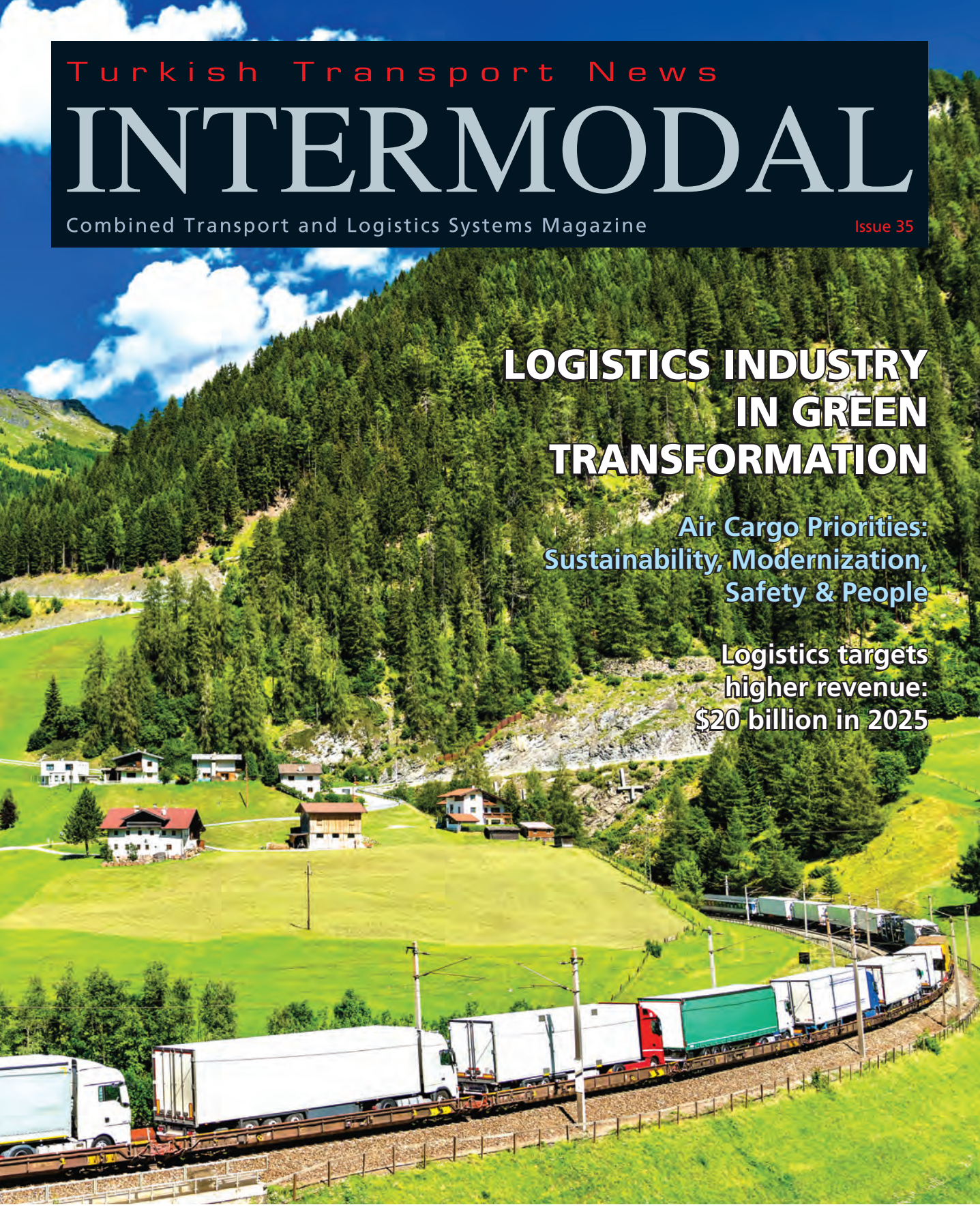
Turkish Transport News

INTERMODAL

Combined Transport and Logistics Systems Magazine

Issue 35



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THE NECESSITY OF CHANGING LOGISTICS ROUTES ACCORDING TO INTERMODAL DIVERSITY

Today, logistical mobility is decisively shared between ship transportation and road transportation. Air cargo and rail transportation, on the other hand, have a qualitative and strategic importance beyond the amount of cargo carried in logistics. It is clear that during the pandemic period, air cargo played a vital role in delivering medical products, medicines and COVID vaccines to their addresses, especially in terms of timely and safe delivery. Air cargo has also been a lifeline for the aviation sector while contributing to the continuation of international trade with the added value it has created during the pandemic period. In logistics, on-time delivery, i.e. just in time, can sometimes be more important than anything else. The on-time delivery phenomenon refers to the safe delivery of the product to the to specified address as well as the time. For this reason, timely and safe delivery of the product along with competitive freight prices is essential at a time when trade is functioning healthily. Intermodal transportation in logistics is now a requirement of both competition and the rules of the game. It is certain that intermodal transportation provides a competitive advantage to logistics companies. Although intermodal or combined transportation initially emerged with the need to offer a multiple option to exporting companies, today it has become much more important functions. The first is that it offers a transportation option based on a safe and competitive price. The second issue is that it provides a time or delivery advantage and the third is that it creates an environmentally friendly transportation opportunity.

We should say that the environmental mission is more prominent today. Intermodal transportation fulfills a truly modern logistics culture in the periods when international movements of goods and services can be made freely. In this aspect, intermodal transport aims to shift the weight of the land transport to other modes of transport. Ports and railway lines integrated into ports have a vital importance in terms of the development of intermodal transport. RO-RO transportation also makes a serious contribution to the development of intermodal transportation in Turkey in this respect. A significant part of Turkey's foreign trade is carried out with the EU and continental Europe. Considering the restrictions imposed and to be imposed by the EU on road transport, it is clear that intermodal transport will be a dominant method of trade with Europe.

Ports and ship transportation in Turkey have a significant share in foreign trade, especially in terms of quantity. As loads from the land transportation shift to ship transportation and intermodal transportation to railways integrated into ports, there is a need for a dramatic investment in this area. When it comes to sustainability, the transition of fleets on highways away from fossil fuels, the creation of clean energy options in all areas of logistics, and ensuring energy efficiency are important topics. Reducing the weight of highways in transportation is also an issue directly related to investments in railways. Especially the railway lines operating on the axis of the east-west line are to be more important at this point. It should not be forgotten that port investments and railway investments are complementary to each other.

The expansion of intermodal transport is indispensable both in terms of the EU Green Agreement and sustainability. The handling capacity of ports in Turkey is increasing. There is also an increase in container transportation. Today, large ports, where a significant part of foreign trade and exports take place, have been privatized by the method of business transfer. Sector representatives point to the need to extend the existing operating periods of these ports before the end of the contract periods and to make new investments according to the increasing needs. If Turkey is to become a regional hub in logistics, which the current global climate gives Turkey this chance and opportunity, we should point out the need to implement railway and port investments quickly. Air cargo, on the other hand, draws a healthy and rapid growth picture under the leadership of THY Cargo in terms of the development and profitability of both foreign trade and the aviation industry. The future is in intermodal transport of course. ■

Necmi Çelik
Editor-in-Chief

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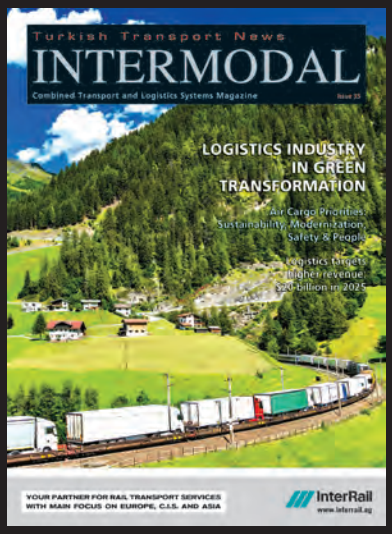
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"WE CONNECT THE WORLD TO TURKEY"



Adil KARAİSMAİLOĞLU

Dear Readers,
Thanks to its strong transportation network, Turkey played an active role in ensuring the continuity of global supply chains during the Covid-19 pandemic by maintaining its access to countries in the surrounding region and in other regions of the world. Setting examples for the rest of the world with projects that align with its goal of becoming a "logistics superpower" and influencing global trade with its transportation network, Turkey has managed to become much more than an alternative route between Asia and Europe thanks to the Middle Corridor. Our country has assumed major responsibilities upon becoming a valuable and lucrative logistics and production base. The Middle Corridor, established along the historical Silk Road stretching from China to London, has once again shown Turkey's undisputed position in global trade. This position has been further reinforced with the war between Ukraine and Russia. The "Black Sea Grain Initiative," which has proven to be crucial for the lifting of the blockade and the distribution of Ukrainian grain to other countries, continues its operations at full speed under Turkey's leadership and initiative. As part of the Black Sea Grain Initiative, a total of 137 ships departed from the ports in the Ukrainian cities of Odesa, Chornomorsk and Yuzhne as of September 13, 2022.
Fifty-four of the 137 ships, 27 of which were stranded since February 24, have been transporting cargo to the ports of Turkey, while the others are transporting cargo to the ports in Germany, Bangladesh, the United Kingdom, Bulgaria, Djibouti, China, France, South Korea, India, the Netherlands, England, Iran, Ireland, Spain, Israel, Kenya, Italy, Libya, Lebanon, Egypt, Romania, Somalia, Sudan and Greece. The total amount of cargo transported to date is 3,055,359 tonnes.

Dear Readers,
Turkey's transportation investments are focused on enabling transit transportation between Asia and Europe.
In line with the emerging trends around the world, we have determined "mobility, logistics and digitalization" as our main areas of focus. Our vision of holistic development that will "connect the world to Turkey" has a lot in common with the basic approaches of the European Union, such as the European Green Deal, the Paris Agreement, and the European Climate Law.
The European Union has always been Turkey's largest import and export partner, which is clearly indicated by the trade volume of $180 billion achieved in 2021. With the upgrading of the Customs Union, our commercial relations with the EU will be developed further in the coming period.
At the Ministry of Transport and Infrastructure, we believe that the financial cooperation mechanism between Turkey and the European Union is just as important as our commercial ties. The EU Instrument for Pre-Accession Assistance (IPA) stands out not only with its financial contributions, but also with its contributions to our experiences of doing business and cooperation with the EU institutions. The Halkalı-Kapıkule Railway Line Project, one of the most important projects of the IPA II period, is one of the biggest indicators of our determination. These projects will have significant contributions for Europe's fight against climate change and its goal of becoming a "carbon-neutral" continent by 2050 as part of the European Green Deal. As in all of its projects and investments, the Ministry of Transport and Infrastructure will continue to develop projects that will accelerate the green transformation in the transportation industry in the IPA III period. ■

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LOGISTICS SECTOR AIMS FOR 20 BILLION US DOLLARS-WORTH OF EXPORTS



Çetin NUHOĞLU
Chairman

The Turkish international road transportation sector does its best to increase the exports of the country and its performance is of great importance to achieve this increase. Thanks to especially the impact of the exports which have increased this year, Turkish international road transporters have organized nearly one million transportations and given the biggest support to the Turkish exporters.

A serious increase has been experienced in the international road transportations during the previous year. This increase has continued in the first 6 months of this year and the export transportations have increased by 15 percent to 1 million. The transportations to Europe alone have reached 450 thousand in the first 6 months. Similarly, the transportations to the Middle East being among the regions receiving the highest number of transportations have reached 420 thousand. The performance of the sector despite all difficulties deserves an applaud. More importantly, this increase is not a temporary situation caused by a periodical impact. This increase is caused by a major change and transformation.

It should be emphasized that the contribution of the logistics sector to the Turkish economy is not limited to goods exports. As we always mention, the more developed the logistics system that a country has, the higher the competitiveness of that country. The logistics sector not only ensures the development of the trade in the country but also exports services and brings direct foreign currency into the country. According to 2021 data, our domestic sector size is around 500 billion Turkish liras. Our exports volume is around 12.6 billion US dollars. Our current goal is to increase this volume to 20 billion US dollars. We do our best to achieve this goal.

As the supply chain shifts to the surrounding regions, the supports to be provided will be invaluable for restructuring our companies and extending their service networks by opening offices in different regions and will ensure that the sector achieves the exports goals of 20 billion US dollars. Turkey now has a key position for connecting the European supply chain to the Central Asia. We are now in an era where goods are purchased from the closest location and the best quality producers. Turkey stands out as the only country with the required strength and logistics expertise to satisfy this need.

One of the most important developments for the sector this year was the supports introduced. The supports to be provided within the scope of the "Resolution to Define, Classify and Support Service Export" matter a lot both for our sector and our country. The supports regarding the Logistics and Transportation services covered by the Resolution to Define, Classify and Support Service Export include different options as market access documents, department support, registration and protection, product placement, national participation, Advertising, Promotion and Marketing support. The sector will increase its international competitiveness with the financial power these supports will generate.

One of the biggest problems of the international road transporters is the queues at the road border gates. We as UND work in cooperation with the Ministry of Trade in order to solve this problem. We have increase the number of crossings from Kapıkule to 1,300 on a daily basis but the number of vehicles preferring this gate is always on the rise. The most important thing that Turkey aiming to grow through exports is to solve the problems at the gates. The entire motivation should be focused on this. If these problems are solved, then the export goals set would be achieved in a shorter period of time and the companies providing services in different sectors will prefer Turkey for their investments. ■

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LOGISTICS SECTOR: IN THE MIDDLE OF CRISIS - ON THE VERGE OF GREEN DEAL



Ayşem ULUSOY
President

The European Green Deal aims for converting the European continent into a carbon-neutral area with zero carbon emission goal for 2050 and plans for a radical and environmental transformation for especially the industrial activities in the European Union. Both Turkey and our sector have a long way to go to satisfy the criteria set by the European Union to achieve these goals. NGOs and universities have important duties to explain the importance of the satisfaction of these criteria and make solution recommendations and share them with the law makers.

The first phase of planning should be made by taking into consideration the potential impacts of the carbon limit tax to be imposed for maintaining competition with the European companies on the Turkish industry. As the countries producing with low emission rates will have an advantageous position in trade with the EU, setting a roadmap by taking into consideration that the half of exports by Turkey are made to the EU countries will prepare us beforehand for such major infrastructure changes.

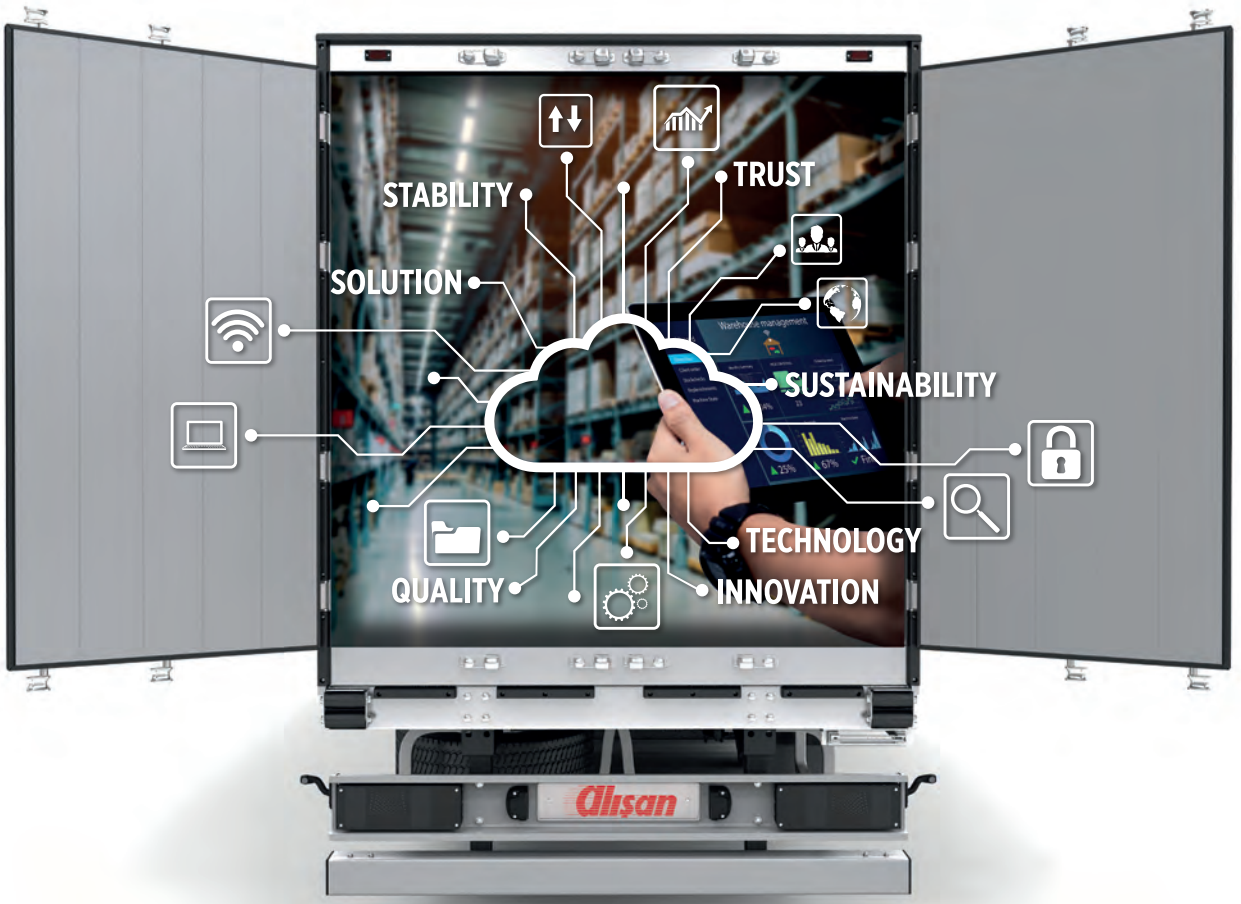
We believe that the sectoral recommendations by UTİKAD being the umbrella organization of the Turkish logistics sector and one of its most important NGOs will play an important role in the green transformation of our sector. One of the main areas that we place high importance on and require urgent actions is the transportation sector. The goals to be set by the EU for the transportation sector that can be considered as an indispensable part of the foreign trade will both affect the production and transportation sectors. Therefore, shifting the goods transported mostly by roads to the environmentally friendly transportation modes such as railway and combine transport, correct structuring of logistics centers which facilitate goods transfers among transportation types and legislation and implementation changes to be made in line with sustainability principle should become agenda items.

While the European Green Deal occupies the agenda of our sector, we had to face the truth of war which converted into an international crisis. Our first effort as the entire humanity should be to put an end to the pains caused by the Russia-Ukraine war at the humanitarian dimension.

The difficult conditions of the last 2 to 3 years we are going through have shown us that the new transportation corridors with the Far East countries including especially China are not only important for Turkey but also the European and even Northern African countries. We as UTİKAD drew attention to the changes in our trade routes due to the macro developments in the world and shared our recommendations to make improvements on the logistics routes passing through our soils at our meetings especially with the public administrations on the early days of the war. We emphasized that the technical problems have to be solved to accelerate the logistics processes on important routes such as the Central Corridor where we are stakeholders. The reason why we focused on the Central Corridor was the decrease in the share of the Northern Corridor in transportation, the Southern Corridor route's being of high cost and having time related disadvantages and Turkey's being in the center of 67 countries within a 4-hour flight distance and the global trade volume of 30 trillion US dollars.

We as UTİKAD did our best to be the higher voice for our members and sector in the middle of the global crisis and on the verge of the Green Deal processes and we will continue to do so.

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Ali Ercan GÜLEÇ
Chairman of the Board

The pandemic process affecting the entire world has significantly affected the logistics and logistics components like nearly all areas. The restrictions experienced in all transportation modes in this process and the bottlenecks caused by them have also affected the global trade flows.

The main impact of the pandemic was that the countries were forced to question their production centers and to make arrangement in this regard, due to the problems experienced in the logistics channels.

Affected by the pandemic, the countries asked themselves the following questions:

1-What can I produce in my own country?

2-What can I have produced in the surrounding countries?

3-Another parameter has come into forefront especially with the Russian crisis. Is this country a friend? Is it a reliable resource?

As the countries started to re-arrange the production centers of especially high technology products with added value, they naturally started to establish new logistics channels to transport these products. During this process, the importance of regional logistics has increased and especially the railways have become to the forefront more with the launch of the European Green Deal.

The railways enabling contactless trade have attracted great interest during the first phases of the pandemic. Export transportations by railways have also increased in Turkey. The increase in railway transportations during the pandemic period has once again showed that obstacles brought by the pandemic to the transportation can be overcome with the railways.

It has once again seen that railway transportation is an indispensable part of the logistics - as is always voiced by us - and how important the connection between ports and production and consumption centers through railways.

Moreover, we are entering into a period with important impacts on Turkey by the EU Green Deal planned to be implemented next year both in terms of the trade integration with regard to Customs Union and EU.

Organizing nearly half of its trades to the EU, Turkey's changing all its policies including primarily trade and industry accordingly is of great importance for the maintaining her international competitiveness. The Transportation Sector is one of the main sectors to be affected by the Green Deal in Turkey.

In order to maintain the competitiveness of Europe and prevent the shift of productions and investments to other countries with lower emission decreasing goals as compared to EU due to the cost of the policies planned to be implemented with European Green Deal on the European industry, the "Border Carbon Adjustment (BCA) Mechanism" is planned to be implemented.

As is known, the "EU Gateway Project" aiming to encourage initiatives to solve global problems from the protection of the environment to the strengthening of the supply chains was launched on December 01, 2021. This Project aims for European Union's supporting the private and public infrastructure investments in the digital technology, energy, transportation, health, training and research sectors across the world in terms of sustainability and has a budget of 300 billion US dollars. Within the scope of the project, investments of 300 billion US dollars are planned to be made to support the global economic recovery process by protecting the interests of the European Union and other countries in cooperation with the EU during the period from 2021 to 2027.

We understand from all these developments that the world will start changing its production centers and establish new logistics lines.

The countries recently focus on production and what they can have produced in neighboring countries.

Especially the Russia-Ukraine crisis has brought a new concept to this approach: Production in and trade with allies.

Today the new logistics conjecture is shaped accordingly. In this conjecture, Turkey now has the chance to be a production center, instead of being in transit trade and has to prioritize and prepare its logistics infrastructure accordingly.

The railway investments come to the forefront more with the resource created by the EU for the Global Gateway and Turkey stands outside this structure.

It is understood that the regional transportations will increase in near future. This will increase the importance and power of the logistics companies. The major marine companies have already started to focus on logistics company investments.

That is because in addition to the significant increases in combined railway transportation in recent years, the logistics and road transportation demands of the companies have also started to increase. ■

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PORT SECTOR IN TURKEY IN THE LIGHT OF CURRENT DEVELOPMENTS AND FORECASTS



Aydın ERDEMİR
Chairman

TÜRKLİM has a very valuable motto; "TÜRKLİM is the sole and strongest non-governmental organization of our port operations and the port sector, which is the basic building block of our country's domestic and foreign trade and tourism by seaway." As of September 2022, 77 port facilities are members of TÜRKLİM. 95% of Containers, 70% of Dry Cargo and General Cargo, 100% of Liquid Chemicals, 87% of RO-RO transportation and 97% of Cruise tourism are carried out by our members. In this respect, TÜRKLİM's representation in the sector is extremely high and due to this effect, the number of our members is increasing every year.

When we look at Turkey's port sector, there was an increase of 253% in total cargo between 1990-2021, while an increase of 183% occurred between 2000-2021. Only the growth rate between 2010-2021 is 51%. In 2021, the threshold of 500 million tons has also already been exceeded. In the same year, while the global growth figure in total cargo was 2.3%, Turkish ports grew by 3.8%. In containers, this growth rate in Turkey is 6.6% compared to the global growth rate of 3.6%. These developments show us that the port sector in Turkey has grown almost twice the global average rate. Considering the development acceleration in the first 8 months of 2022 in Turkey, it can be predicted that by the end of 2022, approximately 560 million tons in total cargo and 13 million TEU in containers will be reached.

On the other hand, the cargo demand projections we comprehensively announced in the "Vision 2050" report we published in 2022 figured out that the cargo demand for ports in Turkey in 2050 will nearly be 1.3 billion tons in total cargo and 41 million TEU in containers. At this point, it is important to implement the port and logistics infrastructure that will meet the increasing freight rates. Because of these forecasted figures which are widely welcomed and considered by all parties in Turkey, we are trying to underline the necessity of new capacities have to be done until 2050.

The Consequences of The Covid-19 Pandemic and the Russia-Ukraine War

While we were saying that the uncertainty started with Covid-19 was just ending, the new events we faced, especially the Russia-Ukraine war, caused the disruption of global production, supply and logistics activities, the fragility of long supply chains, and the negative economic forecasts for 2022. In fact, the expectations for 2023 are not very positive. Since all these developments necessitated the transition to a just in case production model instead of a just in time production model, the situation that emerged had increased global commodity prices, especially energy and food prices. This process also led to an increase in inflation on a global scale.

Green Transformation in Ports, prominent problems, and solutions

Together with a digital transformation based on renewable energy, especially "Green Transformation", their needs are among the main issues ahead of us very quickly. The task of creating the foundations and paradigm of a port industry that prepares the requirements of the green economy roadmap for the target of being carbon-neutral in 2050 with the participation of all its stakeholders, creates institutional structures that will realize stable practices in synergy, protects the balance of the ecosystem, and offers a port management model that has internalized green economic transformation for future generations. Undoubtedly, it is TÜRKLİM's top priority vision.

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GENERAL EVALUATION ON AUTOMOTIVE SECTOR



Adnan AĞAÇLI
Board Chairman

Gasoline-powered automobiles ranked the first with a sales figure of 250 thousand and 401, followed by diesel-powered automobiles ranking the second, with a sales figure of 60 thousand and 316, in the Turkish automobile market in the first 8 months of the year. Hybrid automobile sales were realized as 34 thousand and 265 while autogas-powered automobile sales were finalized at 6 thousand and 278 and electric automobile sales as 3 thousand and 283. According to these figures, the electric automobile sales increased by around 3-fold.

The gasoline-powered automobile sales decreased by 2.5 percent, diesel-powered automobile sales by 25.2 percent and autogas-powered automobile sales by 67.7 percent in the first 8 months of this year, as compared to the same period of 2021. During this period, the hybrid automobile sales increased by 2.9 percent and electric automobile sales by 174.5 percent.

Even though the electric automobile sales in Turkey increased by 3 folds during the first 8 months of the year as compared to the previous year, the major concerns of the Turkish consumers regarding electric automobiles is the number of charging stations, charging durations and costs.

The share of the "green automobiles" in the Turkish automobile market is expected to increase more with the introduction of Togg into the market and the developments in the world in the future. Despite the low share of electric and hybrid automobiles becoming more and more preferred in the world and even the low number of sales, the growth rate of the sales indicates the interest of the consumers in electric automobiles.

The decreasing trend in the diesel engine automobiles attracts attention as the manufacturers launch lower number of diesel engine vehicles across the world as compared to the previous years and plan to end their manufacturing entirely. The sales of hybrid and electric automobiles expected to replace automobiles with internal combustion automobiles in future continue to increase like in the previous periods.

According to the Strategy&PwC Autofacts report, the number of electric vehicle sales with global batteries increased by 81 percent in the world and by 154 percent in Turkey in the first half of 2022 as compared to the same period of the previous year.

According to the research, the number of Plug-in Hybrid Electric Vehicles (PHEV) decreased by 14 percent in 10 European markets in the first half of 2022 as compared to the same period of the previous year.

Among other European markets, the Netherlands and Sweden experienced the highest increase in Battery Electric Vehicle (BEV) sales. The increase rate was around 82 percent in the Netherlands and 77 percent in Sweden in 2022, as compared to the first half of 2021. A significant increase was achieved in Sweden's BEV market in the last period. Its share increased from 9 percent in 2020 to 27 percent in the first half of 2022.

The Netherlands has benefited from the well-developed charging infrastructure of the BEV market. The highest increase was observed in the UK during this period and its BEV market shared increased to 14 percent.

The total electric vehicle sales in Turkey increased by 9 percent in 2022 as compared to the same period of the previous year.

Supply Problem in Turkish Automotive Sector

The biggest problem experienced by the Turkish Automotive Sector is the supply crisis which started with the pandemic and deepened with the war. The companies had difficulties to satisfy the demand until a short time ago. Today, however, we witness that the supply crisis has partially got better and the real threat is the contraction on demand. We see that the delivery deadlines for many brands decreased to one month for local vehicles and 2 months for foreign vehicles.

This contraction is caused by two main reasons. One is the high vehicle prices and the other is the difficulties to access to loans. Moreover, not updating the SCT bases for a long period of time causes that many models are in the upper bracket. This naturally adversely affects the market.

The only way out for the sector is affordable interest rate and a long maturity offered to the consumers. The supply problems are expected to be resolved the next year and cease to be an agenda item as of the second half of the year.

The sector stakeholders in the logistics chain should consider and give credit for the fact that the increasing costs in the automotive sector increase the vehicle logistics costs at the same rate. ■

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TURKISH TRAILER SECTOR HAS A HIGH POTENTIAL



Yalçın ŞENTÜRK
Chairman

The logistics sector whose importance is understood well thanks to the pandemic has also had a positive impact on the trailer sector. Making the best of this positive wind, the Turkish trailer sector has become stronger. Turkey has become the 4th largest market in Europe in the heavy vehicle sector including trailers and tow trucks. While Turkey's share in the world exports is 1 percent, the Turkish trailer's sector share is 2 percent. Currently working with half of its capacity, the sector performs exports worth of around 750 million US dollars and has an important potential to yield. The trailer sector has achieved a foreign trade surplus of around 400 million US dollars in 2021.

Trailer suppliers also continue to invest in Turkey. A trailer supplier plans to manufacture 100 thousand trailer shafts in 2023, ensuring that one third of its total productions in Europe is performed in Turkey.

As local supply increases in Turkey, the production capability of the producers also increases. Thus, we should focus more on localizations. The local supplier companies also increase their investments. Our supplier will increase its sliding curtain capacity from 6 thousand to 14 thousand. It will also increase its sliding roof production capacity from 18 thousand before the pandemic to 28 thousand.

Industrialists perform more than 95 percent of the Turkish exports of 225 billion US dollars.

The changes used to take 50 to 60 years will probably take 3 to 4 years in today's technology era. A faster change awaits for us this year.

The emissions by the transportation sector constitute 25 percent of the total carbon emissions. The goods transportation is expected to increase by 45 percent in Europe by 2040. However, the parties have not fully agreed on the trailer dimensions yet.

Climate crisis and drought are among the most important agenda items both in Turkey and the world. As the only representative of the Turkish trailer sector, TREDER organized a Basis Training on Calculation and Reporting of Greenhouse Gas Emissions and Disposals at Institution Level with the contribution of TSE. We aim to control, decrease and take measures against the negative impacts of the greenhouse gases generated by people and production and to adapt to and overcome the impacts of the climate events.

The "environmentally friendly" features of the vehicles are now in the forefront with the introduction of the "Green Deal" policy both in the world and especially in Europe. We have clearly witnessed these developments at IAA Transportation Fair. The stands of truck and bus manufacturers had at least one electric vehicle.

Our manufacturers and suppliers also keep up with the times with the logic that the semi-trailers will follow the trailers wherever they go. More environmentally friendly trailers especially those with electric shafts were on display at the fair. We will be seeing on roads vehicles with systems generating electricity power from solar energy and brakes. Smart trailers will keep you informed about your goods, tire status, trailer temperature and humidity from thousands of kilometers away.

123 companies from Turkey attended the fair which hosted visitors from 72 countries. 11 TREDER member companies were among them. Having boomed during the pandemic, the Turkish trailer sector has reinforced this boom at the fair. Our manufacturers putting on display new vehicles at the fair have also received the Innovations of the Year awards.

Turkey is now an important center in the world trailer production. We are always covered by the strategic plans. I believe that we have higher potential and way to cover. ■

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LOGISTICS: A KEY ELEMENT IN POLITICAL AND ECONOMIC CRISES



İlker ALTUN
Managing Director - Aysberg Group

Although the world tends to become politically polarized again in this period we are going through, we can say that economies continue to represent a global picture. Today, China pursues different policies on the political front from time to time, but the same China continues to play a role as the main supplier of many countries' economies in a number of production areas, including multinational organizations. In short, China is one of the most important stakeholders in the global economy and global logistics,thanks to its extraordinary production potential, product diversity and large workforce. We know how big problems the supply chains were experiencing due to China during the pandemic period. It should not be forgotten that even a micro-level disruption in the chip crisis supply chain makes automobile factories and other industries inoperable.

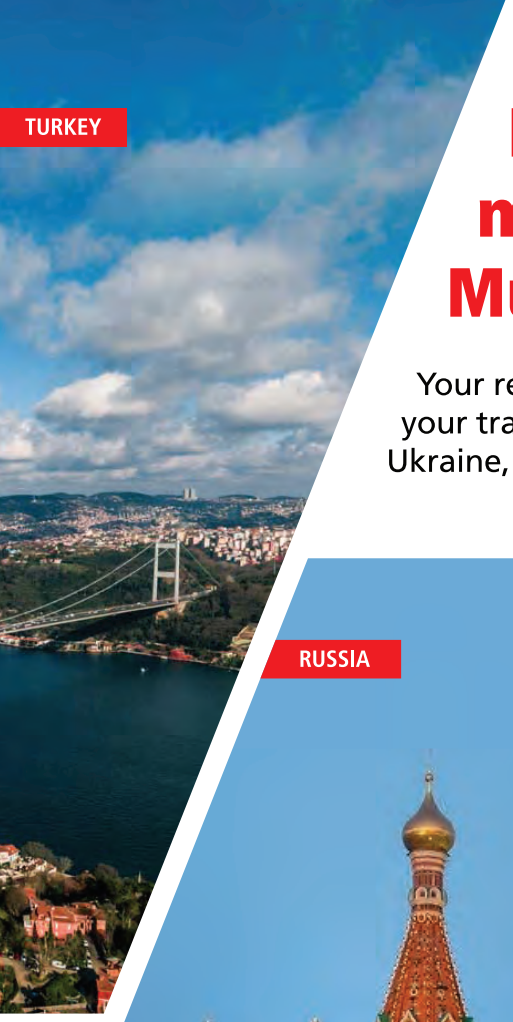
The global economy requires goods and services to move in global traffic, and countries to cooperate and mutually depend on each other in production, trade and consumption chains.

It is also logistics that manages the physical traffic between global economies. Therefore, the logistics sector has no choice but to be global. Growing locally or on a country-by-country basis in domestic trade is undoubtedly an option for the logistics sector. However, when it comes to international trade, the logistics sector does not have the option of staying local, but it has an obligation to be global in every dimension. As a matter of fact, we should note that the logistics sector in Turkey has become a global player today. Today, the technologies adopted with intermodal diversity, inter-modal communication and cooperation are also ecisively in global competition.

Political crises trigger economic crises. Together, both political and economic crisis affect the traffic and road map of the logistics sector. Paradoxically, logistics is both the area where crisis find the fastest reflection and the exit key of crises. 2022 contains two important developments in this context in terms of world history. Firstly; 2022 will go down in history as a year when the pandemic and the severe devastation caused by the pandemic in individual and corporate lives and economies of countries come to an end. The second issue will be the exponential damage caused by the Russian-Ukrainian war in world politics and world economies. Today, Europe is facing a serious energy crisis due to external dependence on energy, and it seems likely that this crisis will be felt even more intensely in 2023. Energy requires a high level of logistics. The logistics of energy works very differently from normal commodities and services. By closing the valve with just one movement, the logistics lines can be interrupted for an unspecified time. When it is said that 'Russia has cut off gas', an entire European continent can enter into a deep energy crisis. Energy is a storable commodity when it comes to fossil fuels. However, it is not possible to guarantee the energy of the future by relying on the fuel or natural gas in the tank. It takes years to produce new options in energy. In short, the logistics of energy can become a very big problem in times of crisis. The energy crisis is affecting both world politics, economies and individual lives.

The logistics sector is looking for new ways with the crisis that started with the sanctions against Russia. The biggest problem is happening on land and in the air. Because the routes have changed in air cargo. Extended routes can extend delivery times as well as affect cargo transportation costs. The sanctions are changing the routes and costs of logistics carried out via the highway. Thanks to its globalized structure and enriched intermodal transportation, the logistics sector is able to overcome the blockage points between countries more easily. Logistics lines in the air, on land, at sea and on railway routes demonstrate exemplary cooperation.

The good news is that Turkey is very well prepared for this crisis in terms of logistical capabilities. Thanks to digitalized processes, modern fleets, as well as storage and processing centers, trained human resources and intermodal diversity that know the nearby geographies well, they play important roles. In air cargo, THY Cargo has become a carrier on a global scale today. Istanbul Airport offers infrastructure and superstructure support in accordance with the increasing importance of Turkey in logistics and the goal of becoming the largest logistics base in the region. All this is reflected positively on the investments of global logistics companies in Turkey. ■



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NEW BORDER GATE BETWEEN TURKEY AND BULGARIA



A new border gate will be constructed on the border Bulgaria and Turkey where gate crossing sometimes takes 5 to 6 days for the trailers due to long queues.

According to the statement made by Minister of Interior Süleyman Soylu, this gate will be constructed at Revze River, Kırklareli, not in Edirne. Soylu told that the border crossings at Hamzabeyli and Kapıkule Border Gates are the highest of all times and they want to make this continuous and increase the number of border crossings.

Minister of Interior Süleyman Soylu told in his press statement after his meeting held with the Bulgarian Minister of Interior Boyko Raşkov within the scope of its visit to Bulgaria that: "This was an important step. The construction of a new gate or a bridge at Revze River, Kırklareli was on our agenda 5 to 6 years ago. We have made progress to a certain point during the technical meeting. When the preparations are completed, a new gate will be established there. Our embassy will follow up the process. We only have to decide on whether the gate will be passed only on foot or whether small cars will use it, too. We are taking a step to strengthen the connections between two countries and to take the historical and cultural connections between them to a better point."

Border Crossings in Kapıkule To Be Increased

Soylu has further made the following remarks: "Both the Bulgarian side and we have left these meetings with positive results. We have discussed the long queues at the border gates caused by the increase in production and exports in Turkey and technical regulation introduced by Bulgaria at the border gates. Our Minister of Trade was recently here. We have discussed how to maintain the border crossings at Hamzabeyli and Kapıkule Border Gates. Kapıkule has 5 exits on our side. Bulgarian side has 2 exits. It will be initially increased to 3. We have recently made a request for the addition of 2 more. They will review this request. Thanks to the efforts of the Embassy, Ministry of Trade and our friends, the length of the trailer queues of around 30 to 35 kilometers has currently decreased to 2 to 3 kilometers. It is important to ensure continuity here for exports and trade activities. The border crossings have reached the highest of all times. We agree on making this better and we will be following this up."

Noting that an agreement has been reached between Turkey and Bulgaria, Minister Soylu told that they will establish a shared mechanism under the chairmanship of the deputy ministers. ■

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TURKEY-TURKMENISTAN INTERNATIONAL ROAD TRANSPORTATION STRENGTHENING PROTOCOL

UND CEO Alper Özel and TULM (Turkmenistan Transportation and Logistics Center) signed the Memorandum of Understanding including the cooperation steps between two institutions at UND Headquarters within the framework of the ongoing cooperation between UND and TULM in order to develop the international road transportation between Turkey and Turkmenistan. TULM has opened a representative office in Turkey as one of the most important logistics centers of the world like Chine, Russia, UAE and India, in line with the logistics policy of the Government of Turkmenistan aiming the increase of the logistics power of Turkmenistan. Turkey, Georgia and Azerbaijan representative office of TULM in İstanbul aims for strengthening the logistics location of Turkmenistan and developing the supply chain between the countries. TULM has been established with the share participation of the public and private organizations in Turkmenistan and reports to the Deputy President Responsible for Transportation Policies of Turkmenistan.



TULM also cooperates with UND in order to identify and solve the transportation problems such as transit crossings, driver visas that the Turkish transporters experience during transits to Turkmenistan to be shared by UND and to establish a strong supply chain between the countries.

The Memorandum of Agreement signed aims for:

-Development of bilateral and transit transportation between Turkey and Turkmenistan,

-Development of the Central Corridor,

-Shared initiatives and studies,

-Establishment of a Working Group with the participation of the Turkish and Turkmenian transportation experts, when necessary,

-Data and statistic information exchange and organization of conferences, trainings and seminars.

UND and TULM agreed on common studies to develop bilateral and transit transportation between Turkey and Turkmenistan and decided to organize visits to the Organization of Turkic States and to maintain shared initiatives such as the development of the Central Corridor.

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RECORD BREAKING INCREASES IN ROAD FREIGHT RATES

Inflation, decreased demand, social instability and the war in Ukraine caused fluctuations in the road freight rates and the freight rates in the second quarter have reached record heights.

Inflation, decreased demand, social instability and the war in Ukraine cause fluctuating developments in road freight rates. These fluctuations affect the freight rates. The freight rates in Europe have reached the highest peak of all times with 121 points in the second quarter of this year.

According to the results of the European Road Freight Rates Benchmark performed by Transport Intelligence, Upply and IRU, the freight rate index in Europe reached 121 scores being the highest level of all times, in the second quarter of 2022.

Stating that the lull in European demand should slow the upward pressure on road freight rates, Upply CEO Thomas Larrieu commented that haulers are still facing significant cost increases (fuel, labor, etc.), so rates are likely to remain at high levels in the coming months.

Ti Economist Nathaniel Donaldson made the following remarks: "The effect of rising costs in 2022 is now very evident with road freight rates across the European continent reaching new all-time highs. Initial fuel price rises following the invasion of Ukraine, industrial action and a worsening driver shortage keep capacity tight and have produced a much more costly environment for European road carriers. A range of indicators are pointing towards a drastic slowdown in consumption and production which will ease further increases while high costs keep rates elevated."

IRU Director of Corporate Services Vincent Erard also made the following comments: "The driver shortage is one of the biggest challenges for the trucking industry at the moment. Its effects are likely to continue to impact freight prices in the near future. The age distribution of drivers already gives a taste of what is to come, with 34% of drivers aged over 55 in Europe and young drivers under 25 representing only 7%. This trend will worsen if older drivers continue to retire, some of them earlier than expected, as during the COVID-19 pandemic, further reducing the pool of available drivers. All the actions and initiatives aimed at improving the attractiveness of the driving profession and removing the barriers to entry into the profession (cost of training, minimum age) will be decisive in the long term." ■

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MINISTRY SUPPORT TO SUSTAINABLE TRANSPORTATION WITH GREEN LOGISTICS CERTIFICATE

The Ministry of Transport and Infrastructure will apply discounts on certificates of transportation authorization and activity and vehicle card fees for the companies having a "green logistics certificate".

▶ The "Combined Transportation Regulation" prepared by the Ministry entered into force upon publication on the Official Gazette. The regulation prepared for ensuring compliance with the European Union legislation sets principles for combined goods transportation and green logistics activities and aims for supporting and encouraging the establishment of an integrated, balanced and environmentally friendly transportation structure and also sets the scope of the "combined goods transportation" and "green logistics activities".

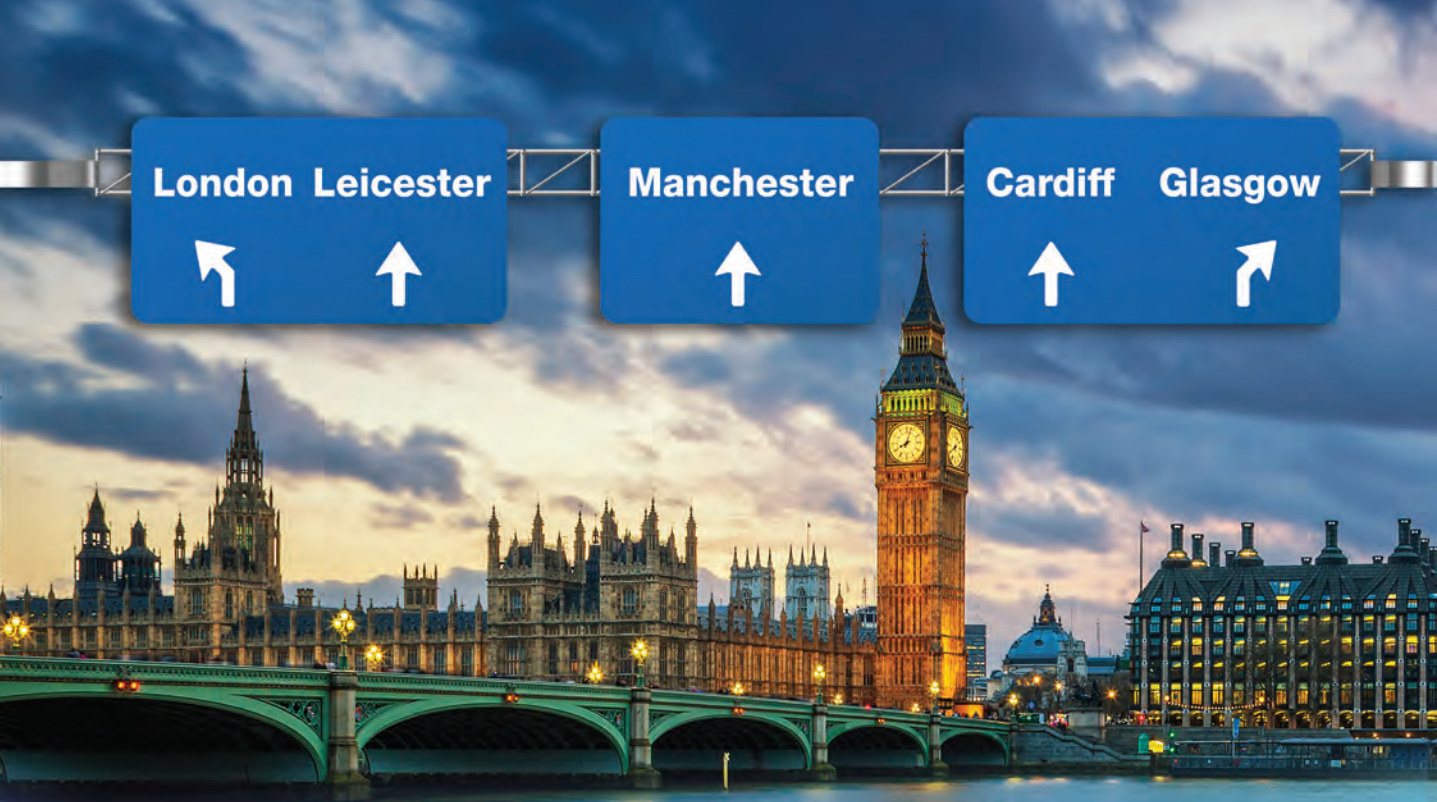
Companies have to perform minimum 200 combined goods transportation trips every year, own a document and certificate showing that minimum 5 percent of the energy consumption is covered by renewable energy resources and use air-conditioning systems working with gases of Low Global Warming Potential for their activities to be considered as "green logistics activities".

Some other requirements will be performance of minimum 5 percent of green packaging activities annually, donating minimum 50 young plants annually to the General Directorate of Forestry for the afforestation fields deemed suitable in Turkey and having a zero waste management system and some necessary documents.

Green logistics certificate will be free

The Regulation also includes information regarding the requirements and documents requested for the "green logistics certificate". The certificate will be for an indefinite term and free. Applications will be filed every January and the applications filed at other times will not be evaluated. The applications for this file will be accepted on the Registered Electronic Mail address of the Bank.

"Green logistics awards" to be granted every 2 years The General Directorate of Transportation Services will grant green logistics awards every two years. Performance of logistics activities for minimum 2 years is required for being eligible for the awards. Real and legal persons holding a Green Logistics Certificate will benefit from incentives, exemptions, exceptions and/or facilities. ■





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TURKEY IS A KEY LOCATION FOR INTERNATIONAL TRANSPORTATION, HIGH INCREASE IN NUMBER OF TRANSIT PERMITS

Attracting attention to overcoming the obstacles for the Turkish transporters before transit crossings, the Ministry of Transportation and Infrastructure announced that the number of additional transit permits has increased to 265 thousand and the number of international transportation from Turkey has reached 820 thousand during the first half of this year.

The Ministry of Transport and Infrastructure has made a statement about road transportation. The statement mentioned that changes have occurred in the supply chain after the pandemic affecting the entire world and the Ukrainian-Russian crisis and continued as follows: "Turkey has overcome this process with growth thanks to her strong logistics infrastructure and corporate transportation sector. Important achievements have been realized in the field of international road transportation forming the backbone of the logistics sector thanks to especially the efforts made in the last 2 years. The Turkish transporters become stronger in transit crossings thanks to the strengthening of the Central Corridor. These achievements have also accelerated our exports."
Noting that these efforts and negotiations with other countries are ongoing also in 2022, the statement continued as follows: "Thanks to the recent efforts of our Ministry, the number of transit permits for Hungary has been increased from 36 thousand to 130 thousand. Transit fees have been abolished for Serbia and 25 thousand permits allowing multiple entries have been started to be issued. The transit permit quota for Greece has been increased from 35 thousand to 40 thousand. Half of these documents are free thanks to our efforts. The number of transit permits has been increased from 250 thousand to 375 thousand with the Joint Road Transportation Commission meeting held between Turkey and Bulgaria. The Joint Road Transportation Commission meeting held between Turkey and Romania decided to liberalize the transit transportations and abolish the transit fees charged for transportations.
Liberalization of the transit transportations with Romania, an EU country, is an important step for overcoming the obstacles before international transportation. Thanks to the achievements on the Greece, Serbia, Hungary, Bulgaria and Romania routes, Turkish transporters now have the opportunity to organize easier and



cheaper transportations to Europe. These achievements will increase our exports to Europe."
Sharing that negotiations are held not only with European countries but with the Central Asian counties, "The bilateral and transit transportation liberalization process has been initiated with the Joint Road Transportation Commission meeting held with Georgia being the main transit route for the transportations

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NEW LINE SUPPORT TO RO-RO TRANSPORTATION

A new regulation covering the supporting of Ro-Ro transportation has been published. According to the new regulation, a Regular Trip Support of 2 US dollars will be given per trailer-tanker for each 10 nautical knots on new lines. Existing lines can benefit from this support if they increase their monthly number of trips by 50 percent.

► The Regulation on Supporting the Transfer of Goods Transported by Road to Sea Transportation has entered into force upon publication on the Official Gazette. The Regulation aims for increasing the share of sea transportation in combined transportation, development of RO-RO transportation, creation of new transportation corridors and decreasing the queues on the border gates and strengthening the environmentally friendly transportation systems. It is planned to increase the use of Turkish ports and the exports by sea with more competitive prices, to decrease the maintenance-repair costs on roads and highways, to provide speedometer advantages to the road freight forwarders, to decrease the maintenance-repair costs of the vehicles and to direct the vehicles from road to sea transportation and thus, to provide the vehicle owners with impairment advantage.

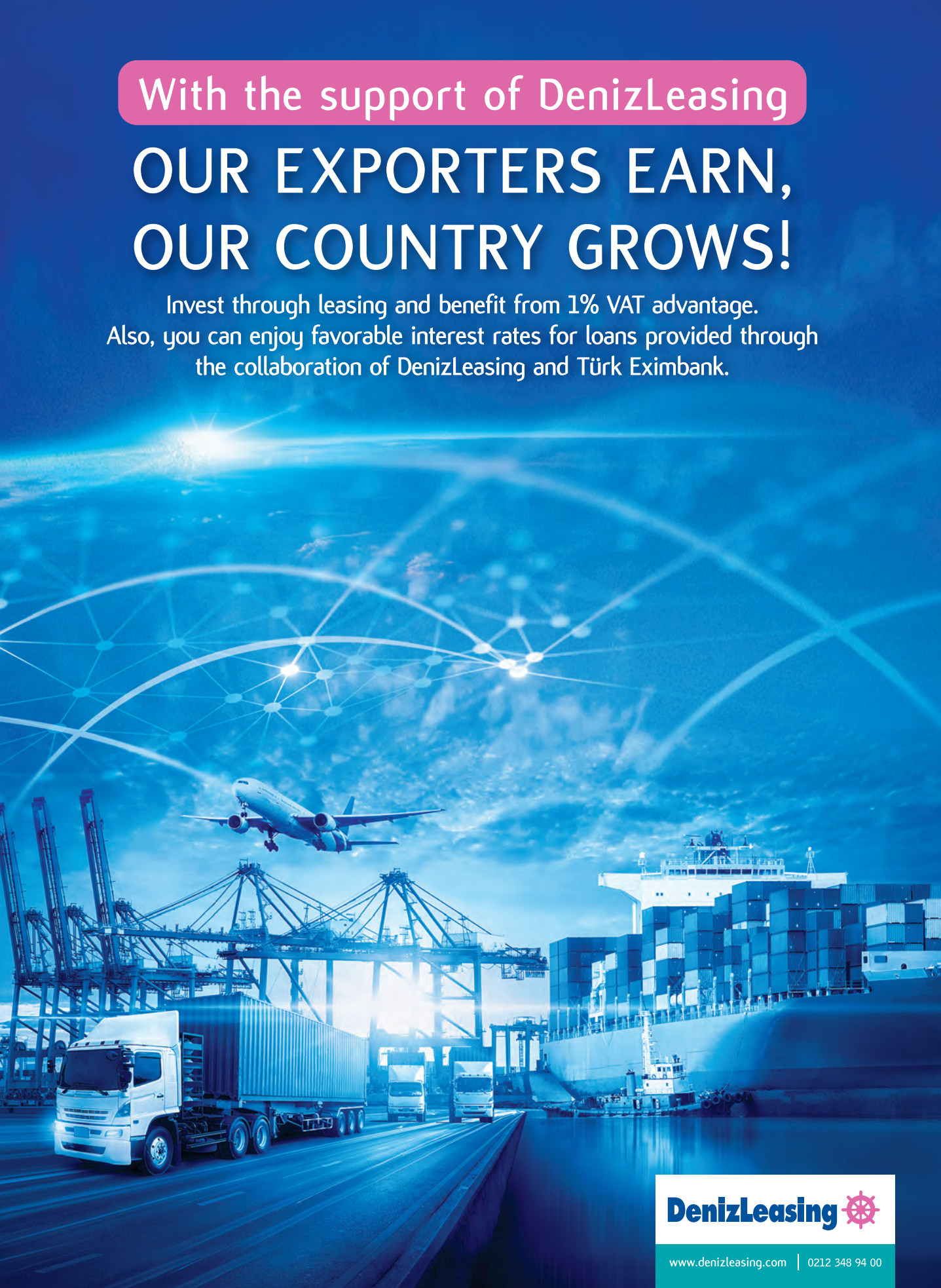
According to the Regulation, Turkish Liras equivalent of 2 US dollars will be paid to Turkish flagged ship owners/operators per unit of goods (trailer, semi-trailer, tanker) for each 10 nautical knots traveled by the ship. If the distance is less than 20 knots, 20 US dollars will be paid per unit of goods. 3 US dollars will be paid to Turkish flagged Ro-Pax ship owners/operators per unit of goods (truck, truck bed) for each 10 nautical knots traveled by the ship.

Regular Trip Support will not be given to the existing lines and the lines established as the continuance of these lines. However, existing lines can benefit from this support if they increase their monthly number of trips by 50 percent. Four monthly trips are required as a minimum for the new lines and the support document will be issued for each ship for two years. The document for the support will be cancelled if the trips are not initiated or the schedule is not complied with, except for any force majeure event including natural disasters. ■

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Green logistics has become an important factor for determining strategies and generating competition advantage. The important companies of the sector continue their investments, supporting the belief that the green logistics has an important contribution to the sustainable future.

'GREEN TRANSFORMATION' EFFORTS ACCELERATE IN LOGISTICS SECTOR

Climate change and the struggle against the climate change are one of the most important agenda items of the today's world. The sustainability criterion of all sectors for their activities is measured in terms of their contribution to the measures taken against the climate change. The European Union creates a new economic system with the Green Deal for effective fight against the climate crisis. Actions are required by the sectors for the European Union's achievement of the decrease of emissions by 55 percent by 2030 and reaching the goal of become a Climate Neutral climate by 2050 as per the Green Deal. The approval of the Paris Agreement for Climate by Turkey is considered as an important step for Turkey to act together with the EU during the Green Deal process. Especially the fast developing economies like Turkey should recognize as soon as possible the climate leadership opportunities laying before them and review their national climate policies in a way to support sustainable renewable energy and energy efficiency investments and to remove the coal and other fossil fuels from their centers.

"Transportation is ranked the fifth for emissions"

Transportation ranks the fifth among global greenhouse emissions. The road transportation constitutes 89 percent of the emissions. Therefore, the logistics sector is among the sectors that will be affected by the phase to the goals to become carbon neutral set for 2030 and 2050. Logistics service providers should shift their business models to more sustainable transportation modes such as combined transportation and intermodal, convert fleet investments into electric and hydrogen technology vehicles, develop biofuel applications such as HVO, use automation systems actively, serve at green buildings and make more investments in to R&D and digitalization.

The combination of different transportation modes, changes in fuel mixtures, more extensive use of sustainable transportation modes and tools such as digitalization and incentive mechanisms implemented as part of the review of the climate policies will ensure that the transportation and logistics sectors with a high share in the greenhouse gas emissions achieve the desired decrease in carbon emissions. The logistics and transportation sector should focus on investing vehicles with low and zero emissions including the infrastructure during this process.

"Fleet renewal costs"

The logistics sector should not be made to face fleet renewal costs and necessary plans should be made by the public sector in order not to add new problems to the problems already experienced by the Turkish truck fleet.■

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TURKEY AIMS AT INCREASING HER LOGISTICS INCOME TO 20 BILLION US DOLLARS IN 2025

The energy crisis caused by the pandemic and Russian-Ukrainian war has skyrocketed the logistics costs, too. The global logistics sector size is expected to exceed 6.88 trillion Euros by 2024. Turkey aims to increase her international logistics income to 20 billion US dollars by 2025 and 30 billion US dollars by 2030 with the growth to be achieved with goods exports. Even though the global logistics sector continues to give growth signals, the global problems increases the cost items and affects the sector adversely.

Railways Need Development

The major expense items of the logistics sector with a great share in the service exports of Turkey attract attention with the increase in the fuel prices, exchange rates, road fees and tolls and tire/supply part prices in addition to the increase in the freight rates.

According to the experts, intermodal transport should be developed, railways should be converted into an alternative transportation mode to the roads, and their shares both in the internal market and the foreign trade should be increased and thus, the pressure on the roads should be decreased, in order to solve these problems. Construction of railway connections for parts, ensuring uninterrupted railway connections on the Eastern-Western axis and connecting OIZs to ports with railways should be important agenda items. Increase in transit transportation, making Turkey the center of transit trade, giving support to the investments regarding the sector and investing in environmentally friendly technologies are also important.

The global logistics sector size is expected to exceed 6.88 trillion Euros by 2024.



Adaptation to Digitalization Is Required

Turkey published the "Green Deal Action Plan" circular in July 2021 as part of the European Green Deal alignment process. The circular includes goals such as decreasing travel durations in transportation, effective use of existing road capacities, ensuring energy efficiency and decreasing the costs given to the environment.

The achievement of these goals by the logistics sector requires determination of a roadmap including supports, incentives and investments by the public and initiation of a mass movement in every area. In addition to primarily the investments made to vehicle transformations by the companies, qualified labor force that will adapt to digitalization should be raised and recycling awareness should be raised to generate alternative fuels and fewer wastes.

Russian Doping in Logistics to Turkey

The Logistics Trust Index decreased by 6 percent in the second quarter of the year and continued to maintain its positive outlook. It increased in Turkey by 20 percent since Turkey is the transit point of Russia. As compared to the second quarter of 2021, the Logistics Trust Index decreased by 13 percent on an annual basis.

"Cautious movement in Logistics Trust Index"

KPMG Transportation Sector Leader Yavuz Öner told that "the Logistics Trust Index continues its cautious decrease trend. Changes have occurred in the supply chain due to the Ukraine-Russia war and the impacts of the pandemic. Fuel costs have increased across the world. It can be said that the transportation sector in Turkey has a positive outlook in the long term. According to the announcements by the Ministry of Transportation and Infrastructure, the number of international transportations from Turkey in January-June 2022 increased by 20 percent to over 820 thousand trips as compared to the first half of the previous year. Russia's using Turkey as a transit center after the embargoes imposed positively affects these figures."

CZECH REPUBLIC
at LOGITRANS 2022

November 16–18, 2022
Yenikapı Avrasya Show and Art Center, Istanbul
Hall 2 / Stand 404

Czech Republic
The Country For The Future

MINISTRY OF INDUSTRY AND TRADE OF THE CZECH REPUBLIC

EU2022.CZ

Czech Republic is with no doubt the crossroads of transport lanes and the hub of logistics in Central Europe. Just have a look on the map: from utmost Western Europe to Turkey, if always by road you will most probably take our main highway D1. If from North Sea ports to Adria, you will cross the country by D8 and D3. But not only road traffic is available, the backbone of transeuropean railroads (Baltic to Adria and further to Turkey) is to be found here as well.

Czech Republic is indeed a country of the most up-to-date logistic services, thanks to its high level of industrialisation and precise technology production (leading industries are automotive including full car assembly, food and beverages, glass and porcelain). All these industries demand for reliable and effective logistic services have turned the country to a well interconnected block of warehouses with own added value services, intermodal connections web and 5G communication. The nests of logistic utilities are regularly spread all around the country, spinnin around the main urban centers as well as the more remote production sites.

Within the country all modes of cargo transportation are offered and the modal split quite fair: at the first hand the road transportation, with the common penetration of about 70 % off the total output; railways carry over 25 % of the volume (which represents an unique level even in Europe). The rest is divided between air and river traffic, due to the fact that the country is too small for national flights and has only one over-border navigable river = Elbe.

Also the provision itself – thanks to the logistic giant Germany – reaches the European standards. There are about 20.000 trucking companies, 180+ forwarding houses and 20+ active rail operators, either independent or representing multinational corporations well known in the respective mode. And now, for the first time in our history we have been given a chance to introduce the best selection of them at Logitrans 2022:

Association of forwarding and logistics Czech Republic – www.svazspedice.cz – representation of members of the Association and support of Forwarding and Logistic business in Czech Republic

AFP SPEDITION – www.afpspedition.com – the company ensures complete services which includes all kinds of transport (road´n´rail, maritime shipping, partial shipments, air cargos) and custom clearance

Bee Interactive – EASY CARGO 3d – www.easycargo3d.com – EasyCargo is container and truck loading software for better utilization of cargo space, saving you time and money

ČD Cargo – www.cdcargo.cz is the largest Czech railway transport provider

CFS Česká Třebová – www.cfsct.cz – is engaged in containers loading and unloading, warehousing, customs brokerage and rail FCL/LCL transport from China

EGT Express – www.egtexpress.com – is an international logistics company with more than 25 years of experience offering transport services between all EU and Asian countries

METRANS – www.metrans.eu – is a licensed railway company in Germany, Austria, Czech Republic, Poland, Slovakia, Hungary and Slovenia to ensure goods get transported in a smooth and environmentally friendly way

NYMWAG – www.nymwag.cz – manufakturing of railway freight wagons, focusing on intermodal, tank and hopper wagons, use of own bogies for all the wagons

PRIMA AIR SEA – www.primalogistics.cz – ocean freight, air freight, road freight, rail freight and of course project logistics such as warehousing & distribution and value added services

PST CLC - www.pst-clc.com – since 1991, a major provider of complex logistics services in the Czech Republic and Central Europe

RAILSCANNER – www.railvis.com – railway booking platform with many solutions for railway industry across Europe, where sharing of available locomotives and wagons for rental and for sale happens.



RAIL TRANSPORTATION WORKING GROUP ESTABLISHED AMONG TURKEY, BULGARIA, HUNGARY AND SERBIA

The Minister of Transport and Infrastructure Adil Karaismailoğlu announced that a Railway Transportation Working Group has been established with the resolution of the Bulgaria-Hungary-Serbia-Turkey Quadrilateral Coordination Council.

The Minister of Transport and Infrastructure Adil Karaismailoğlu told in the press statement he gave at the meeting of Bulgaria - Hungary - Serbia - Turkey Quadrilateral Coordination Council that "We aim to implement our plans for 'green transportation', which will affect the future not only of our countries but also of our world; to remove transport and accessibility bottlenecks and to establish a more effective and efficient transportation network".

Noting that the negotiations held were very effective to increase cooperation, Karaismailoğlu further commented as follows: "The most important result of our meeting is the establishment of the Bulgaria - Hungary - Serbia - Turkey Quadrilateral Coordination Council by the Ministers responsible for transportation and the organization of the Council's first meeting. We as the four member countries of the Council place great importance on the development of our relations in every field of transportation. The Council will undertake a valuable function to reinforce our cooperation in a way to benefit the entire region. Turkey is at a strategic point in terms of transportation between Asia and Europe. The increase in the trade volume between China and Europe alone draws attention to the importance of the position our countries have. When international transportation corridors are considered, the Middle Corridor has turned into a strong alternative in terms of distance and time. If a freight train from China to Europe prefers the Russian Northern Trade Route; it covers 10 thousand kilometers in at least 20 days. If it chooses the Southern Corridor via the Suez Canal by ship, it can travel 20 thousand kilometers and reach Europe in only 45 to 60 days. However, the same train covers 7 thousand kilometers in 12 days via the Middle Corridor and Turkey. These figures alone demonstrate how advantageous and secure the Middle Corridor is in global trade, between Asia and Europe."

We aim for becoming both a regional and global hub in logistics

Pointing out that the Russia-Ukraine War, which has been taking place since February, has put the Northern Corridor in trouble, Karaismailoğlu said, "The Southern Corridor route is disadvantageous in terms of both cost and time compared to its route. Moreover, we still remember that in March 2021, the ship Ever Given destined from Malaysia to Rotterdam, the Netherlands, ran aground and blocked the Suez Canal. Taking into account the fact that we are at the center of the Asian-European foreign trade networks in our region, we aim to be both a regional and a global base in logistics. Our government also attaches special importance to the development of transport and communication infrastructures, which are the lifeblood of large economies. We have serious responsibilities to develop trade and increase the efficiency of the line in the Middle Corridor. First of all, it is one of our goals to increase the competitiveness by reducing the costs in order to improve the volume of freight transported by rail. Our target for 2053 is to increase the amount of freight transported by rail from 38 million tons to 440 million tons annually."

Reminding that the Ministers of Foreign Affairs and Transport of Azerbaijan, Kazakhstan and Turkey met last week, Karaismailoğlu said that with Turkey's proposal, a working group was formed to develop cooperation in the field of transportation and increase transportation between the three countries.

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70 PERCENT SUPPORT BY GOVERNMENT TO LOGISTICS INVESTMENTS

Logistics service providers with receive supports up to 60 million Turkish liras as part of the International Logistics Distribution (YDLA) program. 70 percent support will be provided with this program.

▶ The details of the support package announced by the Ministry of Trade regarding the logistics and transportation services were discussed during the strategy meeting held by the Service Exporters' Association.
The Freight Transportation and Logistics Services Ministry of Trade Supports Notification Seminar was held at TİM Center. During the seminar, information was provided on the details of the 'Resolution on Supporting International Logistics Distribution Networks' and 'Resolution on Definition, Classification and Supporting of Service Exports' published in the Official Gazette No. 31815 dated April 20, 2022 and details of the supports provided to the logistics sector were shared.

Giving an opening speech at the meeting, Service Exporters' Association Board Member and Logistics Committee Chairman Murat Baykara made the following comments: "Our sector will for the first time benefit from important supports like the sectors exporting goods. Having exported goods of 12 billion US dollars last year, our sector will reach the export levels of 20 billion US dollars faster thanks to the supports provided."
Noting that producing quality goods is not sufficient if you cannot transport the produced goods, Ministry of Trade International Service Trade Executive Vice President Yusuf Karakaş further made the following comments: "We will give an investment support including the warehouse rental service up to 70 percent to our companies with our international logistics distribution networks programs. Stand by your job and the government will give you 70 percent support."
Service Exporters' Association General Secretary Fatih Özer told that: "Today, our association has 2794 members and the logistics is the 3rd sector with the highest number of members.
We are working since our first date of establishment to ensure that the service sectors also benefit from supports like the goods exports. We are sure that the support mechanisms announced for the service exports one by one will have a positive impact on the exports of the sectors." ■

Logistics Supports

Available to all logistics companies providing logistics and transportation service and residing in Turkey. The beneficiaries (companies) and cooperation institutions (sectoral associations) can benefit from these supports.

Registration and Protection Support (TRY 600,000 per year)
Market Access Document Support (TRY 1,800,000 per year)
Department support (TRY 720,000 per year per department)
Advertising, Promotion and Marketing Support (TRY 1,800,000 per year)
Personal Participation Support (TRY 300,000 per event)
Product Placement Support (TRY 600,000 per year)
National Participation Support (TRY 300,000 per event)
National Participation Event Organization Support (TRY 1,200,000 per organization)
Virtual Fair Organization Support (TRY 600,000 per activity)
Sectoral Procurement Council Programs Support (TRY 600,000 per program)
Sectoral Trade Council Programs Support (TRY 900,000 per program)
Contest and Event Support (TRY 1,200,000 per event)

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OUR AIM IS TO CREATE SUSTAINABLE LOGISTICS

On our Greenlog Intermodal journey, just as the name of our company implies, our aim is to create sustainable logistics solutions. We attempt to provide a greener transport mode and we play our part in leaving a greener and healthier world to the future generations says Greenlog Intermodal, Strategy and Business Development Director Sevil Öge.

What we have done in intermodal sector?

Established in 2016 with the aim to create greener and more sustainable transport solutions by utilizing intermodal connections for linking Turkey with Europe, we have grown into one of the most reliable intermodal transport companies in Turkey. Our services have matured, our geographical reach has expanded from Europe to China, our routes and lines we use have increased steadily and our client portfolio has diversified making our company financially more secure than ever.

Turkey is centrally situated between Europe, where much of the world's political and economic power is concentrated, and Asia, which has lately become a vital centre of economic growth and rising political influence. From west to east Turkey's actual land borders are with eight countries and many civilizations existed in this strategic territory. 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 UK.

The second route we use is the RORO connections between Turkey, Italy, Greece and France. To bypass the congestions at the port of Trieste in Italy we have also introduced Bari as an alternative gateway into our network.

We also work on Asia corridor to generate alternative routes as Turkey plays an important role between Asia and Europe where there is a big market to manage in overall .

We have enlarged our fleet of intermodal containers and currently represent one of the largest fleets in Turkey and Europe. Our fleet has grown up to 5000 units by 2022 .



Besides offering 3000 x 45'HCPW standard intermodal units we also offer 2000 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.

Now and beyond!

There is an increase of interest in intermodal transport in Turkey. Thus,investment towards intermodal systems, terminals, hinterland connections, intermodal equipment and intermodal-compatible trucking fleets will highly increase.It may put pressure on equipment suppliers as they will need to increase production capacity of containers, swap bodies and wagons produced in Turkey.We have made long term commitment with different suppliers and foresee no shortages on this area.

To sum up, we are proud to be one of the first companies to think outside the box and introduce new routes which did not exist before, we are the leading company to have a GPS tracking unit inside every single container as well as it plays a vital role in stabilizing the intermodal market in Turkey. We are now better equipped and prepared than we were in 2021 to manage the high demand shifted towards intermodal transport. ■

Ports of Toulon Bay

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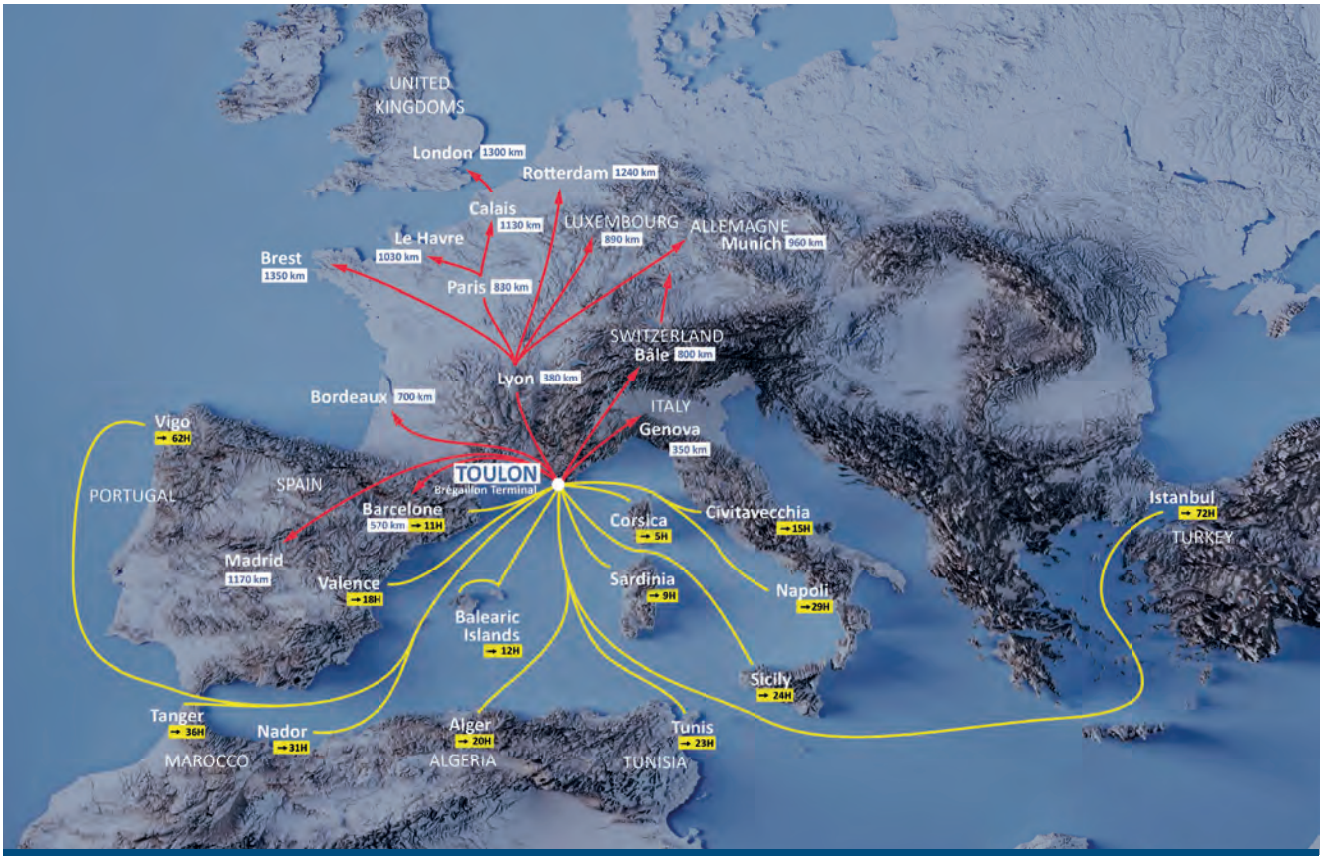
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- **Rhône-Saône river axis:** Lyon (24 hours).
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Brégaillon Terminal Management: Var Chamber of Commerce & Industry / Port Authority: Toulon Provence Mediterranée Metropolis

EKOL: A ROLE MODEL WITH ENVIRONMENTALLY FRIENDLY INTERMODAL TRANSPORT

Ekol has prevented the emission of 658,000 metric tons of Co_2 into the atmosphere thanks to a decrease of 438,000 cubic meters of diesel fuel use over the last 10 years with intermodal transport, its sustainable business model. In other words, it has achieved a reduction in the consumption of fossil fuels that is equivalent to 74,753 hectares of forest, 14 times larger than Istanbul's Belgrade Forest, and enough to travel to the Moon and back 1,700 times. Each month, Ekol prevents the consumption of enough fossil fuels to save a forest the size of 700 soccer fields. These fossil fuels are enough to power 350 circumnavigations of the world.

Transition to electric vehicles is underway

Allocating a €5 million budget for environmental investments, Ekol HAS increased biofuel use in its fleet, aiming to complete its transition to electric vehicles within three years.

In line with its R&D culture, Ekol continues its investments in fleets and ports equipped with low-carbon technologies and equipment (electric tow trucks, road train application, biofuels), automation applications that provide optimization with the latest technologies, and a flexible and effective service network integrated with digitalization.

Voluntary corporate footprint calculation

As one of the signatories of the UN Global Compact, Ekol participates in this initiative on a voluntary basis since 2007 and publishes an annual Progress Report to promote its contributions toward improving human rights, labor standards, the environment, and the fight against corruption around the world. Having signed the UN's Statement from Business Leaders for Renewed Global Cooperation in 2020, Ekol continues to strengthen its commitment to inclusion and multilateralism.

Additionally, Ekol considers "Goal 13: Climate Action" the most critical of the UN Sustainable Development Goals. Accordingly, the company updated its 2020 Corporate Carbon Footprint for all its operations and value chain in compliance with the international ISO 14064:2018 -1 standard to advance "Goal 13." In doing so, Ekol has become the first company in the industry to voluntarily have its carbon footprint calculated and verified according to international standards, despite not being an industrial enterprise. In addition to this verification, Ekol transparently reported its approach to the fight against climate change and its means of incorporating its climate change actions into its sustainability strategy in the Carbon Disclosure Project, Climate Change category (CDP Climate Change) for the first time in 2021. Ekol, therefore, became the first company to receive a score of B in Management in the Climate Change Program of the CDP







with a performance equivalent to the European average and above the logistics industry average. Furthermore, Ekol received an "A" rating in Supplier Relations in the CDP Value Chain Program and became a "Global Leader." To maintain this success, Ekol continues its CDP reporting for 2022 at full speed.

Ekol to generate the electricity for 2,400 households!

Continuing to transform its way of doing business to support the ecosystem, Ekol focuses on environment- and technology-oriented investments. As the world's natural resources are being depleted rapidly, Ekol launches innovative investments that combine logistics with the environment and artificial intelligence to leave a better world for future generations.

So far, Ekol has commissioned the largest Solar Power Plant (SPP) to be installed on a single roof at its Lotus Facility, a green facility that boasts the largest storage space in Europe, and its health operations automation solution. The plant will generate 6,200 MWh of energy in the first year, which is equivalent to the annual electricity consumption of 2,400 households.

ekol | LOGISTICS 4.0

With the Lotus Facility, which was built on an area of approximately 40,000 square meters, Ekol has become the first company in the industry to install panels of this size on a single roof.

With this solar power plant, completed in approximately one year with an investment of $4 million, the Lotus Facility can meet 70 percent of its energy needs from the sun, the biggest renewable energy source of all. The investment will reduce 3,100 metric tons of Co_2 per year, which is equivalent to planting 140,000 trees.

Ekol shares its technology know-how with Logiverse

Through its tech company Logiverse, Ekol aims to serve the industry and all organizations that want to benefit from its know-how in information technology. With Logiverse Teknoloji, Ekol has begun serving organizations, logistics service providers and cargo companies that want to work with innovative business models and processes.

Currently continuing its services with teams working in the fields of software development, business analysis, optimization, and artificial intelligence, Logiverse focuses on solutions for cargo platforms, transportation management systems, e-commerce platforms, warehouse management systems, automation, foreign trade, customs clearance, fleet management, optimization, and data science.

Ekol360: A new brand in e-commerce

Ekol centers its growth around e-commerce. Building on 32 years of expertise in the industry, Ekol has created a brand new system to offer integrated e-commerce services. Ekol360, Ekol's new brand for e-commerce activities, will enable customers to focus on their own production by offering end-to-end, value-added services. The multinational structure of Ekol will help clear obstacles in the way of global expansion.

Offering technological, fast, proactive, and innovative E2E solutions, Ekol360 will utilize its strong infrastructure to create added value not only for Ekol, but for the entire e-commerce ecosystem.



Fuat Pamukçu
Vice President of Sales, Marketing, Business Development and Strategy, DFDS Mediterranean Business Unit

DFDS KEEPS ENHANCING ITS SUSTAINABILITY SOLUTIONS!



DFDS Mediterranean Business Unit commits to reducing its environmental footprint to become climate-neutral by 2050 gradually within the framework of its sustainability vision, and continues to create new solutions and take strong actions in line with its goals. Aiming to cut down its carbon (CO2) emissions by 45 percent by the year 2030, DFDS reduced carbon (CO2) emissions in the entire transportation network on its routes in 2022, both for the vessels in its own fleet and for the chartered vessels. Fuat Pamukçu, Vice President of Sales, Marketing, Business Development and Strategy at DFDS Mediterranean Business Unit, provided detailed information in our interview about the sustainability vision.

What are the sustainability objectives of DFDS Mediterranean Business Unit?

DFDS Mediterranean Business Unit is, in line with its sustainability target, committed to reducing its environmental footprint gradually and becoming carbon-neutral by 2050. DFDS works with a 2-part climate strategy that focuses on both short-term and long-term actions geared to minimize carbon emissions. We aim to cut down our Carbon (CO2) emissions by 45% by 2030.

What is the strategy you employ to progress towards your goals?

We make use of our business partners' ships as well for green fuels. Environmentally-friendly solutions are essential for sustainable mobility. Environmentally-friendly Hydrogen, Ammonia and Methanol fuels are being tested for some routes. We also continue to utilize alternative fuel types, and partner with companies, suppliers and other parties of similar nature. For a sustainable land transport, we launched a project with Volvo Trucks. We are committed to accelerating the transition to electric trucks, and we have already ordered 125 electric units from Volvo Trucks. Moreover, we aim to launch our first green vessel by 2025. We started the "Sustainable Fleet Projects" focusing exclusively on sustainable fuels and future projects related to it.

How have you progressed towards your carbon targets during 2022?

In 2022, we reduced Carbon (CO2) emissions for our entire transportation network on our route, including the ships in our fleet and the chartered ships. Compared to 2021, we have reduced the carbon emission by 3% for our own fleet, and by approximately 4% for all ships on our route. We continue to take measures to reduce carbon emissions. For this purpose: We have installed a "Shore Power System" on one more cargo ship. Three more ships will be equipped with this system by the end of 2022. Our biofuel tests are progressing as planned. Our first ship to run on biofuel is expected to launch in the last quarter of 2022. A waste heat recovery system has been commissioned on all 3 of our ships. In addition, before the beginning of summer, the Port Network Authority of the Eastern Adriatic Sea, the Trieste Harbour Master, the Monfalcone Harbour Master, Shipping Companies and Shipping Agencies signed a Voluntary Agreement with a view to reduce the impact of air emissions produced by ships entering and mooring in the Ports of Trieste & Monfalcone.

The Voluntary Agreement requires that the procedures to be followed for the compliance methods alternative to fuel switching and emission reduction commitments in the course of entering the Ports of Trieste or Monfalcone be notified to the relevant authorities in directives. Without prejudice to the requirements of safe navigation to protect human lives at sea, during sailing in the port area, mooring/unmooring maneuvers and at berth, all technical measures are being adopted, according to good seamanship practices, to optimize the use of the main and/or auxiliary engines, for the purpose of limiting emissions of exhaust gases into the atmosphere.

DFDS Mediterranean Business Unit also stands out with intermodal solutions. What advantages do you offer in this field?

Aiming to strengthen its intermodal solutions with the vision of sustainability on a global scale, DFDS acquired the German railway operator primeRail. We have also started new railway operations with the acquisition of primeRail. primeRail is established as a new field of business within DFDS, covering the primeRail company and DFDS' intermodal transport offerings. Our customers are now able to leave their goods at one of our terminals in Turkey, and receive them at locations close to their destinations in Europe. ■

"TRANSPORTATION OF HAZARDOUS CHEMICALS REQUIRES EXPERTISE AND EXPERIENCE"



Damla Alışan
Vice Chairperson of the Board of Directors

Your company is one of the top 500 companies in Turkey and has been providing services in the industry for many years. Can you tell us about your activities?
Alışan Lojistik was established in 1985 with the vision of becoming an international logistics services provider that empowers its customers with its innovative, flexible and integrated technological solutions in the local and global markets. Today, our 100% "domestic" and "national" company has a self-owned 550-vehicle fleet and 1500 employees in more than 50 different locations throughout Turkey and it offers its customers operating in the chemicals industry, including hazardous chemicals, and fast-moving consumer goods, food, agriculture and many other industries, services such as international transportation, storage/warehouse services, dry bulk, liquid bulk, and energy transportation. Alışan Lojistik meets the demands of its customers from A to Z with its integrated logistics services, which are also called "contract logistics" in the industry, and comes up with tailor-made solutions with high added value.

The industry went through hard times during the pandemic. Did you achieve the targeted growth rates last year?
Our turnover in 2021 was +100 mio EUR, that is more than 40% growth compared to 2020. Our main commercial and financial activities continued throughout the year at an increasing pace in terms of quality and quantity, and we made a successful start to 2022.
The business volume of our "International Transportation" business line grew by more than 80% on an annual basis. Effective business and route planning, successful use of the capacity of our self-owned assets, and procurement management that preserves the long-term win/win balance have leverage our profit above the industry.
The tendency toward cost-effectiveness, efficient and active capacity utilization continued in our "Storage" and "Value Added Services" business lines throughout the year. In addition to our current customers, many new global customers started receiving services from us during the year.
Our "(Bulk) Liquid and Energy Logistics" business line, which requires "high quality" and superior level of "customer services" maintained its steady growth rate. In 2021, we performed CNG distribution activities by adding 50 additional vehicles and 75 additional drivers, performed bulk liquid exports across Turkey and the Balkans - Central Europe through carriage by road, increased the number of our liquid food tankers, and carried out many other activities. We renewed our self-owned vehicle fleet and increased the supply vehicle capacities to make the demand-driven "profitable" growth sustainable.



You are one of the leading companies in Turkey in the transportation of hazardous chemicals. What is the difference between the transportation of chemicals and ordinary cargo?

Rapid industrialization and the widespread use of dangerous goods caused a rapid increase in the transport of these goods from one place to another. Dangerous goods are transported in various ways, primarily by road. There are critical risks, such as loss of life and property and environmental disasters, pertaining to the transportation of dangerous goods.

Carriers aim to achieve customer satisfaction by attaching importance to the environment and human health in line with the set laws and regulations, in order to provide the expected quality in dangerous goods transportation. To this end, it is necessary to inspect the reliability of the services provided with periodic checks and controls. Another way to ensure safety and thus to increase quality is to focus on employees. Employees working at each stage of dangerous goods transportation should be informed in detail about the products they carry and their hazards. Additionally, it is necessary to be careful about properly evaulating and assigning employees, as well as their job descriptions and performances. Training programs should be prepared according to the needs and the employees should be required to participate, and any factor that may affect their performance should be kept under control. It is especially important for companies in this industry to make sure that the process works correctly and smoothly, and to detect possible problems in advance in order to take the necessary measures, by creating their own quality control departments. This department should also observe the process, identify the elements that may increase the quality and update the process procedures. It should carefully examine the causes and consequences of the problems that occur during the process and inform the top management and make recommendations on the issue to ensure that such problems are not repeated. There are many risks posed by dangerous goods transportation and accordingly, in order to minimize these risks, companies should keep themselves up-to-date with the legislation all the time, prepare instructions for loading, unloading, packaging, and transportation processes, and update these instructions according to changes in legislation and updated conditions and distribute them to all employees. In short, the transportation of hazardous chemicals requires additional expertise and experience.

What are your investment plans for this year and the next year? Is there anything else you would like to add?

We expect the chemicals industry to grow and new domestic and foreign players to participate in. This will lead us and the large-scale companies that are our competitors to improve the service quality and technological infrastructure. We plan to renew our fleet, fully comply with all international regulations, and complete technological integrations in order to lead the way for all developments in this area, as we always do. ■



Onur Talay
CEO

SARP INTERMODAL CONTINUES ITS STRONG GROWTH WITH EQUIPMENT AND HUMAN RESOURCE INVESTMENTS

As the leading brand in intermodal transport, Sarp Intermodal continues its equipment and vehicle investments at full steam. Leading in intermodal transportation between Turkey and European and North African countries, the company increased its equipment range by 70 percent over the last year and a half. Furthermore, the company will support its sustainable and environmentally friendly business model with Volvo electric semi trucks.

▶ Established in 2014, Sarp Intermodal quickly became one of Turkey's most competent intermodal transport companies, increasing its shipment volume, turnover, and human resources with each passing year. The company continuously expands its reach and achieves its goals quickly with new investments while growing by 30 to 40 percent every year with over 500 seasoned personnel.
Having increased its equipment and vehicle investments by 70 percent over the last year and a half, the company received a significant portion of nearly a thousand 45' HCPW containers purchased late last year and included them in the transportation operations. The company also invested in a hundred swap bodies and 50 curtain-side trailers in addition to the 45' HCPW containers. Additionally, Sarp Intermodal became the first company to invest in 20' DC containers as well as the first company to provide intermodal transportation services with this equipment. Furthermore, the company will support its sustainable and environmentally friendly business model with Volvo electric semi trucks.
Speaking on the investments, Sarp Intermodal CEO Onur Talay said: "The equipment of our business partners provided us with the opportunity to directly access almost 5,000 containers. We are now closer to our target of 3,000 self-owned containers for the end of this year. We aim to reach 6,000 containers by the end of 2025. At the same time, we will close the year with 52,000 transportation operations in terms of 45' HCPW containers."
Following investments in semi-trailer trucks, Isotank containers, and containers, the company has recently added a further 50 semi trucks to its fleet. The semi trucks are fully capable of ADR transport and will be used primarily for transporting shipments of liquids and chemicals. Talay pointed out that they increased their Isotank container shipments by 35 percent in the first half of this year compared to the same period of the previous year, adding that they would close the year with 10,000 Isotank container shipments.
Highlighting the significant growth they experienced on all the lines they operate, Talay noted that they gained new customers on the Spain and United Kingdom line.
Underlining that they will continue to implement innovations to their intermodal infrastructure, Talay said, "We will add a total of 300 reefer containers to our equipment pool, 100 of them this year and 200 of them next year. We will sustain our investments to meet the substantial demand in this field."

Record growth during the pandemic

Onur Talay noted that the ability to provide equipment amid the pandemic-induced slow international trade and container & equipment crisis put the company one step ahead in the international market.
Highlighting that Sarp Intermodal is the first company in Turkey to be established with a focus on intermodal transport, Talay said: "Since our establishment in 2014, we have grown rapidly, yet realistically. Interest in intermodal transport was already growing with every passing year, and the pandemic has accelerated this process. Corresponding with our growing vehicle and equipment fleet through substantial investments, we doubled the number of our employees within two years."

European Green Deal to Further Strengthen Intermodal Transport

Emphasizing that intermodal transport, also known as green logistics, will become more popular with the European Green Deal, Talay commented that investments for increasing the share of maritime and rail transport will be prioritized since the carbon emissions per unit in road transport are higher than other modes.
Noting that "This will allow the star of intermodal transport to shine even brighter," Talay added that they have prepared a Green Deal Action Plan to support the transition to a green economy and ensure trade continuity with the EU, Turkey's most important trading partner.
Talay affirmed that they preserved the clean air created by the 2.2 million trees with minimum carbon emissions thanks to their intermodal transportation last year, and stated that they will break new ground in the Turkish market with the electric semi trucks they will receive in the new year.

Strong organization in Turkey and Europe

Sarp Intermodal boasts a strong organizational structure in Europe, particularly in Turkey. The company has offices in Izmir, Mersin, Bursa, Ankara, Adana, and Gaziantep. This organizational structure allows the company to strengthen ties with manufacturers and introduce them to cost-effective intermodal transport.
Having also developed its organizational structure in Europe, the company has an office in Italy and operates in Bulgaria with Sarp Intermodal Bulgaria. Additionally, it has been serving in Germany under the name Sarp Intermodal GmbH since 2019. ■

H.ESSERS: YOUR ONE-STOP SHOP FOR SUSTAINABLE TRANSPORT AND LOGISTICS ACROSS EUROPE AND ASIA

▶ H.Essers provides personalised and integrated solutions to take your supply chain to the next level. With 89 branches and 10 local operations at strategic locations in 19 countries, H.Essers has a vast network of experts to tackle your logistics challenges with tailored solutions for pharmaceuticals, chemicals, spare parts and high-value goods.
As a family business, we are ideal for being your loyal, long-term partner. Our goal: to sustainably transform the future of global logistics.
We streamline supply chains and build lasting partnerships in these industries:

Chemicals
H.Essers provides a compliant one-stop shop for all your chemicals – bulk, packed dangerous and non-dangerous goods. With value-added services such as filling, drumming and heating, custom IT systems and an intermodal logistics network that spans Europe, we have what it takes to get your goods where you want them, how you want them.

Pharma
H.Essers has been a pioneer in pharmaceutical logistics since 2006. We boast a strong European network





with warehouses in Belgium, Romania, The Netherlands, Spain, Italy and Denmark. As an asset-based company, we have our own fleet, warehouses, systems and procedures - all of which meet the strictest quality and compliance requirements concerning temperature conditions, traceability and security.

Parts

A ready supply of spare parts is essential for increasing efficiency, reducing costly downtime and avoiding process disruptions. With H.Essers, you have a high-quality one-stop-shop for parts logistics with a dedicated team, IT systems developed in-house and strategic locations close to international cargo hubs. You benefit from fast and reliable service, sharp SLAs, real-time information, and much more.



Worldwide pioneer in synchromodality

Synchromodality is the intelligent and dynamic combination of various transport modes to offer clients a flexible, sustainable and integrated supply chain solution. The modes used vary depending on your goal (reducing costs, CO_2 emissions, or lead times). You can rely on secure and compliant solutions for various cargo types, including temperature-controlled, high-value goods, pharmaceuticals and ADR goods.

Safebox and Coolbox

Safebox is the first highly secured intermodal shipping container. This 45-foot container is TAPA TSR1 certified, features integrated electronic locks and sensors and is monitored by our control tower. Its inside walls are non-ribbed to prevent damage to goods. The Safebox can be loaded onto trucks, trains, barges and shortsea ships, making it a key element for synchromodal transport. The Coolbox offers the same security benefits as the Safebox and adds temperature control.

A strong logistics partner in Turkey

H.Essers has built a leading presence across Europe. Our site in Istanbul serves as a hub between West and East of Europe and Near East. Tuğrul Şeremet, Country Manager H.Essers Turkey: “We are currently expanding our railway connection between Halkalı and Curtici (Romania). The number of transports from Curtici to Belgium will also increase. With our growing capacity, we confirm our position as a valuable partner for Turkish companies in pharmaceuticals, chemicals and high-value goods that want to expand their business to Belgium and the rest of Europe. I warmly invite you to visit our booth at the LogiTrans fair - or get in touch via Tugrul.Seremet@essers.com - to discuss your plans.” ■



Adil Emre Özgey
General Manager

PACE ACCELERATES LOGISTICS INVESTMENTS FOCUSING ON 3 COUNTRIES

Having achieved a substantial growth momentum in a short period of two years, Pace Logistics decided to focus on transportation between Turkey and France, Spain, and Portugal. The company, which reaches the Port of Sète in France with Ro-Ro departures from Yalova, reaches the final delivery point by road and rail or by road transport alone. Furthermore, the company delivers directly to these countries from Turkey by land-border crossings.



Pace Logistics, having grown rapidly in the two years since its establishment, has decided to focus its operations on three countries. Focusing on France, Spain, and Portugal, the company reaches the Port of Sète in France by dispatching Ro-Ro departures from Yalova. Pace Logistics then switches to a combination of road and railway transportation or simply to road transportation at this point to deliver the cargo. Furthermore, the company delivers directly to these countries from Turkey by land-border crossings.

As a reminder that the company was established at the onset of the pandemic, Pace Logistics Managing Director Adil Emre Özgey confirmed that "Our launch of operations coincided with the onset of a pandemic that affected the whole world. Regardless, thanks to our fast decision-making structure, and strong group companies and business partners, we achieved a growth rate far above our target in a shorter time than we projected."

Aiming to Become the go-to service provider for the France, Spain and Portugal line

Highlighting their intention to focus on transportation between Turkey and France, Spain, and Portugal to provide high-quality services for optimized costs, Özgey noted, "We focused on the countries where we can use the power of our business partners most effectively and where we are the most experienced. Thus, we aim to be one of the indispensable logistics service providers operating on this line."

Özgey affirmed that the advantage of using their own vehicles and equipment in transportation provides great flexibility and strength, enabling them to offer tailored solutions to their customers.

Company and warehouse investment in Bulgaria

Özgey added that they invested in a warehouse in Bulgaria this year, emphasizing their aim to restructure in Bulgaria right after Turkey. Özgey explained that they serviced other

pace

European countries using their self-owned vehicles and equipment located in Bulgaria.

Next is the 45-inch container investment

Affirming that the vehicle and equipment investments they have made within the last two years will continue to increase, Özgey noted, "We have invested in a significant number of semi-trucks and trailers in a short time. We were previously transporting all over Europe, and a significant part of it was by land. But now our focus is clear and our transports will primarily be intermodal. In this context, we are preparing to invest in 45-feet containers."

Özgey underlined that they will invest in a total of a thousand 45-feet containers within a year, growing from an initial 300, and announced that they will continue to invest in technology and human resources in addition to vehicles and equipment. ■

JEBEL ALI PORT & FREE ZONE: ENABLING UAE-TURKEY TRADE

The past two years have been fruitful for UAE-Turkey relations. The two countries have worked towards strengthening bilateral ties, with the peak being reached in February when President Tayyip Erdogan visited the country. During his visit, he signed 13 agreements that covered trade, industry, health and medical science, logistics and climate action.

This visit came on the back of a 2021 visit by HH Sheikh Mohammed bin Zayed Al Nahyan, President of the UAE, during which the two countries agreed on investment accords amounting to billions of dollars. Given the flurry of activity, there is no better time than now for businesses in both countries to exploit the opportunities these ties will bring.

The good news is that much of the groundwork to facilitate UAE-



Turkey business is already in place. Over the past two decades, DP World been the key driver of UAE-Turkey trade. To put it in perspective, our Dubai based Jebel Ali Port accounted for USD 8.348 billion of the USD total 8.905 billion that made up UAE-Turkey trade in 2020. And a major reason as to why we have managed to achieve this is because of our constant investments in bridging the trade gap between the two countries. On the Turkish side, we have invested heavily in Yarimca Port, making it one of the most technologically advanced container facilities in the country, and one of the few capable of berthing the world's largest container ships. On the UAE side, we have Jebel Ali Port - the 11th largest container terminal by volume globally - and Jebel Ali Free Zone (Jafza), the Middle East's preferred destination for businesses looking to setup shop in the region.



Jafza is currently home to 167 Turkish businesses employing 1,600 people covering a wide range of sectors, including construction materials, foodstuffs, vegetables, electrical machinery, and furnishings, benefitting from our trade network that reaches out to over three billion people in East Africa, the GCC and wider MENA region, the Indian subcontinent, the CIS countries, and China.

We have also managed to build a one-stop-shop service that allows customers to leverage our physical infrastructure through our range of logistics offerings that includes trade financing, contract logistics, warehousing, RoRo, and cool and cold chain facilities for a seamless experience.

With both countries currently in talks to sign a Comprehensive Economic Partnership Agreement (CEPA) soon, there has never been a better time for UAE-Turkey trade to bloom. With the essential infrastructure and support services in place, the businesses that move the quickest to capitalise on these new opportunities will be the ones to reap the real benefits.

For more information, please contact bridge@dpworld.com ■



AWARD WINNING R2L SOLUTION TO ADRESS UPCOMING THREATS

The road logistic sector has several upcoming challenges ahead:
1) Driver shortage due to retirement wave of baby boomers in the 2020ies
2) Technology transition from fossil fuel to battery electric and hydrogen
3) Co2 Certificate trade applied to logistic sector by 2025

First signs of missing drivers for the road logistic sector has been seen after Brexit in the UK and just recently in whole Europe due to the war in Ukraine, to where several thousand drivers returned from EU to fight for their countries Freedom.

The upcoming wave of the babyboomer generation out of the 1960ies, who will all get retired in the 2020ies will enforce this huge problem for the road hauliers, as there is almost no replacement in sight.

The end of the fossil fuel engine is already heavily discussed, despite real alternatives are not yet in place, as battery trucks will not have the necessary range to cover the long distances throughout Europe and even though hydrogen technology will be available by the end of this decade for long haulage trucks, there will be by far not enough supply of green hydrogen.

But the Co2 certificate trade regime



will be applicable for logistics by 2025 in the EU, so there is a gap of expectation and reality regarding to which direction road logistics shall develop.

The European trailerfleet consist of more than 3 million trailers, out of which only a few percents are cranable and therefore ready for intermodal rail transport across the continent. The market share of craneable trailers is decreasing constantly in the recent years, as such trailer has a weight and cost disadvatage.

The global Co2 challange to reduce Co2 footprint by at least 50% till 2030 calls for a magic stick to get all requirements fullfilled.

The Salzburg and Istanbul based logitsic provider VEGA, specialized in outbound logistic for commercial

vehicle producers focusses therefore on significant Co2 savings and rail logistic in their solution oriented way of handling the complex flows.
In 2022 the company was awarded with the first German Transport transition Prize for its patented roadrailLink (r2L) transport technic.
Over the last couple of years VEGA developped several different r2L connectors to load all kind of non cranable rubber wheels vehicles on standard internmodal rail waggons.
Together with VTG the biggest waggon renting company in Europe VEGA is rolling out its innovative solution all over Europe with new intermodal rail connection, just like from Kaunas/LT to Duisburg/GER or from Suzzara/IT to Barcelona/ES and many many more.

There is an ambitous investment plan behind, which shall grow the fleet year by year by at least 1.000 r2L connectors to adress the above mentioned threats of the road logistics with a smart and ready to go solution.
Following the EU GREEN DEAL of reducing the Co2 footprint in logistics to Zero as well by 2040, VEGA and VTG have the right answer, as each r2L connector has the potential to save 200 to Co2 per year.
The future is rail, VEGA and VTG gets the GREEN DEAL already today on track! ■







r2L product presentation in Osnabrück, 31.08.2022





Onur Güvenler
General Manager

MARK MULTIMODAL PUTS "PLAN B" INTO ACTION, CONTINUES TRANSPORTATION TO RUSSIA AND UKRAINE

Mark Multimodal, which carries out a significant portion of its shipments between Turkey, Ukraine, and Russia, has put plan B into action due to the conflicts between the two countries and the Port of Odessa discontinuing operations. The Company General Manager Onur Güvenler stated that they managed the process successfully and boosted their handling performance on a year-on-year basis.

Offering integrated logistics solutions between Turkey and Russia, Ukraine, and the Baltic and Commonwealth of Independent States (CIS) countries, Mark Multimodal launched "Plan B" after the Port of Odessa, the main point of access for a majority of its operations, closed down due to the war between Russia and Ukraine.

Güvenler affirmed that before Russia invaded Ukraine, a substantial portion of their international shipments to these two countries passed through the Port of Odessa. Reminding that foreign trade and international transportation came to a standstill as a result of the conflict between Russia and Ukraine, Güvenler stated that, in the meantime, they began carrying out multimodal transportation between Turkey and Greece using RoRo ships between the Ports of Pendik and Patras.

"We have not ceased operations, even during the war, and we have not inconvenienced our customers."

Emphasizing that they manage all their logistics operations with a Plan B, Güvenler stated that their Plan B for the Russian and Ukrainian lines was formulated before the war started. Güvenler stated, "Thanks to our offices and colleagues in these countries, we could accurately assess the situation. We had already predicted how the tension would unfold. Although our operations were interrupted during the first couple of months of the war, we recovered quickly afterward. We switched to road transportation, and our offices in the countries resumed their activities. Thanks to our self-owned vehicle and equipment fleet, our expert staff, and our strong logistics infrastructure in these countries, we were able to implement our backup plans even faster."

Issuing a reminder that the Port of Odessa remains closed due to the ongoing conflict and that presently only grain-laden ships are allowed to leave, Güvenler affirmed, "Whether there is a war or an epidemic, logistics operations do not stop. If the logistics operations stop, life would soon follow suit. That is why we reach Russia and Ukraine through alternative routes and by land despite the war-caused challenges in the area. We did not inconvenience our customers. We maintain our import-export operations."



"We gain a competitive advantage thanks to our equipment pool."

Güvenler stated that their operations continue thanks to their advantage of having the largest 45-foot container fleet in Turkey together with the Group companies. He explained that, in addition to the 45-foot containers, they provide services to the standard/mega curtain-side trailer, swap body, chemical - petrochemical, textile, food, FMCG, electronics, and automotive industries, and that they transport all liquid cargo, including flammable and combustible ones, in ISO tanks.

Full-truck-load (FTL) and less-than-truck-load (LTL) services to Russia and Ukraine continue

Noting that they make FTL shipments to Russia and Ukraine seven days a week, Güvenler said, "This service enables us to transport import-export cargoes in a single vehicle, without transfers along the route. We quickly and safely deliver our cargo to the buyer at the most affordable rates."

Güvenler also noted that they consolidate LTL shipments in their warehouses in Istanbul and transport them with self-owned vehicles.

Highlighting their capacity to carry out door-to-door deliveries to Russia and Ukraine thanks to the regular LTL departures on Wednesdays and Fridays, Güvenler confirmed, "Our LTL service offers solutions that reduce unit costs and focus on fast delivery."

Transit shipments from Europe to the Commonwealth of Independent States

Highlighting their service to carry out transportation to third countries along the route between European countries and the CIS, Güvenler emphasized that they carry out transportation to Turkmenistan, Uzbekistan, and Azerbaijan using different transportation modes on these lines. ■



"TRANSPORTATION SECTOR CAN PROVIDE OUR COUNTRY WITH 1 BILLION US DOLLARS MORE"

▶ Remarking that waiting and the queues at Erenköy, Muratbey and Border Gates adversely affect the transportation sector and the problems experienced have to be solved, Best Uluslararası Nakliyat Chairman Ahmet Yayman told that if the problems are solved, more trips can be assigned to the vehicles and the increase in the number of trips will generate more foreign currency for Turkey.

Providing information on Best Uluslararası Nakliyat established in 1992, Yayman told that: "We perform activities in the field of road transportation across Europe with our offices in Turkey and the UK: We exit through Bulgaria and go to Serbia, Croatia, Slovenia, Austria, Germany, Belgium and France and then to the UK by ferry. We can deliver goods to the UK within 5 to 6 days if there is no queue at the gates. The biggest problem for us is waiting or queues at these gates. If we can solve this, more trips can be assigned to our vehicles. When the number of trips is increased, we will ensure that our country earns more foreign currency. Moreover, we are an exporter company and organize foreign currency generating services for our country. Therefore, our drivers perform a very honorable job for our country. This job is a difficult one where they have to be away from their spouses and children but generates foreign currency income for their countries."

Transporters should be excluded from customs security practices

Telling that the queues and customs practices at the gates cause the transporters loss of time, Yayman has continued as follows: "I would like to underline that we want our country to earn more foreign currency. We are discussing this with the Deputy Ministry of Transport and Infrastructure and CEOs. Some practices of the customs organization slow us down. One of these practices is warehouse statement practice. When the trucks coming from abroad go to a private warehouse, we submit a summary statement to the customs office. We are carrying out partial transportations. Let's say the truck has the goods of 10 customers and the truck cannot proceed to unloading without submitting a warehouse statement to the customs office. This statement is set under the law but an exemption was introduced as it causes queues and loss of time. This practice has been re-launched either because of the evaluations by the customs offices or due to security issues.

This process takes a long time and exporters experience problems

regarding the preparation of this statement or invoices. This in turn causes loss of time for the sector. We loss 2 days if the incoming truck has to stop at one customs point and 3 to 4 days if the truck has to stop both at Muratbey and Erenköy. Before, we would just load the truck by submitting a summary statement. This wrong practice both decreases the number of trips and prevents the assignment of my drivers to any trip and in turn, I cannot provide any vehicle to the exporter and therefore, he calls for a Bulgarian or Romanian truck. This causes loss of foreign currency for Turkey. According to the calculations made, Turkey would lose 1 billion US dollars due to the abovementioned reasons.
We want the transporters to be exempted from the security practices of the customs offices, like before. We want to take our goods to a warehouse or the temporary storage areas in Erenköy or Muratbey and unload our goods to the warehouses when we submit a summary statement and give the vehicles the exporters want and transport the export goods."

The bonded warehouses in İstanbul can satisfy the entire demand

Yayman has further made the following remarks: "Our trucks loaded with export goods cannot go inside Erenköy and Muratbey customs offices due to the heavy workload there. This causes queues on the streets and we lose 1 to 2 days there.
The number of Bonded Warehouses in İstanbul is around 300 and if the trucks with outgoing exports can perform their exit transactions at these warehouses, all these waitings, queues and losses can be prevented. Turkey can earn 1 million US dollars more. We hear the rumors that Erenköy customs office will be relocated and new customs facilities will be established. The government does not have to spend its already low resources on such facilities. İstanbul has around 300 Warehouses. These warehouses can satisfy this entire demand. Moreover, effective customs clearance can be performed with new customs fields to be established around Kapıkule. This will further increase the control ratio. In fact, customs offices within the city are not needed. In today's technology era, customs transactions can be performed on online system when the trucks enter and exit through the border gate. Any kind of fraud can be performed during the period from the exit from the customs office within the city to the truck's exiting through the border gate. We are reading news about such frauds on the media."
Noting that the foreign trade of the UK is the 5-fold of the Turkish exports, Yayman told that: "Most of these trade activities are carried out through the Port of Dover. Thousands of trucks enter through the Port of Dover every day. Customs clearance is performed on the online system by the exporters and customs agencies authorized by them. The trucks deliver their goods to London, Birmingham and Manchester as free/cleared within 1 to 2 hours after the customs import transaction. The same transactions are performed for the trucks loading goods destined from the UK to Turkey. The vehicles loaded in different cities can have their truck customs operations at Dover border customs office fast. Recently, the companies with an AEO document perform their customs transactions on their own facilities. There is nearly no intracity customs office in UK and there are some only in very small towns. The system in Germany, France and other European countries is also the same. We can also launch these systems in Turkey in near future."
Underlining that the investments to be made to buildings and warehouses like Erenköy customs office would be a waste of resources, "Instead, we can invest in our border gates, increase their capacities or open new border gates. This will ensure that valuable lands in İstanbul and Gebze can be used for other investments."

We are planning an electric truck investment

Adding that Best Uluslararası Nakliyat plans to invest in green logistics field, Ahmet Yayman commented as follows: "We are expecting new technologies. Electric trucks are not available and provide services on certain regions and within short distances. The biggest problem regarding electric vehicles is charging and distance. If improvements are achieved in this regard, we plan to use zero emission electric trucks. A structuring and investment process in this respect is ongoing in Turkey. We plan to make green logistics investments in the field of zero emission.
The logistics sector is the fastest sector in discovering and implementing the innovations in Europe and other regions of the world. Moreover, as we have more working opportunities in Europe, we work 3 days in Turkey and 15 days in Europe. Therefore, we comply with the rules, laws and standards applicable there.
For instance, the green logistics and emissions impose restrictions on us with regard to shift to electric vehicles. Europe says that if you want to pass through my country and use my highways, then I want you to comply with these restrictions. You have to comply with these restrictions if you want to do your job and protect the nature, as well." ■



LOGITRANS 2022: A GIANT MEETING POINT IN LOGISTICS TO OPEN ITS DOORS

In procurement and logistics, Turkey stands out with its infrastructure and logistics solution options as well as its geography.

logitrans 2021, which was held with physical participation for the first time after the pandemic, took place with a very high number of participants, while the synergy created by this fair created a great demand explosion for 2022 Logitrans.
Thanks to the satisfaction of the participants at the fair, a significant part of the logitrans exhibition areas were contracted by the exhibitors during the fair. The fair will welcome visitors and exhibitors with all areas full.

logitrans TURKEY
international transport logistics exhibition

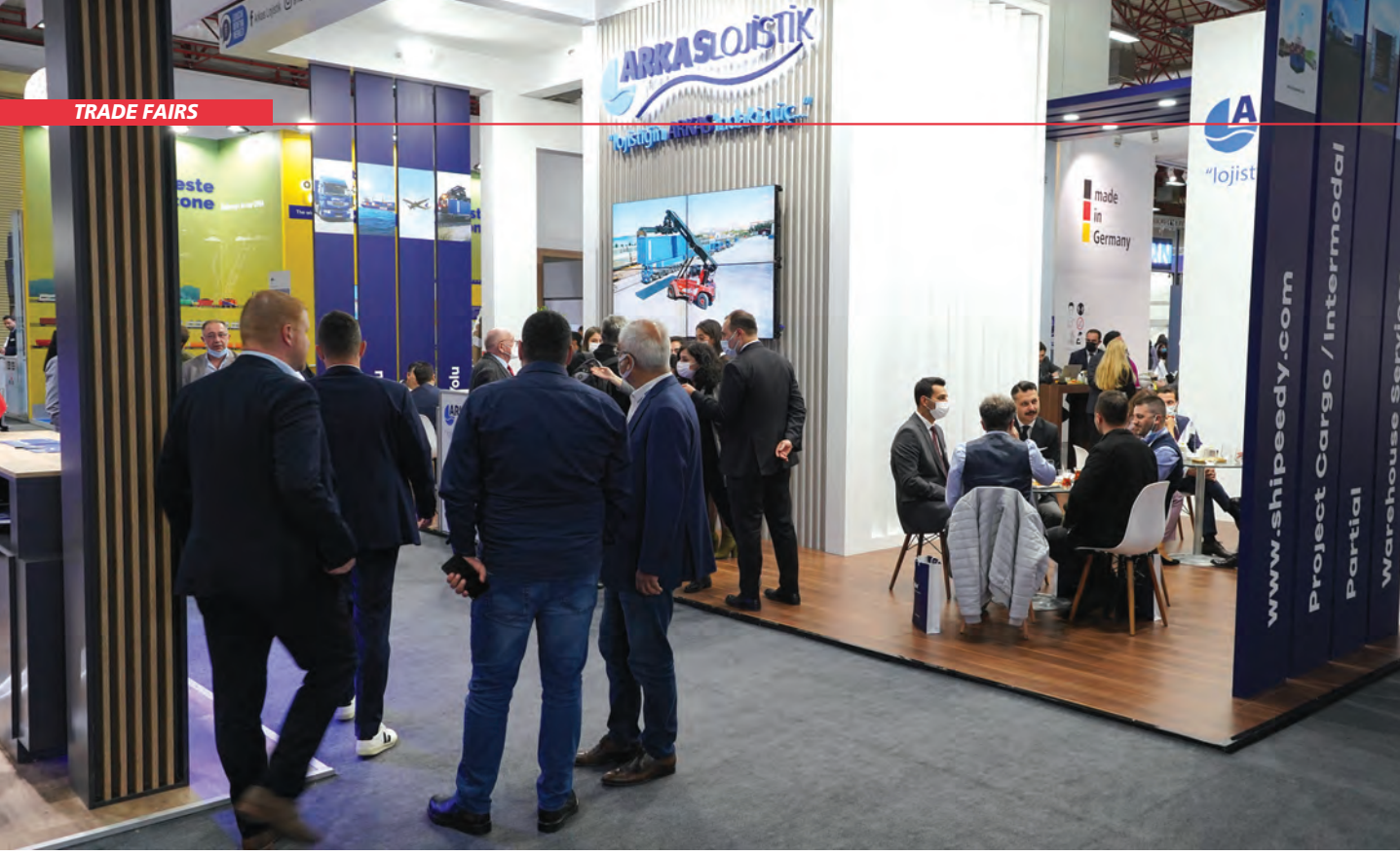
logitrans 2022, the biggest meeting point for the giants of the logistics sector, will host well known institutions and companies from both Turkey and Europe and nearby geographies.
November 16-18, 2022, the 'International logitrans Transport Logistics Exhibition, which is considered the best platform for establishing business relations in the continental supply chain between Europe and Asia, opens its doors this time at the Avrasya Yenikapı Show and Art Center.
21 countries are exhibiting in the logitrans this year. These countries were announced as Austria, Belgium, Bulgaria, China, Czechia, Egypt, Estonia, France, Germany, Hungary, Italy, Kazakhstan, Latvia, Russia, Serbia, Spain, the Netherlands,

Turkey, Turkmenistan, the United Arab Emirates, the United Kingdom. 4 countries, Germany, Czechia, Russia and Latvia will be represented at the exhibition as pavillion.
159 participating institutions and companies, each of which has made a name and brand in its own field, will take part in the exhibition. The exhibitors of logitrans include giant names such as Sarp Intermodal, Arkas Logistics, Galata Taşımacılık, Evolog, Omsan, Karınca, Ulusoy, Tırsan.
On the other hand Turkish Cargo will again be one of logitrans's showcase exhibitors. Giant names are among the organizations participating in the exhibition from outside of Turkey.
DFDS, DSV, Hessers, Kazakhstan Railways, Qatar Airways, Lufthansa Cargo, Port of Trieste, Port of Marseille will receive important names among the foreign participants of the fair. In the German Pavilion, world brand such as Dachser will be represented in the logitrans.
In addition to the permanent exhibitors of logitrans, a significant number of organization and companies participated in this year's fair for the first time.
Stating that the International Logitrans Transport Logistics Fair attracted the attention of the whole world to see Turkey's logistics infrastructure and service advantages, Vice General Manager of Eko Fair, Ekin Seren Ünsaç said, "Logitrans attracts great attention this year as a stronger focus than ever before."
Ünsaç said "Europe and the Western Bloc, which constitute an important size in the consumption volume in the world, are now looking at the world supply chain, which has been disrupted during the pandemic process, with a much more strategic eye. Turkey's location has become much more important with its access opportunities to all geographies, logistics infrastructure and competent companies in their own sectors. Turkey is not only a regional solution center, it is on its way to becoming one of the logistics hubs of the world with its facilities, warehouses, highways, sea and air ports."



Ekin Seren Ünsaç
Vice General Manager of Eko Fair





A rich marketplace where products and services compete

"The Western world and nearby geographies are rediscovering Turkey," stating Ekin Seren Ünsac summarised the new trends: "Turkey has begun to play a central role in logistics as well as the location of the producer and exporter country. Turkey is a country that can both produce and export what it produces with its high-tech focused logistics superstructure and strong logistics infrastructure, which can reach every point of the world. Europe's efforts to provide supplies from nearby geographies are increasingly coming to a strategic position. Reducing the carbon footprint and green deal issues have also become a fundamental agenda item both in Europe and in all countries that have close relations with European economies. European companies want to achieve several goals at once by shortening their supply routes. With this interest and search, logitrans Fair will return to a rich Marketplace where all international logistics options will be discussed, alternatives will be reviewed, and companies' service options compete with each other."

Sustainability and the search for a solution to the climate crisis are the focus

Ekin Seren Ünsaç, stated that logitrans focused on global warming and sustainability issues this year and said, "The importance of the fight against climate change, which has gained concrete with the Paris Climate agreement and the EU Green Deal is obvious. Global warming, which makes itself felt in every dimension, makes it necessary to take strict measures in many areas. The international logitrans Transport Logistics Exhibition will also be a showcase for examples of









the fight against global warming on the basis of companies".
"Our exhibition will be held on November 16-18, 2022 on the 15th times are opening their doors," she said and continued as follows: "Global warming is coming to the agenda all over the world. logitrans will open a wider place for sustainability during the exhibition. The logistics sector, together with all its stakeholders, is one of the sectors with the most responsibility in the fight against environmental pollution and global warming. For this reason, the logistics sector and its stakeholders will address the issue of global warming in every aspect within the scope of logitrans exhibition in line with the goal of a cleaner world. logitrans will host sessions focusing on climate issues, as well as many topics related to logistics. These issues will be discussed in all dimensions in order to make the logistics operations to be sustainable regardless of the climate and weather conditions".

Atlas Logistics Awards 2022

On the other hand, Atlas Logistics Awards 2022 excitement will leave its mark on logitrans. The most prestigious award organization of the industry is being held for the 13th time this year. Atlas, the award of the competition, which has been continuing with an increasing reputation every year since its beginning, attracted great attention in the logistics world in 2022 as well. Atlas, the most prestigious award of the transportation and logistics industry on a national scale, which has continued uninterruptedly for 13 years will be held in logitrans.



AIR CARGO PRIORITIES: SUSTAINABILITY, MODERNIZATION, SAFETY & PEOPLE

The priorities, outlined at the 15th World Cargo Symposium (WCS), which held in London. IATA's Global Head of Cargo, Brendan Sullivan, stressing priorities of air cargo "Going forward, achieving our net zero commitment, modernizing processes, finding better solutions to safely carry lithium batteries, and making air cargo attractive to new talent are critical" said.

"Air cargo had a stellar year in 2021 achieving $204 billion in revenues. At present, however, social and economic challenges are mounting.
The war in Ukraine has disrupted supply chains, jet fuel prices are high and economic volatility has slowed GDP growth. Despite this, there are positive developments. E-commerce continues to grow, Covid restrictions are easing, and high-value specialized cargo products are proving resistant to economic ups-and-downs"
said Brendan Sullivan.



IATA's Global Head of Cargo Brendan Sullivan

Here is remarks of Brendan Sullivan at World Cargo Symposium 2022

Air cargo showed its value during the Covid crisis. It was clear for all that it was a social and commercial lifeline-the backbone of global supply chains, the enabler of e-commerce and best way to distribute high value and critical shipments of medical equipment and vaccines the world knows so well.
As we in the industry have also come to know, air cargo revenue was a financial lifeline. In 2021, air cargo revenues were $204 billion. That's over 40% of total industry revenues-well up from the pre-crisis levels of 12-15%.

So where we are today?

That exceptional performance could come under some pressure. We don't need to tell you that challenges are mounting.



• The war in Ukraine has grounded some key players and disrupted supply chains
• Jet fuel prices are high
• Economic volatility has brought inflation, a weaker trading environment, shifting currency rates and slower GDP growth

However, some positive developments to note include

• E-commerce continues to grow
• Covid restrictions are easing, even if slower than we would like
• The strong rebound of passenger traffic brings more belly capacity for cargo
• And high-value specialized cargo, such are pharma products, are proving resistant to economic ups-and-downs

Our chief economist, Marie Owens Thomsen, will provide a more detailed outlook, but the two points that I would like to make are:

• The air cargo industry is in a better place than it was in 2019-financially stronger, more efficient with advances in digitalization, and better appreciated for the heroic efforts that we all made to keep cargo going during a very difficult crisis.
• And the challenges and opportunities that we face are those that we are used to dealing with.

Priorities

At this World Cargo Symposium, the question is what issues do we need to tackle together? And I would answer that with four priorities.

• Achieving our net zero by 2050 commitment
• Continuing to modernize processes,
• Finding better solutions to safely carry lithium batteries, and
• Making air cargo attractive to new talent

Achieving Net Zero by 2050

Last year the industry took the monumental decision to achieve net zero emissions by 2050. Now we must turn our commitment into actions to reduce carbon emissions.

We have a balanced plan to achieve net zero. A possible scenario of emissions reduction by 2050 could look like this:

• 65% of our carbon emission reductions could come through the

use of Sustainable Aviation Fuel (SAF)
• 13% from new technologies, including hydrogen and electric propulsion
• And 3% should come from more efficient operations and infrastructure
• 19% through offsets and eventually through carbon capture
Air cargo is taking concrete steps… and I will give you four examples….
• BP and Neste have committed to supplying DHL Express with more than 800 million liters of SAF until 2026
• Lufthansa Cargo is buying 1.8 million metric tons of SAF from Shell
• AFKLM Cargo will use SAF to bring Kenyan fresh agricultural and horticultural products into the global markets through Amsterdam
• And FedEx and DHL Express will power 30% of their operations with SAF by 2030
As it can be seen from these examples, SAF is the key. Airlines have used every drop of SAF that was available in 2021. And it will be the same this year. The challenge is SAF production capacity. And to increase it, we need government support. With the right incentives, we could see 30 billion liters of SAF by 2030. And that would be a clear tipping point towards our net zero ambition of ample SAF quantities at affordable prices.
We also need to be able to demonstrate our progress towards net zero. Every industry is being asked to report on their carbon footprint. And that includes our customers.
So it is critical that we are able to measure our carbon output and report it accurately by shipment. Later today we will announce a major new trial of a standardized and specialized methodology for carbon calculation of cargo shipments, with a view to launching a CO2 calculator for air cargo in 2023
With the right tools and the right policies, net zero is achievable for our industry. As an industry, we have committed. And we are hoping that governments-meeting at ICAO this week-will join us by agreeing to the same long-term goal and provide the supportive policy environment to get there.

Modernization and efficiency
Our customers also expect us to be efficient. They live in a world where they can track their personal shipments in real time. And they are frustrated that the progress in modernizing air cargo is not moving faster. However, good things are happening.
First, the ONE Record standard is being integrated into CASS 2.0 and making it possible for everyone across the industry's value chain to see the same information on shipments. Already 156 companies and 4 customs authorities are using it. The challenge now is for our IT solution providers to bring the benefits of digital cargo to all supply chain stakeholders.
Secondly, the updated IATA Interactive Cargo Guidance now provides a common framework so that tracking devices can monitor the quality and accuracy of conditions of time and temperature sensitive goods.
You will be hearing about these and other critical initiatives associated with digitalization over the next days. My message is that we should not forget

IATA TO TRIAL CO2 EMISSION CALCULATOR FOR AIR CARGO WITH ETIHAD



► To effectively manage and report on sustainability progress, the entire value chain - shippers, forwarders, investors and regulators - along with consumers are asking for reliable and trustworthy data calculations. This trial will provide a valuable proof of concept for the cargo component of the IATA CO2 Connect carbon calculator.
IATA has been successfully providing IATA CO2 Connect for passenger flights since June this year, with actual fuel burn data of 57 aircraft types



the lessons that we learned during Covid.

The challenges of the Covid crisis gave us confidence that we can change and adapt fast. We need to use that confidence to get us even closer to the expectations for modernization that our customers have. And we need to be true to air cargo's USP and move even faster!

The modernization agenda also includes governments. Two international agreements brokered through the World Customs Organization are major steps forward in supporting a more efficient regulatory framework for international shipments.

The first is the Revised Kyoto Convention which brings standardization, technology, predictability and speed to trade facilitation. It entered into force in 2006. And the challenge is double, to expand the number of contracting states from the current 131 and to make sure that the contracting states are indeed implementing that Convention. Universal adoption

The International Air Transport Association (IATA) will be trialing a CO2 emissions calculation tool specifically developed for cargo flights together with Etihad Airways.

representing ~98% of the active global passenger fleet . By using airline specific data on fuel burn and load factors, it is the most accurate in the market.

Calculating the carbon impact of cargo shipments has more challenging parameters, not least of which is the unpredictability of routing at time of booking an air cargo shipment that can often include non-air segments. In addition, cargo can be carried on both dedicated freighter aircraft and in the bellies of passenger aircraft. To achieve equal levels of accuracy to the passenger calculator, it is essential to collect actual data on fuel burn, load factors and other key variables in trials. IATA will be working with Etihad Cargo to track the necessary data for cargo shipments during a three-month trial. Etihad will be sharing data from flights and advising on various use cases to achieve the highest levels of accuracy, consistency and transparency. By mid-2023 IATA aims to launch CO2 Connect for Cargo providing the industry with precise and consistent methodologies for both passenger and cargo operations.

"With a strong commitment to innovation, Etihad Cargo actively seeks out and facilitates the development, trials and launch of promising solutions for its customers and partners. The airline's development

and implementation will deliver the greatest benefits.
A year earlier in 2005, the WCO SAFE Framework of standards to facilitate and secure trade were developed. That 172 states have indicated their intention to implement them shows their importance. There have been several amendments over the years -all of which are also important. And we are starting to see the results that we, and our customers, are counting on. But instead of further revisions, we need more implementation.
Truth be told, we are still seeing far too many diverging requirements by governments in areas that should be harmonized by these two tools. This needs to change quickly so we can continue to support global trade-and its vital contributions to economies and the UN Sustainable Development Goals-with modern and efficient air cargo.

Safety: The Dangerous Goods Regulations are the starting point
We also need to keep moving fast on safety issues. The war in Ukraine brought to the fore the importance of safe handling of live animals as many refugees travelled with their pets. The IATA Live Animal Regulations proved fit for purpose as did the CEIV Live Animals certification. And we quickly supplemented this with special guidance to support refugees traveling with their pets. This was a success story of which we can be proud.
We can also be proud of the progress that we are making to further improve on the safe handling of lithium batteries. For air cargo, this is absolutely a top priority. And, over the last year, we were reminded of this by several high-profile incidents. We are making some good progress to ensure that the lithium batteries that are carried as cargo are compliant with regulation.

- The Dangerous Goods Regulations are the starting point. And with DG Autocheck we are making verification that the shipment complies even easier and more accurate.
- From 1 July 2022, changes made to standards for Consignment Security Declarations will align security standards and safety approaches for regulated agents to create a stronger overall framework for managing shipments.
- And we have launched CEIV Lithium Batteries to embed best practices across the value chain. Later today we will honor the pioneer airline and ground handler-LATAM and SATS- with the first CEIV Lithium Battery certificates.

And to better handle any incidents that might happen in flight, we are

with IATA demonstrates the ability and willingness to co create solutions to support Etihad Cargo's journey to achieving net zero carbon emissions by 2050 and demonstrates the carrier's agility in adopting state-of-the-art technology and digital solutions.
IATA's CO2 Connect carbon calculator will be an effective tool in making the transportation of cargo more sustainable and will benefit not only Etihad Cargo's customers but also the wider air cargo sector in the future" said Martin Drew, Senior Vice President Global Sales & Cargo at Etihad Aviation Group.
"Aviation will achieve net zero carbon emissions by 2050. And our customers-travelers and shippers-need accurate information on the emissions related to their activities to manage their own commitments and reporting obligations. For all these purposes, accurate data is critical. IATA CO2 Connect already provides this for passenger operations. This trial with Etihad will help us in bringing an industry-leading carbon calculator for cargo in the coming months," said Frederic Leger, IATA's Senior Vice President for Commercial Products & Services.■

About CO2 Connect for Passengers

IATA CO2 Connect is the most accurate tool available for the calculation of aviation emissions in passenger operations. It makes use of airline specific and actual fuel burn information and load factors. This sets it apart from theoretical data models.
IATA CO2 Connect is available to companies within and outside the travel value chain, such as travel management companies (TMCs), travel agencies, airlines or multinational corporations. They can access the relevant CO2 emissions data and integrate it in a customized manner into their existing flight booking tools. Travel managers or travelers can easily see the CO2 emissions per routing. The tool also permits the consolidation of data for reporting purposes.
IATA CO2 Connect utilizes the newly developed CO2 Calculation Methodology, adopted by IATA's Passenger Service Conference in March this year. This was conceived by leading partners from 20 airlines and major aircraft manufacturers, in consultation with international standard-setting bodies and logistics services providers.



working with EASA and the US FAA to develop a test standard that can be used to demonstrate the capabilities of fire resistant containers and containment covers.
But even the best regulatory structure means nothing if the rules are not followed. Compliance is an issue with the transport of lithium batteries, particularly with the proliferation of new-and inexperienced-entrants in e-commerce activities.
The was highlighted in the results of the 2022 Global Dangerous Goods Confidence Outlook survey run with Labelmaster and the Hazardous Cargo Bulletin. I would draw your attention to three key takeaways:
• We need to continue to press (and help) regulators to crack down on rogue shippers.
• We must all look at our own organizations to note our strengths and improve on our weaknesses, and
• We can be encouraged that training is an accessible and affordable solution to many of the issues identified.

People are at the core of any improvement

The last topic that I will address is people. People are at the core of any improvement in what air cargo can deliver. And these last years of Covid have been brutal. For those who worked through the crisis, it was challenging. That is particularly true for our crew who had to deal with extraordinary measures when operating across borders. And, sadly, we also saw thousands of jobs leave the industry, especially cargo handlers. We are now competing for talent in a very tight jobs market. And when we do find the right and willing talent, training and longer-than-usual security clearance processes delay their entry into the workforce. You know far better than I that we are facing a severe skills shortage. A short-term solution would be accelerated clearance processes by governments. Longer-term, we need to do a better job of attracting, onboarding, and retaining talent. We are working with two of our important industry partners, the International Federation of Freight Forwarders (or FIATA) and TIACA on how we will, together as an industry tackle this challenge.
And we need to keep supporting two critical initiatives which you also hear more about at this symposium:
• The Future Air Cargo Executive (FACE) program which provides a forum for executives under 35 to network and exchange ideas to lead our industry's next chapter
• And the IATA 25 by 2025 which aims to increase female participation across the industry, particularly in leadership roles. We will not have the people we need to drive the industry forward if we do not fully take advantage of half the world's population that is female.
If you are not already among the 125 signatories to the 25by2025 pledge, I encourage you do so today.

There is real and hard work ahead for all of us.

I have spoken of many challenges. There is real and hard work ahead for all of us. And global economic and political developments could well make the going even tougher. But it will be nothing compared to what we have been through with Covid-19. And there is much to motivate us.
Everyday air cargo supports the global supply chains that secure the jobs of hundreds of millions of workers around the planet. Among the important cargo that we deliver are medicines and vaccines. During the pandemic, in times of crisis and natural disaster, the humanitarian aid we carry can be lifesaving.
Air cargo also contributes to 7 of the 17 UNSDGs-critical enablers of a better future for all.
There is no greater motivation than knowing concretely that with every shipment that we deliver we help people to live better lives and secure better futures. ■



RESILIENCE OF AIR CARGO DESPITE HEADWIND AND MULTIPLE CHALLENGES

Passenger demand on airlines has shown a huge increase in both domestic and international flights, and the number of passengers reached a record high, while the war between Russia and Ukraine negatively affects the air cargo markets in many ways. Because the largest air cargo companies are greatly affected by this war climate.

China's strong return to export markets has been an important factor supporting air cargo.



IATA's Director General Willie Walsh

All factors in the industry signal the resilience of the air cargo under mounting pressures from the recent economic volatility and geopolitical conflicts.

A rebound in air cargo demand still faces multiple challenges. Although China has eased some Omicron-related lockdowns, other headwinds persist, including infrastructure and labor supply constraints. In addition, the ongoing war in Ukraine still affects cargo capacity, with a number of important air cargo carriers directly impacted.

Globally, the recovery in the Asia market brought positive growth in air cargo demand in some of the largest cargo markets. Inflation levels in G7 countries dropped for the first time since November 2020, signaling stronger confidence in world trade and the global air cargo market.



IATA figures for August

The International Air Transport Association (IATA) released the latest data as of August 2022 for global air cargo markets which demonstrated the industry's resilience amid economic uncertainties.

Global demand, measured in cargo tonne-kilometers (CTKs), fell 8.3% compared to August 2021 (-9.3% for international operations). This was a slight improvement on the year-on-year decline of 9.7% seen in July.

- Capacity was 6.3% above August 2021 (+6.1% for international operations). This is a significant expansion over the 3.6% year-on-year increase in July.
- Several factors should be noted in the operating environment:

• Global goods trade expanded slightly in August and the additional easing of Covid-19 restrictions in China will positively impact cargo markets. While maritime will be the main beneficiary, air cargo will also receive a boost from these developments.

• Inflation levels in G7 countries slowed for the first time since November 2020.

• Oil prices stabilized in August and the jet fuel crack spread fell from a peak in June.

• New export orders, a leading indicator of cargo demand and world trade, decreased in leading economies in all regions except the US.

Evaluating Air cargo performance, Willie Walsh, IATA's Director General said:



Performance of European Carriers

Europe was again the weakest performing region regarding air cargo volumes, despite a small montly increase compared with July. However, cargo traffic between Europe and North America showed a 13.1% YoY growth, due to both the recovery of the North American market and the logistics support from the US to Ukraine. The significant impact of the Russia-Ukraine war, which started on 24 February 2022, on Within Europe air cargo and the challenge this poses for the region has not diminished.

The Europe-Asia cargo market saw an expanded double-digit gap in international air cargo volumes, down from -13.9% in July to -19.7% in August in YoY terms. Cargo traffic of Middle East Airlines to/from Europe has stabilized from trending sideways, with an improvement of 0.8 ppts compared with July.

"Air cargo continues to demonstrate resilience. Cargo volumes, while tracking below the exceptional performance of 2021, have been relatively stable in the face of economic uncertainties and geopolitical conflicts. Market signals remain mixed. August presented several indicators with upside potential: oil prices stabilized, inflation slowed and there was a slight expansion in goods traded globally. But the decrease in new export orders in all markets except the US tells us that developments in the months ahead will need to be watched carefully."



August regional performance

Asia-Pacific airlines saw their air cargo volumes decrease by 8.3% in August 2022 compared to the same month in 2021. This was an improvement over the 9.0% decline in July. Airlines in the region benefited from slightly increased levels of trade and manufacturing activity due to the easing of Covid-19 restrictions in China. Available capacity in the region increased 13.9% compared to August 2021, a significant increase over the 2.7% growth in July.

North American carriers posted a 3.4% decrease in cargo volumes in August 2022 compared to the same month in 2021. This was an improvement over the 5.7% decline in July. The lifting of restrictions in China improved demand and a further boost is expected in the coming months. Capacity was up 5.7% compared to August 2021.



European carriers saw a 15.1% decrease in cargo volume

European carriers saw a 15.1% decrease in cargo volumes in August 2022 compared to the same month in 2021. This was the worst performance of all regions for the fourth month in a row. This is attributable to the war in Ukraine. Labor shortages and high inflation levels, also affected volumes. Capacity increased 0.4% in August 2022 compared to August 2021.

Middle Eastern carriers experienced an 11.3% year-on-year decrease in cargo volumes in August. Stagnant cargo volumes to/from Europe impacted the region's performance. Capacity was down 0.1% compared to August 2021.

Latin American carriers reported an increase of 9.0% in cargo volumes in August 2022 compared to August 2021. This was the strongest performance of all regions. Airlines in this region have shown optimism by introducing new services and capacity, and in some cases investing in additional aircraft for air cargo in the coming months. Capacity in August was up 24.3% compared to the same month in 2021.

African airlines saw cargo volumes increase by 1.0% in August 2022 compared to August 2021. This was a significant improvement on growth recorded the previous month (-3.5%). Capacity was 1.4% below August 2021 levels.

WIDESPREAD AWARENESS OF THE NEED TO IMPROVE DANGEROUS GOODS (DG) PROCESSES

The International Air Transport Association (IATA) and Labelmaster, and Hazardous Cargo Bulletin, announced the results of their seventh annual 2022 Global Dangerous Goods Confidence Outlook. The survey results underscored the need for greater process consistency, increased automation and more reliable data to facilitate the safe and secure transport of dangerous goods (DG).

"Global supply chain disruptions have put even more pressure on those professionals and companies responsible for shipping goods safely and compliantly. While there are many areas of improvement over the last year, the survey demonstrated widespread awareness of the need to improve DG processes, training, technology and infrastructure," said Robert Finn, Vice President, Labelmaster.

"The air transport industry handles over 1.25 million DG shipments per year. The growth of e-commerce and proliferation of lithium batteries in global supply chains are two indicators that the number of DG shipments will grow. To handle them safely, we must further improve compliance with global standards. Almost any item can be shipped safely, provided we have well-trained professionals following globally agreed standards and supported by the right technology and infrastructure," said Nick Careen, IATA's Senior Vice President Operations, Safety and Security.



Key findings and recommendations

There is a solid foundation for compliance.

Nearly a quarter of those (24%) surveyed said DG compliance is a competitive advantage

Another 37% said their organizations go beyond what is required by regulation, while 39% only adhere to minimum requirements

There is awareness that critical improvements are needed.

Only 25% believe their organization's current infrastructure is equipped to meet future needs

82% believe their organization's DG investment cannot support future regulations or supply chain changes

Confidence in key aspects of DG handling hovered around 50%, pointing to areas for improvement.

64% reported confidence in the ability to handle reverse logistics

56% said they received fast/quality responses from regulatory authorities

55% were confident in the reliability of master data

55% believed that technology was being leveraged sufficiently to support safe shipments

53% said that the DG rules were easy to apply

52% have the requisite budget

48% believed there was sufficient C-suite support

48% noted sufficient regulatory enforcement of DG rules

48% were confident in their organization's DG compliance

Most respondents (67%) indicated that their organization was prepared to handle DGs at most or all of their locations. Top priorities were identified as:

Automating processes (61%)

Harmonizing processes across supply chain (59%)

Accessing complete and accurate data (52%)

Obtaining special permits, letters of interpretation, etc. (48%)

Ensuring training is effective and up to date (45%)

"The survey shows that it is critical for organizations to assess their DG operations and identify processes, infrastructure gaps and areas of opportunities. The good news is that making meaningful improvements does not have to be difficult or require significant investment," said Finn.

"Companies do not have to reinvent the wheel. IATA has digital solutions to improve compliance. DG AutoCheck, for example, automates the complex and time-consuming manual task of checking that each shipper's declaration is compliant and the package(s) are correctly, marked, labelled and packaged, which improves efficiency. This streamlines processes and enhances safety." added Careen.

TOP 20 IMPORTING COUNTRIES (MILLION DOLLARS)

COUNTRY	2021 (AUGUST) VALUE	2021 (AUGUST) SHARE	2022 (AUGUST) VALUE	2022 (AUGUST) SHARE	CHANGE	2021 (JAN-AUG) VALUE	2021 (JAN-AUG) SHARE	2022 (JAN-AUG) VALUE	2022 (JAN-AUG) SHARE	CHANGE
Germany	1.569.667	8,3	1.664.452	7,8	6,0	12.394.744	8,8	13.775.281	8,3	11,1
USA	1.309.703	6,9	1.483.329	7,0	13,3	9.140.357	6,5	11.415.530	6,9	24,9
Iraq	937.212	5,0	1.257.947	5,9	34,2	6.595.134	4,7	8.609.073	5,2	30,5
United Kingdom	1.188.958	6,3	1.103.630	5,2	-7,2	8.410.327	6,0	8.604.027	5,2	2,3
Russia	451.097	2,4	949.063	4,4	110,4	3.499.185	2,5	4.588.476	2,8	31,1
Italy	806.071	4,3	895.138	4,2	11,0	7.075.360	5,1	8.352.182	5,0	18,0
Spain	837.694	4,4	790.115	3,7	-5,7	5.993.164	4,3	6.681.083	4,0	11,5
France	743.636	3,9	764.981	3,6	2,9	5.848.900	4,2	6.170.508	3,7	5,5
Netherlands	614.499	3,3	638.296	3,0	3,9	4.390.991	3,1	5.520.346	3,3	25,7
Israel	558.061	3,0	577.365	2,7	3,5	3.912.574	2,8	4.756.085	2,9	21,6
UAE	309.589	1,6	531.354	2,5	71,6	3.606.891	2,6	3.392.175	2,0	-6,0
Romania	446.992	2,4	482.735	2,3	8,0	3.191.303	2,3	4.611.221	2,8	44,5
Poland	385.803	2,0	411.872	1,9	6,8	2.962.215	2,1	3.637.540	2,2	22,8
Belgium	484.262	2,6	385.979	1,8	-20,3	3.036.941	2,2	3.271.709	2,0	7,7
Bulgaria	317.847	1,7	338.991	1,6	6,7	2.373.911	1,7	3.272.181	2,0	37,8
Egypt	348.702	1,8	310.225	1,5	-11,0	2.708.442	1,9	3.183.539	1,9	17,5
China	320.012	1,7	291.781	1,4	-8,8	2.436.903	1,7	2.091.564	1,3	-14,2
Ukraine	264.554	1,4	273.345	1,3	3,3	1.768.143	1,3	1.569.431	0,9	-11,2
Iran	245.233	1,3	248.279	1,2	1,2	1.752.986	1,3	1.950.375	1,2	11,3
KKTC	122.996	0,7	229.448	1,1	86,5	679.523	0,5	1.230.434	0,7	81,1
Others	6.598.388	35,0	7.708.976	36,1	16,8	48.318.485	34,5	58.925.033	35,6	22,0
TOTAL	**18.860.976**	**100**	**21.337.300**	**100**	**13,1**	**140.096.480**	**100**	**165.607.794**	**100**	**18,2**

TOP 20 EXPORTING COUNTRIES (MILLION DOLLARS)

COUNTRY	2021 (AUGUST) VALUE	2021 (AUGUST) SHARE	2022 (AUGUST) VALUE	2022 (AUGUST) SHARE	CHANGE	2021 (JAN-AUG) VALUE	2021 (JAN-AUG) SHARE	2022 (JAN-AUG) VALUE	2022 (JAN-AUG) SHARE	CHANGE
Russia	2.675.003	11,5	6.297.193	19,4	135,4	17.756.782	10,5	38.413.424	16,1	116,3
China	2.838.000	12,2	4.147.270	12,7	46,1	20.625.109	12,1	28.034.089	11,7	35,9
Germany	1.744.373	7,5	2.049.185	6,3	17,5	14.647.353	8,6	15.327.509	6,4	4,6
Switzerland	212.388	0,9	1.749.511	5,4	723,7	2.278.254	1,3	6.145.249	2,6	169,7
USA	1.159.843	5,0	1.323.931	4,1	14,1	8.040.705	4,7	10.295.084	4,3	28,0
Italy	958.478	4,1	1.176.141	3,6	22,7	7.448.440	4,4	9.132.421	3,8	22,6
France	588.882	2,5	924.300	2,8	57,0	5.363.519	3,2	6.317.247	2,6	17,8
South Korea	589.285	2,5	813.733	2,5	38,1	4.882.200	2,9	6.372.724	2,7	30,5
India	939.055	4,1	766.856	2,4	-18,3	4.816.540	2,8	7.546.883	3,2	56,7
Spain	529.268	2,3	589.958	1,8	11,5	3.991.033	2,3	4.601.171	1,9	15,3
Ukraine	317.966	1,4	506.278	1,6	59,2	2.596.394	1,5	2.704.936	1,1	4,2
Brazil	315.595	1,4	473.825	1,5	50,1	2.790.762	1,6	3.672.300	1,5	31,6
United Kingdom	438.708	1,9	441.341	1,4	0,6	3.806.883	2,2	3.932.580	1,6	3,3
Netherlands	319.648	1,4	408.128	1,3	27,7	3.025.649	1,8	3.107.580	1,3	2,7
Kazakhstan	144.531	0,6	379.290	1,2	162,4	1.053.253	0,6	2.093.518	0,9	98,8
Poland	277.403	1,2	377.166	1,2	36,0	2.450.138	1,4	2.768.892	1,2	13,0
Japan	363.989	1,6	377.083	1,2	3,6	2.881.757	1,7	3.017.081	1,3	4,7
UAE	154.244	0,7	347.425	1,1	125,2	1.645.752	1,0	2.684.781	1,1	63,1
Malaysia	236.673	1,0	330.025	1,0	39,4	1.903.111	1,1	2.958.044	1,2	55,4
Saudi Arabia	305.405	1,3	326.673	1,0	7,0	2.036.366	1,2	3.045.404	1,3	49,6
Others	8 059.T097	34,8	8.725.725	26,8	8,3	55.873.139	32,9	76.872.322	32,2	37,6
TOTAL	**23.167.834**	**100**	**32.531.036**	**100**	**40,4**	**169.913.138**	**100**	**239.043.240**	**100**	**40,7**

Source: RİP (TB&TÜİK)

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