 percent of total international ACTKs (now around 1/3). Airlines have raised freighters fleet size and daily utilization of aircraft, which has resulted in a 20.6 percent yoy increase in dedicated ACTKs over the whole year (24.2 percent in Dec.). Most of the gains in levels happened during the mid-year 2020 however, and carriers have been unable to fully compensate the lack of belly capacity (down 53.1 percent yoy in 2020).

This leads to record-high load factors and revenues

The industry-wide cargo load factor expanded by 7.7 percentage points (ppts) in 2020 overall, which led to a record-high annual load factor. In December, the total load factor rose by 9.9ppts to a new all-time-high for the month. This was also mirrored in international load factors, as APAC, the Middle East and Nth America also posted records. A consequence of the lack of space for air cargo has been elevated fares.

After reaching a first peak in April and May, cargo yields have increased again during the peak cargo season in Q4. With resilient cargo volumes, this has led to exceptionally high cargo revenues, up 75 percent yoy in December according to CargoIS data.

Broad-based improvement in int'l CTKs

In December International air cargo volumes declined by 11.8 percent yoy in 2020 overall, a slightly larger fall than that of total volumes. At the monthly level, international CTKs contracted by 2.3 percent yoy in December, a robust rebound from the 7.3 percent decline the month before. With the exception of Latin America, all the main regions registered an improvement.

2020 Regional Performance- strong variations

Strong variations were evident in the regional performance of air cargo in 2020. North American and African carriers reported an annual gain in demand in 2020 (+1.1 percent and +1.0 percent, respectively), while all other regions remained

in negative territory compared to 2019. International demand fell in all regions with the exception of Africa which posted a 1.9 percent increase in 2020 compared to the previous year.

Decline in demand of 15.2 percent in Asia-Pacific airlines

Asia-Pacific airlines reported a decline in demand of 15.2 percent in 2020 compared to 2019 (-13.2 percent for international operations) and a fall in capacity of 27.4 percent (-26.2 percent for international operations). In December airlines in the region posted a 3.9 percent decrease in international demand compared to the previous year. After a pause in recovery in Q3, demand is improving, driven by a rebound in manufacturing activity and export orders from China and South Korea. International capacity remained constrained in December, down 25.1 percent.

North American carriers posted a 1.1 percent increase in demand

North American carriers posted a 1.1 percent increase in demand in 2020 compared to 2019 (-5.2 percent for international operations) and a fall



in capacity of 15.9 percent (-19.7 percent for international operations). In December carriers in the region posted an increase of 3.1 percent in international demand. This was the strongest monthly performance since late 2018. Strong traffic on the Asia-North America routes, which was up 2.1 percent in 2020, contributed to the performance, driven by strong demand from North American consumers for goods manufactured in Asia. Capacity remained constrained, down 14.1 percent in December.

16 percent drop in European carriers

European carriers reported a 16.0 percent drop in demand in 2020 compared to 2019 (-16.2 percent for international operations) and a fall in capacity of 27.1 percent (-27.1 percent for international operations). In December airlines posted a decrease in international demand of 5.6 percent compared to the previous year. After a pause in recovery in November, seasonally adjusted demand grew 7 percent month-on-month in December, the largest rise of all regions. However, new

lockdowns and adverse economic conditions in the region risk the recovery. Lack of capacity remains a challenge, as international capacity decreased 19.4 percent in December.

Middle Eastern carriers reported a decline in demand of 9.5 percent

Middle Eastern carriers reported a decline in demand of 9.5 percent in 2020 compared to 2019 (-9.5 percent for international operations) and a fall in capacity of 20.9 percent (-20.6 percent for international operations). After a slight slowdown in recovery in November, carriers in the region performed well in December, posting a 2.3 percent increase in international demand. International capacity decreased by 18.2 percent in December, unchanged from November.

Latin American carriers- a decline in demand

Latin American carriers reported a decline in demand of 21.3 percent in 2020 compared to 2019 (-20.3 percent for international operations) and a fall in capacity of 35 percent (-33.6 percent for international operations). In December international cargo volumes

fell by 19.0 percent compared to the previous year. Air cargo recovery in the region has been affected by adverse economic conditions in markets such as Mexico, Argentina and Peru. Capacity remains highly constrained in the region. International capacity decreased in December by 36.7 percent, a steepening of the 30.4 percent fall in November.

African airlines saw demand growth

African airlines saw demand grow by 1.0 percent in 2020 compared to 2019 (1.9 percent for international operations) and a fall in capacity of 17.3 percent (-15.8 percent for international operations). African airlines posted the strongest international growth of all regions in 2020 as well as in December. International demand in the month grew by 6.3 percent year-on-year. African airlines now have the same share of the global international cargo market as carriers from Latin America (2.4 percent). International capacity decreased by 21.6 percent in December, a steepening of the 18.6 percent fall in November. ■

IRU LAYS OUT ECO-TRUCK PLAN TO ACCELERATE DECARBONISATION

► Eco-trucks, which carry more goods than standard vehicle combinations, offer a quick and workable solution to meet ambitious decarbonisation targets. Two Eco-trucks carry the cargo of three standard trucks, instantly cutting the number of trucks on the road. Fuel consumption per tkm is reduced by up to 35 percent, considerably improving the environmental and economic efficiency of goods road transport. "The benefits of Eco-trucks are clear, with significantly lower CO₂ emissions as well as higher efficiency and reduced costs," said IRU Secretary General Umberto de Pretto. "The clue is in the name - Eco-trucks are ecological and economic."

According to the studies and reports reviewed by IRU; replacing just 30 percent of the global truck fleet



involved in regional and long haul operations with Eco-trucks would immediately cut CO₂ emissions by 237 million tonnes annually. With goods road transport set to triple by 2050, this increases to 700 million tonnes annually by 2050.

Over the next three decades, this would cut total CO₂ emissions by up to 13.5 billion tonnes. By comparison, current total global man-made emissions stand at 36 billion tonnes annually. Although goods road transport emits only 2 percent of global emissions, the widespread use of Eco-trucks would have an enormous impact on the sector's drive to decarbonise.

Greener multi-modal logistics

Ever greater volumes of goods are being moved by air, sea and rail, and every multi-modal operation involves road transport at some point. Given the continuously increasing capacity of container ships, cargo planes and freight trains, Eco-trucks are crucial to increase the efficiency and sustainability of multi-modal logistics as a whole. Modal shift will not do this, according to IRU authorities. Eco-trucks have only been operated in 18 countries so far, including Australia, Argentina, China, Mexico, South Africa, the USA and some EU countries - in all cases successfully. Their use worldwide however remains hampered by a lack of harmonised regulations and hence cross-border operations with Eco-trucks remain rare.

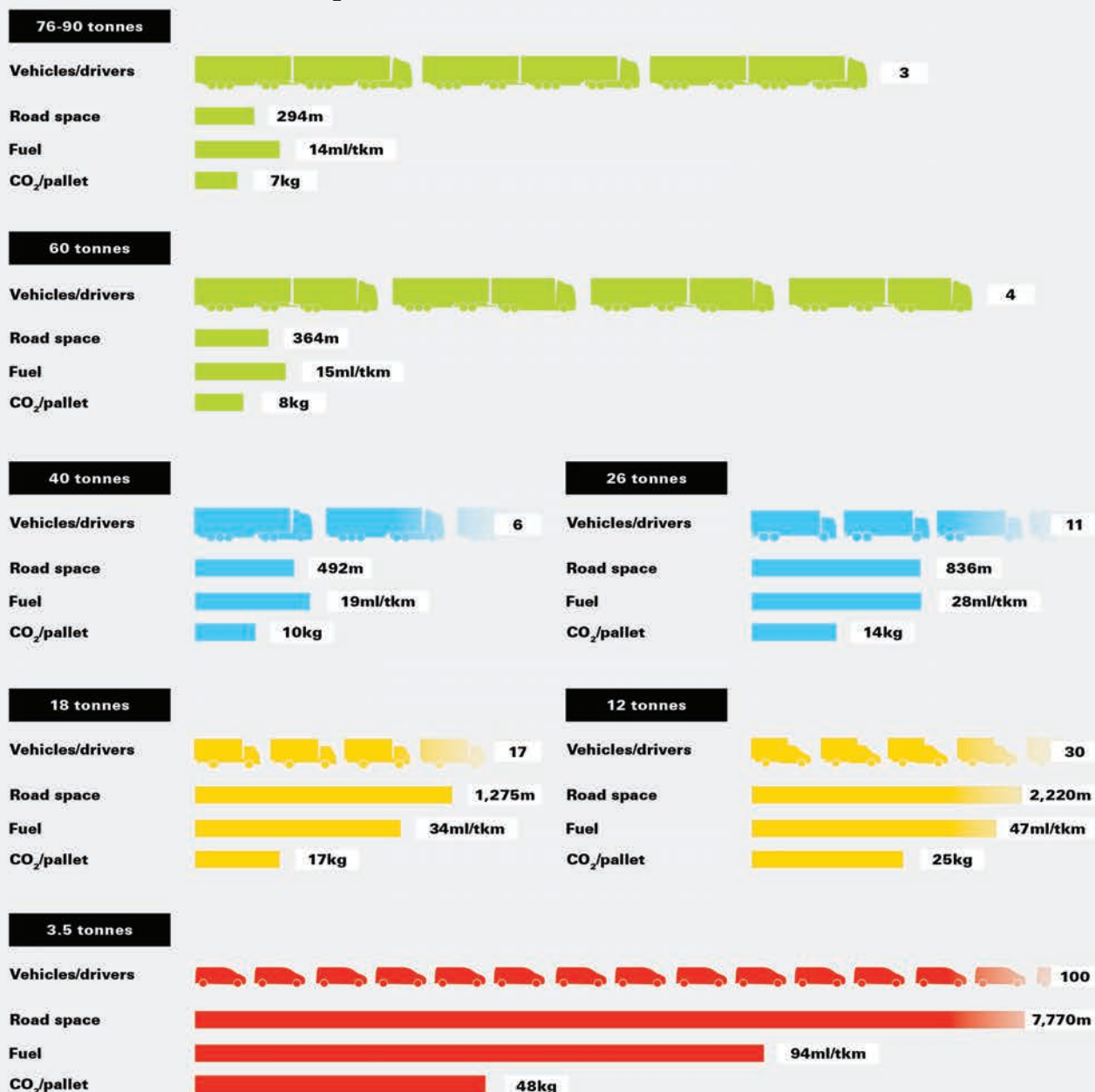
With many governments yet to recognise their potential, IRU is calling on policymakers to unlock the full environmental and economic benefits of Eco-trucks by permitting and promoting their use for national and international operations.

"Governments are missing an opportunity to accelerate decarbonisation and support economic growth. The time to act is now," concluded Umberto de Pretto. IRU members adopted an Eco-truck position in November 2020, as part of the industry's efforts to drive decarbonisation, with a clear call to governments. ■



IRU has renewed calls to promote the use of Eco-trucks to boost transport decarbonisation, including harmonising rules for cross-border operations. This simple and cost effective measure could cut CO₂ emissions by more than 13 billion tonnes between now and 2050.

NUMBER OF VEHICLES, ROAD SPACE, FUEL AND CO₂ EMISSIONS FOR A 200-PALLET LOAD



Source: <https://www.iru.org/resources/newsroom/iru-lays-out-eco-truck-plan-accelerate-decarbonisation#:~:text=IRU%20has%20renewed%20calls%20to,tonnes%20between%20now%20and%202050.>

UIRR: NEW EU ROAD HAULAGE RULES COULD UNDERMINE THE EUROPEAN GREEN DEAL



► International Union for Road-Rail Combined Transport (UIRR) announced that a study unveiled in January 2021 on the impact of the new EU road haulage rules on Combined Transport projects an 8 percent decline of Combined Transport volumes by 2030 if the new rules are fully implemented. "The shocking result is the consequence of a near double cost increase for short-distance trucking, an essential component of intermodal transport chains, versus long-distance trucking, which is its number one competitor," claims the Union. According to the review of the study, Combined Transport is expected to contribute to European decarbonization by saving up to 40 million tonnes of the transport sector's CO₂ emissions under the European Green Deal and in line with the Strategy on Smart and Sustainable Mobility. The substantial contribution of Combined Transport to the decarbonisation will turn into an addition of 12 million tonnes of CO₂ to the carbon emissions of transport between 2020 and 2030 in case the new EU road haulage rules are to take effect without any countermeasures.

The European Green Deal objective that "a substantial part of the 75 percent of inland freight carried today by road should shift to rail and inland waterways" can only



The substantial contribution of Combined Transport to the decarbonisation will turn into an addition of 12 million tonnes of CO₂ to the carbon emissions of transport between 2020 and 2030 in case the new EU road haulage rules are to take effect without any countermeasures.

be realized if the competitiveness of Combined Transport is not undermined by regulatory means. Ralf-Charley Schultze, the UIRR President reminds: "After the

Ralf-Charley Schultze
Chairman, UIRR



adoption of the new EU road haulage rules in July last year, UIRR warned that the result will turn Combined Transport into the collateral damage of improving the social and working conditions of truck drivers. The study unveiled today quantifies the extent of this unacceptable damage. The European Combined Transport sector calls on the decision makers to take action immediately."

The following countermeasures are recommended by UIRR:

- Member States should refrain from exercising the optional suspension of Article 4 of the Combined Transport Directive, especially as the targeted objectives can be more efficiently achieved through clever enforcement.
- The user-pays and polluter-pays principles should be upheld to

the maximum when agreeing the amendment of the Eurovignette Directive and when amending the Energy Taxation Directive – anticipated to be tabled in 2021.

- The framework for adequate Temporary Compensatory Measures should be defined within the upcoming revision of the Combined Transport Directive.
 - Transparency and the complete informedness of decision makers should be ensured through regular and comparably structured reporting by the Member States.
- The UIRR position paper issued on the occasion of the study's publication contains fact sheets for the TOP10 most affected Member States: Germany, Italy, France, Belgium, Austria, The Netherlands, Luxembourg, Sweden, Spain and Hungary. ■



Prof. Dr.
Stefan Iskan

CORONA IN GERMANY: THE CONSEQUENCES FOR ECONOMY, SOCIETY AND POLICY

Corona in Deutschland, which is one of the first books available, integrating perspectives from history, politics, economy, digitization and technology, medicine and journalism.

Your book Corona in Deutschland aims at giving a perspective for the future. Where does your optimism come from?

Each crisis offers chances. Chances for the country, the companies, and for oneself. Independent of the severe medical perspective, people might look with some confidence ahead on the corona pandemic and its different systemic effects and consequences. This pandemic is no

exception in world history. Related to course, actions and consequences in front of us, mankind is not going into new territory. The upcoming times will be characterized by radical change and transformation on all levels. And at the same time, there are cornerstones from past pandemics that might guide our future course. From a political dimension, narratives dealing with future and confidence will be a mobilizing force in politics and among decision makers in the economy. I am not only a logistics professor, management or technology consultant, I am a realistic optimist.

However, you write in your book that companies and authorities will not survive the corona pandemic. Isn't that contradictory?

Not at all. This sentence you picked out is related to a central prerequisite. From my point of view, the corona pandemic is such a deep crisis and change, which we are not able to overcome with pure cash management or cost cutting actions. That likely was a solution in the financial crisis 2008/2009. The underlying mega trend now is digitization. Countries, authorities, and companies that do not invest in their structures, organizations, business models, IT setup, employees,

- Stefan Iskan's brand new book "Corona in Deutschland" (Corona in Germany) is dealing with the pandemic from different perspectives. One of the leading logistics professors in questions of the digital industrialization of transport and logistics companies and editor of the book, Professor Iskan tells the background of the highly interesting



etc. besides their cash management measures, will not come out of the corona crisis. The corona crisis will be their neck breaker. This time, the credo has to be: cash management and investment. In parallel!

You invite your fellow citizens in Germany to see the "Big Picture". What do you mean by that?

Many different topic areas are superimposed by the corona pandemic since months. However, it might be helpful to come off the micro news day by day and to take a kind of helicopter perspective.

Then, we will realize that the big geo-strategic topics of the future do not differ from the pre-Corona-times. One of my main objectives is to offer that perspective.

And what are the big topics?

The trade war between the two super powers, the USA and China, is for sure one of the ruling topics next to the global climate change. Or let's call it better the battle on the technological supremacy and the race on dominating a global digital currency. China's One Belt One Road Initiative is another

big topic. This is geostrategy par excellence. Another trend are all time high deficits in state budgets. We see also more and more state influence on economy, inflation on highly demanded assets, and an increased trend towards cleavage in our societies. I like further to name the role of digitization, winners and losers among industry segments and last but not least the threat of mass unemployment in the upcoming age of industry 4.0. Industry 4.0 is a trend that might threaten not only local social stability, but also the stability on global level. ■

About the Authors of Corona in Deutschland:

Stefan Iskan is professor of logistics and business informatics, especially automotive SCM and digitization, at the University of Applied Sciences Ludwigshafen am Rhein in Germany. Together with IT professional Robert Kölbl (partner of Japanese technology company NEC Corporation), AI expert Prof. Dr. Peer Küppers and Erwin Staudt, IBM's former CEO in Germany and with Germany's former chancellor Gerhard Schröder founder of D21 - he delivers an implementation plan on how to prepare the transport and logistics industry for the future. Stefan Iskan is a thought leader on the digital industrialization of logistics service providers and trusted advisor of CEOs in that business.

Timo Ulrichs is professor of global health at the Akkon University of Applied Sciences in Berlin. Previously, he was consultant for epidemic protection and scenario planning of the influenza pandemic at the federal ministry of health. Further more, Timo Ulrichs worked on infection biological and immunological related questions at the Max-Planck Institute and the Charité in Berlin - one of the largest university hospitals in Europe.

Tanjev Schulz is professor of journalism at the Johannes-Gutenberg-Universität Mainz. The former journalist of Süddeutsche Zeitung is awarded with the Nannen prize, the highest award for journalists in Germany. He was honored for his investigative and reporting work on the trail of the neo-Nazi terrorist group NSU in Germany. His research work is dealing with conspiracy theories, terrorism, press freedom and investigative journalism, for example.

Karl-Rudolf Korte is professor of politics at the University Duisburg-Essen. The director of the NR School of Governance is focussing on Germany's political system and researching on modern theories of governance. During federal elections, he frequently is guest on TV.

As project manager, **Pelin Iskan** works for the Director Procurement and Supplier Quality Exterieur Van at the headoffice of Mercedes-Benz Cars in Stuttgart. Previously, she was Senior Buyer for inbound logistics service providers at BASF in Ludwigshafen and executive assistant to a member of the board of management at DB Schenker Logistics in Essen. She is working on her doctoral thesis at the chair of industrial management at the University of Würzburg while working full time.

Robert Kölbl is expert on cyber security, IT transformation and system integration in running environments as well as in data warehouses and process automation. Robert Kölbl is owner of the Systemhaus Kölbl in Nürnberg and delivering dedicated enterprise solutions in industry and trading. He is working for global leaders in the hotel business.

TOP 20 COUNTRIES OF EXPORT TRANSPORTS BY TURKISH VEHICLES

COUNTRIES	2016	2017	2018	2019	2020	'19-'20 CHANGE (%)	'20 SHARE (%)
IRAQ	436.364	468.798	474.851	515.084	491.400	-5	40,29
SYRIA	154.330	149.836	119.111	136.966	122.786	-10	10,07
GERMANY	94.404	96.418	96.126	91.099	92.290	1	7,57
ROMANIA	29.307	33.552	41.643	45.301	46.817	3	3,84
GEORGIA	43.338	40.157	38.315	41.978	40.708	-3	3,34
ITALY	43.120	44.684	43.368	38.071	35.228	-7	2,89
AZERBAIJAN	26.553	31.358	34.718	35.258	33.819	-4	2,77
IRAN	48.385	50.545	38.043	46.806	29.652	-37	2,43
FRANCE	31.142	30.755	33.358	30.221	27.357	-9	2,24
BULGARIA	15.169	15.590	20.813	23.563	26.142	11	2,14
GREECE	17.640	18.440	21.334	23.718	21.760	-8	1,78
SPAIN	15.393	18.709	20.138	21.195	18.453	-13	1,51
THE NETHERLANDS	13.100	13.999	15.070	15.500	17.825	15	1,46
UNITED KINGDOM	20.456	20.843	20.802	18.950	17.024	-10	1,40
POLAND	13.792	13.618	14.655	14.801	16.405	11	1,35
RUSSIA	357	7.065	13.046	13.021	15.376	18	1,26
UZBEKISTAN	9.048	11.984	18.452	22.679	14.251	-37	1,17
NAKHCHIVAN	57.567	40.756	32.378	21.025	12.827	-39	1,05
UKRAINE	5.039	5.659	8.027	9.111	12.484	37	1,02
TURKMENISTAN	28.052	24.774	12.767	14.562	11.755	-19	0,96
OTHER COUNTRIES	103.021	111.607	114.922	121.463	115.299	-5	9,45
TOTAL	1.205.577	1.249.147	1.231.937	1.300.372	1.219.658	-6	100,00%

TOP 20 COUNTRIES OF IMPORT TRANSPORTS BY TURKISH VEHICLES

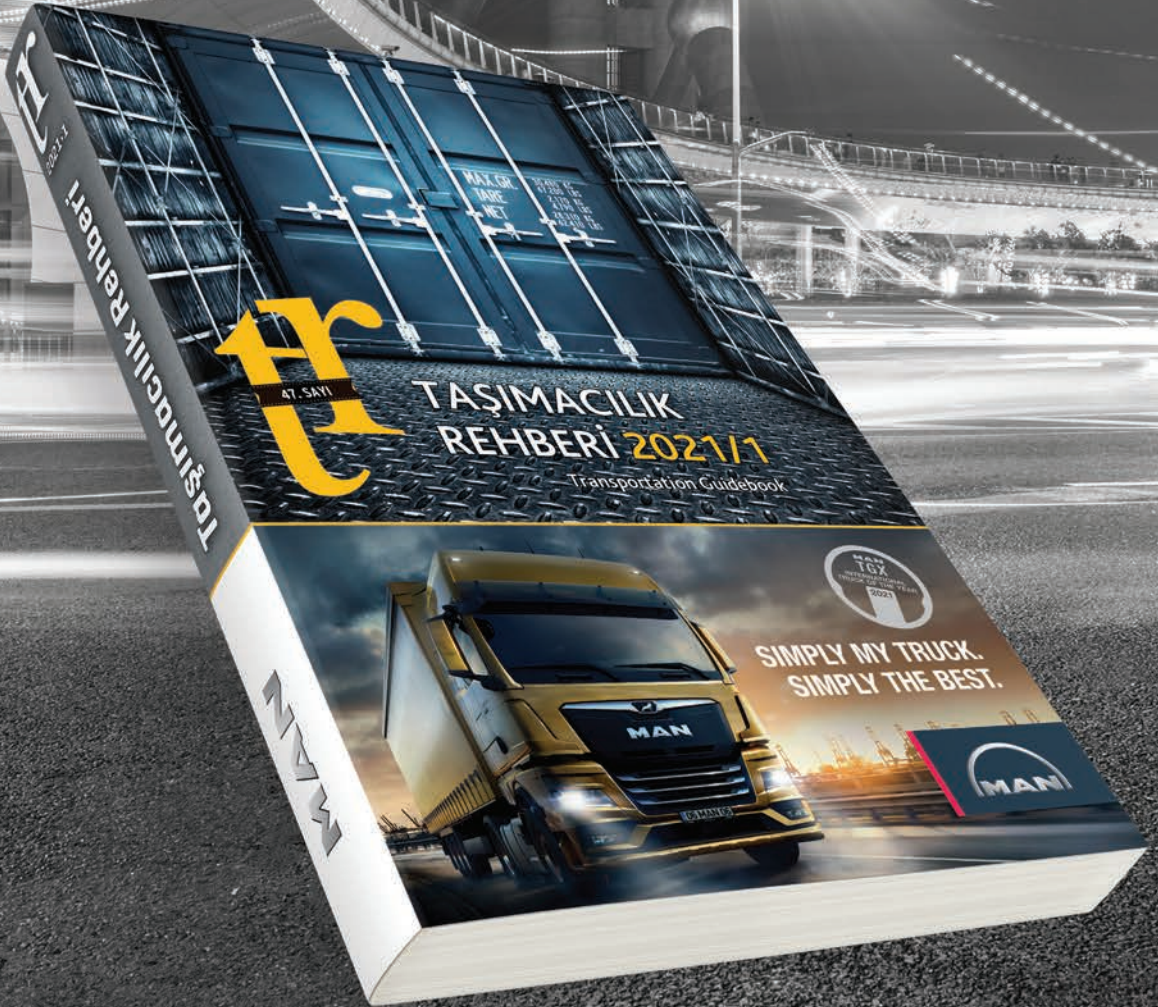
COUNTRIES	2016	2017	2018	2019	2020	'19-'20 CHANGE (%)	'20 SHARE (%)
GERMANY	99.425	99.217	92.625	89.761	87.798	-2	40,29
ITALY	55.827	63.223	59.660	50.124	43.048	-14	10,07
IRAQ	24.989	88.030	49.591	37.178	34.670	-7	8,65
FRANCE	26.699	32.153	33.051	29.806	26.153	-12	6,53
UZBEKISTAN	9.039	9.965	12.095	17.716	11.293	-36	2,82
IRAN	10.471	10.166	9.668	14.051	9.583	-32	2,39
GREECE	10.599	12.889	11.504	12.982	12.047	-7	3,01
AZERBAIJAN	4.681	4.288	5.954	10.104	10.214	1	2,55
ROMANIA	12.113	14.507	13.261	14.778	16.259	10	4,06
POLAND	10.683	11.259	10.916	11.201	13.547	21	3,38
BULGARIA	9.409	9.043	8.120	9.857	8.995	-9	2,24
THE NETHERLANDS	9.137	9.416	9.228	10.054	11.322	13	2,82
SPAIN	8.682	9.250	8.452	9.093	8.270	-9	2,06
UKRAINE	3.367	5.082	7.433	8.830	8.864	0	2,21
HUNGARY	5.657	6.662	6.230	6.987	7.552	8	1,88
UNITED KINGDOM	9.952	8.287	6.180	7.492	7.716	3	1,93
BELGIUM	6.364	6.629	7.324	7.569	8.062	7	2,01
RUSSIA	193	2.923	5.830	6.087	7.722	27	1,93
SYRIA	2.700	2.032	3.181	7.652	15.230	99	3,80
TURKMENISTAN	10.132	8.825	6.718	4.494	5.082	-13	1,27
OTHER COUNTRIES	40.206	43.774	44.989	48.642	47.361	-3	11,82
TOTAL	370.325	457.620	412.010	414.458	400.788	-3	100,00

Source: UND

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HEADOFFICE SALZBURG

Schmiedinger Straße 67
A-5020 Salzburg

Tel +43/662/436280
Fax +43/662/436294

E-mail vega@vegatrans.com
Internet www.vegatrans.com

Salzburg.Vienna.Ulm.Wörth.Rheine.Trieste.Gent.Istanbul.Aksaray
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