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2023 • Issue 37

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Special Interview With Secretary General of IRU, Umberto de Pretto



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READING INTERMODAL TRANSPORT WITH LOGISTICS

It is not surprising to see the word intermodal together under, within or in the first sentences of every topic where the word logistics is mentioned. Although combined and intermodal transportation evoke more or less similar meanings, the needs of the logistics industry and the global economy express intermodal transportation as a more comprehensive service network and level of institutionalization.

Undoubtedly, intermodal transportation not only includes sharing and solidarity between modes, but also explains the reasons why logistics companies can be competitive or not. Firstly, local trade activities as well as international trade emerge as a requirement of the competitive environment as well as economic reasons. When we take Türkiye as a geographic center, intermodal transportation is an indispensable necessity for every geography from north to south, east to west. First of all, when we look to the west, we see the limits brought by the Green Deal, which includes the environmental criteria of the European Union, to the transportation service. The limits set by the EU for the emissions created by road transportation directly concern all companies engaged in trade and transportation to Europe.

It is clear that intermodal transportation will be a necessity, let alone optional, in trade and transportation to Europe. Border carbon regulation is the most important regulation in this process. It can be said that a transportation model in which ship transportation and railway transport are integrated in trade towards the EU will create a strong balance for all parties.



When we look to the north, considering that the war conjuncture in Ukraine has changed the entire logistics road map of the region, the need to use all logistics modes is of vital importance in terms of the continuation of trade in the region. In eastbound logistics, it is observed that all intermodal opportunities are put into use in order to continue commercial activities in both directions. Within the scope of the Central Corridor, intermodal transportation, including railway, is the first option in the flow of eastward trade. All important players of the logistics industry in Türkiye are using all their creative talents to carry the burden of trade uninterruptedly in these geographies in the current conjuncture.

Since Türkiye is the focal point and an important base of the logistics movement in this geography, it is observed that logistics companies are also undergoing a structural change that highlights intermodal transportation. The recent mergers and acquisitions in the sector are enough to understand both this change and Türkiye's central role in logistics.

Intermodal transportation is undoubtedly the main agenda item for railway operators. The following words told by president of International Union for Road-Rail Combined Transport (UIRR) Ralf Charley Schultze point to the future route of the intermodal industry.

Stating that €1,5 billion of annual investments into intermodal assets like terminals, loading units, intermodal wagons, skeleton trailers and digitalisation Schultze said:

"Combined Transport needs to outperform if we are to meet the energy efficiency, fossil fuel decoupling, decarbonisation and clean air objectives of the European Union. Combined Transport and its zero-carbon door-to-door version, needs to grow by an average of 5% per year until 2050 in order to achieve the doubling of rail freight market share". ■

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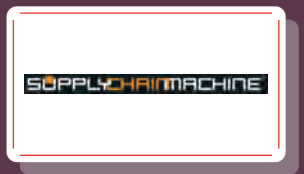

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Minister of Transport and Infrastructure of Republic of Türkiye

"GREEN TRANSFORMATION IN LOGISTICS"



Abdulkadir URALOĞLU

As the Ministry of Transport and Infrastructure, we focus our investments on mobility, logistics and digitalization to ensure the mobility of human, cargo and data. In this context, we prepare action plans such as "Transportation and Logistics Master Plan", "National Intelligent Transportation Systems Strategy and Action Plan" and "Sustainable, Intelligent Mobility Strategy" at a high level by considering environmentally friendly and sustainable transportation from a broad perspective, on the one hand, and on the other hand, we create legislation and standards that will ensure their implementation, and we implement our investments and projects in this direction. As the Ministry, our primary environmental focus areas in our activities are increasing the use of renewable energy by ensuring high energy efficiency, reducing transportation-oriented greenhouse gas emissions, encouraging low-emission transportation modes and creating the infrastructure to support them.

As is well known, the European Commission announced the European Green Deal in December 2019. This agreement basically aims to reduce transportation-oriented carbon emissions on the European continent by 50% by 2030 and to reach the '0' carbon emission target by 2050. As Türkiye, we always closely follow these and similar practices that will affect the balance of power in the global economy. For this reason, in our "Sustainable and Smart Mobility Strategy and Action Plan", we have included the goals of reducing fuel consumption and emissions and expanding the use of micro mobility vehicles by developing sustainable and smart transportation, green maritime and green port practices, railway transportation. In order to achieve these goals, we are implementing our investments in parallel with our green transformation vision by creating the necessary legislation and standards with the high-level strategy documents of our ministry.

In addition, with our country becoming a party to the Paris Agreement, work has started to determine short, medium and long-term strategic goals and actions in line with the "2053 Net Zero Emission Target" and "Green Development Policy". In addition, we are also taking concrete steps to reduce transportation-oriented greenhouse gas emissions to zero in line with our zero emission target for 2053.

There is now a transition from the use of fossil fuels to the use of clean energy in freight and passenger transportation as part of the fight against climate change.

In the transportation sector, which is responsible for about a quarter of greenhouse gas emissions, the transition from fossil fuel vehicles to vehicles powered by renewable energy sources, especially electric energy, has shown a significant increase worldwide. In this context, the production of domestic electric vehicles, which have the potential to significantly increase the number of electric vehicles in our country, has started, and with the further spread of these vehicles, the need for electrical energy and accessible charging stations will be one of the important agendas.

In order to bring more environmentally friendly port facilities to our country; 20 port facilities have been operating as Green Ports so far within the scope of our "Green Port Certificate Program" as part of our project to increase energy efficiency in ports initiated by our Ministry.

We organize trainings to create environmental awareness for new generations by creating joint projects with schools in our port regions. We are in the process of transitioning to systems that run on renewable energy instead of fossil fuels in the construction machinery used in our ports.

To summarize, while realizing mega projects in line with our country's goals of "becoming a global logistics superpower" and "becoming one of the world's top 10 economies" with our investments, we pay attention to ensure that these projects are environmentally sensitive and do not affect ecological life, and are aimed at protecting and developing it. ■



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IMPACTS OF GREEN TRANSFORMATION ON THE LOGISTICS SECTOR



Mustafa GÜLTEPE
Chairman

While the limited resources of our world are being depleted at a great pace, global climate change triggered by increasing production threatens our planet. If this trend cannot be stopped, it will not be possible to continue production and ensure global supply after a while. More importantly, an irreversible process will be entered for humanity.

The international community has belatedly taken action against this major problem. For example, the European Union has focussed on the carbon zero target in 2050 with the Green Deal. Türkiye is also making preparations in line with the carbon zero target in 2053.

Türkiye exports 42 per cent of its total exports to EU countries. Therefore, compliance with the Green Deal is of vital importance for us. As TİM, we do all our work and projections with this awareness.

We look at exports as a team game. Undoubtedly one of the most important stages of export is logistics. No matter how many quality products we produce, no matter how big our brand value is, it is difficult, and often even impossible, to export unless logistics facilities are available. For this reason, the logistics sector has always been the biggest teammate of our exporters. We have always achieved success in exports together with our logistics sector.

As TİM, we have big goals. We are working with the vision of taking Türkiye among the top 10 countries in exports. In the Medium Term Plan, we have an export target of 302 billion dollars for 2026. Therefore, our logistics sector needs to grow along with our exports in the coming years. I believe that we will achieve significant successes together with our logistics sector in the new period as we have done so far. When we evaluate the exports of our country according to the modes of transport, it is seen that we carry out approximately 59 percent of our country's exports by sea, 31 percent by road, 8 percent by air and 1 percent by rail. Here, especially the share of road transport should be reduced and carbon emissions should be reduced. Of course, although it is not always easy to reduce the share of road transport due to geographical conditions, the share of sea and railway transport should be increased by reducing it to a minimum level. However, today we carry out a significant portion of our exports to countries in our close geography, especially Europe, by road. Our exporters also have to use the highway mainly to reach the ports in Türkiye. The development of the railway network in Türkiye and the development of a high-speed train network in freight transport as well as in passenger transport are of vital importance for our sustainability targets. As TİM, we express our demands and expectations on this issue before the relevant authorities, especially our President. To the extent that we can expand our existing railway network and accelerate freight transport, we will be able to reduce our logistics costs and carbon emissions and gain the advantage of faster product delivery to markets.

On the other hand, we are preparing sustainability action plans for 27 different sectors under the roof of TİM. By the end of 2023, our sustainability action plans will be ready in all our sectors. In order to complete the links of the chain in the export process, logistics and other stakeholders need to participate in the process within a similar plan. I would like to underline once again that logistics is the most important stakeholder of our exporters in terms of sustainability compliance at all stages, from the use of transport vehicles with lower carbon emissions to the use of environmentally friendly packaging, from energy efficiency in storage facilities to waste management. As TİM, we are always with our logistics sector, which is our most important teammates, and we are ready for all kinds of cooperation. I believe that we will take firm steps towards our great goals in exports by turning the green transformation process into an opportunity with cooperation and consultation.

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Şerafettin ARAS
Chairman

We have to protect the planet we live in. We still have measures to take against the global warming, being the largest threat against our planet, and they can only be achieved if the entire world acts together. Therefore, goals are set to mitigate the carbon footprint with the climate agreements and legal regulations made. European Union, Paris Convention and European Green Deal aim to neutralize carbon emissions by 2050.

Green Deal foresees comprehensive changes in EU policies from industry to financing, from energy and transportation. The regulations made within the scope of Carbon Border Adjustment Mechanism (CBAM) and Sustainable Product Initiative can significantly affect our exports to EU and the integration under Customs Union. At this point, the logistics and transportation sector undergoes a major green transformation, like in all sectors. Today the international road freight transportation sector transports more than 40 percent of the exports of the country. 100 million US dollar-worth of exports are made to Europe being the region exported to the most and half of these exports are carried out by the road sector. Therefore, European Green Deal is of great importance for the international road transportation sector. Like with the other sectors, green deal also affects the logistics sector forming the backbone of all sectors. The CBAM which stated on October 1 does not cover the logistics sector. The date of effectiveness expected for the logistics sector is 2026.

Despite this, as the transportation has a share in the carbon emissions generated by other sector companies, our sector had to take environmental steps fast, beyond the legal undertakings. Many companies including especially global manufacturers started to include the carbon footprint clause in their cooperation agreements concluded with their logistics partners.

The Ministry of Transportation and Infrastructure published the 'Combined Transportation Regulation' setting the procedures regarding combined transportation and green logistics on May 25, 2022. The regulation covers the combined goods transportation, green logistics activities and the legal persons conducting these activities and also, the supports and privileges to be provided to real and legal persons carrying out combined goods transportation and green logistics activities. A Green Logistics Certificate will be issued to the logistics companies under the Regulation. The Ministry set criteria for this purpose and the sector companies are expected to achieve them. These criteria include organization of combined goods transportation trips, use of renewable energy, planting saplings, having a zero waste regulation and various environmental management system documents.

We as UND carry out studies to prepare the sector and our companies to green transformation and organized trainings in this regard. We concluded cooperation agreement with TESTMER Measurement and Test Services in order to prepare our member companies to CBAM. Within the scope of the agreement, TESTMER will organize and monitor the services to be carried out for ensuring compliance of the logistics companies with the process including all legal processes regarding the CBAM.

Our sector currently uses Euro 6 engine vehicles, currently the most environmentally friendly trucks available. We as Türkiye have the newest and the most environmentally friendly fleets of Europe. The vehicle manufacturers started to launch electric trucks to the market. The companies in the sector started to add these vehicles to their fleet for trial. Our companies will start investing in electric trucks when actual efficiency is achieved, the number of electricity charging stations increases and the infrastructure is established and costs are at a certain level.

However, it will not be possible to achieve the EU Green Deal goals for real and within the desired period of time without the border crossing facilitations for environmentally friendly vehicles, motivation elements such as tax discounts. Within the framework of the improvement works to be carried out, elimination of long queues on crossing of borders between countries, digitalization of border crossing times and supporting of environmentally friendly vehicle fleets and of the environmental transofrmation are mandatory.

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OUR VISION FOR THE FUTURE: GREEN DEAL



Ayşem ULUSOY
President

European Green Deal is one of our important agenda items that will set the course for the international commerce and affect each logistics stakeholder regarding competition. It will become inevitable for both the production sectors and the sectors providing logistics services to undergo a comprehensive transformation. The answer to the question of why this transportation is so important and what the extent of its impact will be is found in the framework and targets of the Green Deal. One of the outcomes aimed with the Green Deal is the planning of a fundamental and environmental friendly transformation including especially the industry activities at the European Union. Within this scope, it is aimed to decrease the carbon emission by less than 55 percent of the levels in 1990 and to convert the continent into a carbon neutral region with the zero carbon emission goal by 2050.

The European Green Deal to cause transformation in many sectors from agriculture to construction is closely related with the logistics sector, as well. Carbon emissions in the entire logistics process from its transportation to its storage as well as how a product transported to Europe is produced are important for the competitiveness of both the production and logistics sector. In order to see how the transportation activities will be affected by the transition process that will inevitably affect all sectors, the global sector statistics should be evaluated. According to the World Economic Forum, 5.5 percent of the carbon emissions in the world are caused by the logistics and transportation sectors. Therefore, we should take into consideration that our most important export partner is the European Union and the European Union has initiated serious initiatives to decrease carbon emissions in recent years and the European Green Deal aims for neutralizing carbon emissions by 2050.

With this in mind, creation of incentive mechanisms to extend environmentally friendly transportation types and legislation and application changes should be made agenda items. Sector stakeholders' being educated about the decrease of carbon emissions and immediately setting a strategy will be beneficial for Türkiye to become a country in the forefront to struggle against crisis. The green transformation of our sector should be evaluated as a process that we will be able to turn into an opportunity in future. To achieve this, the training and investment activities should be inclusive and we should join forces to ensure that each sector cooperates with its stakeholders. We as UTİKAD act with sense of responsibility in order to ensure the fast adaptation of our members to the processes to be realized under the Green Deal and as the most important stakeholder of the exporters in Türkiye. We are aware that we are at the turning point of an important process and therefore, in order to raise awareness among our members, we established the Green Logistics Focus Group. The Green Logistics Focus Group participated by our members evaluate the developments in the world regarding the European Green Deal and share information regarding the things that can be done in order to correctly integrate the "Green Logistics" concept into the logistics sector. Moreover, in order to facilitate UTİKAD members' getting support in the green transformation process, we established cooperation between us and the companies providing carbon footprint measurement service and provide support to the service procurement processes of our members. ■



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INVESTMENTS TO DEVELOP RAILWAY TRANSPORTATION ARE A MUST, NOT A PREFERENCE



Onur KÜÇÜKAKDERE
Chairman of the Board

Being a comprehensive set of policies and initiatives that aim for neutralizing the European Union (EU) in terms of climate by 2050, the European Green Deal have profound impacts on various sectors including the railway industry. The goals and initiatives of Green Deal have significant impact on the railway transportation in Europe and thus, Türkiye.

Green Deal primarily promotes sustainable transportation. It makes a strong emphasis on the promotion of sustainable transportation methods to decrease greenhouse gas emissions. Railway transportation is one of the most environmentally transportation modes which release significantly less emissions per passenger-kilometer or ton-kilometer as compared to the road or air transportation. Green Deal that Türkiye is a party provides initiatives to increase the use of railways as a tool to clear the transportation sector of carbon.

After Green Deal, important investments are planned to be made also to the railway infrastructure as part of the wider goal for the development of a sustainable and efficient transportation system. These investments support the extension and modernization of the railway networks including the development of high speed railway lines, electrification projects and intermodal transportation connections.

In order to achieve emission decrease goals, support is given to transition from road and air transportation to more sustainable alternatives such as railways and this change covers both the passenger and goods transportation. EU promotes the use of railways in long distance goods transportation in order to decrease traffic congestion and emissions and to increase the efficiency of the logistics sector. Electrification of railway networks is a significant aspect of the carbon emission decreasing efforts of the Green Deal. Electrification eliminates the use of diesel engine locomotives and causes significant decreases in greenhouse gas emissions and air pollutants. EU supports the members states in terms of electrification of railway lines and investing in cleaner railway technologies.

EU also promotes researches and innovations in the railway sector to increase energy efficiency, decrease emissions and increase general sustainability. Financing programmes such as Shift2Rail aim for promoting innovations in railway technologies and making railways more competitive and environmentally friendly. Within the scope of the strategies to minimize the carbon footprint, railway companies are encouraged to adapt and implement energy efficient technologies.

EU aims for ensuring cooperation and improving standardization in the railway sector via initiatives such as the European Railway Traffic Management System. While standardized systems increase the efficiency and security of railway operations, they also decrease costs.

In conclusion, the European Green Deal has deep impacts on the railway sector and strongly focuses on promoting sustainable transportation, decreasing emissions and increasing efficiency. The railway industry in Europe will benefit from increasing investments, electrification, researches and innovations aiming to improve sustainability and contributing to the extensive goal to ensure climate neutralization in EU by 2050. This alignment with the green goals makes railways the most critical component of a more sustainable and environmentally sensitive European transportation system. Now it is also a must, not a preference, for Türkiye to urgently make investments and legislative arrangements and develop strategies to improve the railway transportation of Türkiye.

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İlker ALTUN
Managing Director - Aysberg Group

The Belt and Road Initiative (BRI) is progressing. If such projects correspond to an ongoing situation, the rulers of the ongoing situation do not hesitate to take steps to prevent the initiative. The efforts of the USA and its surroundings continue against China, which is trying to shift the path of world trade from US-controlled seas to land. Although the USA's initiatives cannot prevent this project, they can have results such as delaying it, making it more expensive, and dividing countries into sides. For example, Italy announced that it would withdraw from the Belt and Road Initiative

Meanwhile, there are also regional projects that are smaller-scale but developed in a way that looks at the the Belt and Road Initiative. These emerge as countries' opposition stances, measures or efforts to integrate into projects. For example; The "Development Road Project," in which Türkiye is also involved, connects Iraq's FAV port to Türkiye via the Persian Gulf. The line, which consists of 1,200 kilometers of railway and highway, can get a special meaning when considered in connection with the Belt and Road.

Türkiye's infrastructure investments, independent of the Belt and Road Initiative, have the potential to serve an important purpose when evaluated together with the project today. In the days when even Kazakhstan is talking about complying with the West's embargoes against Russia and the Israel-Palestine war begins to align the countries, the Turkish transition and the Central Corridor are increasingly coming to the fore. The possibility that Türkiye would be able to access Central Asia without needing Iran if the Zangezur Corridor was opened spurred Iran into action. Iran can come to the same point of view with Russia and western countries so that Nakhchivan and Azerbaijan do not have a land connection. Additionally in a recent decision, Iran announced that Turkish vehicles carrying cargo to Central Asian countries would not be allowed to transport these cargo to Turkmens by changing trailers within Iran.

The saying "There is no corridor without Türkiye" reflects the facts, especially when it comes to the China-Europe highway. Türkiye's developing highways, railway connection from the Caucasus with BTK, highway border gates in the east and southeast, possible road connection with Azerbaijan, developing relations with Armenia and Armenia's efforts to get closer to the west, China and India's land transition to both Europe and Africa. All of these factors make Türkiye more advantageous. I cannot make economic sense of road transportation through Arab countries, especially the passage through Saudi Arabia." Rational roads on this route pass through Türkiye. Türkiye's Mediterranean and Black Sea ports are perfect for this purpose. With the development of the passages provided by the Third Bridge on Bosphores and Marmaray connecting the continents, especially with the strengthened railway options over the third bridge, Türkiye and Istanbul will continue to connect the continents to each other for the safest and most profitable trade, as always.

Istanbul is the mouth of the funnel through which world trade and supply chains pass. The golden link of the logistics value chain is Türkiye and Istanbul. The currently operating or projected ports in the Black Sea and the Mediterranean, developed highways, elite logistics operators that can produce high-level services, and the world's most important logistics operators deployed in Türkiye, which connects three continents every day, prove the belief and expectation in this country. ■

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ROAD TRANSPORTATION REGULATION IS AMENDED

Good news for the road transportation sector by the Ministry of Transportation and Infrastructure: A 5 percent discount. The discount limits are increased for the transporters carrying out activities in the field of road transportation for their transactions on e-Government.

► Minister of Transportation and Infrastructure Abdulkadir Uraloğlu told that they took new steps for the digitalization of the transportation sector and making e-Government more attractive for the citizens providing services in the road transportation sector and they try to ensure that they can perform transactions without visiting institutions. Uraloğlu further noted that: "All application process will be finalized on e-Government without the need for submitting printed documents and this will decrease bureaucracy and shorten transaction times. We aim to achieve a significant increase in the number of transactions on E-Government with the latest incentive given."

Minister of Transport and Infrastructure Abdulkadir Uraloğlu made important remarks regarding the amendments made in the Road Transportation Regulation that became effective upon publication in the Official Gazette. Uraloğlu told that with the regulation amendment, they increased the discount limits up to 5 percent for the transactions the transporters carrying out activities in the field of road transportation sectors perform on e-Government. Uraloğlu added that "Thanks to this amendment, a discount of 5 percent will be made for the transactions of the transporters on e-Government up to TRY 32 thousand 854."

Up to 75 percent discount in K1 certificate of authorization

Uraloğlu stated that another new initiative is that when the citizens carrying out activities in the domestic goods transportation sector and holding a K1 certificate cease to carry out their activities or sell their vehicles, the buyers of the vehicle will get a discount. Uraloğlu explained this with the following: "If truck owners holding a K1 certificate stop working or is entitled to retirement, the persons to whom they sell their trucks and give consent will benefit from a discount up to 75 percent for K1 certificate of activity for the remaining validity period of their certificate. With this new initiative, the truck owners will be able to sell their vehicles more easily and they will have a chance to earn income from their K1 certificates that they will cancel when they stop working." Another new initiative under the Regulation is related with inspection and insurance. Minister Uraloğlu told that if the vehicles with a certificate of activity issued as per the Road Transport Regulation whose inspection period and insurance expired get their vehicles inspected and insured within 6 months, they will be automatically added to the certificate of activity as free of charge. Uraloğlu stated that a warning sanction is introduced by the amended regulation for the agencies that act as an intermediary for scheduled (against tickets) or non-scheduled (tourism) passenger transportations if they issue tickets or agreements in violation of the applicable legislation. Uraloğlu added that "We plan to prevent the problems experienced by the citizens with regard to violating tickets or agreements with this new initiative".

Passengers getting off before their destination to be notified to U-ETDS

Another initiative was introduced by the Regulation regarding passenger transportation activities for notifying the passengers getting off before their destination to U-ETDS system. According to this new initiative, the passengers getting off from bus will be notified to U-ETDS on a real time basis. This new initiative introduced for the security of transportation will allow for real time monitoring of the passengers electronically. ■

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A THREE-POINT PLAN FOR DRIVER SHORTAGE

IRU, the world road transportation employers' organization, representing more than 3.5 million road transport operators, and ITF, the International Transport Workers' Federation, representing 18.5 million transport workers, have today launched a three-point plan to help fix driver shortages. The new approach aims to ease driver shortages and transportation labor market imbalances, ensure decent working conditions and standards for drivers working outside of their home country, and simplify and enforce rules for workers and employers.

IRU Secretary General Umberto de Pretto said that "Driver shortages are quickly getting out of control. Balancing global labor supply and demand via simple measures to ease legal immigration and stop exploitation of non-resident drivers is one way to fix the problem, support decent work and keep vital road transportation services moving."

ITF General Secretary Stephen Cotton said that "Governments, transportation employers, and the multinational customers of transportation must work together with trade unions to build decent work to end driver shortages. Road transportation will only be able to attract and retain drivers if it is built on cooperation between all stakeholders and rights holders to ensure decent work, fundamental labor rights and genuine social protections." ■



THE PLAN OUTLINES ACTION FOR THE UN, NATIONAL GOVERNMENTS AND THE INDUSTRY:

1. UN and international organizations - develop a global framework with clear guidelines to protect non-resident drivers; improve driver conditions and increase social cohesion; and harmonize qualification standards and cross-border recognition.

2. National governments – amend and enforce labor immigration procedures to protect non-resident drivers, reduce bureaucracy to allow easier legal immigration for current and potential drivers; boost recognition of third-country qualifications via bilateral agreements; invest in and increase enforcement of road transport laws and regulations; and subsidize domestic training and integration programmes.

3. Road transportation operators - develop operational integration programmes for non-resident drivers to receive the same conditions as their domestic workforce; and support training, skills management and certification processes.

The plan aims to better balance national labor pools - between those with a surplus and those with a deficit of driver talent - without exporting problems from one country to another. It should not override existing national initiatives, or harm safety standards or worker conditions.

The chronic global shortage of professional truck, bus, coach and taxi drivers is accelerating, impacting millions of road transport workers, employers and services. Around 11% of driver positions were unfilled in 2022. With up to one third of drivers retiring within the next three years in many countries, unfilled driver positions could more than double by 2026. Governments, unions and operators are driving multiple actions, but it is not enough. Other solutions include subsidizing license and training costs, building more safe and secure parking areas with better facilities, encouraging more women and young people into the profession, and improving the treatment of drivers and understanding of the profession.

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Turkish Transport News
INTERMODAL
Combined Transport and Logistics Systems Magazine

EUROPEAN ROAD FREIGHT RATES ARE EXPECTED TO DECREASE

The Upply, Ti, IRU (International Road Transport Union) European road freight rates index for Europe shows that both spot and contract rates are falling quarter-on-quarter, dropping by 7.5 and 2.8 points, respectively.



Spot rates in the European road freight market have experienced their second consecutive quarter of decline, marking a significant shift since the onset of the Covid-19 pandemic. The spot rates index fell by -7.5 points quarter-on-quarter to 132.5 points. This is the first time rates have fallen for two consecutive quarters since Q2 of 2020.

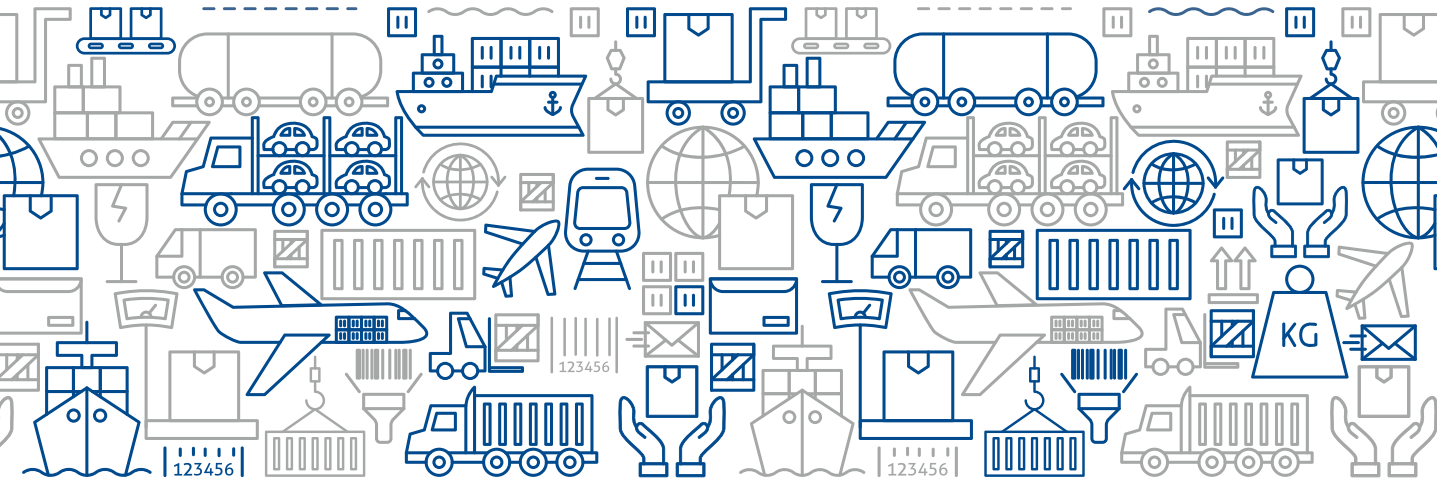
Additionally, the spot market index has fallen below its Q2 2022 level, a time when costs rise following the war in Ukraine first became clear. Despite this, spot rates remain up by 8.9 points year-on-year.

The contract rates index has also fallen by 2.8 points quarter-on-quarter, the first fall in six quarters, but it is still up 10.7 points year-on-year. With volumes slackening and available capacity improving, the downward trend in rates looks set to continue in 2023.

- The 2023 Q1 European Road Freight Spot Rate Benchmark Index stood at 132.5, 7.5 points lower than in 2022 Q4 but 8.9 points higher than in 2022 Q1.
- 2023 Q1 is the second consecutive quarter a fall has been seen in the spot rate index.
- The 2023 Q1 European Road Freight Contract Rate Benchmark Index stood at 127.2, 2.8 points lower than in 2022 Q4 but still 10.7 points higher than in 2022 Q1.
- Fuel prices were 9% lower in 2023 Q1 than in 2022 Q4.
- Driver shortage projected to see 9% of positions unfilled in 2023, slightly lower than the 10% in 2022.
- Freight rates are expected to continue to soften in 2023 Q2 but will remain elevated in comparison to historic norms as supply side pressure keeps costs high. Towards the end of the year, volumes are expected to start recovering, applying upward pressure on rates.

IRU Senior Director for Strategy and Development Vincent Erard told that: "The stagnation in freight demand from 2022 Q4 has continued into 2023, flattening the driver shortage curve, for now. But nothing has changed in the long-term outlook of the profession. The share of young drivers remains extremely low. Any jump in demand from European economies will further exacerbate the shortage of drivers, which in turn will limit economic growth. We cannot take our eye off the ball. We need to continue pushing for both immediate and structural solutions to driver shortages."

Despite the easing of demand-side pressure, the supply pressures remain. A worsening driver shortage is eroding capacity, while fuel costs have fallen from their 2022 high, they remain elevated compared to 2021. The cost-of-living crisis across the continent is also increasing wage demands in 2023, resulting in labor costs increase. The likely result is further freight rate falls from falling demand. However, the size and scope of these falls will be limited by supply-side pressure that has created a higher cost base which will prevent freight rates from reaching historic lows.



CZECH REPUBLIC at LOGITRANS 2023

November 15–17, 2023

Yenikapı Avrasya Show and Art Center, Istanbul
Hall 2 / Stand 401

Czech and Turkish logistic networks are again united through Logitrans Istanbul 2023

Global logistics has been recently dramatically changed by two major events: the covid-19 pandemy, which had closed several hubs in China and Far East, promoting then intensive search for alternative routes through the continent, and the war in Ukraine, which doubled the necessity of safe and capacity strong routes in the same direction. Another new symptom of that development is called „near-shoring".

Czech Republic, although majority of its trade volume remains within European Union, is strongly depending on imports from China and Far East while most of the volume has been meanwhile returned to sea. Airfreight serves again for urgent and high value shipments and railfreight needs a new push to return to its position of a serious alternative to both. And a short look on the continental maps is obvious = Turkey represents the main crossroads, any future intracontinental lanes shall have to enter and cross the country.

Czech logistics experts are well aware of that unique position of Turkey and are developping bilateral ties with Turkish business partners since a longer while. The utmost change has however been offered by attending and presenting themselves at the transport exhibitions held in the country = on top with the Logitrans Transport and Logistics Fair organised annually in Istanbul.

In 2023 it will be already our second visit, bringing 7 companies representing Czech logistic mix, headed by the Ministry of Industry and Trade and supported by Association of Forwarding and Logistic Czechia. Come and visit us in hall 2, stand 401!

Association of Forwarding and Logistics Czech Republic – www.svazspedice.cz
The mission is to represent the members of the Association and to support Forwarding and Logistics business in Czech Republic.

ČD Cargo – www.cdcargo.cz
The largest Czech railway transport provider (domestic and international transport).

EGT Express CZ – www.egtexpress.com
International logistics company with more than 25 years of experience, offering transport services between all EU and Asian countries, including Russia and the Middle East.

LOTRACO – www.timeslotcontrol.com
This company has been developing and improving the interactive platform Time Slot Control, that was first implemented at the customer´s site in 2012.

METRANS – www.metrans.eu
A licensed railway company (with more than 30 years of experience and 19 European terminals) in Germany, Austria, Czech Republic, Poland, Slovakia, Hungary and Sloveni to ensure goods get transporte in a smooth and environmentally friendly way.

NYNMWAG CS – www.nymwag.cz
Manufacturer of railway freight wagons with focus on intermodal, tank and hopper wagons (own bogies for all the wagons).

PST CLC – www.pst-clc.com
Since 1991, a major provider of complex logistics services in the Czech Republic and Central Europe (member of the global holding company Mitsui-Soko Group).

RÖHLIG SUUS Logistics – www.suus.com
The company was founded in 2017 and provides comprehensive services in the field of domestic and international transport and logistics.

LOGISTICS MARKET TO REACH 19 TRILLION US DOLLARS BY 2025

The global logistics freight market is expected to grow by 5.3 percent to 19 trillion US Dollars by 2015 thanks to the technological innovations and fast economic growth in Asia Pacific.

▶ The logistics sector will grow fast by 2025 and reach a volume of 19 trillion US dollars thanks to the increase in e-trade, fast economic growth in the Asia-Pacific region and the impact of technological developments.
According to the "Global E-Trade Logistics 2022" report prepared by Transport Intelligence, e-trade logistics market increased by 20 percent in 2021. The report states that an average growth of 11.8 percent will be achieved annually during the period from 2021 to 2026.
Reminding that the world has an e-trade volume of 5.5 trillion US dollars, the report notes that around 20 percent of this e-trade volume will be realized in the field of e-trade.
According to the report, the e-trade volume in the world is worth of around 720 billion US dollars.

Logistics investments in Türkiye are ongoing

The e-commerce volume of Türkiye was realized last year as TRY 800.7 billion with an increase of 109 percent while its e-trade volume is around 1.5 billion US dollars according to the report.
Stating that the increasing demand in the logistics and freight services, the report notes that faster and more effective distribution solutions are needed to satisfy the expectations and needs of the consumers.
Noting that Türkiye made a



transportation - infrastructure investment of around 183 billion US dollars in the last 20 years, the report states that it is aimed with these investments to make Türkiye a logistics hub between Asia and Europe.

Türkiye was ranked as 38th in Logistics Performance Index

According to 2023 data of the Logistics Performance Index announced by the World Bank since 2007, Türkiye' rank increased to 38. Türkiye received a score of 3.4 among 139 countries in the field of logistics. This index gives scores to the countries under the categories of customs, infrastructure, international shipment, logistics competence and quality, timely delivery and monitoring. Determining the place and performance of the countries in the logistics sector, the index will be effective to provide guidance for the capital to invest in logistics.
This increase in Logistics Performance Index 2023 shows the progress of Türkiye in the logistics sector.

How can Türkiye increase Its performance in future?

The developments and the digitalization process in the logistics sector might crease positive impacts also on the trade volume of Türkiye. The report published by the World Bank presents the current situation of Türkiye in logistics services and also provides guidance for the improvements and developments to be achieved.
Türkiye can take following steps to increase her logistics performance:
-Speeding up the customs transactions and decreasing bureaucracy
-Prioritizing infrastructure investments and improving especially sea ports, airports and multi-modal facilities
-Transition to digital technologies, digitalization of the supply chain and improvement of the end-to-end processes
-Increasing initiatives for environmentally friendly and sustainable logistics services, transition to transportation methods to decrease carbon emissions and adoption of energy efficient storage solutions. ■

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MORE THAN 6.5 MILLION TONS OF GOODS PLANNED TO BE TRANSPORTED ON BTK LINE

The Economic Cooperation Organization (ECO) / United Nations Economic Commission for Europe (UNECE) Coordination Committee on the Trans-Caspian and Almaty-Istanbul Corridors met in İstanbul.



▶ The United Nations Economic Commission for Europe (EIT) and Economic Cooperation Organization (ECO) and representatives from the railway administration officers of Türkiye, Azerbaijan, Iran, Georgia, Kazakhstan and Uzbekistan came together in İstanbul for the Second Meeting of the ECO/UNECE Coordination Committee Meeting on the Trans-Caspian and Almaty-İstanbul Corridors of the Working Party on Transport Trends and Economics (WP.5). Giving a speech at the inauguration meeting hosted by the General Directorate of TCDD Taşımacılık, TCDD Taşımacılık Executive Vice President Çetin Altun emphasized on the cooperation between member states and member states and third countries for the development of transportation and underlined the importance of the establishment of more effective cooperation.

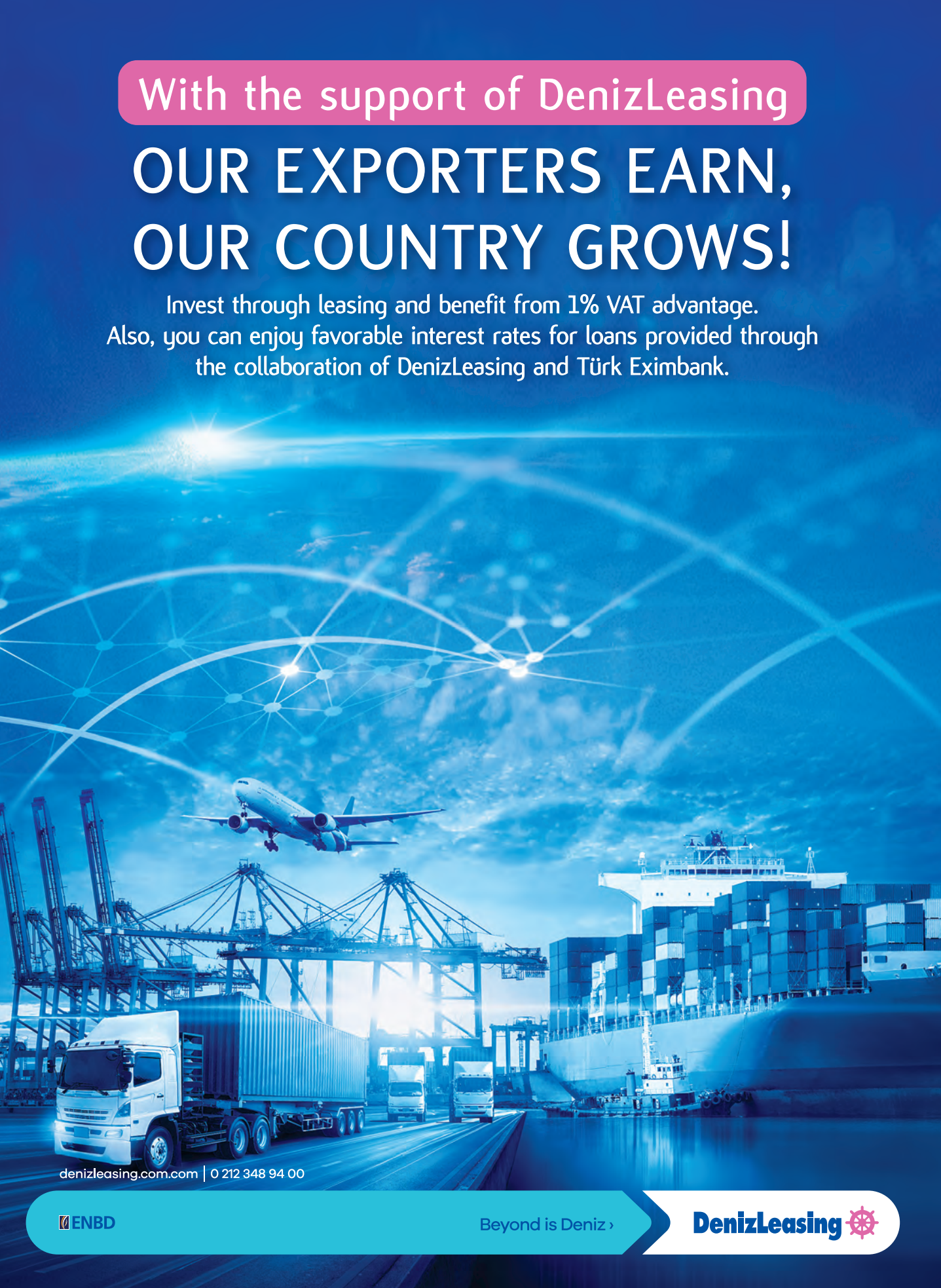
Executive Vice President Çetin Altun further remarked as follows: "We transport 88 thousand tons of goods with an average of 200 train trips per day within the country and abroad. Baku-Tbilisi-Kars railway line which was opened on October 30, 2017 provides the opportunity for transportation over a wide hinterland from Asia to Europe and from Russia to the Middle East and Africa thanks to the Middle Corridor and the demand for this railway corridor increases day by day. Baku-Tbilisi-Kars railway line and Iron Silk Road come to the forefront as a very important international railway corridor thanks to several advantages it provides such as more affordable, shorter, safer transportation and good climate conditions. Marmaray Bosporus Rail Tube Crossing allows for uninterrupted railway transportation as the golden ring of Baku-Tbilisi-Kars railway line and the Middle Corridor. We aim to transport more than 6.5 million tons of goods in the long run on BRK Railway line.

Altun made the following additional remarks: "According to the decisions made in the 8th Meeting of Türkiye-Iran Joint Transportation Commission held in Tehran on April 28-29, 2019, our studies are ongoing in cooperation in order to increase the railway freight transportation volume between two countries from 350 thousand tons in 2019 to 1 million tons per year. Moreover, the transportations of aid to Afghanistan from Türkiye via İran (İnceburun) - Turkmenistan (Etrek) border crossing are continuing under the United Nations World Food Programme. The goods transportations to the Central Asia countries via Sarakhs, the border crossing between Iran and Turkmenistant are also ongoing." ■

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EXPORTS CANNOT BE MANAGED WITHOUT OVERCOMING OBSTACLES IN LOGISTICS FLOW

The Transportation and Logistics Working Group meeting chaired by TÜSİAD Transportation and Logistics Working Group Chairman Ali Avcı discussed the important topics of the logistics sector and underlined the importance of the cooperation between the Non-Governmental Organizations representing the sector. Ali Avcı, the Head of Transportation and Logistics Working Group of the Turkish Industry & Business Association (TÜSİAD), came together with the chairmen of important sector associations at a meeting hosted by TÜSİAD. Association of International Forwarding and Logistics Service Providers (UTİKAD) Ayşem Ulusoy and International Transporters Association (UND) Deputy Board Chairman Murat Baykara and Deputy Executive Vice President Elif Savrun also attended the meeting.

The prioritized agenda items of the logistics sector and the agenda items of TÜSİAD Transportation and Logistics Working Group were discussed at the meeting moderated by TÜSİAD Transportation and Logistics Working Group Chairman Ali Avcı. The meeting ended with the consensus that the exports cannot be managed without the strong cooperation of the NGOs and the business world and overcoming the obstacles in the logistics flow.

UTİKAD Chairman Ayşem Ulusoy informed Ali Avcı about the problems in the logistics sector and the studies of UTİKAD regarding them before the Working Group meeting. Attending



TÜSİAD Transportation and Logistics Working Group meeting afterwards, Ayşem Ulusoy shared her opinions on the agenda items of the working group.

The agenda items of the Working Group meeting included transportation and logistics activities in the disaster zone after the earthquake, recent problems of the logistics sector in every mode, legislation and regulation deficiencies of the logistics centers, railway operation problems, problems experienced at customs and borders during road transportation and logistics factors in e-commerce processes.

Ayşem Ulusoy told that the Green Deal stands at the center of the logistics sector, that the share of railways should be increased as it is an environmentally-friendly transportation mode and that establishment of railway connections for the ports and encouraging multimodal transportation will provide important benefits. Noting that even though multimodal transportation is promoted in the work flows, the customers do not favor multimodal transportation and prefer direct door-to-door transportation with the traditional methods that they are used to, Ayşem Ulusoy told that the promotion of the environmentally transportation methods is of great important and the public administration should take promoting steps in this respect.

Talking about the agenda items of EU regarding Türkiye, TÜSİAD Brussels Representative told that the EU places on its agenda especially the revision of the Customs Union regarding Türkiye with the Strategic Compass published and that it is emphasized that Türkiye is among the important partners in the new system established. Brussels Representative also added that the determination of the roadmap to be implemented for EU-TR relations will be also among the agenda items of the EU Parliament. ■

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RAIL FREIGHT TRANSPORTATION CONTINUES TO INCREASE

Rail freight transportation comes to the forefront among other transportation modes as it is more environmentally friendly, affordable and safe. The share of rail transportation in the foreign trade of Türkiye is lower than the share of all other transportation modes.

As rail transportation allow for contactless trade, it ensured the maintenance of trade activities between the border gates forced to be closed due to the pandemic. Thus, it is considered that the pandemic was advantageous for the rail transportation. Therefore, the plans of the Ministry of Transport and Infrastructure to realize the service ratio of rail transportation as 20 percent in all transportations for 2025 are of great importance. While the transportation systems using mostly roads were preferred before the pandemic, the pandemic showed that the sector should be restructured to focus more on other transportation modes including rail transportation and integration among transportation modes. Within this scope, when the distribution of the public investments in the past among transportation modes is examined, the share of road investments decreased and the share of railway infrastructure investments increased.

As announced under the Presidency Program 2023, the expected share of railways in total territorial passenger transportation is 4.5 percent for 2022 and this share is estimated to increase to 5.7 percent in 2023. Moreover, the expected share of railways in total territorial freight transportation is 4.9 percent for 2022 and this share is estimated to increase to 5.4 percent in 2023.

448 Million Tons of Goods to Be Transported by 2053

As part of the efforts for the Transportation and Logistics Master Plan 2053, all of the railway tracks will be electrified and signalized, energy efficiency of railways will be improved and high speed train network will be extended over Türkiye. The number of provinces with high speed train connection will be increased from8 to 52 in line with the goals set. The annual freight transportation will increase from 38 million tons to 448 million tons. The current railway line length of 13 thousand 12 kilometers will be increased to 28 thousand and 590 kilometers. A sustainable, liberalized and profitable railway sector will be developed. A railway infrastructure aligned with the mega trends changing in the sector and taking as basis the sector dynamics will be established. 35 percent of the total energy need will be satisfied from the renewable energy resources.

Rail freight transportation and international block train operation planned to be of high demand over the years as they are affordable and environmentally friendly are expected to further improve the foreign trade volume of and provide serious economic benefits to Türkiye.



EKOL: A ROLE MODEL WITH ENVIRONMENTALLY FRIENDLY INTERMODAL TRANSPORT

Striving to be the best for the world with sustainable business models, Ekol today operates in 12 countries in transportation, contract logistics, foreign trade, customs, and supply chain management with an excellent service approach. Ekol is one of the leading logistics providers in Europe, with distribution centers in Türkiye, Germany, Italy, Greece, France, Ukraine, Romania, Hungary, Spain, Poland, Slovenia, and Sweden covering more than 1 million square meters of indoors area. It also offers intermodal transport by leveraging its 52 unit trains and 7,500 vehicles.

Ekol contributes to a low-carbon economy

The green solutions Ekol provides help reduce global carbon footprint. In particular, Ekol's intermodal transportation and route optimization efforts contribute greatly to both resource efficiency and the reduction of our environmental impact, particularly our corporate carbon footprint. Ekol expands its service network by constantly adding new lines to intermodal, an environmentally and ecosystem-friendly transportation model and thus contributes significantly to the low-carbon economy model. In the last 10 years, Ekol has reduced carbon emissions through intermodal transportation and created a positive impact equal to 74,753 hectares of green space, more than 14 times the size of Istanbul Belgrad Forest. Ekol has also prevented the emission of 658,000 metric tons of Co_2 into the atmosphere thanks to a reduction of 438,000 cubic meters of diesel fuel use in this period.

The company has been calculating its carbon footprint in accordance with international standards since 2012 to measure and manage its environmental impact. As a result, Ekol develops low-emission projects that contribute to sustainability and minimize the effects of many greenhouse gas emission sources such as energy consumption, waste management, consumables consumption, employee vehicles, and services.

Ekol, which is the largest investor in sustainability in its industry in Türkiye, is committed to serve the low-carbon economy model while building a facility or drawing a new route to reduce carbon dioxide emissions. With its Energy Management Systems practices and CDP (Carbon Disclosure Project)

reporting, Ekol has been rated B Management Level for two consecutive years with a performance on par with the European average, making it the first and only Turkish logistics brand in its industry in this regard.

First company in Türkiye to receive the green logistics certificate

In 2023, Ekol has continued to invest in LEED-certified facilities, green ports, and offices, which it has developed and commissioned with its leadership approach in energy and environmental design. Ekol's top priorities include developing more sustainable business models by using natural resources in the most optimal way in its logistics activities and ensuring sustainable development through the creation of business processes and projects that respect the ecosystem. Working to comply with European Union regulations, Ekol is the first company in Türkiye to be awarded the "Green Logistics Certificate" by the Ministry of Transport and Infrastructure.

The company is committed to the European Union Green Deal carbon neutrality targets in all its projects and invests in automation solutions that provide high-tech optimization of fleets and ports supplied with low-carbon technologies and equipment (electric tow trucks, a road train application, biofuel).

Spp Investments will continue

Ekol took the biggest step to decarbonize the electrical energy it uses in its facilities and reduce its emissions from electrical energy at the Lotus facility. At Lotus, Europe's largest green facility in terms of storage space, Ekol meets 70 percent of its energy needs with a rooftop solar power plant and continues to improve this gain, which is equivalent to the annual electricity consumption of 2,900 households, with new SPP investments.



At the Lotus facility, Ekol has reduced Co_2 emissions by 3,100 metric tons of Co_2 per year, which is equivalent to the planting of 140,000 trees.

The total installed power capacity of Lotus SPP is 5,589-kilowatt power (kWp). Of this capacity, 4.8 percent is provided by solar panels installed on the parking lot with a peak of 270 kilowatts, and 1.3 percent by solar panels installed on the porches on the walkway.

Ekol progresses in line with green deal goals

Ekol has mapped all its operational and value chain emissions to reduce its emissions in the fight against the climate crisis. With the European Green Deal, Ekol is aligning with the European Commission's policy to make Europe climate neutral by 2050. Ekol aims to be carbon neutral by 2030 by reducing its absolute emissions (Scope 1-2-3) by 55 percent compared to 2020, and by reducing the total emissions caused by its vehicles operating in Europe by 75 percent by 2050.

Ekol Sustainability Report 2022

Ekol Logistics' sustainability efforts revolve around the strategy of "Being the best for the world, not the best in the world." The company has recently published its first sustainability report documenting its work and showing where it stands. The Ekol 2022 Sustainability Report reflects an environmental, social, and governance (ESG) approach in line with the United Nations Sustainable Development Goals, global trends, and increasing customer demands on sustainability. The report provides detailed information on projects in various fields including the environment, financial indicators, R&D, and human resources.

The report covers Ekol's operating period between January 1, 2022, and December 31, 2022, and was prepared in accordance with the "GRI Standards: Core" option of the Global Reporting Initiative, the world's leading organization in its field. The emission values in this report have been verified by Bureau Veritas, an international audit organization, as part of a limited independent assurance audit. ■

DFDS CONNECTS EUROPE AND TÜRKİYE THROUGH ITS UNIQUE AND DIGITIZED NETWORK



Lars Hoffmann
Vice President and Head of Business Unit Mediterranean

▶ DFDS, the European leader in passenger and freight transportation, has made significant investments in Türkiye with its Mediterranean Business Unit headquartered in İstanbul. The DFDS Mediterranean Business Unit, established in 2018, has increased its number of ships from 14 to 21 in just 5 years, enabling businesses operating all over Türkiye and international transportation companies to reach markets like Italy, Greece, France, Germany, the UK and North Africa in the fastest and safest way possible.

Safe and fast transportation solutions through intermodal infrastructure

Continuously improving secure and fast transportation solutions with its strengthened intermodal infrastructure, the DFDS Mediterranean Business Unit added railway services to its network with the acquisition of primeRail in 2021. DFDS operates Pendik Port and offers seven sailings a week between its Pendik (Türkiye) and Trieste (Italy) lines. It provides easy access from Trieste Port to Northern, Central and Western European cities, and from Pendik Port to Istanbul, Tekirdağ, Kocaeli and other Anatolian cities.

By increasing the weekly sailings to 5 on the Yalova-Sète route, the DFDS

Mediterranean Business Unit enhances its services in line with its customers' needs. The Ro-Ro and railway operation network connecting Yalova and Sète serves as a bridge between Türkiye and the UK, providing speed and competitive advantage in the international markets.

The new Izmir - Sète line on the 100th anniversary of the Republic

One of the most significant investments made in 2023, which marks the 100th year of the Republic, is undoubtedly the İzmir-Sète route, which started operating in April. This new route allows transportation from İzmir to Sète in just 72 hours and provides high capacity, ensuring the fastest, safest, and most reliable access to target markets. The İzmir-Sète route, which provides transit time and cost advantages for shipments to and from the South Marmara, Aegean, and the rest of the Anatolian regions, is scheduled to operate on Sundays with one weekly sailing.

DFDS is also leading the industry with technological innovations

At the heart of the company's digitalization efforts lies 'DFDS Development Center Istanbul' located in Istanbul. The centre conducts software development work in various fields, using over 30 different programming languages and platforms to develop products.

Lars Hoffmann, VP & Head of DFDS Business Unit Mediterranean said "Digital transformation has gained significant momentum worldwide, especially with the pandemic, impacting all sectors. As the leading company in passenger and freight transportation in Europe, DFDS invests in innovations and technologies which lead the industry, in order to optimize efficiency and keep up with the times. Integrating digital technologies into all processes, optimizing the existing ones, creating new operational processes, and thereby delivering a flawless customer experience are among our priorities".

DFDS' technology and software development centre consists of Chapter Leads and Scrum masters to manage organizational responsibilities horizontally. Nine teams specialize in various fields and work on a wide range of projects, including mobile application development, enterprise resource planning (ERP) solutions, maritime transportation and port operations solutions, intermodal transportation solutions, storage solutions and system integration solutions for employees and customers, and more.

Efficiency-focused solutions

Among DFDS' technology applications, the 'GTMS' (Terminal Management System) holds a special place. The GTMS application indicates where vehicles entering the terminal should park, thereby boosting efficiency at every stage of our operations, resulting in time and fuel savings.

In line with DFDS' digitalization strategy, the DFDS Mediterranean Business Unit implemented the GTMS system at Pendik Port on November 14, 2022, enhancing its operations. With this system, every vehicle entering the port is registered, and based on the type of cargo it carries, the system automatically assigns a parking position to the vehicle. In addition, details such as how many reservations are made for daily Ro-Ro trips, how many vehicles are in the field, or how many have not yet entered the port can be viewed. Based on this information, loading plans are easily created through the system. With the new system, operators using terminal tractors and container reach stacker (CRS) vehicles in the field receive work orders transmitted by



GTMS through tablets on their vehicles, allowing them to load units from their parking positions onto the ship. With the usage of the GMTS system, the company observed a decrease in traffic congestion and CO2 emissions that also contribute to DFDS' sustainability goals.

Lars Hoffmann continued "With both our sectoral investments and the solutions we have developed in the field of technology, we will continue to contribute to exporters gaining a larger share of global trade".

Two new technologies specific to Pendik Port

In addition to GTMS, DFDS introduced two new applications specific to Pendik Port. One of them is the 'facial recognition system' used for entry and exit at the port. Currently, system testing is underway, and similar to facial recognition used in passport control at airports, the facial recognition system will be used for drivers entering and exiting the port. The goal is to shorten the paperwork registration time for vehicle drivers waiting at the gate, thereby improving service quality. Additionally, it reduces the carbon emissions produced by vehicles as a result of the shorter waiting time.

The second application is called "Shore Movement Sensors". As safety is of paramount importance at DFDS, it aims to use the technology as much as possible to eliminate potential risks. Installation of movement sensors on ramps prevents illegal entries from the sea. If one of these sensors triggers an alert, a visual and auditory alarm system is activated in the security cabin. ■

ALIŞAN LOGISTICS CONTINUES TO INVEST FOR FUTURE GENERATIONS



Damla Alışan, CEO of Alışan Logistics, stated that they are proud to be one of the 2 brands entitled to receive a green logistics certificate in Türkiye. Damla Alışan said, "Our investments regarding our environmentally friendly practices and activities within the scope of sustainability will continue without slowing down, to make our world more livable for future generations."

What would you like to tell us about Alışan Logistics? What are the industries that you serve?
Established in 1985, Alışan Logistics is the pioneer SQAS assessed company in Türkiye for Warehousing, Transportation & Tank Cleaning Modules. As a member of PSA Group since June 2023, Alışan company has a self-owned 550-vehicle fleet and more than 1600 employees in more than 50 different locations throughout Türkiye 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 Logistics 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.

We know that R&D is important for your company, and you are continuing your efforts in that area. Can you share some information with us about your R&D activities?
Our R&D Centers in Istanbul and Konya are constantly coming up with new projects on digital transformation and the effective use of technology. Fast execution of business processes with zero error and in a way that meets high standards, through integration with customer systems, Artificial Intelligence, and advanced Robotic Process Automation is just one of the goals these projects aim to achieve.

We would also like to hear about your perspective on sustainability. What are the precautions you have taken in your operations in the sector for a more sustainable world?
We are very diligent about this issue because of our expertise in the chemicals industry & all operations are under SQAS. Therefore, I would like to draw your attention to the fact that the chemicals industry has the second largest share in exports in Türkiye. Carriers should aim to achieve customer satisfaction by attaching

importance to the environment and human health in line with the set laws and regulations, to provide the expected quality in dangerous goods transportation.

To this end, an examination of the industry would show that it is necessary to inspect the reliability of the services provided, with periodic checks and tests. Another way to ensure safety and increase the quality in the sector is to have well-trained and well-educated employees. It seems that the "border carbon regulations" to be implemented by the European Union within the framework of the European Green Deal will oblige many sectors such as chemicals and logistics industries to make the necessary changes in terms of sustainability. Within the framework of corporate citizenship, major brands will also prefer logistics companies that implement these regulations. As Alışan, we take this matter very seriously. We have also been conducting diligent studies for a long time for reduction of wastes and their disposal without harming the environment.

Alışan LOGISTICS
A MEMBER OF THE PSA GROUP

We have already signed Responsible Care & Operation Clean Sweep Agreement. In addition, last year we started the renewal of our fleet and completed the renewal of the second batch at the end of the year. In the new year, we plan to reduce the average age of our truck fleet which will reduce our carbon footprint.

While we have been providing services to our customers since 2010; we have paid attention to implement the logistics practices that are the most suitable for environmental conditions, both in our own organization and our business partners in the supply chain. In 2005, we took the initiative to open the first tank cleaning facility that would operate at European Union standards and allow washing of tankers that carry chemicals, considering the environment protection. We offered this facility to the use of the logistics and chemicals companies of our country. Likewise, we have also made important contributions to the enactment of the relevant legislation. As a result of all these efforts, we were granted the 'Environment-Friendly Facility Award' by the 'Turkish Healthy Cities Association', which was supported by World Health Organization.

In addition, we have been heavily involved in the lobbying efforts on this matter for a long time. For instance, we are also the founder of KTTD (Chemicals Transport Vehicles Cleaners' Association), and to continue to be an advocate of this important issue, we, as Alışan Logistics, still actively take part in the Board of Directors of the association.

As a result of, we are very proud of it to be one of the 2 brands qualified for green logistics certification in Türkiye. Our investments regarding our environmentally friendly practices and activities within the scope of sustainability will continue without slowing down, to make our world more livable for future generations. ■





SGS TRANSITNET SUPPORTS THE INDUSTRY 24/7 WITH STRONG GLOBAL STRUCTURE

SGS TransitNet, which provides services with a competent team of professionals in Türkiye, submits one million declarations in 24 countries globally.

SGS

SGS TransitNet, which provides guarantees for export, import and transit transportation in road, sea and rail transportation within the scope of Common Transit, provides T1, T2 and TR guarantees, which are valid in all EU and EFTA countries for all kinds of transports. SGS TransitNet Türkiye is also available 24/7 with a number of offices abroad. In addition to submitting declarations, the company both advises customers on the problems they experience in foreign customs and takes an active role in solving the problems, creating significant cost advantages.

The TransitNet system, which was launched in 2006, was first put into service in Türkiye and has been successfully operating since then. Even during the period when Türkiye was not a member of the Common Transit System, SGS TransitNet had started to provide services to Turkish transporters through cooperation with industrial associations. SGS TransitNet, which submits nearly one million declarations annually in 24 countries with the guarantee of SGS, without the need for any intermediary institutions, is structured in Türkiye as a separate company. About 55 percent of the declarations are submitted in Türkiye. The company provides services in Türkiye with a team of 80 professionals and departments competent to provide all kinds of services. Additionally in Poland, a back office is also structured to resolve and coordinate any problems at the relevant customs, and to follow up payments and fines.

SGS prides itself on providing the fastest and earliest service, carrying out all projects concurrently with the EU. The company aims to exceed the expectations of the sector by

constantly analyzing the needs of the sector.
Having received the Authorised Consignor Status, SGS TransitNet is ready to put Tekirdağ facilities into service following Hadımköy. The company, which foresees investments at other critical locations for transporters, carries out company acquisitions and restructuring abroad.
SGS TransitNet, which started these initiatives in Belgium, the Netherlands and the UK, states that by having the status of Authorized Consignee in Germany, will be involved in export and import services all over Europe.
SGS TransitNet focused on digitalization process in 2023 and has commissioned its new interface. With this interface, which is much easier and user-friendly, all operations can be done on a single page. Online or one-on-one trainings are provided to customers who prepare their own declarations. Thanks to the new interface, it will also be possible to submit declarations to the customs of the countries that will transition to NCTS Phase 5.



SGS, which has a total guarantee of 580 million Euros, has a guarantee amount of over 10 billion TL in Türkiye alone. SGS TransitNet explains the most important reasons for being preferred as wide service network, strong financial position and high-quality service. SGS, which provides services in all EU and EFTA countries, creates a significant cost advantage by providing services itself without an agency or pediment. ■



Why SGS?

SGS is the world's leading testing, inspection and certification company. SGS is recognized as the global benchmark for quality and integrity. With more than 98.000 employees, SGS operates a network of over 2,650 offices and laboratories around the world. SGS provides independent services that make difference in people's lives all over the world and touches almost all the trade. Founded in Switzerland in 1878, the company has been established in Türkiye since 1933, having witnessed 90 years of 100-year history of the Republic of Türkiye. SGS Türkiye has 1,300 employees and 20 liaison offices around the country with state-of-the-art laboratories in Istanbul, Kocaeli, Mersin and Ankara extended on a facility area of 25 thousand square meters and is among the biggest service providers in Europe.

ÖBB RAIL CARGO GROUP CONNECTS CONTINENTS

With perfectly interlocking transport networks and innovative load carriers, ÖBB Rail Cargo Group brings Europe and Asia even closer together - and your goods safely and on time to their destination.

As a leading rail logistics provider in Europe, ÖBB Rail Cargo Group (RCG) shapes the transport industry in Europe and beyond into Asia. Thanks to its presence in 18 countries and the know-how of 5,887 logistics professionals from 34 nations, you benefit from decades of experience and a reliable hands-on mentality that ensures that over 1,200 trains reach their destination every day. Thus, through efficient end-to-end logistics solutions, RCG transports over 88 million net tonnes of freight every year – maybe soon yours too?

At your service: 300 new Curtainsider Swap Bodies

In 2023, RCG has expanded its versatile transport fleet with 300 new Curtainsider Swap Bodies, a significant proportion of which are already in use for customers in Türkiye. The multimodal load carriers close the gap between road and rail and enable universal loading – which means that, unlike conventional trucks, they can be loaded and unloaded from all sides, as well as from above. This makes them very different from conventional containers. Another advantage: thanks to their variability, they can be used for all types of goods, from palletised goods and consumer goods to special parts for the automotive and chemical industries.

TransNET: Your Cargo, our Logistics Solutions

TransNET is the comprehensive network of the ÖBB Rail Cargo Group, which extends over the entire Eurasian continent and, in addition to the most important ports, also provides connections to all essential





economic and industrial centres. Within the network, RCG operates conventional freight wagons as well as intermodal loading units and the Rolling Road - and, by request, also takes care of the first and last mile with different modes of transport. At the heart of TransNET are the approximately 60 TransFER connections with regular roundtrips, as well as the more than 1,000 TransFER combinations and many customisable routes, which can be perfectly tailored to your individual requirements and needs. Depending on the departure and destination, additional freight services such as transshipment, warehouse logistics or customs services can be booked. RCG takes care of every detail - from the first to the last mile.

New TransFER connections between Europe and CIS countries

RCG has recently launched sixteen new intermodal services via the Middle Corridor, linking the trading centres of Central Europe with those of Central Asia. The focus is on two central routes:

- From Istanbul or Köseköy via Georgia for wagonloads and containers by rail to Tbilisi, Yerevan, Baku, Astana, Almaty, Ashgabat and Tashkent.
- From Istanbul (Halkali terminal) or Constanta via Poti for container shipments (temperature-sensitive goods incl. transhipment onto trucks) to Tbilisi, Baku, Astana, Almaty, Ashgabat and Tashkent.

Rail Cargo Group
Member of ÖBB

Türkiye as an international hub

As the flexible connections via the Middle Corridor are exempt from geopolitical sanctions, transport insurance can be taken out. Your advantage: safe routes that offer attractive transport windows to Europe thanks to eight round trips per week between Budapest and Türkiye and two round trips between Curtici and Türkiye.

Let's talk business

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Onur Talay
CEO

WE ARE AT THE CORRECT PLACE AT THE CORRECT TIME WITH INTEGRATED INTERMODAL TRANSPORTATION SOLUTIONS

Being the first company to come into mind in the Turkish market when the subject is intermodal transportation, Sarp Intermodal is getting ready to become one of the leading companies of the logistics sector in the world thanks to its innovative approaches and sustainability oriented investments.

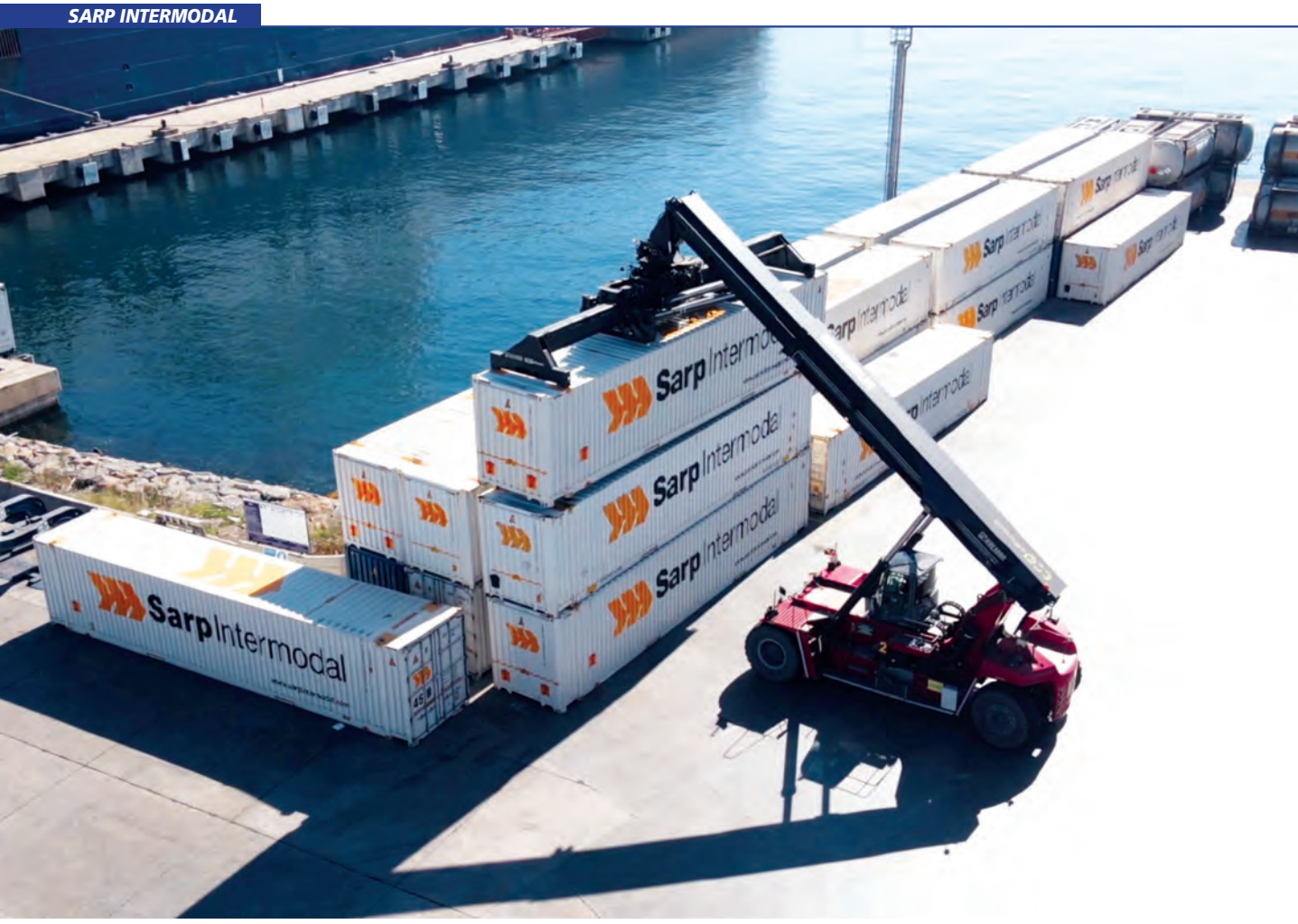
Sarp Intermodal continues to extend its product range and access network in order to provide end to end logistics services and innovative solutions to the special needs of its customers leading the Turkish market in the field of sustainable green logistics with #YarınınYolu (#RoadofFuture) vision. Having become a main topic of conversation with the first electric truck investment in 2022 and having significantly decreased the carbon footprint of its fleet, Sarp Intermodal group companies aim to provide an entirely integrated logistics ecosystem to its customers with new additions to the group of Talay Gümrükleme established to provide customers brokerage services to global and local customers and Tal Trailer with annul vehicle production capacity of 250 vehicles per year in an indoor area of 9 thousand and 200 sq ms.

Sarp Intermodal aims to help its customers for the smooth and fast performance of international commercial activities with Talay Gümrükleme due to the complexity of trade and busy processes. Sarp Intermodal will cover all aspects of customs transactions with Talay Gümrükleme and will help them to compete in the global market. The services provided to the customers via Talay Gümrükleme includes important fields such as export and import customs clearance, customs consultancy, documentation services and fee management and customs transactions speeding. Managing all processes with sensitivity thanks to its expert staff, the company can provide all kinds of consultancy service also for the sector in order to held the company customers to extend their trades with safety.

Aiming to appear on the global platform by carrying out activities at every region where the heart of the trade beats, Sarp group companies also continue its plans to extend abroad in parallel with their ecologically and economically sustainability oriented investments. The Company currently operates in Germany, France, Italy, Lithuania, Greece and Bulgaria. Having become a part of Sarp group companies in 2023, Logiva aims to provide niche services to its customers as a company that develops end to end interrupted logistics solutions for transportations between Baltic, Scandinavian and Eastern Europe countries and Türkiye with its expert staff. Having also completed its formation in Romania by late 2023, Sarp Intermodal aims to extend to a wider area in Europe.

Planning to add partial (LTL) business volume to its more than 60 thousand complete (FTL) loadings per year with the new structure, the group





of companies that strengthens its current staff also continues to make investments in various regions to strengthen its current structure. Having determined as initial goal for itself the central regions of Europe and Morocco and Tunisia, the company aims to have a partial transportation network covering the entire Europe and Northern Africa countries as part of its short term goals. Within this scope, intensive studies are ongoing to strengthen the local agency relations.

Desiring to extend its local market competence in Iso Tank transportation to Europe, the company continues with the preparations for new projects together with its business partners. Having strengthened its sea transportation muscles by participating in international forwarder networks like WCA and wanting to make its presence felt also in air transportation with the IATA certificate it obtained in previous months, Sarp Intermodal set its short term goal as becoming among top 10 also in the field



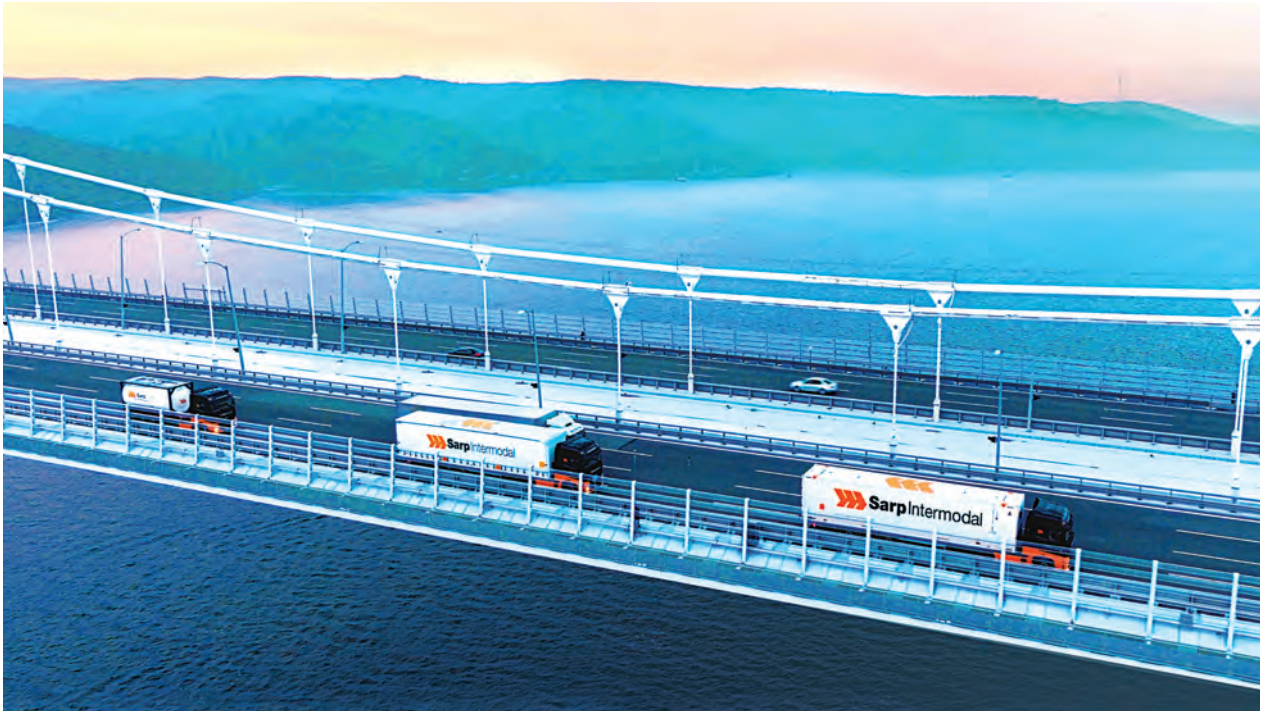
of air and sea transportation thanks to its expert, dynamic and experienced staff. The company also works on some projects for the establishment of an intermodal line that will support the international sea transportation constituting 90 percent of the trade volume in the entire world and that will lead the way for Türkiye to get a share from this volume.

Having increased the number of its equipment to over 3 thousand and 500 with 100 mega trailers to be received in recent days, Sarp Intermodal wants to host new technologies to be implemented to the field of logistics with Tal Trailer. Having a product range comprised of container carriers, swap body

trailers and tilt trailers, Tal Trailer gets ready to provide services to a large customer group in Türkiye and Europe with its qualified staff and technological investments.
The company continues to work intensively on the electric trailers which may serve as a kind of battery for electric trucks without compromising on any volume. This technology aims to ensure that the trailers with a range of 300 to 350 kms work for longer distances and the international road transportation paves the way for the extension of electric vehicles. Thanks to this, Sarp Intermodal will provide the most effective, the fastest and the most environmentally friendly solutions under current conditions by supporting the sea and rail weighted transportation models with electric vehicles also on road transportation.
The company will continue to develop transportation solutions based on renewable energy resources



also in the following period.
Having been established in 2023, Talay Bilişim supports the end to end integrated logistics systems established by group companies with software that unites ERP, CRM and SPM solutions they develop under a single umbrella and establishes its own ecosystem with analyses created via route optimization, emission optimization and artificial intelligence integration. The company plans to provide to its customers as a product the software continued to be developed as a modular, API supported and web based application covering the entire supply chain process.
Sarp Intermodal continues to achieve the goal of becoming one of the leading logistics companies of Türkiye and the world with its sustainability oriented investments. Seeing its customers as a partner for its sustainability goals, the company also provides carbon emission reports to its customers. These reports help the customers to mitigate environmental impacts. These investments by the company will make important contributions for the logistics sector to become more environmentally friendly. Being the first company to come into mind in the Turkish market when the subject is intermodal transportation, Sarp Intermodal is getting ready to become one of the leading companies of the logistics sector in the world thanks to its innovative approaches and sustainability oriented investments. ■





Mesut Cesur
CEO

ULUSOY INVESTS TO INCREASE QUALITY AND TO IMPROVE ENVIRONMENT

Being one of the well-known brands of Türkiye in the field of transportation and logistics, Ulusoy carries out regular RO-RO line operations with its 5 RO-RO ships between Çeşme Port operated by it and Trieste port of Italy. Ulusoy is also on the global maritime stage with its 4 dry bulk ships providing services on international waters.

Ulusoy is an important intermodal service provider that makes a significant contribution to the foreign trade of Türkiye. Ulusoy pioneered the establishment of UND RO-RO in 1993. It started the first RO-RO transportation between Türkiye and Russia in 1994 and was one of the most important players in taking the trade with Russia to its current situation today.

Ulusoy established a bridge between Türkiye and Europe with the regular RO-RO trips it started in 2000 between Çeşme and Trieste with its RO-RO ships. A significant part of the export and import goods of the Southern Marmara, Mediterranean and Central Anatolia regions including especially Aegean region is transported safely, on time and in the most affordable way with Çeşme-Trieste RO-RO line.

Ulusoy today provides services with its 3 modern RO-RO ships with a capacity of 283 trailers each. This service is also sometimes supported with 2 ships with a capacity of 164 trailers. Moreover, bulk goods transportation is made in international waters with 4 dry bulk ships.

The primary goal of Ulusoy is to further improve Çeşme-Trieste RO-RO line, Çeşme Port that Ulusoy operates and TİMT Terminal in Trieste with new investments and to get them ready for future in a way to satisfy all kinds of needs and to continuously improve the service quality. The right of Ulusoy to operate Çeşme Port was extended to 2052 with the agreement signed this year. Its right of use of TİMT Terminal in Trieste was extended for 19 years. Investments suitable for the future capacity of the line are ongoing at full speed with investments for a port area of 85,000 square meters and 2 Temporary Storage Areas of 70,000 square meters in total.

Taking steps regarding green deal, Ulusoy takes due care to decrease energy consumption and to use environmentally friendly energy at its ships and ports. Within the scope of these steps taken towards green deal, scrubbers were installed to all ships. In addition to Çeşme port's having an International Renewable Energy Certificate (IREC) since 2021, Ulusoy covers nearly half of the electricity consumption of the port with the renewable energy it generates thanks to the solar panels installed at Çeşme Port in 2022.



In line with its growth goals, Ulusoy plans to create new transportation lines and expand its service portfolio. Adopting a sustainability oriented approach, Ulusoy tries to make its transportation processes more environmentally friendly for Green Deal and the fight against climate change.

Ulusoy aims to mitigate the impacts of carbon tax and provide our customers with a more sustainable transportation option.

The distance of the countries in the Mediterranean basin is very suitable for RO-RO transportation. Ulusoy expects that the transportations by road to the countries accessible via RO-RO will shift to RO-RO lines as a result of green deal and carbon border tax and the trade volume in the region will increase in parallel with the economic growth. Therefore, another development expected by Ulusoy is the emergence of alternative new lines and operators and the performance of mergers and procurements as the capacities on current lines increase.

Being careful about the ports and customer profile changes in Türkiye, Ulusoy is ready to develop various approaches to increase competition or encourage cooperation. Ulusoy is open to new cooperation opportunities and maintaining its undertaking to provide customer oriented solutions.

Ulusoy believes that Turkish economy will especially grow in technological production and this will create additional capacity on RO-RO lines. Thanks to its capability to adapt to changes and uncertainties and its flexibility approach and work force, Ulusoy considers it to be a step before its competitors and develops strategies to be ready against uncertainties in future and to support our customers. ■

INDUSTRY IS RUNNING OUT OF WILLING LOGISTICS SERVICE PROVIDERS

Procurement and tenders for transport and contract logistics are caught between the conflicting interests of capacity, availability, profitability and "Excel frictions": What really matters.

▶ Who in procurement of logistics services and on the side of their freight forwarding and contract logistics partners is not familiar with this: Completely frustrated dispatchers who have lost faith in their own professional performance after a failed project implementation? Exhausted contract logistics project managers in task force teams still trying to save what has already gone wrong in a decisive phase before? In the tendering process and the related tender management.
The procurement of transport and logistics services is booming in 2023. The cost cutting process in industry and retail is just getting more intense again. And this is happening in parallel with the upcoming restructuring of supply chains and geostrategic relocation projects including a clear localization strategy. Declining volumes and cost pressure at all levels with one key difference: while freight rates in international ocean and air freight are just falling, the situation in road freight remains tense. The example of the automotive industry shows that industry and trade are running out of willing service providers.



Underestimated CO2 factor
The CO2 factor on the road toll is currently underestimated in the logistics procurement in Germany for example. Bureaucratization, industrial ESG audits with low fit for freight forwarding and contract logistics processes, increased costs, a market location with a shortage of resources will lead to further restricted capacities in 2024 and beyond. This overall situation could even lead to the scenario, that some logistics service providers will close or sell their business. Why should logistics service providers continue doing business like this in tenders? Preaching sustainability once again in the tenders and then only "gambling" on the price in the tender itself via e-procurement systems and no extra payment for sustainable solutions including powertrain technologies. In 2023, this is the case in transport and logistics procurement in industry - despite the fact that the budgets for emergency transports in international supply chains are still high.

Prof. Dr. Stefan Iskan
Professorship for Logistics and Business Informatics, especially Automotive SCM and Digitization / Founder
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Strategic-operational Protection
However, while the best price-performance ratios have been in the focus of logistics procurement in the past, it is now the strategic-operational assurance of availability and capacities for the production and distribution network that is required. After all, the transport and logistics market has turned around since the COVID-19 pandemic. Suddenly, logistics service providers were in the driver's seat. Some professionals in transport and logistics procurement even discribed that phase as „Wild West Style". Fact is: The willing service providers are running away from the supply chain directors and their lead buyers not only in the automotive industry. A new partner ecosystem and a move away from "Excel messing around" in the strategically wasteland of tender management are needed.

"RFQ Business Heart Attack"
The heart of every manufacturing company, besides research & development, is production planning. What production planning is there, tender management is for logistics service providers. However, logistics service providers regularly suffer serious "tender business heart attacks". The consequences: Emergency firefighting, negative project margins, loss of reputation and frustration in the organization. Professionals who want to increase their success rates in tenders should not only invest more intelligence

and structure into their tender management, but also anchor this strategically important area at the top management level and implement a culture of a "learning and data-driven organization".
Similar to product engineering, costs and profitability of an operation are determined in tender management and thus at the beginning of the RFQ process. Enterprises that offer key account and tender management as well as the downstream implementation team from a single source are likely to have a higher success rate in practice, but also profitability in business. In this constellation, learning from experience is made possible from tender to tender and learning effects from implementation are also transferred to the next tender processing. In addition: An organizational setting in vertical markets or industry-specific competence centers is outdated. What counts is: Network-capable business or "dedicated processing"? And if the answer is the second, then the question: Is it profitable to run stand-alone or not? If not, then out with the tender and the customer. Pure cross-dock business without connected shuttle transports, which are under the customer's own disposition and thus under the customer's own responsibility for capacity utilization, should also be critically evaluated.

Homemade Problems

How can professionals in industry, retail and at logistics service providers take countermeasures in their outsourcing tenders? The current challenges are not purely market-driven. In many cases, they are homemade in the industry. A comparison between industry and the logistics service providers sector shows: CEOs in the automotive industry mostly come from production planning or product engineering. The importance of this area in the organization is correspondingly high. In addition, they would probably never say: "Let's get the customer order first. Then we'll see how we can produce it." Unfortunately, many managers and employees, especially at logistics service providers, know this statement all too well. Where is the tender management rooted and what resources are there? Often virtually, as a small team organized under sales and in one department mostly with junior "Excel cracks" who have the fate of having to process several tenders at the same time. Overtime, excessive coffee consumption and errors in the Excel calculation are inevitable. When key people are absent due to illness, even large logistics groups are faced with the question of how to handle their tender management at all. Practice show, this is where resources are at their most limited.

Tender Hit Rate

If the tender hit rate should be increased and the organization set up more sustainably, these are the approaches for better profitability:

- Clearly define corporate strategy (target industries, customers, regions, solutions)
- Anchor tender management in the person of a top management member
- Consistently process only those tenders that are in line with the formulated strategy
- Say strictly „No" to customers and to their RFQs being not in line with your formulated strategy
- Say strictly „No" to logistics consultants and software providers who also work for your industrial customers (why enabling them with your know-how?)
- Integrate tender management, key account management and business development, data engineering and analytics plus implementation management and KVP in one single department as an internal 4PL unit for your entire enterprise (learning organization)
- Introduce 100% software-based tender management and network simulation
- Visualize data errors in tendering and recalculation towards shipper top management (professional escalation management on C-Level and not in operations)
- Develop dedicated career and development programs for tender managers.
- Provide data-driven transparency on production and cost structures in your network
- Automate and simplify price matrices and invoicing (game changer)
- Stop unqualified job rotation in supply chain management, transportation and contract logistics procurement in the industry and retail sector

"Squeeze The Lemon!"

Overall, industry and retail are running out of willing logistics service providers. The lemon has been squeezed out in procurement for decades. However, industry 4.0 and is smart factory concept means: forming an alliance with a few remaining set of logistics service providers. In times of digital industrialization, it cannot be the interest to continue to play the game of " changing suppliers and logistics providers". The game changing moment is evident in the shortage of truck drivers for example. The industry has got rid of its truck drivers itself - by its "cheap is cool" tendering practice in transport procurement.
We need to name causes so clearly. Talking around them is no longer helpful. This is the only way we can honestly work on solutions in the supply chain. Together. Investing in an "Intelligent Supply Chain Enterprise" of the future is too expensive for everyone in the value chain. A strategic driven eco-partner system with a small number of financially strong, high-performing players is key in future. Cooperate, secure cash and dig into value creation. That is the strategic imparative. This is why respect is given to every business leader who has a long-term vision and makes the following decision: "Do we want to invest in new models, including simplified invoicing in our new tenders and tender resources, in order to secure our earnings tomorrow - knowing that this decision will cost us cash and thus EBIT margins today? Or do we prefer to leave it and optimize our customer structure as far as we can - with the risk of having deadlocked processes in a few years that may no longer be future-proof for further business and new customers?" ■



THE EYES OF THE LOGISTICS INDUSTRY ARE FOCUSED ON THE OPENING OF LOGITRANS 2023

Considered as the most important and largest meeting platform of the logistics industry in Türkiye, International logitrans Transport Logistics Fair is counting the days for its opening. logitrans will reflect the pulse of the industry again this year with many participating organizations from both Türkiye and the world. This year, 175 participating organizations and companies from 19 countries, including Türkiye, will be represented at the logitrans 2023 Fair. Pavilions of three countries, Germany, Czechia and Belarus, will take place at the fair. There is intense interest from sectoral institutions,companies and countries in the logitrans Fair, which has received a high demand beyond its capacity this year.
A special program that will make logitrans more meaningful this year will also take place on the opening day. International Road Transport Union IRU, headquartered in Geneva, will celebrate its 75th anniversary at the logitrans Fair.
The main agenda of logitrans, which was held for the 16th time this year at the Eurasia Performance and Art Center in Yenikapı, will be Türkiye's increasing importance in logistics. logitrans plays an important role in achieving the goal of increasing international logistics revenues to 20 billion dollars in 2025 and 30 billion dollars in 2030 by growing together with Türkiye's goods exports.
It is expected that the pavilions of the countries participating in the fair, the stands and exhibition areas of the companies and organizations will make a significant contribution to the creation of a very colorful fair environment with their contemporary and functional designs and well-constructed architectural elements, just like last year.
logitrans attracted great attention this year as a stronger focal point than ever before. The interest generated by last year's fair also provided a significant increase in demand for 2023 logitrans. While all fairgrounds for 2023 were sold, new areas were opened to



meet the increasing demand. The increase in interest and demand for logitrans from many countries, especially Europe, Asia and nearby geographies, fully reflects the fact that Türkiye is the most important logistics hub in the region. International logitrans Transport Logistics Fair will be held at the Eurasia Show and Art Center (Yenikapı Avrasya Gösteri ve Sanat Merkezi) in Yenikapı between 15-17 November 2023.

EKO Fair Deputy General Manager Ekin Seren Ünsaç said that they expect the fair to host a record number of visitors this year as well. Ünsaç said: "While logitrans will host almost all stakeholders of the logistics sector, it will further strengthen Türkiye's strategic position in the Eurasia region in logistics. Türkiye has now become both a logistics hub and an international supply chain base in the Eurasia region. "The interest shown to logitrans by both participants and visitors confirms this fact."

The showcase of logistics Ekin Seren Ünsaç stated that logitrans is a strong platform that creates added value for all parties of logistics in this process and that they are very happy that the participating organizations created the opportunity to establish new customer relationships as well as strengthen their existing relationships at the fair, and said, "3 companies with the indoor area of 10 thousand square meters The hall was completely full as of March, and we encountered a demand far exceeding the exhibition space offered for this year's fair. This is a happy situation for both logitrans and the logistics industry. "The fair will bring together visitors with the important logistics and transportation companies of the sector, especially from Türkiye, Germany, Azerbaijan, Belarus, United Arab Emirates, Bulgaria, China, Czech Republic, France, Italy, Kazakhstan, Latvia, Luxembourg, Russia and Spain." said.

Stating that the interest of the sectoral institutions as well as the participants in the fair is high, Ünsaç said:

"In addition to TOBB-UND participation, we have prepared a fair above expectations with the support of top organizations such as DEİK, domestic transportation associations such as UND, UTIKAD, ARLOD, WILAT, CILT and ACEX from Russia. Open areas where commercial vehicle manufacturers can participate and There was great interest in the stand areas created indoors offering different participation options. "We are determined to show that logitrans is Türkiye's number one showcase in global logistics, with the intense support of our country's institutions as well as international participation."

EKO Fair Deputy General Manager Ekin Seren Ünsaç



Ünsaç emphasized that logitrans is also an idea platform where very important discussion topics regarding the future of the sector are discussed and said, "logitrans Fair, the most important logistics event of Eurasia, is a great event for those who want to come together with their customers and business partners and follow the developments in the sector closely." It provides a very important opportunity. "logitrans Fair is preparing its visitors for an eye-catching encounter by exhibiting innovative logistics solutions in this dynamic region. Conjunctural developments in the region will further increase the importance of Türkiye in logistics. In this respect, logitrans has a bigger role in terms of creating new collaborations and new commercial relations."

ROAD TRANSPORT: THE FIRST AND/OR THE LAST LEG OF EVERY JOURNEY



What kind of work is the IRU doing for more employment of the female population in logistics and road transport?
Umberto de Pretto: Commercial road transport's workforce has traditionally consisted of more men than women. The percentage of women working in the sector is slowly but steadily changing. The share of women truck drivers is less than 3% in most regions. It's a bit better in the passenger sector. For example, 22% of bus and coach drivers are women in Denmark. But the European average is below 12%.

Reasons deterring women from entering the profession include difficult working conditions, a lack of safe and secure parking areas, and long periods spent away from home. These are the same reasons deterring men from joining the profession. We encourage both more women and men to join the profession, it is essential that improvements are made to improve working conditions.

► This year IRU is celebrating its 75th anniversary and its 50th anniversary in the EU. How would you describe IRU's role in both global logistics and road transport today?

IRU was founded in the aftermath of World War II to help rebuild Europe's war-torn trade links. Fast-forward to 2023 and we are now the voice of the global commercial road transport industry.

Our work has expanded to all corners of the world, representing, via our 175 members, over 3.5 million road transport companies, from small family firms to major multinationals, operating mobility and logistics services in over 100 countries.

The TIR system, created by IRU in its first year to speed trucks more efficiently across Europe's borders, is still the only global transit system. It is the easiest, safest and most reliable way to move goods across borders, saving transport operators and customs authorities time and money.

Our mission looking ahead is to make mobility networks and supply chains even safer, more efficient and greener.

We also celebrated 50 years of representation to the EU this year. Our Brussels office focuses on policymaking at the EU level, ensuring that the voice of road transport companies is heard loud and clear. Together with



our members, we strive to shape industry policies that help our sector thrive in the interest of the EU's citizens, communities and businesses.
We are also planning another event in Istanbul this November to celebrate our 75th anniversary together with our members and partners in Türkiye and the region.

Highways undergo significant changes from east to west, from north to south. In this context, do you support the development of intermodal transport in this geography?
We certainly support the development of intermodal transport.
Road transport has a unique place in all intermodal transport movements. It is the first and/or the last leg of every journey. It can be the link between different stages of the transport, moving goods between sea, rail and air, or often the only way to move goods across landlocked countries. It also provides the economic stimulus for growth along trade corridors, lifting the fortunes of communities, cities and towns along the way.
Road transport is the only mode that can ensure the transport of anything that is grown or manufactured, with or without other modes, to major world markets.
Nevertheless, optimising intermodal transport is one of the most effective ways to reduce total logistics costs, increase efficiency and capacity, and provide high quality services.

MESSAGE FROM OF IRU SECRETARY GENERAL UMBERTO DE PRETTO FOR LOGITRANS 2023



Türkiye is at the heart of trade and transport corridors crossing the Black Sea region heading westwards to Europe and eastwards to the Middle East and Asia, driving economic development and social prosperity from the smallest villages to the largest urban centres.
But with increasingly congested trade corridors and border crossings, and the challenge of decarbonisation and digitalisation, how can the road transport industry, governments and international organisations work together to better deliver a brighter trade and transport future for the region?
We look forward to marking IRU's 75th anniversary with a special event - hosted together with our corporate member TOBB UND, in partnership with our association members TOBB and UND - within Logitrans, Türkiye and Eurasia's most important logistics exhibition.
Together, we can streamline border crossings for better connectivity, recognise excellence in road transport and hence shape a brighter future for trade and transport around the Black Sea and beyond.

Parking areas, security, hygiene and accommodation are the most important problems in international land transportation. What does the IRU do on the basis of countries for progress and improvement in this regard?

Safe and secure parking areas are a critical aspect of a thriving road transport industry that values and respects its biggest asset, its drivers. Good parking areas are a basic aspect of drivers' working conditions.

But, unfortunately, many regions are seriously lacking safe and secure parking areas.

We're advocating for safe and secure parking in Türkiye and neighbouring countries, as we do in other parts of the world. This is becoming an even bigger issue because of increasing freight volumes transiting Türkiye due to geopolitical issues.

We have had some success in the European Union, where we have convinced the European Commission to increase co-funding for safe and secure parking areas and to mandate Member States to build a minimum safe and secure parking infrastructure. We're working on replicating this action in other regions, including in Türkiye and across the Black Sea region.



What do you think about the driver crisis in the bus, coach and truck market? Can you summarise what IRU has been working on since the beginning of 2023?

Chronic professional driver shortages are putting already stressed economies and communities at higher risk of inflation, social mobility issues and supply chain meltdown.

According to our flagship annual driver shortage report, over 2.6 million truck driver jobs are unfilled. It's particularly acute in Türkiye, where 85,000 truck driver positions are vacant, 16% of total truck driver positions.

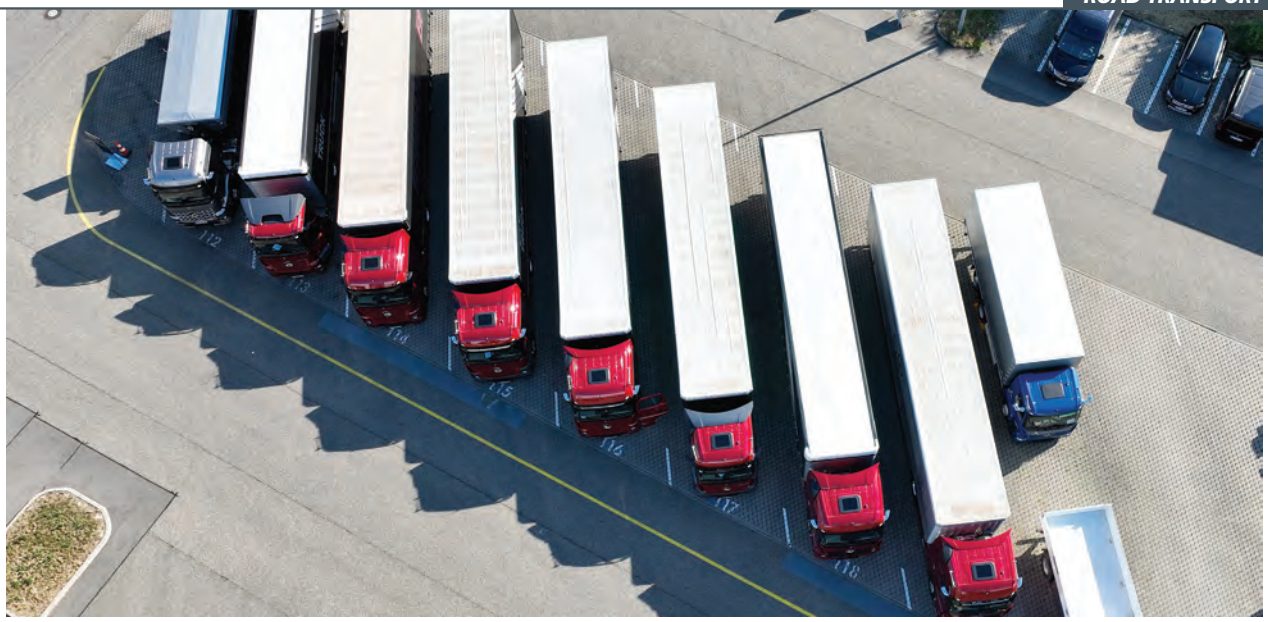
It's not looking good in the passenger sector either. In Europe's passenger sector, 10% of driver jobs are unfilled. In fact, it's becoming even more concerning as the post-Covid-19 recovery kicked in later than in the goods sector. Moreover, bus and coach drivers are even older than truck drivers on average, meaning that more will retire in the coming years, while the rate of replacement is lower.

We are continuously working on finding regional and global solutions to driver shortages.

Most recently, we, together with the International Transport Workers' Federation (ITF), launched a plan to help fix driver shortages.

The new approach aims to ease driver shortages and transport labour market imbalances, ensure decent working conditions and standards for drivers working outside of their home country, and simplify and enforce rules for workers and employers.

One key avenue to reducing driver shortages is by improving drivers' working conditions.



The relations between IRU and Türkiye and professional organizations go back many years. What can you say about today and future of this cooperation?

It most certainly does. IRU's first Turkish member, the Commodity Exchanges of Türkiye (TOBB), joined in 1965. Our relations with Türkiye has only grown stronger since.

The International Transporters' Association (UND) joined about a decade later, and in 2012, TOBB UND, a joint venture between TOBB and UND, also became an IRU member. TOBB's Head of Transport and Logistics Solution Department, Asli Çalik, is also IRU's Vice President, as well as the President of our Goods Transport Council.

Türkiye's strategic location makes it a major trade and transit hub. At the moment, Türkiye is seeing even more movements due to shifting trade corridors. As we're all aware, Transit via Türkiye increased by 50% in the first six months of 2022. The growth in trade volumes put pressure on already busy borders, markedly slowing down cross-border transport.

Just this summer, I visited the increasingly congested Sarp-Sarpi border between Georgia and Türkiye. Its narrow customs area is limiting its daily capacity, but inefficient procedures and a lack of digitalisation are further slowing down border crossings.

The good thing is that there are always tried-and-tested solutions waiting to be implemented that can drastically improve the flow of goods. TIR Green Lanes, express lanes at border crossings, should be introduced at the Sarp-Sarpi between Türkiye and Georgia until eTIR, including eTIR express lanes, are implemented. The use of TIR can significantly accelerate border crossings, reduce congestion and increase security.

To sum up, we have a lot on our plate, and we will continue to tackle these pressing challenges with our Turkish members. ■

Umberto de Pretto, Secretary General of the International Road Transport Union (IRU)





GREEN AND DIGITAL TRANSFORMATION PROCESS OF TÜRKİYE SPEEDS UP

The Green Deal Action Plan created in 2021 aims for ensuring sustainable growth and development in Türkiye in a comprehensive way, supporting the green transformation of the Turkish economy and industry, strengthening the integration to the global supply chains and attracting green investments to Türkiye.

The first and most important step taken by Türkiye for the fight against climate change was the United Nations Framework Convention on Climate Change (UNFCCC) which Türkiye became a party to on May 24, 2004. Within this scope, Paris Agreement was accepted at the 26th Conference of the Parties of the UNFCCC held in Paris in 2015. Türkiye signed the Paris Agreement on April 22, 2016 together with 175 country representatives at the High-Level Ceremony held in New York and the Agreement approved by Türkiye on October 6, 2021 entered into force in Türkiye on November 10, 2021 and the net zero emission goal by 2053 was announced for Türkiye.

The action plan prepared to align with transformation including the comprehensive changes foreseen under the European Green Deal announced by the European Union (EU) includes a total of 32 goals and 81 actions under 9 main headings. These nine headings include "Carbon Border Adjustments", "Green and Circular Economy", "Green Finance", "Clean, Affordable and Safe Energy Supply", "Sustainable Agriculture", "Sustainable Smart Transportation", "Fight Against Climate Change", "Diplomacy" and "European Green Deal Information and Awareness Raising Activities".

The Green Deal Action Plan Activity Report 2022 includes information on the developments achieved on the headings under the action plan and the works carried out by the related institutes and institutions regarding the additional areas required to be studied on in order to ensure a comprehensive green transformation.

The "Green Deal Action Plan Activity Report 2022" is published on the Ministry of Commerce website in line with the goal of Türkiye to align with the policies on fight against climate change which are trending on the international trade order.

Total export volume of Türkiye is 31.8 billion US Dollars

Green Deal Action Plan Annual Activity Report 2022 includes information on the works of Türkiye on the carbon border adjustments, green financing, sustainable agriculture and smart transportation. The Report states that the exports by Türkiye to the EU countries were around 13.1 billion US dollars and its total exports were 31.8 billion US dollars in 2022. The report also states that the exports made to Europe constitute 41.5 percent of the total exports of Türkiye.

The report prepared underlines that works are carried out to ensure a national Emission Commerce System aligned with EU methodology is established not to restrict the competitiveness of the industry sector in Türkiye and to transfer the income to be generated from this system to the green transformation, clean energy transformation and other decrease, alignment an fair transformation measures.

Green Deal Action Plan Activity Report also states that a National Circular Economy Action Plan is prepared. The project aims to promote transition to circular economy contributing to more efficient source and waste management across Türkiye and to strengthen corporate and technical capacity of Türkiye for transition to circular economy in line with the EU Circular Economy Model.

Share of solar and wind energy in electricity production increased

According to the Report, 2,766 MW electricity generation facilities using renewable energy resources in 2022 in parallel with the National Energy and Mining Policy of Türkiye and the additional capacity generated by these facilities constitutes 65 percent of the total additional capacity.

Within this scope, the installed capacity of Türkiye using renewable energy resources reached 56.393 MW as of the end of 2022 and its share in the total installed capacity is 54.3 percent. Moreover, the electricity generation using renewable energy resources reached 137.6 GWh and the share of electricity production using renewable energy resources is 42.2 percent in total electricity production.

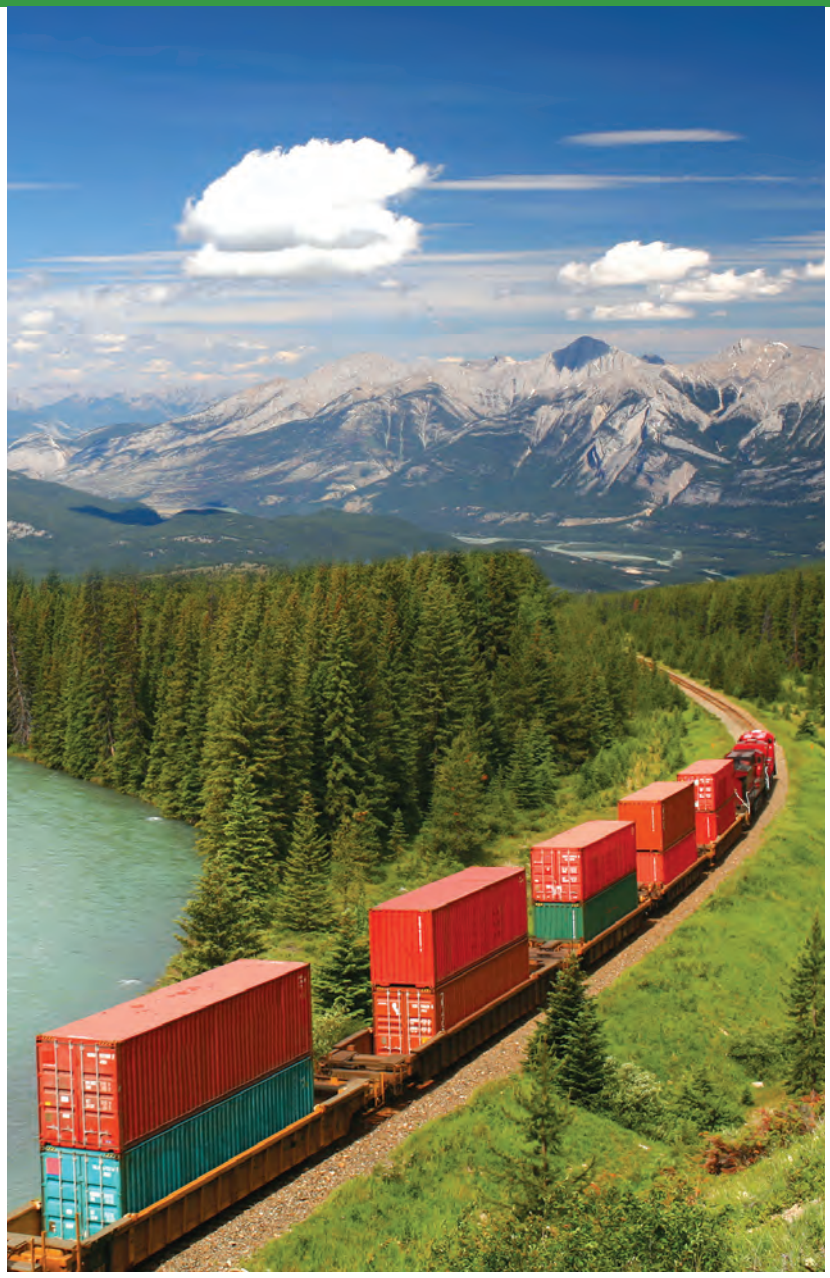
Giving information also on the National Energy Plan of Türkiye published by the Ministry of Energy and Natural Resources and prepared by taking as basis the Net Zero Emission by 2053 Goal, the report states that the share of electricity production in energy consumption increased, the share of renewable energy in installed electricity capacity reached 64.7 percent, battery and electrolyser capacity is launched and the share of solar and wind energy in electricity generation increased and the new nuclear energy power plants will generate significant amounts of energy by 2035. ■

WORKS CARRIED OUT UNDER GREEN DEAL ACTION PLAN

- Carbon Border Adjustments
- Green and Circular Economy
- Green Financing
- Clean, Affordable and Safe Energy Supply
- Sustainable Agriculture
- Sustainable Smart Transportation
- Fight against Climate Change
- Fair Transition Policies
- Green Transformation Diplomacy in Education and Training
- Information and Awareness Raising Activities



COMPETITIVE ZERO-CARBON COMBINED TRANSPORT FOR EUROPE AND RAILWAYS



UIRR
INTERNATIONAL UNION FOR ROAD-RAIL COMBINED TRANSPORT

With the latest additions UIRR's membership has grown to 51, while its technology partners number is 21 and the MoU Peers number 28. Altogether the UIRR network is 100 entities strong.

President of International Union for Road-Rail Combined Transport (UIRR), Ralf Charley Schultze, summarising his views about future of intermodal transport said: "Combined Transport needs to outperform if we are to meet the energy efficiency, fossil fuel decoupling, decarbonisation and clean air objectives of the European Union. Combined Transport and its zero-carbon door-to-door version, needs to grow by an average of 5% per year until 2050 in order to achieve the doubling of rail freight mar- ket share. The needs are

- €16,5 billion of annual investment into the rail infrastructure to establish the harmonised TEN-T parameters including a 4-metre loading gauge, as well as 22,5t axle load and 740m train length,
- €1,5 billion of annual investments into intermodal assets like terminals, loading units, intermodal wagons, skeleton trailers and digitalisation, and
- the creation of a supportive

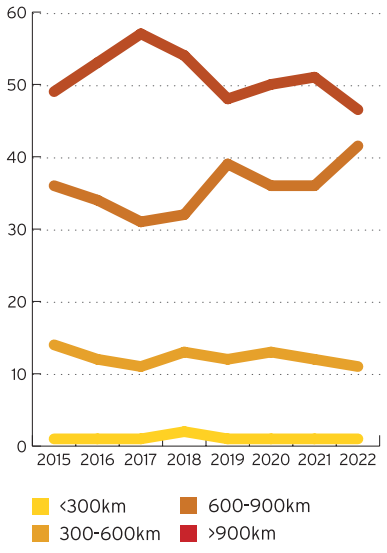


The EUROPEAN ROAD-RAIL COMBINED TRANSPORTATION 2022-2023 report summarizes the importance and future of Intermodal Transport by focusing on new projects and solutions.

regulatory environment that grants ade- quate quality and quantity of train paths to intermodal freight trains."
Here's the full scope of the UIRR report:

Intermodal transportation
Intermodal freight transportation, and its Combined Transport variant - where the road legs are kept to the shortest possible - concluded a very challenging year in 2022. The historic high performance of 2021 was been surpassed by both domestic and intra-EU services, while intermodal transport on relations outside the EU suffered a sharp decline. A series of crises that hit intermodal rail freight caused a contrac- tion of 0,3% in terms of consignments and of 11,7% when measured in tonne-kilometres over the course of 2022 with the quarterly trend deteriorating as the year progressed.
Combined Transport delivers value simultane- ously to economic actors and society by bring- ing together various modes of transport to per- form a single door-to-door transport operation. It is up to 70% more energy efficient with a carbon footprint that may be as much as 90% smaller than the dominant method of inland transport by end-to-end trucking. Door-to-door Combined Transport is capable to efficiently carry any type of cargo that is transported in trucks, and it can provide a sustainable alter- native solution to any origin/destination that is served by trucks today.
Combined Transport should be integrated into the various national policy strategies of EU Member States, including those on
• Energy efficiency
• Climate change mitigation and decarbonisation • Reduction of energy dependence
• Clean air initiatives
• Road accident and congestion reduction.
Combined Transport offers the means to achieve the EU objective

Distance Matrix
(Terminal-to-Terminal)



of doubling the market share of rail freight in Europe until 2050. The main source of rail freight performance growth is in modal shift, whereby freight trains need to get involved in the carriage of cargo that currently travels over long distances in trucks. The inter- modal transhipment technique – based on the use of intermodal loading units to contain the cargo carried – offers the most efficient means to bring trucked cargo to freight trains.

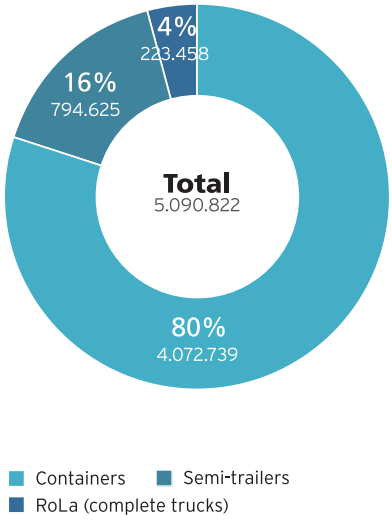
Rail freight: infrastructure and quality
Rail freight performance, which covers the longest section of intermodal transport chains, remained unreliable throughout 2022. Punctu- ality performance underwhelmed as a conse- quence of intensive passenger traffic together with excessive works on the network. The inferior bypass routes offered to freight trains, combined with the preference given to passenger trains to pass through the works-affected sections led to severe disruptions and loss of capacity. UIRR calls for a rethink of the traffic manage- ment and capacity allocation preferences on the rail infrastructure pursuant to the socio-eco- nomic cost-benefit principle. Replacing every twentieth passenger train with a freight train could provide all the infrastructure capacity needed for freight to continue with modal shift.

EU road haulage rules

The implementation of the Eurovignette Directive, amended in 2021, as well as the Mobility Package rules from 2019 are in the focus of attention. The German government was the first to announce a major revision of the road tolling rules, which foresees assigning a value to each externality category: CO2 and pollutant emissions, congestion, accidents and noise.

The European Court of Justice ruling on the complaints related to the Mobility Package is used as an excuse for Member States to hold back on the implementation of those rules. Only Denmark, Sweden and Fin- land have announced a derogation from compliance with Article 4 of the Combined Transport Directive.

Types of Intermodal Loading Units (Ilus)





France's late implementation of the 2015 amendment of the Weights and Dimensions Directive arrived in 2022. The unchanged imposition of the Directive's rules caused disruption to the road legs of cross-bor- der Combined Transport operations, as a 3-axle tractor is required for a 44-tonne gross weight truck, while 2-axle tractors are only allowed to tow a 42-tonne vehicle.

Dangerous goods and waste transport

Dangerous goods are an important commodity type for Combined Transport with a market share reaching nearly 20% of the UIRR traffic performance in 2022.

The pontential future growth for dangerous goods and waste transport by Combined Transport is under- mined by the introduction of national, regional and even local restrictions on certain types of dangerous goods classes that push some chemical actors to use end-to-end trucking instead of the safer CT alterna- tive. Trains run on tracks at controlled speeds and according to standardized safety protocols. This sig- nificantly reduces the risk of accidents and ensures the safe handling of dangerous goods for the chem- ical industry. Authorities should be much more cau- tious in their risk assessment related to the transport of dangerous goods.

Waste with or without dangerous goods – towards an equal share in terms of consignments – is a dynami- cally growing commodity type for Combined Trans- port. CT operators pay particular attention to ensure that shipments of waste using rail freight is managed in a manner that protects the environment and human health against any potential adverse effect.

The current discussions on the Waste Shipment Reg- ulation (WSR) will not only propose new and stricter



conditions to tackle illegal waste shipments, but also establish a fully electronic exchange system to reduce the administrative burden on business and to facili- tate the shipment of waste for recycling and re-use in the EU. Digital paperless-based solutions must be the preferred option for the business and authorities as they are prescribed by the eFTI Regulation. The recent resolution of some Member States (e.g. Italy) to revert to paper-based processes must be avoided.

Environment and decarbonisation

Combined Transport, and especially its zero-carbon ver- sion powered by renewable electricity, offers the least environmental burden, while getting the heavy lifting job done. Moreover, the electricity is used directly from the grid, hence the reliance on batteries is limited to mobile transhipment equipment and the electric trucks that perform the short first and last mile transports.

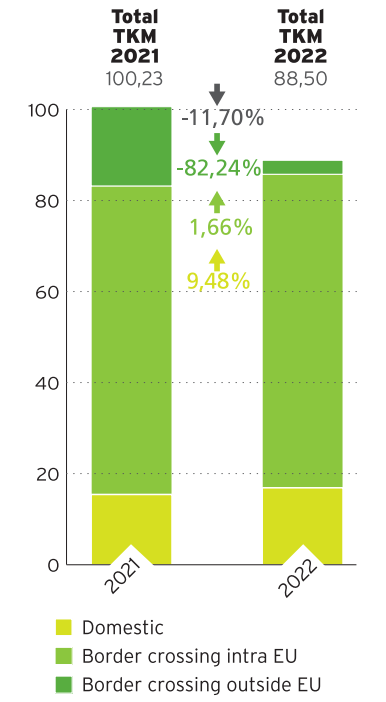
Modal shift is the indicator of the success of zero-car- bon door-to-door Combined Transport (ZCCT). If the regulatory framework conditions allow for the supe- rior energy efficiency and environmental performance of ZCCT to be reflected in the rates quoted to custom- ers, and if the required rail infrastructure capacities are available, the modal shift indicator – thanks to ZCCT – should show a gradual shift from road to rail.

Environmental considerations in the EU are expressed through

- The REPowerEU initiative which requires a 15% energy efficiency improvement by each Member State
- The Fit for 55 Package which should enable the achievement of the 55% carbon emission reduction pledge by 2030
- The Clean Air Package which drives the action to reduce air pollution across the EU

Both contemporary Combined Transport and ZCCT even more are the most effective means of delivering the environmental and climate objectives.

Tonne-Kilometres 2021-2022



GLOBAL LOGISTICS MARKET EXCEEDED 10 TRILLION US DOLLARS

While the size of the global logistics market is calculated as 10.68 trillion US dollars for 2022, it is expected to reach around 18.23 trillion US dollars by 2032 thanks to demand increase in the e-commerce industry.

Association of International Forwarding and Logistics Service Providers (UTİKAD) published its 2022 logistics sector report. UTİKAD gives detailed information about the situation of the global logistics sector after Covid-19 under its Logistics Sector Report. The report touches on many important topics such as the impacts of the crisis between Russia and Ukraine, the problems in the logistics operations after the embargoes imposed on Russia and breakage of the supply chains. Covering many important topics including container surplus after the global container crisis, decreasing trend in freight prices and impact of global recession, the report attracts attention to some important obstacles before the logistics sector.

In addition to these developments, the logistics sector report includes many important topics including especially the container surplus after the global container crisis, decreasing trend in freight prices and impact of global recession. Noting that the war between Russia and Ukraine made the biggest impact in 2022 on the global economic and logistics sector which has started fast recovery after the pandemic, the report tells that the war created an important impact from energy crisis to the change of global trade routes. The report emphasizes that the war between Russia and Ukraine which are two important countries in the world in terms of the export of many commodities such as energy resources, grains and food and perform most of the external trade activities via sea transportation caused problems in the logistics operations and breakage of the supply chains due to the impact of the embargoes and states that this created and continues to create a major risk for the sustainability and development of the global trade.



Container deficit replaced by container surplus, freight prices decreased

The logistics sector tried to overcome different crisis in the new world order starting with the pandemic process. One of the developments on the agenda of the sector in 2021 was the container crisis causing high cost increases. In 2022, however, the container deficit was replaced by container surplus and the freight prices decreased, as compared to the previous year. This was evaluated as the indicator of the slowing down global economy and supply.

Logistics Market Exceeded 10 Trillion US Dollars

The size of the global logistics market is calculated as 10.68 trillion US dollars for 2022. As the development of the e-commerce industry contributes to the development of the logistics sector, the size of the global logistics market is expected to increase to around 18.23 trillion US dollars by 2032 with the demand increase in the e-commerce industry.



The highest foreign trade of the last decade

According to the examination of the foreign trade of Türkiye over the years, Türkiye reached its highest foreign trade volume in 2022. While the exports increased by 12.9 percent to 254.2 billion US dollars, the imports increased by 34 percent to 363.7 billion US dollars in 2022, as compared to the previous year. The sector report included detailed information of the product groups subjected to foreign trade, the largest export markets and import-export data by country.

Distribution of goods among transportation modes

Including detailed information on the transportation volumes of the transportation modes in the foreign trade of Türkiye, the report states that the transportation and communications sector got the biggest share from the total investment plan of Türkiye in 2022. According to the information on the report, sea transportation has the biggest share both in imports and exports on the basis of the value of the goods transported in Türkiye. While the road transportation was ranked the third, air transportation was ranked the third. Rail transportation is the mode with the lowest share in the foreign trade of Türkiye.

While the railways increased their share by tonnage in export transportations of Türkiye in the last 10 years, they did not increase their share by value. The highest value of 35.66 percent in 2013 could not be achieved in export transportations by road, again, in 2022. According to the section examining the role of Türkiye in transit transportation, transit goods constituted around 12 percent of the goods handled on the ports in 2012 by TEU and this ratio increased to around 16 percent at the end of 2022 and the ratio of transit goods by TEU increased by 127 percent in the last 10 years.

Carbon Footprint of Global Logistics

European Union (EU), being the most important export partner of Türkiye, started serious initiatives regarding the decrease of carbon emissions in the recent years. Within the scope of this process, EU aims for neutralizing carbon emissions by 2050 with European Green Deal. According to the World Economic Forum, 5.5 percent of the carbon emissions in the world are caused by the logistics and transportation sectors. It is a must that the sector stakeholders should be trained to decrease carbon emissions, immediately set a strategy in this respect and the world should act together to fight against the crisis.

It was decided to implement the Carbon Border Adjustment Mechanism (CBAM) in order to prevent leakage of intensive energy production outside the EU borders and negative impact on the EU economy because of the emission decrease measures planned to be made more advanced.

With this practice, the EU Emission Trade System (EU ETS) will be expanded to cover imported goods. European Commission published the Fit for 55 package on July 14, 2021 and this package includes the recommendation for the establishment of the Carbon Border Adjustment Mechanism (CBAM). The draft CBAM Regulation is planned to enter into force on January 1, 2023. CBAM is aimed to be implemented step by step via the transition period until December 31, 2025. However, the European Parliament reached a temporary agreement with the European Council in order to implement the CBAM and it was decided that the transition period for the regime will start as of October 1, 2023.

Opportunities for the Central Corridor

Stating that the shipments between China and USA on the Northern Corridor decreased by 40 percent since the occupation of Russia by Ukraine, the report emphasized that this made the Central Corridor initiative passing through Türkiye more attractive. The report stated that Türkiye got the chance to strengthen its role in transit transportation and to achieve this, the legislation, customs and infrastructure systems of the transit countries should be re-arranged to activate the Central Corridor. In the light of the regional developments, the importance of the development of the railway network of Türkiye and ensuring integrations between modes also comes to the forefront. ■

WORLD AIR CARGO FORECAST SHOWS 4.1 PERCENT GROWTH IN VOLUME AND 60 PERCENT IN FLEET IN 20 YEARS

A general statistics estimate that the global volume of air-freight transport was forecast to continuously increase between 2023 and 2028 by in total 35.0 billion ton-kilometers (+14.28 percent). The volume of air-freight transport is estimated to amount to 280,404.54 million ton/km.

Although the supply and demand forecasts for cargo aircraft of the two major aircraft manufacturers, Boeing and Airbus, vary slightly, they indicate that the demand for wide-body and long-range cargo aircraft will increase further.

According to Airbus forecasts, express cargo is expected to grow by 4.7 percent annually and general cargo by 2.7 percent on a global scale.

Airbus forecast shows that, in general, approximately 2,440 cargo aircraft will be needed in the next 20 years, 880 of which will be newly built aircraft.

Boeing's 2022-2041 air cargo forecast is that air cargo will grow by 4.1 percent annually. The same forecast shows that 940 freighters will be produced and 1885 planes will be converted into cargo planes and will be in service.

Boeing expects its global freighter fleet to increase by 60 percent by 2041, with air cargo demand increasing due to the speed and reliability of e-commerce and air transportation.

Air cargo projections made by Boeing indicate that the fleet in cargo service in 2019 will increase by 80 percent by 2041, and the cargo aircraft fleet will reach a total of 3,610. 925 of this number will be wide-body cargo aircraft.

Here are the main headlines and analysis of Boeing World Air Cargo Forecast for 2022-2041 period.

Maritime for tonnage, air cargo for value

Measured in tonnes of goods moved, the maritime transport industry is much larger than the air cargo industry. In 2021, the world maritime industry carried an estimated 11.1 billion tonnes, compared to 60.9 million tonnes of air cargo. By weight, 86% of the world's maritime trade is in raw materials and other bulk items. Most of these commodities, such as oil, metal ores, and grains, are low in value, not time sensitive, and shipped in specialized vessels. These cargoes cannot be directly compared to the high-value, dry commodities associated with air transport. However, while air cargo accounts for less than 1% of the world's trade tonnage, the high value of these goods means it is responsible for about 35% of the value of all globally shipped goods.

E-Commerce distribution

Rapid expansion in e-commerce is expected to boost air cargo growth. The complex logistics of e-commerce rely heavily on local postal systems, express networks, and, in some cases, extensive insourced distribution networks managed by retailers. Air cargo packages are generally not identified specifically as e-commerce by shippers, and airmail shipments are typically bundled in bags with assorted documents and parcels. However, it is clear that e-commerce is revolutionizing customer expectations and air cargo logistics. Global e-commerce revenues are expected to more than double pre-pandemic levels by 2026, reaching $8.1 trillion-up from $3.4 trillion in 2019, and five times higher than the $1.5 trillion spent in 2015. While domestic e-commerce business is often supported by large ground networks, growth in cross-border e-commerce,



as well as emerging markets without well-established postal and ground networks, will promote an increased role for air cargo.

Combination carriers leverage both dedicated main-deck freighters and the belly capacity of extensive passenger networks to provide reliable air connections, particularly to and from home markets and hubs.
Express carriers operate main-deck freighter fleets of all sizes to provide time-definite services as well as general air cargo capability. Express carriers typically utilize standard body and medium-widebody freighters to support their hub operations.

Containership dynamics influence air cargo markets due to modal competition
Containerized cargo is the maritime sector that most closely corresponds to air cargo. While the majority of maritime cargo is low-value bulk, containerships carry some of the same commodities as air cargo does, while offering a low-cost alternative for goods that do not require high speed and peak reliability.

Freighters are indispensable
Freighters are critical for airlines competing in air cargo markets. While nearly half of the world's air cargo has historically been carried in the bellies of passenger airplanes, freighters are a key component of the customized scheduling and operations flexibility that many air cargo customers need.
As a result, airlines with main-deck freighters in their fleets earn 90% of the air cargo industry's revenue.
While increasingly capable widebody passenger airplanes helped the air cargo industry grow in the decade preceding the pandemic, we expect dedicated freighters to continue to carry at least 50% of the world's air cargo traffic, even after long-haul passenger networks recover to pre- pandemic levels and beyond. There are several key reasons for freighter preference in air cargo flows:
• Most passenger-belly capacity does not serve key cargo trade routes.
• Twin-aisle passenger schedules often do not meet shipper timing needs.
• Freight forwarders prefer palletized capacity, which is not available on single-aisle aircraft.
• Passenger bellies cannot transport hazardous materials and project cargo, two important sectors in air cargo flows.
• Payload-range considerations on passenger airplanes may limit cargo carriage, increasing the risk that cargo will fail to arrive on time.

Importance of main-deck freighters
The Covid-19 pandemic highlighted the importance of main-deck freighters in the global air transportation system. With high air cargo yields and greatly reduced long-haul international networks, conditions were favorable for many airlines to use passenger widebody fleets for cargo-only operations, in order to generate much-needed cash flow and industry capacity. These "preighters" replaced some of the capacity shortfall, and even (in some cases) generated quarterly profits for carriers, despite minimal passenger

operations. While long-haul passenger operations are still recovering, enough passenger capacity has returned to most markets that almost all preighter operations have been discontinued.
In normal times, airplanes generate more revenue in passenger service. However, the experience of the past two years has highlighted the value of cargo operations. For airlines looking to diversify risk and operations coming out of the pandemic, that experience has provided an incentive to incorporate cargo operations in their network and fleet planning.

Near-Term dynamics

Air cargo capacity and yield trends were severely disrupted by the pandemic, but are beginning to see a return to longer-term trends. Before the pandemic, nearly 50% of air cargo worldwide was transported in widebody passenger cargo holds. This capacity virtually disappeared in March, 2020, as passenger widebody service was suspended globally. Freighter operators responded to this disruption by operating at above-normal utilization levels, delaying freighter retirements, and bringing new and parked airplanes into their fleets to compensate for the cargo-hold shortfall. While overall air cargo capacity has regained 2019 levels, the ratio of main-deck freighter capacity to belly capacity remains elevated, with nearly two thirds of all air cargo capacity being carried on main decks, as long-haul passenger networks continue to rebuild.
In the decade prior to the pandemic,air cargo yields averaged a 3% annual decline. Falling oil prices in 2014, declining fuel surcharges, and trade dynamics contributed to the softer yield environment.
During the pandemic, air cargo capacity disruption, strong air cargo demand, and congested supply chains all boosted air cargo yields well above long-term average rates. In 2021, some flows saw rates that tripled pre-pandemic averages. Yields are now starting to fall as supply chains and long-haul passenger networks recover, bringing air cargo belly capacity back into the market. However, rates in the third quarter of 2022 are still roughly double the pre-pandemic averages.
Since March, 2022, higher fuel prices have contributed to these elevated levels, but the overall supply-demand balance continues to be a key factor in bringing additional capacity needs back into air cargo markets.
With air cargo traffic volumes now running near pre-pandemic levels, and yields elevated, global air cargo revenues have reached all-time highs. In 2021, air cargo revenues hit $170 billion, up from $100 billion in 2019. Combination and all-cargo carriers have seen the largest increases, with both segments roughly doubling their 2019 revenues in 2021, while revenues for express and belly-only carriers increased roughly 45% compared to pre-pandemic levels.

Long-Term dynamics

The global economy and world trade have demonstrated long-term resilience despite near-term challenges. It has been a tumultuous two and a half years since the Covid-19 pandemic brought most activity to a halt. The shock turned out to be very deep, but it was short-lived by historical standards. After dropping 9% between fourth-quarter 2019 and fourth-quarter 2020, global GDP regained its pre-crisis peak by the first quarter of 2021.
Global trade in goods made an even more impressive comeback. Initially GDP and Trade Quick to Recover disrupted by production shutdowns and uncertainties, the exchange of goods resumed quickly. Medical goods and protective equipment moved around the globe and, as lockdowns took their toll on in-person service activities, consumers turned to purchases of goods instead. Industrial production and global trade were higher than 2019 levels by the end of 2020. Growth continued for the global goods trade in 2021 and into 2022, as consumer spending remained robust and producing industries invested and expanded. As a result, the volume of global trade was more than 8% higher in fourth-quarter 2022 than in fourth- quarter 2019, and it surpassed the previous all-time high of 2018.
However, as 2022 drew to a close, the outlook for growth and trade became much less certain. Strong demand for goods created friction in supply chains, leading to price hikes and inflation. This, in turn, set central banks on the path to sharply tighter monetary policies.
Russia's invasion of Ukraine has thrown commodity and agricultural markets into turmoil, and China's stance toward Covid-19 continues to disrupt trade flows and raise uncertainties about demand.
Near-term metrics such as the Purchasing Managers' Index signal stalling, if not declining, activity in the goods-producing sector.
Forecasts for both GDP growth and trade expansion have been revised sharply downward. Many advanced economies are projected to experience a recession in 2023. As the pandemic recedes, consumers are redirecting their spending toward services, and high inflation could sap consumption overall. Goods consumption looks ready to normalize or even undershoot trend rates, after a period of extraordinary growth. All this is likely to subdue near-term trade growth. On the other hand, strong household balance sheets and solid labor markets continue to support demand in many economies. In addition, the easing of supply chain frictions could release backed-up flows of goods, and so introduce a near-term tailwind.
The probable slowdown in economic



activity and trade will pose challenges. Uncertainty about the extent of rebalancing efforts and the speed of subsequent recovery could increase and linger into 2023. But growth and trade have proven resilient before. Most experts predict a relatively shallow recession, and trade remains a crucial part of the global economy. The pandemic has shown how important global linkages are for the provision of medical equipment and vaccines, as well as for the delivery of goods to people and companies as they adjust to changing external circumstances. Supply chains are diversifying, and many emerging markets are undeterred in their pursuit of global integration as the key to higher standards of living.

Prominent role for structural factors

Express networks are proliferating. E-commerce doubled its share of retail sales over the past five years, and this high growth rate was incorporated in pre-pandemic forecasts. But, as with many things Covid-related, it was a trend that accelerated, with adoption rates taking a big jump during the pandemic. Today, consumers are more acclimated to online shopping, and they have high expectations for fast service. Covid pulled ahead pre-pandemic forecasts and expectations with container speed and reliability less suited in some cases to serving the demand. In addition to accelerating growth, the global impact of the pandemic has boosted plans to develop express networks in emerging markets-particularly China-and also has raised expectations for the segment overall, particularly in the standard-body and medium-widebody freighter categories.

New players in the air cargo arena

Some shipping companies are exploring a shift to more vertically integrated operational strategies. Historically, freight forwarders were the primary interface between producers and shipping companies. Some shipping companies now aim to compete in the freight-forwarder space by developing their own full-service solutions. For customers, the value propositions here are the elimination of modal uncertainty and the de-risking of service levels. To provide this integrated mobility of goods, some shipping container and logistics companies are acquiring airplanes to provide the promised range of service levels. This trend suggests some aggregate movement of shipping volumes from sea to air. While the volumes will not likely be large relative to total global trade, even small shifts toward the speed, reliability, and risk mitigation of air could be significant, considering that air cargo now represents only about 1% of global trade volumes. In addition to growth among established logistics providers, markets around the world are seeing a range of air cargo newcomers, including a spurt of operations growth for smaller general-freight and express airlines.

Strategic supply chain, logistics innovations

Globally, the pandemic experience highlighted the risks of the just-in-time supply chains that had evolved

over the previous several decades.
As labor shortages constrained both shipping and manufacturing, single-source supply chains became points of failure. As a result, many goods companies and logistics firms today are exploring diversified supply chains as a way of mitigating future risk. If the past two decades saw the pendulum swing toward reduced costs and greater efficiency, the years ahead suggest a swing toward diversity and reliability. In the near future, supply chain resilience will be recognized as a key performance indicator.
This trend likely will bolster air cargo demand for two reasons: First, air cargo's flexibility and point-to-point service are ideal for multi-node supply chains. And, second, the pandemic has demonstrated the value of air cargo's speed and reliability. As manufacturers and logistics providers consider ways to diversify supply chains, a range of transport modes is likely to be one more instrument in the toolbox for some commodities.

Multiple drivers of growth

A range of issues beyond cyclical economic trends influence air cargo market growth forecasts. Among them are modal competition, globalization, market liberalization, and new air-eligible commodities.
Complementing the 2.6% long-term economic growth outlook, trade and industrial production will be key drivers for air cargo growth. We forecast that trade will outpace economic growth, increasing 2.8%, and that industrial production will grow 2.2%, both annually, over the next two decades. These economic factors, as well as the regulatory and industry structure dynamics highlighted above, support Boeing's forecast that air cargo traffic, measured in revenue tonne kilometers, will grow an average of 4.1% annually from 2022 to 2041.
East Asian markets lead the global air cargo forecast in both volumes and growth rates. Today, the Transpacific and Europe-to-East Asia air cargo flows are the largest. By the end of the forecast period, the intra-East Asia region will become the third largest global market, up from the number-five position in 2021, with 5.7% projected East Asia Markets Will Lead average annual growth. Driving this shift will be increasing goods production and booming consumer markets. Industrial production, trade, and express-market growth are forecast to propel traffic growth of 5.3% in the domestic China market, the second fastest-growing flow in our 20-year forecast. The intra-North America and Transatlantic air cargo flows will round out the top five markets by the end of the forecast period, with large markets today but slower growth rates due to the more mature market dynamics of Europe and the United States.
Since 2000, carriers based in the Middle East have leveraged their geographic position at the crossroads of Africa, Asia, and Europe. Middle East carriers quickly expanded their widebody passenger and freighter fleets, which allowed them to increase their share of

DEMAND FOR AIR CARGO GREW FOR THE FIRST TIME IN 19 MONTHS

► The International Air Transport Association (IATA) released data for August 2023 global air cargo markets, showing that year-on-year air cargo demand grew for the first time in 19 months.
Global demand, measured in cargo tonne-kilometers (CTKs*), increased by 1.5% compared to August 2022 levels (1.2% for international operations).
• Capacity, measured in available cargo tonne-kilometers (ACTKs), was up 12.2% compared to August 2022 (11.8% for international operations). This was largely related to belly capacity which rose 30% year-on-year as airlines ramped-up operations to meet peak-northern summer travel season demand.
• Several factors in the operating environment should be noted:
- In August, both the manufacturing output Purchasing Managers Index or PMI (49.4) and new export orders PMI (47.0) saw a slight improvement to the previous month. They remained, however, below the critical threshold represented by the 50 mark, indicating a continuing, if slower, annual decline in global manufacturing production and exports.
- Global cross-border trade contracted for the fourth month in a row in July, decreasing 3.2% year-over-year. This reflects the cooling demand environment and general macroeconomic conditions.
- Inflation saw a mixed picture in August, with an increase in US consumer prices for the second month in a row. Meanwhile in Europe and Japan, consumer and producer prices fell. In China, which is fighting deflationary pressures, consumer prices rose.
"Air cargo demand grew by 1.5% over the previous August. This is the first year-on-year growth in 19 months, so it is certainly welcome news. But it is off a low 2022 base and market signals are mixed. Looking ahead, while many uncertainties remain, we can take some optimism from PMI data moving towards positive territory. This is particularly significant as we head



world air cargo traffic from 4% in 1999 to 13% in 2021. In 2021, airlines based in East Asia, Europe, North America, and the Middle East accounted for 91% of all world air cargo traffic. In charter traffic, North American airlines are the leading providers.
Growing domestic markets and intra-regional flows are the key drivers for the deployment of standard-body and medium-widebody freighters, while the longer-haul intercontinental flows, typified by the top three regions (Transpacific, Transatlantic, and Europe-Asia), will be the primary users of large-body freighters. These dynamics underpin the Boeing freighter fleet forecast. ■

into air cargo's traditional peak year-end season," said Willie Walsh, IATA's Director General.

August regional performance

• Asia-Pacific airlines saw their air cargo volumes increase by 4.9% in August 2023 compared to the same month in 2022. This was a significant improvement in performance compared to July (+2.3%).
Carriers in the region benefited from growth on two major trade lanes: Europe-Asia (up from 3.1% in July to 8.8% in August) and Middle East-Asia (up from 2.7% in July to 3.5% in August).
• North American carriers saw their air cargo volumes decrease by 1.2%. This was an improvement in performance compared to July (-5.4%). Carriers in the region benefitted from a slight improvement in growth on two major trade lanes: North America – Europe (2.9% annual contraction in August,1.2 percentage points better than in July) and Asia - North America (declined 4.2% in August compared to 4.4% decrease in July).
• European carriers saw their air cargo volumes decline by 0.2% in August compared to the same month in 2022. This was, however, an improvement in performance versus July (-1.0%). Volumes saw an increase due to the forementioned Europe–Asia performance and a small increase in the Middle East - Europe markets by 0.4%. Capacity increased 3.6% in August 2023 compared to 2022.
• Middle Eastern carriers experienced a 1.4% year-on-year increase in cargo volumes in August 2023. This was an improvement from the previous month's performance (-0.1%). The demand on the Middle East–Asia market has been trending upward in the past three months, expanding its year-on-year growth from 1.8% in June to 3.5% in August. Capacity increased 15.7% compared to August 2022.
• Latin American carriers had the strongest performance in August 2023, with a 6.2% increase in cargo volumes compared to August 2022. This was a significant increase in performance compared to the previous month (+0.5%). Capacity in August was up 13.7% compared to the same month in 2022. ■

2053 GOAL FOR SHIPPING IS 21.6 BILLION US DOLLARS

Minister of Transportation and Infrastructure, Abdulkadir Uraloğlu told that 2022 turnover of the shipping sector is around 531,2 billion and aims to invest 21.6 billion US dollars by 2053.

Minister of Transportation and Infrastructure Abdulkadir Uraloğlu attended the Chamber of Shipping Council Meeting in İstanbul. Gathering together with the members of the Board of the Chamber of Shipping and sector representatives, Uraloğlu said that he was happy to be with them and focused on the developments in the field of shipping in his speech. Uraloğlu told that one of their goals is to ensure Türkiye utilizes its rich potential on the seas in the best possible way and gets the place it deserves in world shipping. Uraloğlu made the following remarks in this regard: "2022 turnover of the shipping sector is around 531 billion and 238 million. The number of ships owned by Turkish citizens is one thousand and 765 in total and one thousand and 352 of them are foreign flagged. The volume of goods handled at the ports reached 543 million tons. The cruise tourism which decreased due to the pandemic has been revived again. The number of passengers increased by around 2-fold to 483 thousand and the number of ships increased by 30 percent to 420 in 2022 as of the first 6 months of 2023. We increased the size of the Turkish Owned Maritime Trade Fleet by around 4.4-fold to 39.1 million deadweight tons since 2022 and was ranked the 14th on the global ranking since 2023. Our ports where 85 percent of the world trade are carried out have significant importance for our economy. The number of our ports increased by 46 percent from 149 in 2000 to 217 in 2022. The number of shipyards increased from 37 in 2002 to 84. In



addition to our shipyards on our coasts, 749 ship construction facilities, 192 harbor launches and 23 ship recycling facilities are among the indispensable premises for the ship industry sector.

We certified 20 ports with our "green port" certification programme

Uraloğlu told that Türkiye gained new environmentally sensitive port facilities and 20 port facilities were certified with the Green Port Certificate Programme. Noting that the way before the sector was cleared with the legislation works carried out and new regulations made, Uraloğlu continued as follows:

We made some changes on our incentive mechanism in favor of the sector with the "Regulation on the Incentivization of the Building of New Ships to Replace Turkish Flagged Ships to be Scrapped" which became effective in June 2022.

Within this scope, incentives will be given to 10 ships per year for up to 1.5-fold for those that use fossil fuels, for up to 2.5-fold for those that use environmentally friendly energy resources and up to 25 percent for conversion to the use of environmentally friendly energy resource.





Abdulkadir Uraloğlu, Minister of Transportation and Infrastructure

We also have many regulations and projects that we carry out and whose process is ongoing. We invite the sector to benefit from these supports and invest in the Turkish shipping. We ended the special consumption tax (SCT) charged on the fuel used by the ships working on the coasting trade."

Turnover for 2022 is Around 531 Billion and 238 Million

Minister Uraloğlu told that "We will invest 21.6 billion US dollars to the shipping sector by 2053. We will make 180 billion US dollar-contribution to our national income. Its impact on production will exceed 320 billion US dollars. It will also make a 5 million-person contribution to the employment for 30 years."

Uraloğlu also told that they as the ministry will continue to provide every possible facility for the growth of the Turkish shipping trade and added the following:

"The ship forwarding undertaking 90 percent of the world trade is the backbone of the world economy. Sea trade is more affordable as compared to the maritime, road and rail transportation. Sea transportation is mandatory for a sustainable economic growth and welfare as it is low cost and efficient. Therefore, we have to determine well the strategies to take this sector to the future. We will take necessary steps together with our sector in order to increase the share that Türkiye will take from world sea trade and to reach the place she deserves among the "Leader Marine Countries" under the leadership of our Esteemed President. I believe that Türkiye will make her presence felt more with the works we carry out and will become one of the leading countries of the world in the field of shipping by increasing her competitiveness." ■

E-COMMERCE VOLUME REACHED 800 BILLION TURKISH LIRAS IN TÜRKİYE

The Turkish E-Commerce Ecosystem Report prepared by iyzico, Electronic Commerce Operators Association and Dogma Alares is published. According to the report, the sector size reached 801 billion Turkish liras.



According to the Turkish E-commerce Ecosystem Report co-prepared by the E-Commerce Association of Türkiye (ETİD), İyzico and Dogma Alares, the number of e-commerce transactions increased from 3.4 billion to 4.8 billion. While the size of the e-commerce market in Türkiye was 5.7 percent in 2021, it constituted 6 percent of the GDP of the country last year.

According to the report, the size of e-commerce sector reached 801 billion Turkish liras in 2022, constituting around 6 percent of the Gross Domestic Product. Having grown by 69 percent in 2020 as compared to 2021, the sector grew by 107 percent last year as compared to 2021 because of high inflation. According to the report, the average basket amounts also increased from 13 Turkish liras in 2021 to 79 Turkish liras in 2022. The report stated that in addition to the traditional payment methods such as credit card, debit card and cash payment at door, the share of alternative payment methods such as pre-paid cards, A2A (account to account) payments, digital wallets, shopping loans and crypto moneys and buy-now-pay-later will also increase in future.

e-commerce is on the rise from all aspects

The sector also grew by 12.5 percent in US dollars last year as compared to 2021. Having reached 226 billion Turkish liras (31 billion and 830 million US dollars) in 2020, the sector reached 382 billion Turkish liras (42 billion and 960 million US dollars) in 2021 and 801 billion Turkish liras (48 billion and 340 million US dollars) in 2022. The sector continued to grow both as inflation-adjusted and in terms of foreign currency. Sharing the report with the public, iyzico General Manager Orkun Saitoğlu told that the increasing trend also continued in the first 6 months of this year and added that: "Infrastructure investments were made. We have companies making sales everywhere in the world." The share of e-commerce in the total retail trade in Türkiye increased to 16.5 percent in 2022. This ratio was 5.3 percent in 2018, 6.4 percent in 2019, 11.3 percent in 2020 and 13.7 percent in 2021. China is the world leader in this field with a share of 31.4 percent. It is followed by the UK with 27.5 percent and USA with 26.3 percent.

The number of female users increased by 10 percent

According to the report, the number of users using the e-commerce platforms increased by 2.2 percent as compared to the previous year. Moreover, while the ratios of male and female users were 58 and 42 percent, respectively, as of 2022, the share of female users increased by 10 percent as compared to 2021.

The product categories with the highest market share in terms of e-commerce sales volume and number of transactions were fashion and accessories, electronic and technology, cosmetics and personal care, service, tourism and travel in 2022. These five sectors constituted 63 percent of the e-commerce sector and 66 percent of the transactions in terms of sales volume. The most significant growth was seen in cosmetics and personal care.



53.3 percent of the sellers are in İstanbul

While the three geographical regions where most of the sellers are located were Marmara, Central Anatolia and Aegean regions, the provinces in the Eastern Anatolia and Southeastern Anatolia regions do not get the highest share from the regional volume. 53.3 percent of the e-commerce sellers in Türkiye are located in İstanbul. İstanbul is followed by Ankara with a rate of 8.2 percent.

E-export should increase

Electronic Commerce Operators Association (ETİD) Chairman Emre Ekmekçi told that the share of e-commerce in Türkiye among general exports should increase from 1 percent to around 4 percent which is the world average. Ekmekçi added that: "How we can sell products to foreign customers and market diversification should be among the topics which we should talk the most in the sector. Upon being asked the question by Yeni Mesaj regarding whether e-export increased or not, Ekmekçi made the following remarks: "e-import (online orders from abroad) was a serious matter 4 to 5 years ago. 28 million packages were delivered from abroad 5 years ago. A tax of 20 percent is imposed on the delivered products. This taxation is a procedure implemented in the entire world. 150 Euro-system is now a settled system in Türkiye. Product orders can be placed abroad from various domestic products. Amounts over 150 Euros are subject to tax."

e-commerce also boomed in the world

Noting that the e-commerce growth trend which increased during the pandemic, the report revealed that the sector continued to maintain its power both in Türkiye and the world. According to the report emphasizing that especially the pandemic period caused a permanent change in the shopping behaviors of the consumers, e-commerce which generated a market share of 5.7 trillion US dollars in the world in 2022 constituted 5.7 percent of the global gross product of 100.2 trillion US dollars. The share of e-commerce in global retail sales was 22 percent. ■

ARTIFICIAL INTELLIGENCE SUPPORT TO THE LOGISTICS SECTOR

The evolutionary growth and development of the artificial intelligence and cutting-edge technologies have brought to the forefront the requirement for innovations and technological adaptations in the logistics sector. Steps should be taken in the sector for new generation technologies for Türkiye to further improve its logistics performance and to reach higher ranks.

Many sectors have initiated intensive digitalization programmes starting in the last few years. For the logistics sector, the traditional operators should also change their way of doing business and digitalize their processes in order to ensure that the global trade is maintained smoothly when the competition caused by the new actors in the sector and the increasing customer expectations are taken into consideration. The logistics sector which is one the sectors adapting fast to the innovations have many advantages in this respect. Those who can integrate digital transformation to their processes expected to reach 16 trillion US dollars in 2026 will get the biggest share from the cake.

The logistics sector is expected to achieve a more efficient, faster, more reliable and low cost structure with the digital transformation. Many Turkish logistics companies increase efficiency by using technology in order to keep up with the developing sector and continuously renew itself to ensure customer satisfaction.

In order to improve the global competitiveness of Türkiye regarding the logistics sectors, attention should be made to elements such as cost minimization, innovative systems and software, warehouse and storage investments.

Digital transformation transform the logistics sector fast like all other sector. Especially the logistics companies in large economies speed up their services, decrease costs and provide competitive advantage by using the technology. The logistics companies gain momentum by increasing the use of technology in many developed countries. However, most of the logistics companies in Türkiye are currently behind this digitalization process. This adversely affects the global competitiveness of the Turkish logistics sector and prevents the effective use of especially the new trade routes. But it also provides the Turkish logistics sector with the opportunity to speed up its services, decrease its costs and increase its competitiveness thanks to digitalization. However, the logistics companies in Türkiye should make more investments into technology and accelerate the digitalization process in order to make use of this opportunity.

Impact of technological investments on the logistics sector

The technology has a deep impact on the world economy and this is also reflected in the logistics sector. The developing technologies are expected to guide the logistics sector like all industries. Artificial intelligence, big data, internet of things, blockchain and automatized robot technologies break new ground in the logistics sector. These technologies make the goods and service transportation,



storage and monitoring process more efficient, faster and prone to fewer mistakes.

Digitalization not only improves efficiency and operational effectiveness but also helps with decreasing the carbon footprint and reaching environmental sustainability goals. It also has the potential to increase the transparency of supply chain and decrease its complexity. While the artificial intelligence and machine learning make the supply chain estimations more accurate, the IoT allows for real time monitoring of goods and services. The blockchain technology keeps a fully transparent and verifiable record of each step along the supply chain and provides assurance to the consumers. Moreover, automatized robot technology facilitates warehouse management and inventory control and decreases the ratio of human errors in the logistics sector. However, training and support are required for the effective integration of technological innovations, improving the existing infrastructure and adaption of the personnel to the new technologies.

Therefore, the adoption of technological innovations by the logistics companies is of vital importance for them to remain competitive and expand their market share. The logistics sector in Türkiye can be the pioneer of this technological transformation with investments and strategic planning and can make use of more opportunities in the local and international arena.

TOP 20 IMPORTING COUNTRIES (MILLION DOLLARS)

COUNTRY	2022 (AUGUST) VALUE	2022 (AUGUST) SHARE	2023 (AUGUST) VALUE	2023 (AUGUST) SHARE	CHANGE	2022 (JAN-AUG) VALUE	2022 (JAN-AUG) SHARE	2023 (JAN-AUG) VALUE	2023 (JAN-AUG) SHARE	CHANGE
Germany	1.662.569	7,8	1.782.019	8,2	7,2	13.771.571	8,3	14.158.954	8,6	2,8
USA	1.440.017	6,8	1.323.144	6,1	-8,1	11.370.847	6,9	9.809.642	6,0	-13,7
Iraq	1.257.539	5,9	1.091.000	5,0	-13,2	8.606.391	5,2	7.738.182	4,7	-10,1
United Kingdom	1.094.756	5,1	1.063.377	4,9	-2,9	8.591.698	5,2	8.019.825	4,9	-6,7
Italy	891.985	4,2	876.598	4,1	-1,7	8.396.264	5,1	8.098.557	4,9	-3,5
Russia	947.753	4,5	846.341	3,9	-10,7	4.583.789	2,8	7.463.732	4,5	62,8
France	763.719	3,6	842.648	3,9	10,3	6.169.246	3,7	6.868.053	4,2	11,3
Spain	793.561	3,7	783.147	3,6	-1,3	6.672.938	4,0	6.748.760	4,1	1,1
Netherlands	659.882	3,1	768.671	3,6	16,5	5.491.712	3,3	4.927.101	3,0	-10,3
UAE	496.927	2,3	628.224	2,9	26,4	3.319.834	2,0	4.385.366	2,7	32,1
Romania	476.986	2,2	562.896	2,6	18,0	4.602.846	2,8	4.608.660	2,8	0,1
Poland	411.400	1,9	500.316	2,3	21,6	3.636.480	2,2	3.824.902	2,3	5,2
Israel	576.872	2,7	495.931	2,3	-14,0	4.755.177	2,9	3.829.062	2,3	-19,5
Belgium	385.086	1,8	394.397	1,8	2,4	3.269.930	2,0	2.941.259	1,8	-10,1
Bulgaria	334.472	1,6	351.729	1,6	5,2	3.267.280	2,0	2.826.545	1,7	-13,5
Libya	210.206	1,0	331.311	1,5	57,6	1.883.766	1,1	1.960.603	1,2	4,1
Greece	223.149	1,0	330.173	1,5	48,0	2.224.529	1,3	2.688.644	1,6	20,9
Kazakhstan	140.877	0,7	305.488	1,4	116,8	884.487	0,5	1.879.574	1,1	112,5
Iran	247.559	1,2	282.945	1,3	14,3	1.949.178	1,2	1.946.021	1,2	-0,2
Morocco	226.674	1,1	280.369	1,3	23,7	2.170.385	1,3	1.977.760	1,2	-8,9
Others	8.033.859	37,8	7.774.098	36,0	-3,2	59.884.052	36,2	58.092.306	35,3	-3,0
TOTAL	**21.275.850**	**100**	**21.614.821**	**100**	**1,6**	**165.502.401**	**100**	**164.793.509**	**100**	**-0,4**

TOP 20 EXPORTING COUNTRIES (MILLION DOLLARS)

COUNTRY	2022 (AUGUST) VALUE	2022 (AUGUST) SHARE	2023 (AUGUST) VALUE	2023 (AUGUST) SHARE	CHANGE	2022 (JAN-AUG) VALUE	2022 (JAN-AUG) SHARE	2023 (JAN-AUG) VALUE	2023 (JAN-AUG) SHARE	CHANGE
China	4.147.068	12,7	3.828.930	12,6	-7,7	28.035.160	11,7	30.669.535	12,4	9,4
Russia	6.297.306	19,4	3.338.881	11,0	-47,0	38.411.372	16,1	31.722.254	12,8	-17,4
Germany	2.049.545	6,3	2.554.849	8,4	24,7	15.327.477	6,4	18.832.618	7,6	22,9
UAE	347.425	1,1	1.988.207	6,6	472,3	2.684.800	1,1	7.131.928	2,9	165,6
Switzerland	1.749.511	5,4	1.449.089	4,8	-17,2	6.145.249	2,6	15.697.878	6,4	155,4
USA	1.324.563	4,1	1.446.246	4,8	9,2	10.295.750	4,3	10.590.921	4,3	2,9
Italy	1.176.122	3,6	1.215.639	4,0	3,4	9.132.549	3,8	9.893.954	4,0	8,3
South Korea	813.724	2,5	904.915	3,0	11,2	6.370.999	2,7	6.445.644	2,6	1,2
France	924.254	2,8	813.379	2,7	-12,0	6.317.173	2,6	7.744.469	3,1	22,6
Spain	589.967	1,8	789.532	2,6	33,8	4.601.141	1,9	6.233.649	2,5	35,5
India	766.852	2,4	773.886	2,6	0,9	7.546.547	3,2	5.414.861	2,2	-28,2
Japan	376.886	1,2	526.425	1,7	39,7	3.016.876	1,3	3.609.848	1,5	19,7
United Kingdom	441.398	1,4	515.075	1,7	16,7	3.932.705	1,6	4.233.461	1,7	7,6
Brazil	473.825	1,5	386.160	1,3	-18,5	3.672.304	1,5	2.893.550	1,2	-21,2
Poland	377.177	1,2	384.923	1,3	2,1	2.768.873	1,2	3.311.086	1,3	19,6
Belgium	325.964	1,0	357.939	1,2	9,8	3.078.933	1,3	3.027.933	1,2	-1,7
Egypt	197.656	0,6	357.113	1,2	80,7	1.620.071	0,7	2.390.486	1,0	47,6
Malaysia	330.068	1,0	348.247	1,2	5,5	2.958.104	1,2	2.769.843	1,1	-6,4
Netherlands	408.114	1,3	342.612	1,1	-16,0	3.107.413	1,3	2.967.922	1,2	-4,5
Kazakhstan	379.290	1,2	312.957	1,0	-17,5	2.095.712	0,9	2.337.644	0,9	11,5
Others	9.035.371	27,8	7.636.353	25,2	-15,5	77.918.262	32,6	69.177.583	28,0	-11,2
TOTAL	**32.532.085**	**100**	**30.271.357**	**100**	**-6,9**	**239.037.472**	**100**	**247.097.066**	**100**	**3,4**

Source: RİP (TB&TÜİK)







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