

Transport and Logistics Systems Magazine

INTERMODAL

Road • Rail • Sea • Air • Storage • Infrastructure • Supply Chain

2024 • Issue 39

THE COMBINED TRANSPORT SECTOR CONTINUES ITS INVESTMENTS IN EUROPE

**TÜRKİYE TO
BECOME
A GLOBAL
LOGISTICS HUB**

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increasing role of
Türkiye in logistics

Air Cargo Market
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LOGISTICS CONTINUES TO BE THE STRENGTH AND ORGANIZATIONAL ABILITY OF THE GLOBAL ECONOMY

► *Intermodal Magazine, as a magazine published in English in the logistics sector in Türkiye, strengthens its publishing feature with every issue that conveys the problems of the sector, the opinions of both public and private sector organizations to the whole world. In a sense, Intermodal Magazine is an important resource and guide for the logistics sector to keep its pulse and make predictions for the future. With this issue, we have left behind the 39th issue.*

Intermodal Magazine reaches industry representatives and companies on many international platforms, especially at Logitrans and Messe Munich Fairs.

In addition to shedding light on the current picture in logistics, Intermodal Magazine is also an important resource for monitoring future assessments and projections.

When we look at the sector today, it is seen that the evolution of transformation from road transport to the logistics sector to cover all forms of transportation is undoubtedly not easy. The road transport fleet, which is the main component of the logistics sector, continues to make its presence felt as an important player not only in Europe, but also in all nearby geographies.

It is obvious that technological superiority and fleet modernization, as well as fleet size, are indispensable for maintaining competitive superiority in international trade. Considering that one of the most important leverage of competition is sustainability, it is essential that fleet modernization includes electric vehicles and intermodal transportation.

At a time when logistics routes are being redefined all over the world, the return to a route that has remained in history, such as the Cape of Good Hope, creates an ironic situation from the point of view of the global economy as well as from the point of view of the sector. Significant developments and changes

are taking place not only in the routes, but also in the role of transport modes. The effective use of air cargo in many products, especially e-commerce, has further increased the importance of cargo in airline revenues.

Undoubtedly, it is not a dream to predict that the new picture imposed by the cyclical situation on the sea routes will change and the Red Sea route will return to its good old days. Sea lines and ports will continue to be the most basic carriers of global trade not only in terms of value, but also in terms of tonnage.

On the other hand, the global routes in which Türkiye is located make more than one mode of transportation indisputable. Although it is not part of a grand strategy, the natural development course of the logistics sector shows a development in accordance with the increasing importance of Türkiye in global and regional trade. Geographical advantages form a suitable composition with geopolitics and logistics

the sector is able to create a competitive advantage with its dynamic and flexible structure. Türkiye, which is located at an important crossroads on the east-west axis, stands out as a reliable logistics stakeholder for all countries. We should also say that the logistical importance of Türkiye on the Northern and Southern axis has increased in terms of all modes of transportation.

On the one hand, the sector is moving towards a structure where foreign players are active with new acquisitions and mergers. It should be accepted that such consolidations are inevitable as a condition of maintaining competitiveness. The investments of DHL Group and Fedex, two giant names of the world in logistics, in Türkiye also provide an opportunity to read the future positively.

Logistics will be not only the transporting power of the development engine and global trade in all economies, but also its organizational capability. ■

Issue 39

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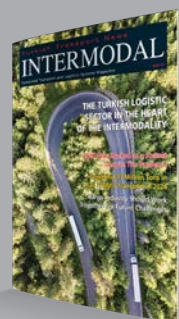
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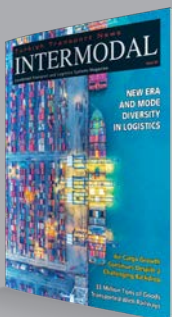
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FUTURE OF SUSTAINABLE TRADE THANKS TO GREEN LOGISTICS

Şerafettin ARAS
Chairman



► We aim for 375 billion US dollars of goods export and 200 billion US dollars of service export by 2028. In order to realize these goals, we strive for increasing the effectiveness of our export activities in nearby geographies, taking our exports to geographies further away and ensuring that our country gets a larger share from the supply and value chains. The recent developments in our region have rendered our country a safer and more reliable transit route between Europe, Caucasus, Central Asia and China and increased our potential to become a regional logistics hub. Specific improvements and investments are needed in order to make more effective the corridors such as the International Trans-Caspian Middle Corridor and Zenzegur Corridor and Development Road where our country has a key location. We have to take faster steps regarding the public-private sector-NGO cooperation in order to realize the process and capacity improvements, digitalization and legislation enactments/ amendments to facilitate the transit transportation required to make faster the road border entries and to increase today's

entry figures by 3-fold in the next 5 years.

Moreover, as UND - the leading organization and founder of the Ro-RO/Ro-pax transportation from Türkiye to Europe, I would like to underline that we always support the development and making effective of the intermodal and combined transportation practices including the use of different transportation modes in logistics to support each other.

In order to get a better share from the world trade, our country has to provide the international trade masters a Logistics Eco-System which would ensure that her access to the existing and new markets in a more effective, fast and competitive way via roads, sea and railways

This system must be provided with a range of logistics services where different transportation types support and complement each other as a "Supply Chain".

We welcomed with great pleasure the cost advantages provided with the "Combined Transportation Legislation" and Green Logistics Document system introduced by the Transportation and Infrastructure Ministry to our sector.

However, unless the infrastructures

and superstructures and naturally the legislation infrastructure are not made sufficient, the number of companies that will perform the Green Logistics activities will not increase and the intermodal/ combined transportation operations will not become sustainable.

As UND, we added the RO-RO/ RO-LA/Intermodal Transportation Working Group to the working groups in the new period. We are open to the support and participation of the esteemed sector stakeholders to the studies to be carried out under our umbrella.

Let's activate the position of our country's location in the Middle Corridor, the Development Road and other international corridors, establish new RO-RO lines and Logistics centers so that Türkiye yield the benefits. ■



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THE INTEGRATION OF MARITIME AND RAIL TRANSPORT INEVITABLE

Hamdi ERÇELİK
Chairman



► Türkiye's strategic location serves as a bridge between Europe, the Middle East and Asia, making the country an important point in the global logistics network. Aiming to assume a stronger role in the global supply chain, Türkiye is rapidly increasing its infrastructure investments in this direction, with a particular emphasis on railway transport. This transformation in the transport and logistics sector will enable Türkiye to become more competitive not only regionally but also internationally. Railways stand out as both an economical and environmentally friendly option for transporting large volumes of cargo on land. Railway investments not only help to reduce transport costs, but also contribute to minimising environmental impacts by offering sustainable logistics solutions. Within this framework, Türkiye is taking critical steps in railway transport as well as other modes of transport. These investments are expected to play an important role in increasing Türkiye's share in export and import transport. In this context, the integration of railway networks in Türkiye with ports, airports and highways will form the basis of a universal logistics system. On the other hand, increasing environmental concerns

worldwide have brought the issue of sustainability in the transport sector to the forefront. The decisions taken within the scope of the European Green Deal point to rail transport as an important tool for countries to reach their decarbonisation targets. In this context, the role of railway transport in reducing carbon emissions is important.

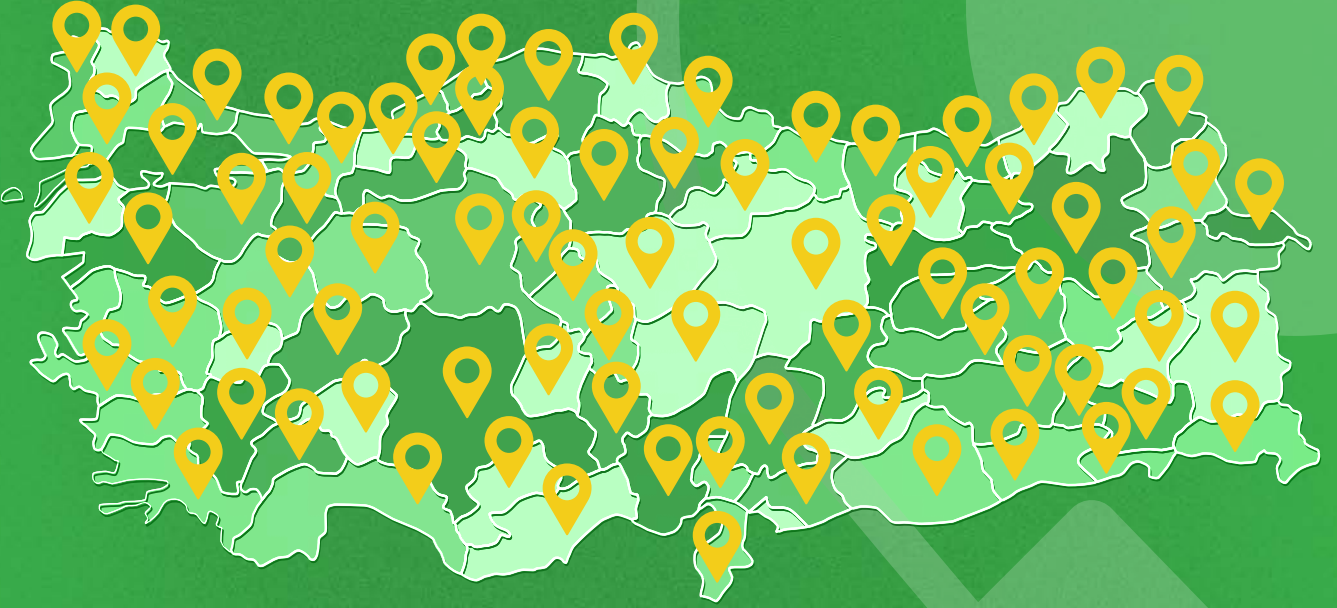
Importance of integration with maritime transport

One of the most important complementary elements of railway transport is maritime transport. Türkiye's geographical location and the significant port inventory on its coasts make the integration of maritime and rail transport inevitable. Cargo transport through ports can be integrated with railway networks to offer faster and more economical logistics solutions. While maritime transport plays an effective role in transporting large volumes of cargo over long distances, the railway serves as a critical interconnection for transporting high volumes of cargo inland. Strengthening the railway connections of ports in Türkiye is among the issues that are given importance by the public and included in national strategies and development plans.

Importance of integration in railway and logistics

Railway transport, rather than being a stand-alone solution, reaches maximum efficiency when integrated with other transport modes. Türkiye continues to work on the establishment of logistics centres and the integration of the railway network with ports and land transport. In this way, it is aimed to realise both domestic trade and international trade in a faster and more efficient manner. While this integration in the logistics sector increases Türkiye's competitiveness, it also supports Türkiye's goal of becoming a regional logistics hub. As a result, Railway transport stands out as an important transport mode that will further strengthen Türkiye's position in international trade. With both economic and environmental advantages, it will play a key role in achieving Türkiye's sustainable development goals. Railway investments in line with the European Green Deal and other international sustainability targets have the potential to turn Türkiye into a regional logistics centre. Integration with maritime transport in this process will further reinforce Türkiye's competitive advantage in the global supply chain. ■

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THE FUTURE OF RAILWAY TRANSPORT

Onur KÜÇÜKAKDERE
Chairman of the Board



► In recent years, the logistics sector has undergone a profound transformation due to the impact of global events and economic dynamics. Factors such as the pandemic, political tensions, and climate change have triggered a search for new solutions in the field of transportation. In this context, rail transport has emerged as a strategically valuable option worldwide due to its environmental benefits and cost efficiency. Türkiye is one of the countries with significant potential to become an important logistics hub during this transformation process. However, achieving this goal is only possible through the rapid development of railway infrastructure and the establishment of strong connections with neighboring countries. In the transformation of the logistics sector, rail transport plays a critical role due to its low carbon emissions and high carrying capacity. In line with the goals of the European Green Deal, the need to reduce carbon emissions has increased the demand for environmentally friendly transportation methods. Rail transport offers both economic and environmental advantages, becoming an important alternative alongside road and sea transport. In this context, it is crucial for Türkiye to develop its railway infrastructure to align with the Green Deal and establish a sustainable transportation network.

The future of rail transport is not limited to domestic transportation but is also becoming an integral part of international logistics corridors. Thanks to its strategic location, Türkiye has the potential to play an active role in these corridors. However, turning this potential into reality requires the expansion and modernization of the current railway network and the establishment of seamless connections with neighboring countries. Investments in rail transport, in line with Türkiye's goal of becoming a logistics hub, will positively affect both regional trade and international logistics routes.

A report prepared by the Railway Transport Association (DTD) offers important recommendations on promoting rail transport. The report highlights the critical importance of integrating ports with railway infrastructure and emphasizes the importance of combined sea and rail transport. These investments will increase Türkiye's effectiveness in logistics corridors, boosting the region's trade volume. At the same time, such investments will contribute significantly to reducing carbon emissions by supporting environmental sustainability.

For Türkiye to make a significant leap in rail transport, the modernization of infrastructure is inevitable. In this context, eliminating bottlenecks on

existing railway lines and making geometric improvements will increase the speed and efficiency of transportation. Additionally, the legal framework regulating rail transport needs to be clarified, and the General Directorate of Transport and Communications Regulation (UHDGM) should become independent to pave the way for sector development. Investment incentives play a vital role in the development of rail transport. Operational support for Rail Train Operators (RTOs) will encourage the private sector to be more active in this area and increase competition within the industry. Furthermore, incentives for rail vehicle investments and local production projects will enable Türkiye to adapt more quickly to technological innovations in the railway industry. Rail transport plays a key role in ensuring sustainable growth in Türkiye's logistics sector. Infrastructure investments, legal regulations, and alignment with environmental goals are among the main factors that will support the development of this sector. Encouraging the private sector to play a more active role in this area demonstrates the great potential of rail transport from both economic and environmental perspectives. With a strong railway network, Türkiye has the opportunity to rise to a more effective position in regional and international logistics. ■



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TÜRKİYE'S RISING ROLE IN RAILWAY TRANSPORT: THE FUTURE OF THE MIDDLE CORRIDOR AND GREEN LOGISTIC

Berna AKYILDIZ
Chairman of the Board



► Türkiye has long been a strategic bridge between Asia and Europe. This position places the country at the heart of global trade under the modern Silk Road and Middle Corridor initiatives. Central to Türkiye's ambition of becoming a global logistics hub is its railway transport system, which provides both environmental and economic advantages. This is further supported by sustainable logistics practices and the European Green Deal, enhancing Türkiye's role in global supply chains. As part of the Silk Road revival, Türkiye has positioned itself as a vital player in international trade, with the Middle Corridor connecting China to Europe. This route is one of the shortest and safest land connections between Asia and Europe, offering a more sustainable alternative to the Suez Canal and the Northern Corridor. Key infrastructure projects like the Marmaray, the Baku-Tbilisi-Kars (BTK) Railway, and several large-scale port developments highlight Türkiye's strategic importance. Türkiye has ambitious railway expansion plans. By 2053, the country aims to invest approximately \$198 billion in its railways. This will include expanding its high-speed rail network to 13,000 kilometers and establishing 26 new logistics centers. These projects will significantly

increase rail freight volume, positioning Türkiye as a key logistics hub between Europe and Asia. Railway integration is crucial for strengthening Türkiye's trade ties with Europe, the Middle East, and Central Asia. For large-scale shipments, railways offer a cost-effective, fast, and sustainable alternative. Compared to road transport, rail can reduce carbon emissions by up to 70%, making it essential for achieving sustainability in logistics.

Moreover, Türkiye's rail infrastructure investments align with the European Green Deal, which aims to shift a substantial portion of road transport to rail and sea routes by 2030. Türkiye's role in this shift will be supported by green logistics solutions, such as hydrogen-powered trains and electrified railways, which will help reduce the logistics sector's carbon footprint.

In terms of intermodal transport, Türkiye's railways are increasingly integrated with ports, highways, and airports, enhancing the country's role as a logistics bridge between Europe, Asia, and the Middle East. This not only boosts trade efficiency but also reduces costs and improves environmental sustainability. One of the standout projects is the BTK Railway, forming a backbone of the Middle Corridor. As trade

between China and Europe grows, Türkiye's rail networks are crucial in linking these regions. Strengthening these connections will transform Türkiye into a production hub serving areas from Eastern Europe and Russia to the Middle East and Africa.

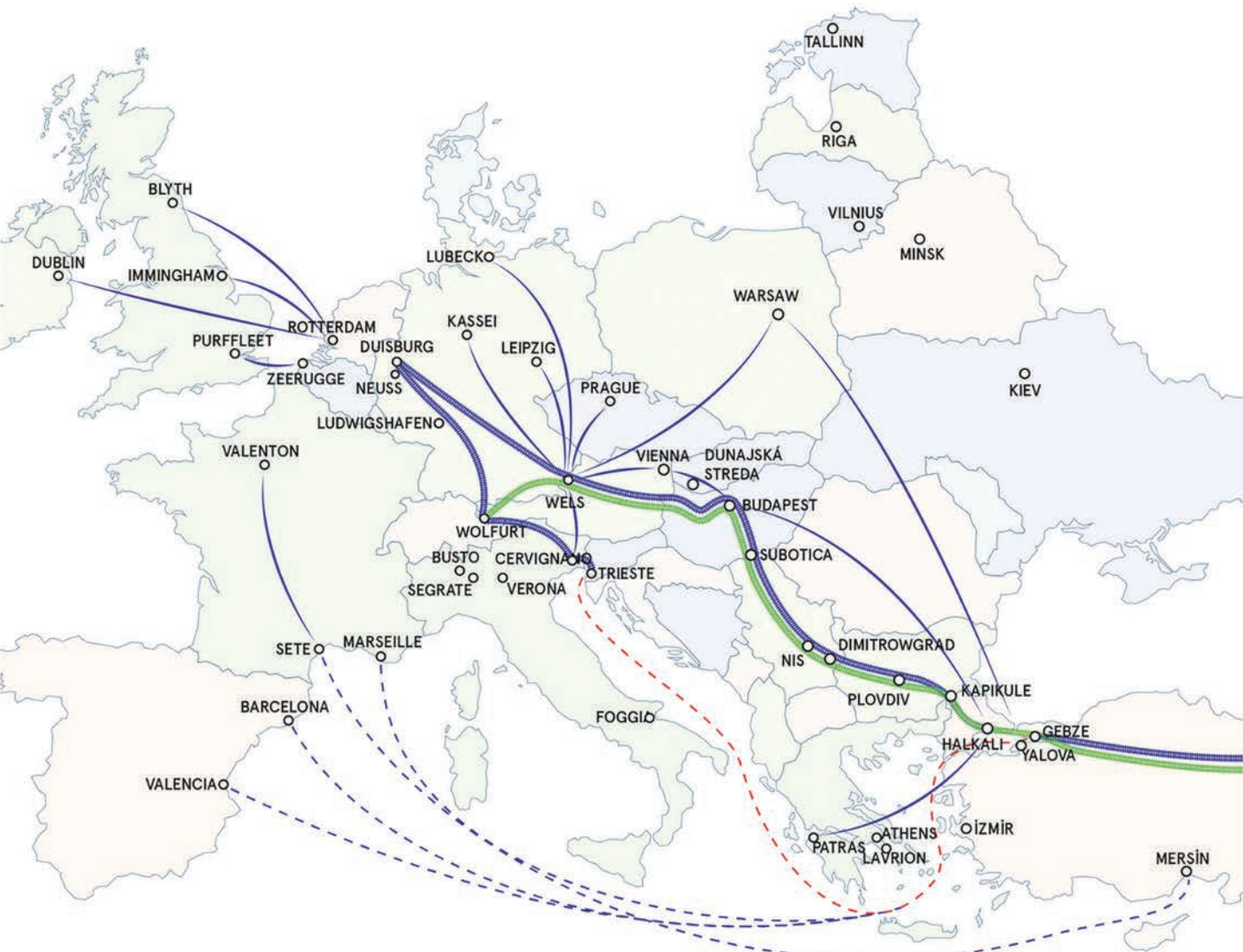
A robust rail infrastructure will accelerate production and distribution activities, playing a key role in global supply chains. As Türkiye's rail networks expand, the country will become a strategic hub for trade routes, linking production centers to ports and global markets. However, infrastructure investments must also be accompanied by digital innovation, such as smart logistics, blockchain tracking, and AI-driven route optimization, to enhance global competitiveness.

Sustainable technologies like hydrogen-powered trains and electrified railways will further strengthen Türkiye's green logistics efforts. These advancements, aligned with the European Green Deal, will drive the green transformation of the logistics sector.

Türkiye's commitment to integrating sustainable technologies, digital innovation, and logistics education ensures that its rail networks will shape the future of global transport, positioning the country as a leader in the railway industry. ■

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► The total automotive production decreased by 7 percent and the automobile production by 5 percent in January to September 2024 as compared to the same period of the last year. The total production amounted to 1 million and 597 while the automobile production amounted to 657 thousand and 148. During the period from January to September 2024, the automobile and light commercial vehicle market decreased by 0.9% to 849,892. The automobile sales increased by 1.3% to 675,273 and the light commercial vehicle market decreased by 8.4% to 174,619. The heavy commercial vehicle sales have a normal trend despite the difficulties to borrow loans. However, a decrease of around 20 percent is expected in the market in 2025. According to the Heavy Commercial Vehicle Association (TAİD) data, the Heavy Commercial Vehicle Market increased by 11 percent during January to December 2024 as compared to the same period of the previous year. The total number of vehicles sold during this period was 28,586. According to the last 10-year's average, the total market increased by 52 percent, the automobile

market by 56 percent, the light commercial vehicle market by 39 percent and the heavy commercial vehicle market by 43 percent. During the period from January to September, the capacity utilization ratios were 69 percent for the light vehicles (automobiles + light commercial vehicles), 73 percent for the truck group, 51 percent for the autobus-midibus group and 64 percent for the tractors. The total capacity utilization ratio for the Automotive Industry was 69 percent during the period from January to September. The new automobile sales in the European Union (EU) decreased by 18.3 percent from 643 to 637 in August as compared to the same month of the previous year. Out of the new automobiles sold in the EU member states, 33.1 percent are running on gas, 31.3 percent are hybrid, 14.4 percent are running on electricity and 11.2 percent on diesel, 7.1 percent are plug-in hybrid and 2.9 percent are vehicles running on other fuel types. The new automobile sales decreased by 27.8 percent in Germany, 24.3 percent in France, 13.4 percent in Italy and 6.5 percent in Spain in August as compared to the same period of the last year.

Due to the decrease in the demand in China and the uncertainties in the global trade, Mercedes-Benz has also started to be affected negatively by the difficult process in the sector in Europe, right after Volvo and BMW. The Germany based company has announced that the revenue from the sales would be between 7.5 to 8.5 percent. The previous estimation was between 10 to 11 percent. After this announcement of Mercedes, the automotive sector stocks decreased by 3.2 percent and Volvo and Stellantis stocks by 4 and 2.7 percent respectively. Volvo also withdrew its goal of making all its vehicles electronic vehicles by 2030 and decreased its profit margin and income goals. Volkswagen Group re-decreased its profit estimations after two point half months and the stocks of the Company listed on the stock exchange were subjected to sales pressure. Volkswagen expects its profit margin to decrease from 6.5 to 7 percent to 5.6 percent for this year (nearly 18 billions of Euro). The Turkish automotive market is expected to reach one million and one hundred thousand by the end of the year. ■



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Chairman



► The Turkish trailer industry is undergoing a crucial turning point. The market conditions within the country and abroad gets more and more difficult every day. The main market Europe cannot recover after the pandemic. The war between Russia and Ukraine directly affect the region and the world. Due to the inflation policies in the country, the financing has nearly stopped. There are many other negative factors, in addition to those listed above.

Despite these developments, the Turkish trailer industry continues to hold its ground. This is, in fact, a new stage, a new challenge. The trailer scale of Türkiye continues to increase. Companies make great progresses in many fields such as production capability, capacity, number and technology usage, product diversity and marketing activities. Despite the stepping-back-like movement of the trailer industry in Europe, we will have achieved an important progress if our attempts are successful.

We are increasing our strength in exports

Despite the market loss of 30 percent within the country as compared to the previous year, I consider the decrease of 9 percent in the exports as positive. Türkiye manufactured 60 thousand of trailers in 2023. The share of exports in total production increases gradually. We can accept the market fluctuations

within the country but we should achieve sustainable development in export markets. TREDER members make a great effort to achieve this. The participation in the exhibitions in Europe and Asia increases more and more every year passing by. The Turkish companies are among the highest number of participants in France, Italy and Russia. More than 1650 companies participated in the IAA Transportation 2024 - the largest commercial vehicles of Europe - this year. The Turkish trailer sector played the biggest role in the high participation from Türkiye. 19 TREDER member companies participated in the fair, therefore, displaying the design, production and market power of the Turkish trailer sector.

The types of trailers displayed by TREDER members revealed the strength and product diversity of the sector. The trailers displayed included curtain sided, reefer, low-bed, container carrier, dumpers and tankers and bulk trailers satisfying the requirements of highest standards.

We are at a turning point regarding ATP

ATP/BTB certificate will be mandatory in Türkiye as of January 1, 2025 in domestic transportations. This date will be a turning point for full compliance with ATP practices. Just like our successful transformation in

ADR, we can do the same in ATP. The competence and the infrastructure of TSE are our biggest advantages. The losses in the process called "from the fields to the tables" would decrease with the ATP/BTB's becoming mandatory under the applicable legislation. In an era where the world struggles against famine, we should not accept the losses caused by the cold chain. The efficiency in agriculture should be at the highest level in a sustainable economy. Keeping produce grown with lots of efforts and financial resources in the field waiting for rotting on the roads is not acceptable in the era we are in.

The reefer trailer production in Türkiye can satisfy the needs of Türkiye at a sufficient level and does not require imports. Although the initial investment cost might be high, the decrease in the lost goods would generate a great revenue in total for Türkiye. Therefore, the granting of initiatives for ATP/BTB would be appropriate.

In conclusion, Türkiye will be the largest trailer production center of Europe in future. The largest trailer producers of Europe based their operations in Türkiye. They also started to carry out productions in sub-industry. Major reasons such as the human resource, production quality and closeness to the Middle East will make the trailer industry stronger in Türkiye. ■



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ONE QUESTION, MORE ANSWERS IN GLOBAL PICTURE

İlker ALTUN
Managing Director-Aysberg Group



► The only question is what kind of world are we heading towards or what kind of world is waiting for us in the next 3-5 years? Although it may seem like a very general question, it is also out of the question to pass such a question off with a general answer. Who will answer this question when it comes to the whole sphere?

The answer that each country, each economy or each sector will give to this question will naturally be different. At the corporate level, there seems to be no other option but to read the overall picture properly and make cautious predictions.

The leading forces of the global economy, especially the United States and the European Union, are also shaping world politics. China, which is the only country that is a candidate to take the leading role of the United States in the world economy in some way in 5-10 years, can only make subtle touches to world politics. China's foreign economic relations, which have adopted quiet diplomacy with long-term consequences, are also gaining intensity. In addition to its dominance in the Asia-Pacific region, which has become the base of production and investment, its economic relations with Russia are also in the process of gaining a more integrated dimension. It is obvious that the strong infrastructure and superstructure provided by China in the supply and logistics chain, especially in the Belt and Road Project and the Middle

Corridor, will also guide the changing routes of global trade.

There are endless variables when looking for an answer to the question of what kind of world awaits us, but it is worth remembering that China's position as a super economic power will be an independent variable in the face of this question.

There is no doubt that it is not too difficult to plan for the future in our personal lives. Because we have a chance to postpone, cancel or reshape our plans according to rapidly changing conditions. When it comes to countries, general economies, sectors, companies, production and distribution chains and investments, it is necessary to plan the future well and move forward with a low margin of error in these plans. Every country, every economy or every sector is affected in some way by global positive and negative dynamics.

There are also important developments and regulations that make it easier for us to make a prediction about the world that awaits us in the near future. The concept of sustainability as a general guideline, gives direction to the whole world. Although the Paris Climate Agreement fall slightly behind the agenda, the EU is trying to restructure the economies of the member states, as well as the peripheral countries, including Türkiye, through the sustainability window in accordance with the Green Agreement. Not only global giant

companies, but every company involved in world trade has linked its future goals with sustainability and carbon footprint. As for the question of how Türkiye and the logistics sector should position themselves in this world picture, it is necessary to evaluate positive factors together. In the current conjuncture, future forecasts also show that Türkiye is playing an important role in global transit routes. It is also a well-known issue that this leading role can only be realized with a strategy integrated with the foreign policy axis. Since geographical location is always an effective criterion in terms of investment, production and logistics preferences, it is a common expectation that a country directly connected to European, Asian and African Sundays, such as Türkiye, will make good use of its 'excellent' position in the sense of being a production base in a geostrategic sense. Türkiye also has a highly experienced and talented workforce, a business world that is prone to cooperation and is accustomed to a competitive market feature that can move quite quickly, adapt quickly, respond instantly to developments and changes in the global picture. The position of Türkiye, which is located between Europe and the Middle East with short transit times, is also an important advantage in terms of transportation time and costs. When analyzing the global economy, not every question has one correct answer, the answers are multiple answers, contrary to mathematics. ■

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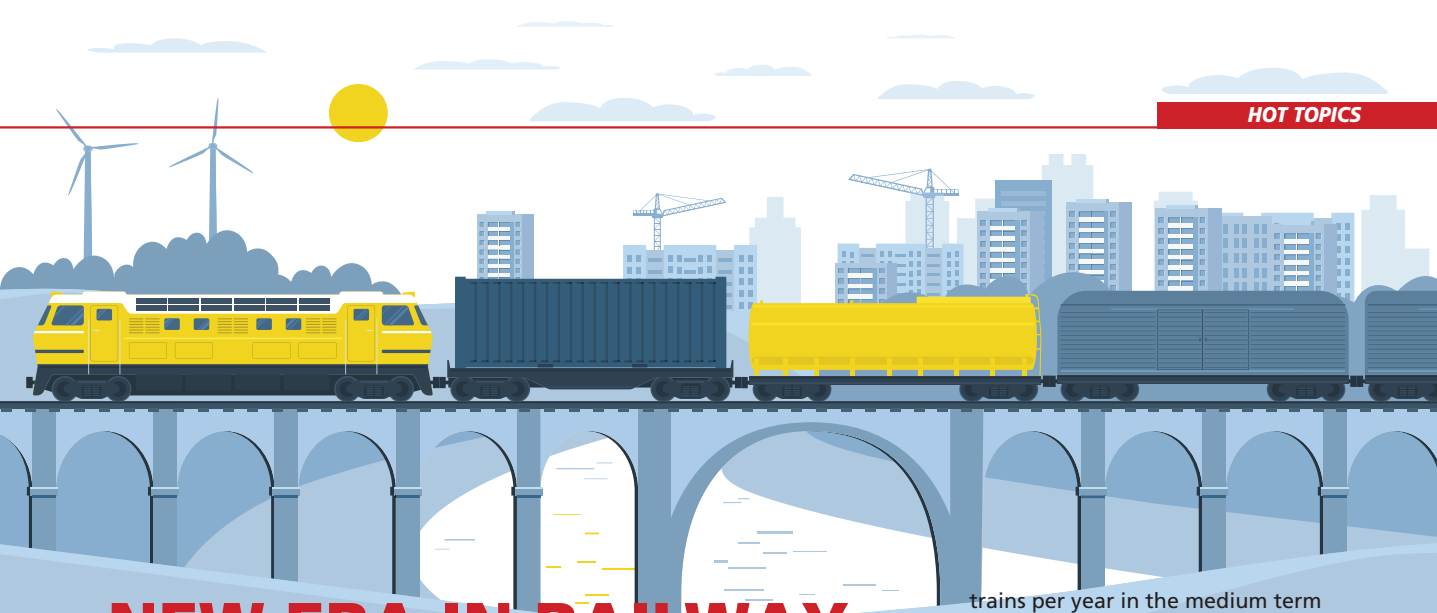


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NEW ERA IN RAILWAY INVESTMENTS: 'CAPACITY INCREASE NEW SUSTAINABILITY'

► The investments in the railway sector makes various contributions to the Turkish economy. New projects create business opportunities and contribute to local economies. Moreover, since the railway transportation offers a more environmentally friendly alternative as compared to road transportation, it helps with the decrease of carbon emission and achievement of the environment protection goals. The projects announced recently by the Turkish State Railways (TCDD) include new high speed train lines, intercity railway networks and modernization of existing lines. Some of these projects are increasing the capacity of the high speed train line between Ankara and İstanbul, construction of a new high speed train line between İzmir and Eskişehir and new railway connections in the Eastern Anatolia Region. The total investments made to the railways as of 2023 have exceeded 960 billion Turkish liras. These investments ensure that operation activities are ongoing on the rail lines of 13 thousand and 919 kms in total. The

share of railways in transportation investments increased from 33 percent in 2023 to 48 percent in 2023. Moreover, the length of electrified tracks increased by 237 percent while the signalized tracks by 221 percent in the last 22 years.

Türkiye's strategic location Is reinforced

The railway transportation has reinforced the strategic location of Türkiye and strengthened the regional cooperations. Türkiye has continued to play a role as an important transportation point between China and Europe via the Middle Corridor. The projects such as the capacity increase on Baku-Tbilisi-Kars line and rehabilitation of Ankara-Zengazur line have increase the efficiency of Türkiye in railway transportation. 1 million and 470 thousand tons of goods in total were transported on Baku-Tbilisi-Kars Railway Line until today. Out of the 757 kilometer-line, 429 kilometers are located in Azerbaijan, 220 kilometers in Georgia and 79 kilometers in Türkiye. Türkiye aims to operate 200 block

trains per year in the medium term and one thousand and 500 block trains and 6.5 million tons of goods in the long term on the Middle Corridor and Baku-Tbilisi-Kars Railway Line. Moreover, the travel duration between Türkiye and China is planned to be decreased to 10 days. Kars Logistics Center was opened in May 2021 and aims for increasing the effectiveness of the logistics activities in the region. Zenzegur Corridor attracts attention as this corridor is believed to increase the goods transportation capacity for the railways and roads and to make positive contributions to the Eastern-Western trade. Moreover, it is emphasized that the transportation and energy cooperations with Azerbaijan, Nakhichevan and Russia will increase the strategic location of the world.

Sustainability and future goals

The Turkish State Railways aim for sustainable energy management in order to decrease the environmental impacts of the railway transportation and increase energy efficiency. One of the priority goals of the Turkish State Railways is to increase the railway line length to 28 thousand and 590 kms in future years. The 12 logistics centers currently in operation has a carrying capacity of 13.6 million tons in total. The investments of the Turkish State Railways continue with the goal of strengthening and modernizing the railway transportation across the country. ■

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IRU AND EU NEGOTIATE TEN-YEAR IMPLEMENTATION PLAN FOR SUSTAINABLE TRANSPORTATION

The International Road Transport Union (IRU) discussed how the road transportation will be directed and what tools will be used in the process regarding the Decade of Sustainable Transport at its meeting held with the United Nations (UN) representatives at the High-level Political Forum on Sustainable Development event organized in New York.

► Following the United Nations General Assembly Resolution that established the Decade of Sustainable Transport from 2026 to 2036, IRU and key UN players came together at the High-level Political Forum on Sustainable Development (HLPF) event in New York and evaluated the targets and success criteria for road transportation. During the HLPF event in New York, IRU outlined how road transport can drive the Decade of Sustainable Transport and shared the sector's views on targets and tools to measure success in a high-level meeting with Armida Salsiah Alisjahbana (UN Economic and Social Commission for Asia and the Pacific), Claver Gatete (UN Economic Commission for Africa), José Manuel Salazar-Xirinachs (UN Economic Commission for Latin America and the Caribbean) and Tatiana Molcean (UN Economic Commission for Europe).

IRU's Senior Global Advocacy Adviser, Jens Hügel, detailed how tried-and-tested UN road transport conventions, including the TIR Convention, should be mobilized to implement the UN Decade of Sustainable Transport. He further emphasized that the ratification and full implementation of such conventions should serve as key indicators to monitor progress at every step of the way. Jens Hügel also highlighted how IRU's Green Compact serves to guide governments and transport companies to lead and monitor progress on the industry's pragmatic decarbonization pathway.

IRU Recognizes Top Road Transport Managers for 2024

The International Road Transport Union (IRU) has presented this year's Top Road Transport Manager Awards to 67 managers in 12

countries. The prestigious award recognizes the best managers in road transport companies, including bus, coach, taxi and truck operators. These managers demonstrate the highest levels of professionalism in providing innovative solutions for safe, productive and sustainable road transport services. Recipients must hold the appropriate CPC (Certificate of Professional Competence) Manager Diploma and actively promote vocational training for themselves and their staff, such as courses provided by the IRU Academy. This year's winners come via IRU member national road transport associations in 12 countries: AIRCUZ (Uzbekistan), AITA (Moldova), ASMAP (Russia), ASTIC (Spain), BAMAP (Belarus), Best Mobility (North Macedonia), CANACAR (Mexico), ERAA (Estonia), KAZATO (Kazakhstan), TLN (Netherlands), UND (Türkiye) and UNTRR (Romania). ■



According to the “Evolution of Alternative Fuels for Aviation” report published by KPMG, the global sustainable aviation fuel (SAF) capacity expected to be nearly 6 billion gallons (around 23 billion liters) by 2030 from 1.3 billion gallons (around 5 billion liters) in 2023.

USE OF SUSTAINABLE FUELS IN AVIATION INCREASES

► While the aviation sector will have to overcome huge challenges to achieve its goal of net zero carbon emissions by 2050, the industry has made great strides in its decarbonization journey. The “Evolution of Alternative Fuels for Aviation” report of KPMG revealing how the aviation sector benefits from new technologies for its transformation into a more sustainable industry reports that the uptake of the sustainable aviation fuels (SAF) is growing. According to the report, the global sustainable aviation fuel (SAF) capacity expected to be nearly 6 billion gallons (around 23 billion liters) by 2030 from 1.3 billion gallons (around 5 billion liters) in 2023. However, today the industry is severely constrained by the limited availability of alternative aviation fuels that are low in lifecycle carbon, cost-effective, safe, and high-performance.

Although the aviation sector only accounts for just over 2 percent of global energy-related greenhouse gas (GHG) emissions, air transportation is growing fast as global populations become wealthier. It means under a business-as-usual scenario, air travel could consume up to 10 percent of the planet’s remaining 1.5°C carbon budget by 2050.

Air freight, while it only represents one percent of world trade by volume, also continues to increase with double digit growth expected in 2024. Higher value and more perishable goods tend to use air over other heavy transportation such as shipping. According to the report, combined, they are putting the aviation industry under immense pressure to become more sustainable. “The next two decades offers great opportunities to the aviation sector

for a sustainable future”

Commenting on the subject, KPMG Türkiye Energy Sector Partner Hakan Demirelli made the following remarks:

“The next twenty years might present the aviation sector with great opportunities to establish a more sustainable future. The sector can decrease its environmental footprint and increase its operational efficiency by prioritizing the expansion of SAF and thus, can position itself to benefit from the opportunities that might arise from this transition. The aviation is a field requiring making of long term plans by taking into consideration the long R&D processes. Therefore, the companies operating the sector have to decide from today on what they will do in the next 10 years regarding the sustainable fuels without its being too late. This report prepares a detailed analysis on the data that the leaders and stakeholders in the aviation sector can take actions regarding alternative fuels. The aviation companies can tackle the challenges before the transition to sustainable fuels, manage the process successfully and thus, mitigate the related risks and lay the foundations of their strong locations in future from today, by utilizing the detailed information in our report.” ■

"VIA CARPATIA": THE PROJECT TO STRENGTHEN THE MIDDLE CORRIDOR AND THE DEVELOPMENT ROAD

► The Minister of Transportation and Infrastructure Abdulkadir Uraloğlu shared his comments on the "Three Seas Initiative" launched by the countries bordering the Baltic, Adriatic and Black Sea with the goal of resolving the infrastructure problems in the fields of energy, transportation and digitalization in the Central and Eastern Europe. Minister Uraloğlu told that the Three Seas Initiative was established by the EU Member States in order to better integrate the countries on the Northern-Southern Axis by connecting the infrastructure in the energy, transportation and telecommunications sectors.

Noting that the "Via Carpatia" Highway Project planned to be constructed within the scope of the Three Seas Initiative and interesting Türkiye directly because of its having a direct connection to the Middle Corridor will start from Klaipeda Port of Lithuania and then extend to the Thessaloniki Port after passing through Poland, Slovakia, Hungary, Romania and Bulgaria, Uraloğlu emphasized that this project might be an important economic activity and opportunity field for our country, taking into consideration the competitiveness and production quality of Turkish companies in the global market. Stating that the "Via Carpatia" Highway Project to ensure the direct delivery of the products to arrive at Türkiye via the

Middle Corridor and the Development Road or manufactured in Türkiye will make great contributions to the international transportation activities, Minister Uraloğlu told that "Via Carpatia" is a project extending on the Northern-Southern axis between the Baltic, Aegean, Black Sea and Adriatic Seas. The part of the Project in Poland will be completed in 2027. Its total length constitutes 712 kms of the main route. As of today, 259.6 kms of the project was completed. 280.8 kms of it is currently under construction while the remaining 171.6 kilometers is in tender and preparation phase".

Noting that Türkiye was included in Via Carpatia Project in 2016 with the 2nd Lancut Declaration after Belarus, Bulgaria, Croatia, Greece, Hungary, Lithuania, Poland, Romania, Slovakia and Ukraine, Minister Uraloğlu further commented as follows: "The expansion of the Via Carpatia Highway Project extending on the Northern-Eastern axis between the Baltic, Aegean, Black Sea and Adriatic Seas will increase our connectivity to the European Union as well as make positive contributions to the development of transportation activities with the countries on this route. Moreover, the inclusion of our construction sector into the process of constructing the road infrastructure of the countries included in this project is of great importance for our country".

Emphasizing that Türkiye is an important

part of this trade corridor and Europe, Uraloğlu further noted the following: "The Project will ensure that Türkiye is located on new international trade corridors and cooperate with the countries in near geography. The historical Silk Road and today's Modern Silk Road was from East to West. Today everyone wants to get a share from this cake. This project covers the route from the north to the south, not the corridors on the east to west route. Via Carpatia Highway will connect the trade routes in the Middle East to the entire Europe via Türkiye". Underlining that the project initiated by the countries neighboring the Baltic Sea, Adriatic Sea and Black Sea is a very correct project, Minister Uraloğlu further made the following remarks: "The Project intersects with the Middle Corridor and the Development Road and will directly strengthen these corridors. Starting from Klaipeda Port of Lithuania and connecting to the Middle Corridor in Bulgaria, Via Carpatia Project is a project we support even if we are not a member to the initiative. We are ready to be a part of this project and all kinds of cooperation. It is a project that we must be in under any conditions because of the project's connection to the Middle Corridor. If there is to be corridor in this geography because of our location, this corridor cannot be without Türkiye. Türkiye is a sustainable and safe port from every aspect. ■

The Ultimate Integration Solution for Streamlining E-commerce Operations

Ekol Logistics is proud to present Ekol360, an innovative e-commerce integration platform designed to revolutionize how businesses manage their operations. Ekol360 combines cutting-edge technology and Ekol Logistics' industry expertise, offering a comprehensive suite of features that enhance efficiency, optimize inventory management, and simplify cross-border trade. This all-in-one solution is set to become the backbone for businesses seeking to scale in the competitive e-commerce landscape.



Why Choose Ekol360?

Ekol360 addresses the growing complexities faced by e-commerce businesses by providing a unified platform where all operational needs are met. Its features are designed to support businesses of all sizes, from small startups to large enterprises, ensuring seamless integration, management, and growth.

Key Features of Ekol360:

1. Comprehensive Inventory Management:

- Ekol360 offers an advanced inventory management system that allows businesses to monitor stock levels, movements, and availability in real-time. This feature helps prevent stockouts, minimizes overstock situations, and optimizes warehouse space.
- Automated alerts and reporting systems notify businesses about low stock levels or upcoming supply needs, ensuring proactive management of inventory and uninterrupted sales.

2. Seamless Cross-Border Operations:

- Leveraging Ekol Logistics' extensive network, Ekol360 facilitates seamless cross-border operations, providing businesses with the tools they need to expand globally. The platform supports ETGB (Electronic Trade Customs Declaration), ensuring a smooth customs process and quick delivery times.
- Businesses can access our international fulfillment centers in strategic locations across Europe, benefiting from efficient last-mile delivery services that reduce costs and improve delivery speed.

3. Scheduled Delivery Services:

- To enhance the customer experience, Ekol360 offers scheduled delivery services that align with businesses' logistical needs. This service ensures that orders are dispatched and delivered according to fixed schedules and pre-determined routes, minimizing delays and increasing customer satisfaction.
- Businesses can customize their delivery plans based on demand patterns, geographic locations, and customer preferences, offering flexibility and reliability.



4. Marketplace Integration:

- Ekol360 integrates with major global marketplaces via our partner C.Engine. Businesses can manage all their marketplace listings, sales, and performance metrics from a single, user-friendly interface.
- The platform also provides automated order syncing, inventory updates, and sales tracking, ensuring businesses have complete visibility and control over their multi-channel operations.

5. International Warehousing and Fulfillment Services:

- With fulfillment centers located in key European hubs, Ekol360 enables businesses to store and manage their inventory close to their customer base. This strategic positioning significantly reduces shipping times and costs while ensuring swift order processing.
- Our warehouses are equipped with state-of-the-art technology, including automated sorting systems and real-time tracking, allowing businesses to maintain high efficiency and accuracy in order fulfillment.

6. Data-Driven Insights and Reporting:

- Ekol360 offers a robust analytics dashboard that provides real-time insights into business performance. Users can track sales trends, customer behaviors, delivery efficiency, and inventory status.
- Customizable reports allow businesses to generate data specific to their needs, helping them make informed, strategic decisions to maximize profits and minimize operational costs.

About Ekol Logistics

Ekol Logistics, a leader in logistics and integrated transportation solutions, has a well-established presence in Turkey and Europe. Our extensive operational network, combined with our commitment to innovation, enables us to offer top-notch services that cater to the needs of businesses in the dynamic e-commerce sector. Ekol Logistics' expertise in cross-border trade and fulfillment services ensures that our clients have the competitive edge they need in a rapidly evolving market.

Get Started with Ekol360 Today

To learn more about how Ekol360 can transform your e-commerce operations and help your business grow, visit www.ekol360.com.

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Peter Kiss
CEO

METRANS: YOUR TRUSTED PARTNER IN INTERMODAL LOGISTICS

► Setting the Standard in Intermodal Logistics

METRANS is a leading player in the field of intermodal logistics, with over 30 years of experience. Our neutral and reliable services are key to our success in the European market. With an extensive network of terminals and regular train connections, we ensure efficient, fast, and sustainable transport of goods that meet the needs of our customers.

Strengthening the Connection Between Dunajská Streda and Halkali

On our regular route between Dunajská Streda (Slovakia) and Halkali (Türkiye), we currently organize two departures per week in both directions. Our goal is to increase the number of departures to three in each direction by the end of this year, enhancing the frequency and flexibility of our services for customers in both regions.

Expanding Trailer Transport

With the implementation of r2L (Road-to-Rail Loaders) technology, we can convert trailers that cannot be handled by cranes into units suitable for rail loading. This will allow us to



efficiently organize trailer transport between Halkali and Dunajská Streda terminal, providing significant sustainability and efficiency benefits.

Car Carrier Containers

Our new innovative Car Carrier Containers represent a revolution in rail vehicle transport. These containers are designed to safely and efficiently transport vehicles by rail, offering significant advantages in logistics. With the increasing demand for this type of transport in the Turkish market, we are ready to offer this service and provide customers with a reliable and efficient solution for vehicle transport.

An Alternative to the Silk Road: Expanding Connections with China

We are currently seeing growing interest from customers in alternative routes between Europe and China. Halkali terminal is one of the options, which China Railway Express and their platform companies are using. METRANS could offer service from and to Halkali and also connect our

terminal in Malaszewicze which is Silk Road HUB, as well as other 20 METRANS terminals. We offer a flexible and reliable option for those seeking new transport possibilities. This connection can be particularly appealing for customers looking for alternative and more efficient transportation solutions.

Future Development of Terminals in Türkiye

Recognizing Türkiye's strategic importance and the growing demand for our services, we are actively exploring ways to expand our presence in this region. As part of our long-term plans, we are considering various options to strengthen our infrastructure in Türkiye and improve the quality of our services. This step would enable us to better serve our customers and solidify our position in Eurasia.

Driving the Future of Global Logistics

METRANS remains committed to providing top-notch logistics services that focus on innovation, sustainability, and reliability. We continuously adapt to the changing needs of the market and develop our services to meet the expectations of our customers around the world. ■





Ronald L. Makzume
President

AROUND THE WORLD IN 80 YEARS

Johan Vermeiren and Damiano Turriziani, who have taken on the development of new businesses in China and Hong Kong, shared their motivation and vision for the future for Intermodal Magazine. These developments increase LAM's utilization in the international market and strengthen its ambition to respond more effectively to customer demands.

► **Congratulations on the 80th anniversary of LAM Group! What are the most important milestones in the company's history?**

No milestone is more significant than my father, our founder Lyonel's, decision to stay in İskenderun and establish a three-person agency to serve the interests of his two brothers, who were already ship agents and short-lived shipowners in Syria and Lebanon.

From there, we built strategic partnerships, expanded to a nationwide service in Türkiye, and integrated the second generation at an early stage. I began interning periodically during school holidays as early as 1956 and fully joined the company in late 1965 after my military service. My late sister Muriel and my brother Raymond joined later, bringing their unique skills to the team. The third generation came onboard in 1994 with my elder son, Timur, and in 2006 with my younger son, Selim. Their arrival brought a renewed energy and vision we could not have achieved otherwise.

What about the current organizational structure of the group?

The third generation leads the way now. My brother and I are fortunate to still have an active consulting role within the group, with daily involvement. For me, sales has always been my lifetime hobby, and for my brother, it's finance—a passion since his days as a mathematics and Sup Elec Paris graduate.

How many people make up the "LAM family," and where are they based?

We are about a thousand strong across four continents and 20 countries. The largest presence is still in Türkiye, but we also have a strong foothold in Egypt, Georgia, and the Far East, which has grown faster than anticipated.

LAM Group started as a small local shipping agency in 1944. What are the core competencies of the company today?

Today, we pride ourselves on a nearly 360-degree service scope in shipping, logistics, and marine services.

What do you see as the biggest challenges for LAM Group's business?

The lack of regulations in our industry in many countries allows fierce competition from various players with no financial securities, posing significant challenges.

What is the secret to the company's success? Can you share an example from its rich history?

Our success is rooted in humility, tolerance, courtesy, and respect towards competition. Honesty, stability, transparency, and natural long-term planning are our cornerstones. Our track record speaks for itself: 60 years with GAC, 50 years with Jugolinija Rijeka, 50 years with NEASA Madrid, 30 years with CMA CGM, 20 years with Blasco Odessa & Estonian Shipping Co., 15 years with Prodomos, and 10 years with Sarens and Sinotrans, to name a few.

Where does LAM Group plan to expand its business? Are there any major investments planned for the ongoing year?

There are countless countries we have yet to explore. With the world reshaping, we're eyeing opportunities in Indonesia, Brazil, Saudi Arabia, Ethiopia, Kenya, and West Africa. It's not a race, and there's no ego involved; but with God's will and healthy financial growth, we will continue to pursue opportunities.

What is the company doing to promote sustainable development?

Although we may not be large enough to make a huge impact, we've

implemented several eco-friendly policies, such as transitioning to hybrid vehicles and advocating for "dry iron" in ports we work with. Recently, we invested in the Swiss EPFL-based startup Aeler, which pioneers next-generation containers aimed at reducing carbon emissions.

Who will survive in the future: large multinational companies or family-driven providers like LAM Group? Where do you envision the company in its 100th year, in 2044?

Both will survive, and both may also vanish. We've been in the business long enough to witness family businesses disappear, new families emerge, multinationals merge, and once-global names fade away. LAM is 80 years old, but other branches of our family have been active in shipping and trading for over 150 years. I have high hopes that LAM will be even more prominent in 2044. God willing, the third generation will maintain today's energy, and either a fourth generation will take the reins, or we'll see a mix of family and corporate leadership. Qui vivra verra! (Time will tell!) Will I live to see it at 104? Chi lo sa? (Who knows?)

What fascinates you about the logistics business personally?

It never stops, never sleeps, and nothing is set in stone. After over 60 years in this field, I'm still learning something new every day. ■



Mine Kaya
General Manager

**BRAND-NEW AUTHORIZED CONSIGNOR
SERVICE BY SGS TRANSITNET IN BULGARIA:**

FACILITIES AT KAPITAN ANDREEVO PROMISE EASE OF OPERATIONS

SGS TransitNet has recently launched a favorable service in Bulgaria, which not only facilitates the customs procedures but grants cost and time advantages to logistics operators and freight forwarders. SGS TransitNet facility at Kapitan Andreevo with Authorized Consignor status is located at a very strategic location and offers great advantages with modern service facilities like restaurants and supermarkets.



► “Following our Authorized Consignor services in Ergene / Çerkezköy and Çatalca in Türkiye, we are now proud to launch our brand-new location with perfect advantages at the Kapitan Andreevo border of Bulgaria,” heralds Mine Kaya, the General Manager of SGS TransitNet and continues: “Such a strategic location will not only ease and facilitate the customs operations but will grant the logistics operators and freight forwarders who use our services great time and cost advantages. Our services ensure that the goods do not need to be submitted to the local customs office as all of the customs checks will be completed and the vehicles be sealed by our authorized SGS TransitNet team. This eliminates long waiting hours at the customs and lets the drivers spend their time at modern and safe facilities with restaurants and supermarkets while the transit documents are prepared by our expert team. Our services provide nearly 1 day transit time advantage and 50 percent efficiency at customs costs. As SGS Transitnet, we are the first in Türkiye to get the AEO Certificate. In our highly secure facilities in Ergene/ Çerkezköy and Çatalca, we have been providing the best quality service for more than 2,000 vehicles per month. Now we are very proud to be again the first service provider at this critical location in Bulgaria and to contribute to the facilitation of trade by supporting logistics operations”

SGS

What does TransitNet offer?

TransitNet is a universal, multimodal e-customs transit guarantee service in which SGS acts as holder of the procedure (HoP) towards customs on behalf of its clients (transporters, freight forwarders, etc), enabling them to create transit declarations and submit them along with a financial guarantee in favor of customs to any of the customs systems where SGS is HoP. TransitNet clients do not need to own their own customs guarantees. All transit declarations created via TransitNet are submitted using SGS's own customs guarantees in accordance with customs territory regulations.

TransitNet is a secure, multilingual, web based platform that captures, controls and monitors transit declarations, allowing clients to track them online until termination. TransitNet is currently connected to 25 different customs systems. These include 23 NCTS countries, Moldova and Belarus in the Euro Asian Economic Union, giving clients access to 40 countries of destination including Belarus, Russia, Kazakhstan and Kyrgyzstan. With an extensive coverage and significant guarantee pool, SGS TransitNet is able to offer their clients an unbeatable range of possibilities. ■

What is offered at SGS TransitNet facilities with Authorized Consignor Status at a single point

- Inspections of goods and vehicles
 - Weighing of vehicles
 - Sealing of vehicles
 - Preparation and release of transit declarations
- Upon completion of the Authorized Consignor procedure, trucks can proceed directly to the point of destination without additional stops, speeding up the export process and reducing the potential for delays.

Transporters using SGS's Authorized Consignor service benefit in a number of ways:

- Trucks do not have to visit local internal customs office prior to departure
- Long delays at internal customs offices are avoided
- There are no additional charges for formalities at the customs office of departure, such as registration, overtime, weighbridge fees, customs agent fees, etc.
- There is a reduced need for transporters to ask questions such as:
 - Has my Transit Declaration been prepared?
 - Has my vehicle been inspected?
 - Has it been sealed?
 - Has it been cleared at customs?
- Transporters can be confident that vehicles can travel directly to the destination country's customs office with all pre-export requirements having been completed



1,000,000+

Transit declarations per year



25

Countries covered



14,000+

Satisfied clients



850+ mln

Guarantee amount

Cumhur Ön
General Manager

**ROOTED IN THE MIDDLE
EAST, REACHING OUT TO
THE WORLD**



► Tell us about Dark Blue Shipping

Dark Blue Shipping started operations in Dubai in 2016 with a team of just three people, with a clear goal in mind: to fill the gap in the market for a premium, client-oriented and all-round logistics service provider in the region. Unlike most other freight forwarders, our goal was not just to be the cheapest, but to be the best and provide a smooth experience and peace of mind to our clients. The success of this model was so rapid that, within 12 months we opened our second branch in Muscat, Oman, and 12 months later, we opened our third branch in Istanbul, Türkiye.

As of 2024, we own and operate a 20,000-square-meter open yard and closed warehouse facility in Jebel Ali with a fleet of trucks, as well as 3PL storage solutions in Sohar, Mersin, and Istanbul.

Why did you expand your presence to Türkiye?

Türkiye is not only a growing industrial economy with large volumes of both imports and exports, but also a major transit hub between Europe and the Middle East region. Having established our name and operations in the UAE and Oman, we wanted to expand our network to connect European markets



DARK BLUE SHIPPING LLC

member of DARK BLUE HOLDING

to the Middle East and, consequently to Far East markets, all within our own operations, providing stability and control to meet our clients' needs. Coupled with the local demand for logistics in Türkiye, this expansion provided incredible strength to our group of companies.

What sets Dark Blue Shipping apart from other competitors?

Over the years we have focused on specialized cargo such as OOG, Breakbulk, Flexibag and dangerous goods, which have seasoned our team to handle oversized industrial machinery, various classes of dangerous goods, chemicals in liquid or solid form, pipes, etc. This expertise, along with our extended network of offices puts us in an excellent position to transport these cargoes from European and Chinese suppliers to the Middle East and Central Asia. Additionally, our warehouses located in Jebel Ali, Sohar, Istanbul and Mersin provide

temporary storage solutions to our clients, especially for raw materials and chemicals that are often bought in large volumes.

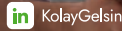
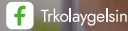
What's next for Dark Blue Shipping?

Growth always comes one step at a time, and our next step is to incorporate reefer storage facilities into our warehouses as well as reefer trucks into our fleet. This will complete the all-round package of services we provide to our clients. In terms of geographical expansion, we have our eyes on a new branch in Hong Kong to tap into the Chinese market and connect our operations globally.

What is your message to the logistics industry?

From the apprentice all the way to the CEO, the magic words are never forgotten; "we are in the service sector, and customer satisfaction is the only priority." All other details come second. We must be aware of the importance of our profession. Logistics is the rising value of the future and the needs of humanity will always require our support and commitment. This responsibility strengthens us against all adversity in this profession. DARK BLUE SHIPPING, now aims to be everywhere... ■

THE INNOVATIVE BRAND OF THE CARGO INDUSTRY: KOLAY GELSIN



KOLAY GELSIN: A VALUE-DRIVEN E-COMMERCE DELIVERY EXPERIENCE

► Türkiye's e-commerce industry continues its robust expansion, mirroring global market trends. This surge has catalyzed unprecedented growth in the delivery industry throughout 2023, eclipsing the previous year's performance metrics. In this industry employing thousands, a competitive edge is forged through bespoke services, cutting-edge digital innovations, streamlined field operations, and friendly client relationships.

Amidst this fierce competition, Kolay Gelsin distinguishes itself as an industry trailblazer, consistently capturing headlines with its groundbreaking innovations. Kolay Gelsin, with its customer-centric philosophy, has transcended conventional delivery paradigms to

spearhead technological innovation in the industry.

We sat down for an engaging interview with Kolay Gelsin's General Manager, Gülçin Poyraz, to both take the pulse of the industry and hear firsthand about Kolay Gelsin's contributions to the industry.

Can you share the opportunities Kolay Gelsin provides to both your industry and customers?

The intensifying competition has yielded significant benefits for both recipients and senders. Kolay Gelsin's core mission is to simplify everyday life for our customers. With this ethos at our core, we prioritize delivering exceptional service, ensuring punctual and intact deliveries as conveniently as

possible. For recipients, we offer a suite of flexible options including "Scheduled Delivery," "Deliver to Different Address," "Deliver to My Neighbor," "Live Tracking," and "Ring/Do Not Ring," allowing them to tailor deliveries to fit their schedules. The "Live Tracking" option, in particular, builds strong customer trust by allowing them to track their shipment in real-time, view information about the delivery personnel, and access all essential details throughout the delivery process. We prioritize cultivating a robust, trust-based relationship between brands and their users. Our digital innovations and experience-enhancing initiatives aim to ensure complete customer satisfaction with Kolay Gelsin's services. We harness our state-of-the-art technology to ■

maximize operational efficiency. Customer endorsements and glowing testimonials about their experiences serve as our driving force and ultimate validation.

In your perspective, what makes the “customer experience” paradigm central to Kolay Gelsin’s ethos?

Each exceptional experience we deliver strengthens our brand loyalty, cultivating a devoted customer base. As e-commerce has flourished, delivery services have undergone a parallel evolution, becoming an increasingly pivotal factor in consumer preferences. The era of enduring days-long waits for packages has been consigned to history. We streamline delivery times by integrating technology into every aspect of our operations. Through meticulous industry analysis, we continually refine our services to deliver unparalleled value. Kolay Gelsin has always placed customer experience at the forefront of its business philosophy. We consider it our paramount duty to execute each delivery punctually, flawlessly, and with genuine warmth.

How does your proprietary technology enhance the customer experience?

Since day one, we’ve provided our customers with the benefits of cutting-edge technology. We seamlessly weave life-enhancing innovations and flexible options into the fabric of our delivery and return processes, ensuring an unwavering commitment to elevating customer satisfaction. From inception, we’ve championed the full integration of technology into the delivery industry, launching our operations with this pioneering vision as

our cornerstone. Kolay Gelsin’s clientele consistently appreciates our innovative approach and the solutions it yields.

In today’s fast-paced world, we understand that waiting all day for a package is impractical. That’s why we deliver on the exact day our customers choose, respecting their time and schedules. Today, we stand as a trailblazing brand that has spearheaded numerous innovations in the delivery industry, catalyzed technological advancements, and embraced a core mission of providing our customers with seamless, swift, and dependable services. We remain steadfastly committed to our users, continuously delivering life-enhancing solutions that evolve with their needs.

How do you assess the remarkable expansion of both the e-commerce and delivery industries in Türkiye?

As of 2019, e-commerce constituted 10 percent of the total trade volume. By 2023, this figure has more than doubled. Over the past four years, we’ve witnessed consistent and robust growth in these industries. E-commerce spending usually peaks in November, fueled by promotional campaigns during this period. With the campaigns starting in November, we will enter an even more intense period. Our goal is to maintain exceptional customer satisfaction through our seasoned workforce and comprehensive service network. This will allow us to continue providing swift, premium delivery services across Türkiye.

What innovations can customers anticipate as Kolay Gelsin extends its reach across Türkiye?

We recently consolidated our operations by integrating Sendeo



Gülçin Poyraz
General Manager

under the Kolay Gelsin brand. This move extends our footprint across every corner of Türkiye. In this crucial phase of expansion, our field operatives are the linchpin of our success. Our Customer Operations Specialists (COS), overseeing nationwide deliveries, will bring our exceptional service experience to customers across Türkiye. Extending Kolay Gelsin’s premium services to every corner of the nation is not just our goal, but a solemn commitment. Positive customer feedback on our premium services has always been of immense value to us. We are now expanding Kolay Gelsin’s customer satisfaction-driven services, which have already exceeded our expectations in feedback, to all of Türkiye. As always, we will ensure timely, accurate deliveries, tailored to our customers’ preferences. We will relentlessly strive to maintain our service quality, ensuring satisfaction for every Kolay Gelsin customer. ■



Mesut Cesur
CEO

ULUSOY SEALINES INCREASES ITS CAPACITY WITH ENVIRONMENTAL FRIENDLY INVESTMENTS

Carrying out RO-RO transportation between Çeşme and Trieste in addition to the operation of Çeşme Port, Ulusoy Sealines Group increases its capacity with environmentally friendly investments.

► Organizing regular RO-RO transportation between Çeşme and Trieste with 5 ships of a total of 18000 lane-meters in its fleet, Ulusoy Sealines provides an environmentally friendly intermodal infrastructure service thanks to its regular trips and Çeşme Port operation. Providing services for the transportations between Europe and Iran and Middle East in addition to Türkiye and cruise and daily passenger ships, Çeşme Port becomes more comfortable, more environmentally friendly for the world and safer for irregular migration. Starting by saying that "The biggest need of RO-RO lines is sufficient storage area" in his statement given to Intermodal Magazine regarding the subject, Ulusoy Sealines General Manager Mesut Cesur made the following comments: "The increasing business volumes at ports restrict the storage opportunities and durations every passing day. Therefore, we make new investments in order to increase our capacity and improve our RO-RO line for providing unlimited services to our customers." Mesur Cesur further added the following: "Our efforts to establish an 'Easy Transit Center' (ETC) over an area of 42 thousand square meters named as 'Çeşme Port Back Site' are ongoing with TOBBUND. The project is ready and we plan to open the ETC in 2025 Q1 upon obtaining the necessary permits. After the launch of the project, the shippers in the region will come to Çeşme without going in the traffic in İzmir and complete their transactions at the ETC in a very short time and then, get on the ship. With this investment, we will create a big saving opportunity to our shippers both in terms of time

and costs at a safer area and also prevent migrant smuggling with the customs examination to be made at the last point.

Implementing the same approach, we want to open a part of the area of 50 acres we purchased in Prosecco Region of Trieste as Authorized Buffer Area (ABA) and make it available for our shippers. Our negotiations in this respect are ongoing. Services will be started to be provided in this area in 2025 Q1 according to our schedule. One of our goals is to obtain a Free Zone consent in order to convert this area into a Transit Distribution Center. In the meanwhile, we made a new arrangement at our TIMT Terminal in MOLO VI and increased the capacity of our parking area to 200 vehicles. We launched a modern waiting hall with a capacity of 60 persons for our drivers. Our parking area of 100 vehicles available in the main port outside the TIMT terminals continues to be operational.

Our negotiations for the construction of an 'Eco Design' RO-RO ship with a higher capacity and more environmentally friendly design are ongoing in order to increase the transportation capacity of our line. In addition to our new investments for which projects are created with environmental concerns, our studies on different projects are ongoing in order to decrease the carbon emission of our existing ships."

Summarizing the investments of Ulusoy Sealines planned to be launched in a short period of time, "The textiles sector mostly shifted to Egypt because of the extremely valuable TRY, increasing costs and the opportunities provided by Egypt to the investors." Cesur further added: "A suitable environment was



created for the establishment of a new RO-RO line between Türkiye and Egypt and Egypt and Europe in order to transport the textiles production and other commodity produced in Egypt to Türkiye and European markets." Mesur Cesur further made the following remarks:

"A total of 50 thousand and 842 vehicles were transported with 228 RO-RO journeys from Çeşme Port to Trieste in the first 9 months of this year. Moreover, the number of cruise ships calling at our port reached 71 journeys in the first 9 months of this year and 34 thousand and 828 passengers were transported with these journeys. One thousand and 818 journeys were organized between Çeşme and Chios and 351 thousand and 126 passengers were transported in them, which increased by 26 percent as compared to 2024. We expect a serious increase in especially in cruise traffic based on the reservations made for 2025. The contribution to the structure against climate problems is among our prioritized goals. We want to feed our ships calling at our port with the onshore power system (OPS) we want to establish at our port. To achieve this, we completed the onshore power system installation studies and project in order to achieve zero carbon emissions from the ships calling at our ports. Our project works to add our ships to this system are nearly completed and we are very close to sign a contract in this respect. We aim to obtain a Green Port certificate for Çeşme Port in 2025 and we believe that we will obtain it." ■

MIP GENERAL MANAGER AJAY KUMAR SINGH:

**"MIP IS A WELL-SHAPED
POWER OF MERSIN
AND THE LOGISTICS
GATE OF TÜRKİYE"**

As the largest container port of the Mediterranean, Mersin International Port fulfills an important part of the export and import volume of Türkiye and makes a great contribution to the economy of the country. The port comes to the forefront as the largest logistics center of Türkiye with its annual capacity of 2.6 million TEUs.

► Mersin Uluslararası Liman İşletmeciliği A.Ş. (MIP) established under the partnership of Akfen Holding and PSA International took over the Turkish State Railways Mersin Port Operation for 36 years and Mersin Port continues to be the largest port in Türkiye.

As one of the leading container ports of the Mediterranean Region, MIP handles a large part of the export and import volume of Türkiye thanks to its distribution connections to the Middle East and Black Sea, its wide hinterland and advanced transportation opportunities. MIP with its container handling capacity increasing symmetrically with its strategic position continues to strengthen its critical role in international trade.

Noting that they as MIP are proud of the social and economical contributions that they make to Mersin, Mersin International Port (MIP) General Manager Ajay Kumar Singh commented as follows: "MIP is not only the largest port of Türkiye but also is a key player shaping the future of Mersin and

thus, undertakes a crucial role in the development of the region. Our projects steering the economy of the city, our contributions to the social life and especially the priority we place on the employment of women are of great importance for the process of Mersin's becoming a brand.

"We also make important contributions to the general logistics infrastructure of Türkiye"

Underlining that MIP is one of the main centers of the regional trade and exports as the largest port of Türkiye with its annual capacity of 2.6 million TEUs, Singh further commented as follows: "Thanks to its being located on one of the busiest trade routes of the Mediterranean, our port both contributes to the economy of Türkiye and is also a power supporting local employment. It acts as a bridge on the world trade routes by benefiting from the strategic position of Mersin and makes important contributions not only to the region but also to the general logistics infrastructure of Türkiye.



Our social responsibility projects aim for ensuring a sustainable development in Mersin. We add value to the social life of the city with the support we provide to the training, health, sports and environmental projects. We provide internship and training opportunities to young people by cooperating with the local training institutions and create opportunities for them to become the leaders of future. Our contributions to the professional training programs especially in the fields of maritime and logistics are investments made to the future of both Mersin and Türkiye. Stating that they as MIP set as a prioritized goal the more active and robust inclusion of the women in the business life, Ajay Kumar Singh added the following to his comments: "We offer leadership programs, mentoring systems and flexible working opportunities supporting the professional development of our female workers. We aim to become a role model regarding societal gender equality by ensuring equal opportunities in the labor force with the projects we have initiated to increase the employment of women. As MIP, we will continue to contribute not only the economic but also the social development of Mersin." ■



LOGITRANS 2024 IS TAKING PLACE THIS YEAR WITH A WIDER INTERNATIONAL PARTICIPATION

► The International logitrans Transport Logistics Exhibition which is considered the most important and largest meeting platform of the logistics sector in Türkiye, will take place in Istanbul between November 20-22, 2024 with the participation of a large number of organizations and companies from both Türkiye and the world. 181 participating organizations and companies from 18 countries, including Türkiye, will be represented at logitrans 2024 Exhibition, which has a strong international aspect this year. Czechia, Russia, Belarus, Germany, Spain pavilions will open their doors to visitors at the fair. While logitrans Exhibition takes the pulse of the industry for three days at the Eurasia Show and Art Center located in Yenikapi, a large number of visitors are expected to attend the fair this year and the number of visitors is predicted to exceed 15,000. The country pavilions, stands and exhibition areas of the companies and organizations in the fair will not make significant contributions to the formation of a multi-colored fair environment with their contemporary and functional designs and well-designed architectural elements this year, as last year, and will color the fair atmosphere. logitrans, which has received a great demand from the



international transport
logistics exhibition

sector and international companies will welcome its visitors and host its participants with full capacity this year.

Ekin Seren Ünsağ, Deputy General Manager of EKO Fairs, who stated that they have raised the bar higher every year at logitrans fairs held after the pandemic, "logitrans 2023 has been a peak year for us in a real sense. We have connected a significant part of the

*EKO Fair Deputy General Manager
Ekin Seren Ünsağ*



fairgrounds of 2024 to contracts during the 2023 fair and finalized their sale. We know that Türkiye has now become a real hub in the region in logistics. The increase in interest and demand for logitrans from many countries, especially in Europe, Asia and the nearby geographies, also fully reflects the fact that Türkiye is the most important logistics hub in the region and globally as well " she said.

Ekin Seren Ünsağ, noting that the importance of Türkiye on the global logistics map has increased significantly during this period when logistics routes have undergone changes, said, "Türkiye is rapidly becoming a global and regional center in logistics with its land, air and sea and railway capacities and infrastructure".

"It is very important that logitrans is taking place at such a juncture. In this respect, the fair will be a powerful platform for establishing business relations in the intercontinental supply chain between Europe and Asia and bringing together the stakeholders of the logistics sector. logitrans will host almost all the stakeholders of the logistics sector in this region. And with a wide international participation, it will further strengthen Türkiye's strategic position in the Eurasian region in logistics. In the current



situation, Türkiye has become both a logistics base and an international supply chain base, especially in the Eurasian region. The interest of both exhibitors and visitors shown to logitrans also underlines this fact. We believe that logitrans has an important function and mission in Türkiye's goal of reaching a size of \$ 100 billion in logistics." She said.

International showcase of the sector

Stating that logitrans is a powerful platform that creates added value for all sides of logistics in this process and that the participating organizations create an opportunity to establish new customer relationships at the fair, as well as to thoroughly strengthen their existing relationships, Ekin Seren Ünsağ said that logitrans receives a great demand from the industry every year.

"In addition to international participation, we are determined to show that logitrans is the number one showcase of Türkiye in global logistics with the intensive support of the institutions of our country." Ünsağ stated that logitrans is also a think tank platform where very important discussion issues related to the future of the industry are discussed.

Ünsağ summarized his views on this issue as follows ;

"logitrans Exhibition, which is the most important logistics event of Eurasia, offers a very important opportunity for those who want to follow the developments in the sector by coming together with their customers and business partners. Cyclical developments in the region are further increasing the importance of Türkiye in logistics. In this regard, it has now been proven that logitrans has a bigger role to play in terms of

creating new collaborations and new commercial relationships. We believe that the speeches to be made in our panels will also create a horizon-opening content for the entire sector and the participants. Important innovations will be announced and discussions will be held in the sector under the topics of sustainability and decarbonization."

Within the scope of logitrans, there are also panels of UND, UTIKAD, CILT and its Women's branch, WILAT. In addition, the Atlas Logistics Awards will again make their mark on the exhibition. The UND Award Ceremony will also take place within the scope of logitrans.

In addition to the establishment signing ceremony of the Union of Turkish States Transport Associations, the Fair will also host high-level participants from IRU and Turkish States Associations. ■

THE COMBINED TRANSPORT SECTOR CONTINUES ITS INVESTMENTS DESPITE NEGATIVE BACKDROP

The second quarter of 2024 brought about a 4,25% rebound in the Combined Transport performance as some of the disturbances of the previous months did not recur. Poorly coordinated infrastructure works can easily undermine the quantity and quality of Combined Transport services in several regions of Europe. The Combined Transport community nevertheless continues its investments into new transport and terminal capacities, as well as in digital solutions to further enhance its competitiveness.

EXPECTATIONS FOR 2024-2029

The Combined Transport community of Europe, represented by UIRR, unveiled its policy expectations for the 5-year European political mandate of 2024-2029.

- 70% better energy efficiency,
- Infrastructure efficiency through the use of heavy duty modes over the longest segment of the logistics chain,
- Superior labour productivity and work/life balance for employees of intermodal transport chains,
- Outstanding environmental and climate efficiency enabled by the direct use of European generated non-fossil renewable electricity (90% less CO₂

emissions),

- Effectively reducing accidents and related congestions through a superior safety performance.

"Combined Transport brings together the industrial zones in Europe, from origins to destinations, effectively supporting the freight logistics system. It is the best solution and the backbone for the European Union to boost its competitiveness and resilience. Delivering the policy expectations proposed by UIRR will accelerate the achievements of our shared objectives." stated UIRR Director General, Ralf-Charley Schultze.

► A brief clearing of clouds

The second quarter of 2024 brought about a 4,25% rebound in the Combined Transport performance as some of the disturbances of the previous months did not recur. Nevertheless, the Combined Transport sector cannot consider itself out of the woods as severe works-related disruptions are projected to impact during the summer months: the Simplon route, the Passau section, the Rhine Valley, the Sofia-Nis section and in Budapest just to name but a few. The business sentiment of CT decision-makers is unchanged at "neutral", which contains an amount of optimism concerning the management of the aforementioned works-related disruptions. Poorly coordinated infrastructure works can easily undermine the



quantity and quality of Combined Transport services in several regions of Europe. Concerns about war and economic growth also remain. The Combined Transport community nevertheless continues its investments into new transport and terminal capacities, as well as in digital solutions to further enhance its competitiveness. The support of policymakers is needed to reinforce the business confidence

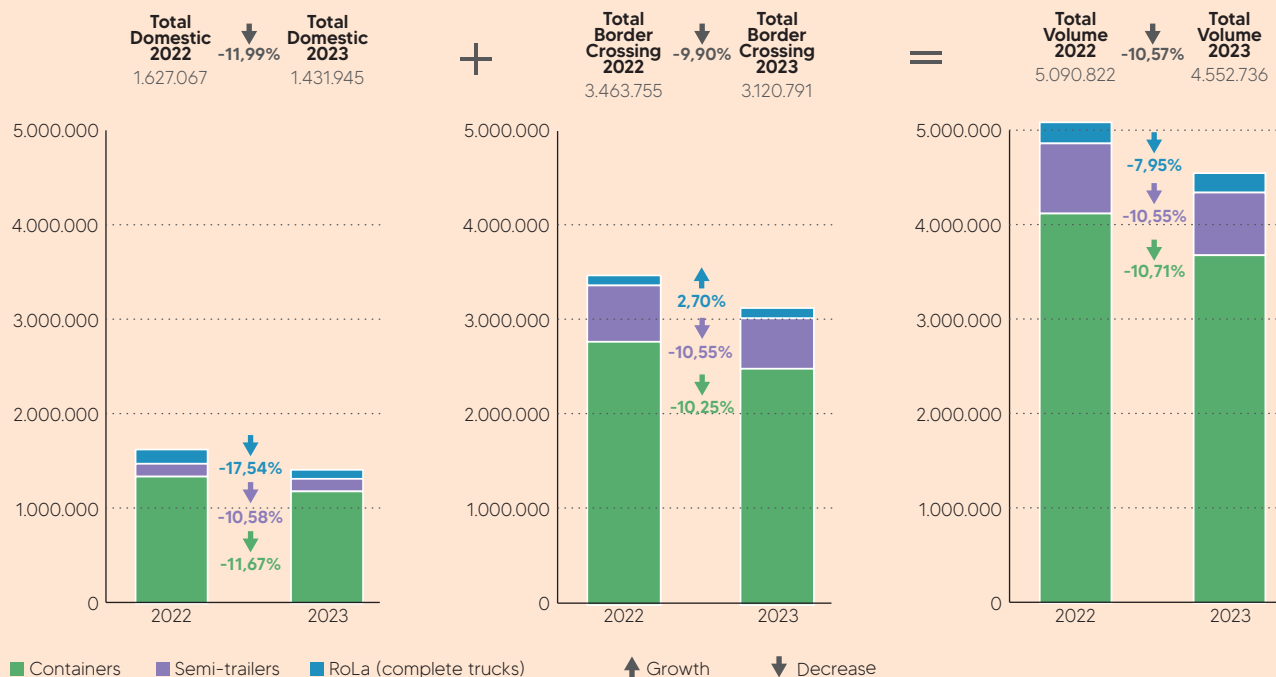


that is the fuel for the development of our supremely efficient Combined Transport services. And the reindustrialisation of Europe requires more Combined Transport.

A look at performance of 2023

European Road-Rail Combined Transport (CT) suffered a reduction of 10,57% in the number of consignments transported, which translated to a loss of 9,39% in tonne-kilometres during 2023. The negative trend already started with the energy crisis in the second half of 2022. The rapidly increasing number of infrastructure

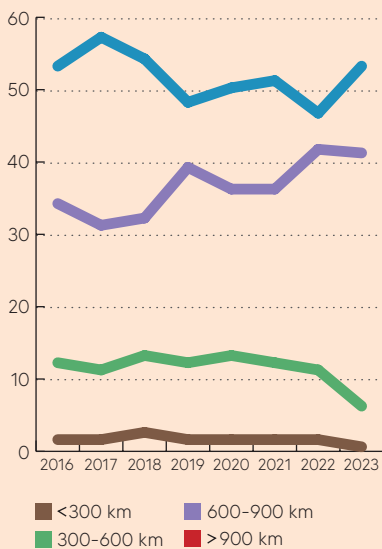
NUMBER OF CONSIGNMENTS TRANSPORTED 2022-2023



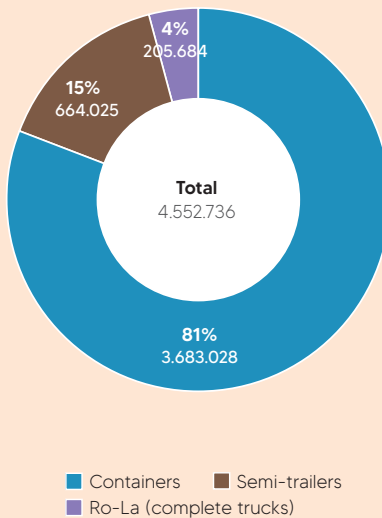


STATISTICS 2023

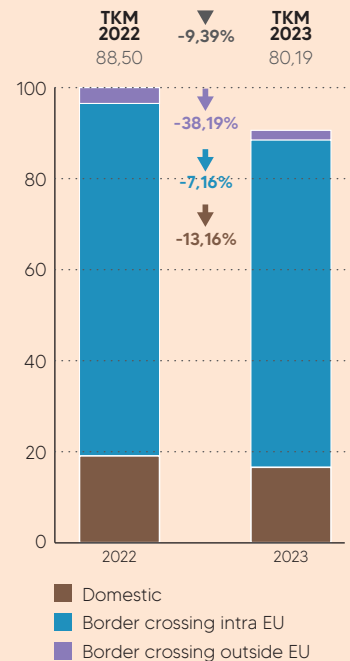
DISTANCE MATRIX (TERMINAL-TO-TERMINAL)



TYPES OF INTERMODAL LOADING UNITS (ILUS)



TONNE-KILOMETRES 2022-2023



works dramatically impacted the capacity for freight trains and their punctuality. Strikes, accidents and natural disasters coincided with major disruptions to maritime transport, inter-national trade and an overall weak economy requiring fewer transport services.

During the first months of 2024, the situation generally did not improve. Door-to-door Combined Transport saw its competitiveness decline compared with the uni-modal long-distance road haulage alternative due to the following factors:

1. The price of diesel fuel normalised in early 2023, while traction electricity remained relatively more expensive.
2. Reduced demand for freight transport meant that excess capacity appeared in the market at below-the-cost prices.
3. Member States delayed the implementation of recently adopted EU law that aims at correcting the imbalances of the regulatory framework. The European Commission had to launch dozens of infringement procedures as a consequence.

Combined transport assets

The success of Combined Transport lies in UIRR's continuous efforts towards harmonisation and standardisation to achieve a higher degree of interoperability between the transport modes and the intermodal assets used. The ideal combination of standardised loading units, intermodal wagons, as well as the appropriate rail and road infrastructure is a precondition for competitive Combined Transport. In 2023, UIRR has been absorbed by dossiers that threaten harmonisation and standardisation. Railway undertakings and infrastructure managers should



implement the necessary risk control measures based on common safety methods and integrate the outputs in their safety management systems. UIRR called for a European methodology for infrastructure managers to better evaluate the risks of crosswind exposed sections of the railway infrastructure network rather than employing indiscriminate national risk mitigation measures, such as adopted recently in Denmark.

Intermodal wagons and dangerous goods

The circulation of intermodal wagons under severe weather conditions, getting more frequent as climate change progresses, is becoming more challenging, especially on network sections impacted by strong crosswinds. The intermodal sector, in the context of various EU Railway Agency JNS procedures, has adopted the Action Plan in 2022 that adapts technical and operational rules to enhance safety for the carriage of (empty) semi-trailers on pocket-wagons even under strong crosswinds. The transport of dangerous goods remains an important commodity type for Combined Transport with a market share reaching nearly 20% of the UIRR cross-border traffic performance in 2023. The new rules set in the 2023 ADR/RID version have been integrated into

1.572

MORE WAGONS SERVE IN THE UIRR FLEET

The 12,7% increase in UIRR members' wagon fleet during 2023 promises substantial additional capacity – on top of previously achieved historic levels.

553.086

MORE CONSIGNMENTS WERE TRANSPORTED BY UIRR OPERATORS DURING THE PEAK IN 2021

UIRR CT Operators transported 553,086 more consignments during their historic high in 2021 when compared to 2023, which translates to over 1 million full truck equivalents for the entire intermodal sector.

11

NEW TERMINALS ARE UNDER CONSTRUCTION BY UIRR MEMBERS

Investment into vital intermodal infrastructure continued unabated during 2023 with a record number of new terminals under construction by UIRR members alone.

-10,57

CT PERFORMANCE IN 2023

UIRR member CT Operators suffered a 10,57% reduction of consignments transported during 2023. The loss of tonne-kilometres was lower at 9,39%. Domestic, border crossing and extra-EU showed a uniform decline, while the share of loading unit types showed no change. The transport of full trucks by rolling motorway services performed better, delivering a 2,7% growth on cross-border relations compared to a year earlier. The average rail distance increased to 823km, up by 2,85% from 800km a year ago.



INTERMODAL TRANSPORT

Door-to-door Combined Transport suffered 18 months of continuous contraction from the second half of 2022. The decline in the transport performance of the UIRR community amounted to -10,57% in 2023. This took European Combined Transport back to pre-Covid levels of transport performance.

Beyond the rail infrastructure-related issues, Combined Transport operations were adversely impacted by global trade disruptions involving China and the Red Sea, as well as the overall weak economic output. Intercontinental intermodal transport also continues to be heavily impacted by the war in Ukraine.

Cost increases of traction electricity, rail infrastructure access charges and the cost of labour undermined the cost competitiveness of door-

to-door Combined Transport in comparison to its unimodal road haulage alternative.

Despite the setbacks, investment programmes into intermodal assets such as terminals, wagons, loading units and digitalisation continued unabated. Despite the loss of approximately 2 million TEU in transport volume over the past 18 months, ongoing investments will bring an additional capacity of 4 million TEU to European Combined Transport.

Door-to-door Combined Transport, and especially its zero-carbon version powered by renewable electricity, offers minimal environmental harm while getting the heavy lifting job done. Moreover, the electricity is used directly from the grid, meaning that the reliance on batteries is

limited to mobile transshipment equipment and the electric trucks that perform the short first and last mile transports.

The combined transport for Europe campaign 2021-2024

Door-to-door Combined Transport offers the most affordable and efficient, while lowest risk path to realising the various policy objectives of the European Union. Through the intelligent connection of rail, road and waterways, contemporary Combined Transport provides a door-to-door freight transportation service which:

- Reduces carbon emissions by up to 90%
- Improves energy efficiency by up to 70%
- Contributes to a reduced dependency on imported fossil fuels

daily operations by the respective operators. UIRR Best Practice Guidelines, available in 4 languages, have been adapted and published on the UIRR website. Digital solutions must be the preferred option for the business and authorities as they are prescribed in the eFTI Regulation.

Waste is a continuously growing commodity type carried by Combined Transport that needs particular attention in the context of the Waste Shipment Regulation (WSR). A fully digitalised exchange would be established to reduce the administrative burden on operators, which remains challenged by some Member States that insist on their own rules for waste transport.

Multiple fold growth

Rail freight performance, which covers the longest section of intermodal transport chains, became increasingly unreliable during 2023. Punctuality performance underwhelmed as a consequence of intensive passenger traffic together with excessive works, accidents, extreme weather impacts and labour action on the network traffic together with excessive works, accidents, extreme weather impacts and labour action on the network.

Inferior bypass routes offered to freight trains in combination with a priority for passenger trains to go through the works-

affected sections resulted in severe disruptions and loss of capacity. The number of works sites along the European railway network have grown multiple-fold, which imposes significant additional cost to operators through occasionally very long bypass routes and a loss of revenue due to frequent train cancellations.

UIRR calls for a prioritisation of freight trains that reflects the socio-economic and environmental benefits of these trains, as well as takes into account the relative ease of transferring passengers to buses. Freight cannot be transferred to trucks along sections impacted by line closure or serious capacity reduction. ■



- Lowers the transport sector's emissions of harmful pollutants including noise
- Prevents the occurrence of several road accidents and road congestion

- Slows the degradation of road infrastructure including bridges
- Improves the working conditions and work/life balance of truck drivers
- Creates high value-added jobs

Zero-Carbon Door-to-Door Combined Transport (ZCCT) will deliver the decarbonisation of inland freight transportation efficiently.

DTD REPORT: "NEW LOGISTICS CORRIDORS AND NEW STRATEGIC RECOMMENDATIONS FOR THE RAILWAY TRANSPORTATION OF TÜRKİYE"

► The Railway Transport Association (DTD) prepared a comprehensive report including the risks encountered by and opportunities available for the Turkish railway transport sector and submitted the report to the responsible ministries. According to the Report, the pandemic and the turning points in the logistics sector caused by the pandemic have forced the countries to look for new alternatives regarding production and logistics. The Report emphasizes that the political and economic changes across the world have caused the formation of new logistics corridors.

New logistics corridors and opportunities available to Türkiye

According to the report, new production centers are planned recently thanks to the impact of



the EU Green Deal and this plays a determinant role regarding where and how these logistics corridors will be established. These developments increase the potential of Türkiye to become an important production and logistics center. However, in order to achieve this, Türkiye needs strong and efficient railway connections with high capacity with her neighboring countries. Problems such as especially the lack of a railway connection with Iraq, Lake Van crossing problem regarding

the connection with Iran and the capacity problems with Europe have to be resolved.

Railway infrastructure needs improvements

According to the Report, Türkiye has to expand its railway infrastructure and increase the efficiency of the existing lines in order to increase her effectiveness in important logistics corridors such as the Middle Corridor, Zenzegur and Development Road. The Report also underlines that the railway road transport sector and the vehicle fleet should be increased. The existing railways focus on road transportation. However, the goods transportation should be improved likewise.

Current situation in the sector and the need for growth

The Report reveals that the railway

The Railway Transport Association (DTD) prepared a comprehensive report detailing the risks encountered by and opportunities available for the Turkish railway transport sector. The report states that new logistics corridors were established with the impact of the EU Green Deal in addition to the turning points in the logistics change caused by the pandemic and global changes and the potential of Türkiye to become an important production and logistics center increased with these developments.

goods transport in Türkiye is currently not at the desired level and the share of the private sector is still low. The low infrastructure efficiency and the private railway transport enterprises' not benefiting from the financial supports provided to the Turkish State Railways are considered among the factors affecting the development of the sector. According to 2053 plan of the Ministry of Transportation and Infrastructure, the railway transportation is aimed to increase by 15-fold as compared to 2023. Therefore, the investments in locomotives and wagons should be accelerated.

The railway goods transportation currently being 32.5 million tons in 2023 is expected to be increased to 306 million tons in 2035 and 448 million tons in 2053. In order to achieve these growth targets,

around 300 more locomotives will be needed by 2035 and more than 4200 locomotives by 2053. The cost of these investments is expected to reach around 30 billion euros by 2053.

Environmental and economic advantages

The railway transportation generates emissions of 12-fold as compared to road transportation and therefore, provides a significant advantage in terms of environment. The increase in railway transportation might decrease the road traffic congestion, accidents and wastes and might also increase the efficiency of the port operations.

Roadmap: Short, medium and long term recommendations

The report presents short, medium and long term recommendations for

bringing the railway transportation the desired level. These recommendations include provision of operational financial supports such as supporting the private railway transportation businesses, energy expenses and attractive financing opportunities in the short and medium term. In the long term, steps such as infrastructure improvements, decreasing bottlenecks, use of regenerative energy and wide signalization/electrification investments have to be taken. The report prepared by DTD clearly indicates the steps required to be taken to make Türkiye stronger and efficiency in the railway transport sector. This report has once again emphasized the importance of the required infrastructure and policy reforms for the achievement of the goal of Türkiye for becoming a logistics hub. ■

EUROPEAN ROAD FREIGHT SPOT RATE BENCHMARK INDEX ROSE BY 3.5 POINTS

► The UxT x Ti x IRU European road freight rates index shows that Q2 rates fell in the contract index by 1.3 points as compared to the previous quarter while the spot rate index rose by 3.5 points. Annually the spot index is now up slightly by 0.8 points, while the contract index is down 0.7 points. The Q2 2024 European Road Freight Spot Rate Benchmark Index rose to 127.7 points while the Q2 2024 European Road Freight Contract Rate Benchmark Index fell to 127.1. According to IRU's preliminary 2024 driver shortage results, 48% of European companies expect to face more difficulties filling truck driver positions next year. Diesel prices fell throughout the quarter until early

June when they began to rise again. In the EU, industrial production decreased in May 2024 and the low consumer demand affected the spot rates. However, the market conditions are expected to increase gradually in the remaining part of 2024.

Low levels of consumer demand have pushed down spot rates since Q2 2023. However, spot rates have begun to normalize, as the demand environment is now less negative. Adjusted retail sales, excluding motor vehicles in the euro area, have improved only marginally. The quarterly increase was 0.3 percent while the annual increase was 0.4 percent.

In the EU, industrial production

saw a 1 percent decrease for intermediate goods and a 2.1 percent decline for durable consumer goods in May 2024 compared to the previous month. Non-durable consumer goods rose by 0.8%. The lack of industrial demand contributed to the contract index dropping by 1.3 points on a quarterly basis. Operating costs have increased quarterly, especially for labor, maintenance and insurance. Average costs have risen across the board, with the average growth being 1.2 percent for the EU. Most notably, labor and vehicle insurance costs have increased by 1.2 and 3 percent, respectively. However, the increases are not as steep as in the last



quarter, when labor costs increased 1.8 percent and spares rose 1.1 percent. This made it possible to observe the effects of supply-side pressure easing on both spot and contract rates.

Diesel prices fell between April and June, driven by declining crude oil prices. The EU weighted average diesel price reached 1.07 euros per litre on June 10, down from 1.20 euros per litre on 8 April (-11%), the lowest level since summer 2023. However, the diesel prices have increased since, pushed up by rising crude oil prices, with the EU weighted average diesel price reaching 1.14 euros per litre on July. Ti Head of Commercial Development Michael Clover made the following comments on the subject: "Though the pace of road freight cost increases has slowed, notably falling in terms of fuel, we still expect to see costs rising for the year ahead. With volumes returning and capacity tightening again, we expect to see carriers be more successful in passing on cost increases to their customers. In that sense, we are expecting market conditions to return to their long-term trend of gradual increases in line with costs for the remainder of 2024."

Upply Chief Executive Officer Thomas Larriau also made the following comments: "Our data for the second quarter of 2024 shows a slight increase in spot rates, contrasting with a modest fall in contract rates. Despite persistently high operating costs, the first signs of stabilization in consumer demand are beginning to appear. Lower fuel prices and improving consumer confidence offer a positive outlook." Ti expects that spot rate increases will continue to be incremental as consumers are still cautious and the contract rates will remain relatively



low as long as the recovery in industrial output remains sluggish. With upcoming contract renewals, companies will demand less volumes for road freight, freeing up capacity and reducing upwards pressure on contract rates.

According to IRU's preliminary 2024 driver shortage results, 48 percent of European companies expect to face more difficulties filling truck driver positions next year. Over one third of truck drivers are 55 years old or older and will retire in the next ten years, while the ratio of young drivers is low. If the demand in road transportation does not get better in 2025, the driver shortage and costs may increase.

Sweden has shared its plan for the introduction of its tolling scheme's CO component for vehicles with a gross combination weight exceeding 12 tonnes in 2025. Denmark and the Netherlands will follow suit in 2025 and 2026, respectively. Sixteen EU

countries received a formal notice from the European Commission to advance with the implementation of the Eurovignette Directive. Slovenia, Belgium and Hungary have also increased the toll fees for heavy vehicles.

IRU Senior Director for Strategy and Development Vincent Erard told that the increasing costs and new CO2 toll fees would adversely affect the sector. Erard further made the following remarks: "This is likely to increase freight rates, as growing demand for transport services is putting pressure on the available capacity. With much of the sector consisting of small and medium-sized enterprises, operators have razor-thin margins. Policymakers must support operators and the sector to meet demand, including by quickly investing in both efficiency measures - for vehicles, drivers and the wider logistics system - and alternative fuels implementation." ■

PREDICTIONS FOR AIR FREIGHT MARKET IN 2030S

► The global air freight market size is expected to grow at a CAGR of 10.3% from 2024 to 2030. It is obvious that the air freight industry has experienced substantial growth in recent years, driven by a confluence of factors. The burgeoning e-commerce sector has significantly boosted demand for rapid, cross-border transportation. As consumers increasingly expect swift deliveries, air freight has become an indispensable Destination of the supply chain. Moreover, the COVID-19 pandemic exposed vulnerabilities in traditional logistics models, emphasizing the critical role of air freight in ensuring business continuity. Companies are now prioritizing supply chain resilience and diversification, leading to increased reliance on air cargo.

Technological advancements are revolutionizing the air freight industry

According to IATA figures world air cargo traffic is forecast to increase dynamically, with the annual growth rate over 4% in the next 20 years. In that, air freight is projected to grow at a rate of 4.3% per annum while airmail will grow at an average rate of 2%. Air cargo market is and will be significantly stimulated by the boom of e-commerce, with its market size forecast to increase 20% per annum during the next five years, to about \$5 trillion in 2021. More special commodities, less letters, more parcels, more periods of high demand... illustrates a shift in the type and volume of goods handled through cargo facilities. Transportation of letters decreased from 340 to 328 billion globally, whereas the number of postal parcels grew from 6.7 to 7.4 billion.

Shippers, freight forwarders and logistics providers increasingly demand or expect excellence, simplicity, traceability, transparency and speed.

Regulations impacting air cargo will continue to increase, though ideally, they will be smart, balanced and data driven.

Air cargo will continue to evolve, cargo facilities must keep pace

Economic outlook, increasing customer expectations and changing regulations are redefining the handling, storage and distribution of goods transported by air which consequentially impacts cargo facilities. Changes are therefore needed in business models, architectural and process designs, deployed technologies and workforce skillsets. Fully automated high-rack warehouses, automated and green vehicles navigating autonomously through the facility, employees equipped with tools, including Artificial Intelligence (AI) and Augmented Reality (AR), empowering them to be more efficient – the next generation of technology-enhanced cargo facilities will boost productivity, operational efficiencies and increase responsiveness to customers.

The cargo facility of the future will be safe and secure, green, automated, connected and smart. This will ensure the cargo facility of the future is fit for purpose in size, location and for the people who use.

Complex and regulatory framework

The integration of blockchain, artificial intelligence, and the Internet of Things (IoT) is enhancing



supply chain visibility, optimizing operations, and improving security. These technologies enable real-time tracking of shipments, predictive maintenance of aircraft, and streamlined customs clearance processes. Additionally, growing environmental concerns have prompted industry to adopt sustainable practices. Airlines and cargo handlers are investing in fuel-efficient aircraft, exploring alternative fuels, and implementing carbon reduction initiatives to minimize their ecological footprint. The air freight industry operates within a complex and intricate regulatory framework imposed by both national and international

authorities. To ensure safety, security, and efficiency, a multitude of regulations govern various aspects of the industry.

The International Air Transport Association (IATA) establishes global standards for cargo handling, security, and environmental protection. Complementing this, the International Civil Aviation Organization (ICAO) sets forth comprehensive regulations for civil aviation, encompassing airworthiness, air traffic management, and security measures. Additionally, customs regulations, which vary significantly between countries, dictate the clearance and movement of goods across borders. ■

AIR CARGO MARKET CONTINUES WITH DOUBLE DIGIT GROWTH IN NINE STRAIGHT MONTHS

► The August 2024 Air cargo market analysis report prepared by IATA Sustainability & Economics shows nine consecutive months of growth in the global air transport industry.

- Global Cargo Tonne-Kilometers (CTK) increased by 11.4% year-on-year (YoY) in August delivering the ninth consecutive month with double-digit demand growth and the second straight month with record year-to-date demand levels. Net of seasonal adjustment, demand contracted by -0.2% month-on-month (MoM).
- International CTK added 12.4% relative to last year, driven by all

regions and major trade lanes. Asia Pacific carriers recorded the largest expansion with 14.8% YoY, and demand on the Middle East-Europe trade lane outpaced all others with an outstanding 28.9% annual surge.

- Global air cargo capacity, measured in Available Cargo Tonne-Kilometers (ACTK), saw 6.2% growth YoY in August, seeing slower growth than in the months prior but at the same time delivering record capacity levels.
- Despite global record capacity and falling fuel prices, the global air cargo yield maintains a moderate upward trend.

Air cargo industry exhibits the second consecutive month with record year-to-date demand levels

In August, the global air cargo industry experienced the ninth consecutive month with double-digit demand growth, recording an increase of 11.4% YoY (Chart 1). Compared to the previous month, industry-wide CTK fell marginally with -0.2% (after seasonal adjustment), exhibiting the first MoM reduction since February.

As for the four months prior, the largest contributors to the annual surge in CTK were carriers from Asia Pacific and Europe, which contributed 43% and 25% to the global increase, respectively. Measured in traffic volume (CTK), these airlines represent the largest and third largest regions for air cargo, in that order. The second largest region – North America – contributed 12% to the industry-wide rise. Their contribution was outperformed by Middle Eastern carriers, who added 15% to the global figure.

Year-to-date, air cargo demand settled 13.0% above 2023 levels last month. And even though the high YoY growth rates in 2024 are inflated by an overall weak 2023 market, demand is reaching near-peak levels. For instance, August brought about the second straight month with record year-to-date demand.



SEPTEMBER 2024 PERFORMANCE IS ALL-TIME HIGH FOR DEMAND

The International Air Transport Association (IATA) released data for September 2024 global air cargo markets showing continuing strong annual growth in demand.

Total demand, measured in cargo tonne-kilometers (CTKs*), rose by 9.4% compared to September 2023 levels (10.5% for international operations) for a 14th consecutive month of growth. IATA Director General Willie Walsh said:

"September 2024 performance brought continued good news for air cargo markets. With 9.4% year-on-year growth, cargo volumes continued to mark all-time highs for demand. Yields are also improving, up 11.7% on 2023 and 50% above 2019 levels. All this points to a strong finish for this year."



Demand on international routes sustained robust growth across all world regions and major route areas in August, led by carriers registered in Asia Pacific

International routes continue to drive the exceptional traffic levels, which surged by 12.4% YoY in August. Airlines benefit from surging e-commerce demand from consumers in the US and Europe and the ongoing capacity limitations in ocean shipping. As has been the case for almost one year, carriers from all regions experienced expansions in international traffic compared to the previous year, with the month of August displaying strong growth rates ranging from 7% to 15%. Airlines registered in Asia Pacific saw the highest annual growth in international CTK, registering 14.8% YoY. European and Middle Eastern airlines followed with 13.6% annual growth each. Latin America experienced the second highest annual growth rate in almost two years with 12.5%, and a notable 3.2 percentage point increase from July's figure (partially due to the high base in July 2023). Africa and North America added 7.5% and 7.1%, respectively, compared to last year's traffic levels. For the latter, the August result reflects a considerable 2.7 percentage point decrease from July (almost entirely related to a base

effect). Regarding African carriers, the World Health Organization's declaration of Mpox as a public health emergency did not visibly affect their overall traffic volumes. The annual expansion in international CTK was also supported by all major route areas, although with some differences in magnitude. Middle East–Europe championed growth figures again in August, maintaining a streak of double-digit growth that originated in September 2023 with an outstanding evolution of +28.9% YoY. CTK on the routes Africa–Asia and Europe–Asia (the second largest market measured in CTK) followed with impressive annual surges of 21.1% and 18.4%, respectively. Both trade lanes have also been experiencing double-digit annual growth since the second half of 2023. For Africa–Asia the August reading reflects a 5.3 percentage point increase compared to the figure recorded in July (related to a base effect), which is the largest increase among major route areas. Within Asia, Within Europe, and Middle East–Asia, followed closely with 16.1%, 15.0%, and 13.5% annual growth, in that order. All three route areas saw nothing but double-digit annual growth for months. However, for intra-Asia traffic, the August annual growth reflects a 5.0 percentage point

decrease from the month before. Possibly, this can be partially linked to the social unrest in Bangladesh and Typhoon Shanshan in Japan. Both events impacted local logistics operations with airport closures and flight cancellations. Meanwhile, Asia–North America, the largest trade lane by volume, recorded an annual increase of 9.3% last month, and North America–Europe added a comparatively modest 6.1% YoY.

The busy summer season on the passenger side brought record air cargo capacity despite a gradual slowdown in the growth rate

Global ACTK increased by 6.2% YoY in August (+0.2% MoM after seasonal adjustment), the lowest rate since January 2023. Nevertheless, industry-wide capacity reached an all-time high. In fact, August represents the fourth consecutive month with global ACTK above 50 million, a level never seen before in the history of air cargo. In year-to-date terms, ACTK surged 8.7% YoY. And even though this last statistic has been decreasing slowly every month in 2024, the month of August also maintained the streak of record capacity levels in year-to-date terms, which started in May 2023. The air cargo load factor, which illustrates the industry's balance between demand and supply, shed 2.0 percentage points compared to August 2023.

Similar to the demand side, growth in air cargo capacity last month was driven by international routes, where the industry registered an expansion of 8.2% YoY. Maintaining the trend of the past few years, the expansion in international ACTK in August was driven by a surge in international belly-hold capacity, which continued to record double-digit annual growth last month with 10.9%. And while increased belly capacity from passenger flights is a feature of every summer holiday season, this year saw record belly capacity levels (since the beginning of recording in 2019). However, that the latest belly-hold capacity growth statistic was the lowest recorded since the 2021 spring season. With global passenger belly capacity fully recovered to 2019 values, the question emerges as to whether the impressive growth in the international passenger market will normalize and how this will impact the use of dedicated freighters going forward. At present, the slowing expansion of international belly capacity is accompanied by

a moderate increase in dedicated freighter capacity, which rose by 5.0% YoY in August.

Global cargo yield maintain upward trend

In August, the global jet fuel price fell by 7.9% over the previous month and -24.4% YoY, closing at USD 94 per barrel. The jet fuel crack spread dropped to 13 USD, the lowest value since early 2022. This can be explained by the reduced demand for oil from China coupled with record oil production levels in the US. This is a welcome development for the world economy, as lower oil prices boost economic growth and might help further curtail inflation. The August reading is also good news for airlines in particular, as the jet fuel price is a major contributor to airline operating costs and the exceptionally wide crack spread has been putting pressure on their relatively slim margins.

In contrast to the evolution in jet fuel, the global yield for air cargo (with surcharges) expanded by

2.0% MoM in August and 11.7% YoY, the highest annual increase in more than two years. And even though the rising annual growth rates are partially related to a rapidly decreasing base in 2023, the fact that the average yield is refusing to drop to pre-Covid levels is remarkable, especially given the peak capacity during the summer season. In August, the air cargo yield was still an impressive 46% above 2019 levels. This can be partly explained by the fact that new e-commerce players and shippers that shift from sea to air (due to capacity limitations in ocean shipping and the associated rise in sea freight rates) compete for capacity with the more traditional air cargo clientele.

Small improvements in production and trade figures and fall in PMI

Industrial production, measured at constant USD prices and reflecting the output generated by industrial sectors such as mining, manufacturing, and utilities, stayed level in July compared to the previous month. Compared to last year, the index increased by 1.6%, continuing the moderate upward trajectory seen after the pandemic, which aligns with pre-pandemic trends (2012-2019). Meanwhile, global goods trade experienced a small expansion of +1.7% YoY (-0.3% MoM). On the other hand, the global manufacturing output PMI (Purchasing Managers' Index) fell below the critical 50-point benchmark in August, signaling a minor contraction with 49.9 points (down from 50.2 in July), as inflation and high borrowing costs, tight labor markets, and supply chain disruptions continue to weigh on the manufacturing sector. The global result was partially driven by the US





economy, where the manufacturing output PMI fell even more dramatically to 48.2 points, possibly linked to slower than expected sales, rising inventory build-up, and high input costs. Similarly, the global new export orders PMI, a measure of the perceived well-being of international trade, maintained a pessimistic outlook in August with 48.4 points (down from 49.3 in July). With this, purchasing managers expected new export orders to contract for the third time in a row, after two months of a slightly improved outlook. In addition to the pressures that affect global manufacturing, global trade also has been suffering from deteriorating trade relationships.

Consumer Price Inflation goes down to lowest level in main economies since 2021

US headline inflation, as measured by the annual evolution of the

Consumer Price Index (CPI), dropped by 0.3 percentage points to 2.6% in August, the lowest value since early 2021. Combined with several other factors (an uptick in the unemployment rate and rising inventory build-up), the Fed ultimately decided to cut interest rates by 0.5 percentage points in September. Similarly, the August inflation rate in the EU fell by 0.4 percentage points to 2.4%, the lowest value since mid-2021. The ECB started cutting interest rates in June and implemented a second round of cuts in September. At the same time, Japan's inflation rate ticked up by 0.3 percentage points to 3.0% in August, the highest reading in 10 months. China's consumer price inflation continued its moderate upward trend, growing by 0.1 percentage points to reach 0.7%, the highest reading in six months. Muted inflation in China

since 2023 reflects weak domestic demand triggered by elevated unemployment, reduced income growth, and the downturn in the property market.

The Producer Price Index (PPI) tracks changes in the prices that producers receive for their products, and it can serve as a leading indicator for the CPI. Compared to July, producer price inflation fell last month in the US to 1.8%, Japan to 2.5%, and China to 1.2%. For the latter, this marked a substantial 2.5 percentage point drop compared to July's figure (partially linked to a base effect). August values for the EU 27's PPI are not available to date. In July, the region maintained the major deflationary trend that began mid-2023 with a PPI reduction of -1.9% YoY, although that figure reflects the smallest instance of deflation in 13 months. ■

TÜRKİYE TO BECOME A GLOBAL LOGISTICS HUB



► The “Logistics Market Outlook Türkiye 2024” report was published by Cushman & Wakefield |TR International in cooperation with the Presidency Investment Office in order to provide detailed information about the logistics sector in Türkiye to the potential investors. Providing detailed information regarding the high investment potential of Türkiye in the logistics field based on the first quarter data of this year and prepared specially for the international investors, the report includes important data for the potential logistics investors from European, Asian and Middle Eastern countries. The Report includes in details the distinctive features of Türkiye in terms of economic and strategic location, the logistics sector data, infrastructure projects, investment regions, demand and market conditions, common market practices, trade routes, incentives and corporate trends. Analyzing the process of change in the global trade routes due to the “supply chain crises caused by the collisions around the Red Sea and the war between Russia and Ukraine”, the report highlights that the “nearshoring” concept has become importance for the investors looking

for new markets in international trade.

Stating that the operational costs increased and the freight prices increased from 1480 US dollars to 3 thousand and 400 US dollars due to the foreign currency fluctuations and longer trade routes caused by the geopolitical risks last year, the Report noted that the “nearshoring” concept meaning that the international investors looking for more affordable, safe and environmentally friendly supply chains move their productions to nearer regions is still one of the strongest arguments created against the crises in the global supply chain. The Report emphasized that Türkiye is one of the countries at the center of the nearshoring concept. According to the Report, Türkiye where multinational companies are positioned as the production, export and management center ranks the third among the most popular resource finding and re-supply regions for the European companies. The Middle Corridor where Türkiye is located comes to the forefront as compared to the North Corridor due to its being more affordable and faster.

The logistics market reached a worth of 100 billion US dollars

Türkiye ranks the 11th in the “Agility Developing Markets Logistics Index” provided in the

report and evaluating 50 countries based on 2023 data. Türkiye comes to the forefront with high scores in “domestic and international opportunities, business foundations and digital preparation”.

Getting a share of 2.5 percent from the global logistics exports thanks to its logistics market of 100 billion US dollars, Türkiye has the potential to become a global center for the transportation and logistics thanks to its strategic location, continuous increase of the logistics capacity in the last 5 years, increasing infrastructure investments, economic growth, export oriented industry base, pollution and wide labor force pool.

The potential of Türkiye in this field is also increased by the “strong retail market and its fast growing e-commerce capacity”. Therefore, the digital trade transaction value of Türkiye which is 89.42 billion US dollars is expected to increase to 136.89 billion US dollars in 2027. International giants queue for investments

According to the Report, the fast growth of e-commerce increase greatly the investments made in transfer centers and regional warehouses and thanks to the new logistics corridors and infrastructure investments, many international companies plan moving their production lines to Türkiye. Chinese automotive company Skywell Türkiye announced that they would make an investment of 1.6 billion US

The ‘Logistics Market Outlook Türkiye 2024’ report reveals the high investment potential of Türkiye in the logistics sector thanks to the fast growth of e-commerce and new infrastructure investments.

dollars in Türkiye while SAIC Motor and DFSK Motor announced that they plan new investments in Türkiye. Amazon opened its first logistics center in Türkiye in Tuzla and thus, can provide more efficient services to the local and global markets while Fedex Express integrated its operations over three continents in İstanbul Airport Cargo Zone and started to establish a center of 23 thousand square meters. The strong demand in the sector where the warehouse supply was restricted due to the operational costs have increased the rents in the recent

years but the logistics facility supply is expected to change in the short and medium term.

The need for smart storage areas increases due to the dual transformation trend

While the investments in technology and automation have increased significantly in the new area where qualified and smart storage areas are needed, the logistics systems and robotic automation managed with artificial intelligence and sustainable energy solutions come to the forefront.

The use of the drones and autonomous vehicles in order to satisfy the fast delivery expectations is considered as an “important development” while the digital transformation process meaning the use of digital and green logistics practices together is expected to be used by the companies across the world. The Report states that Türkiye supports digital transformation under its 12th Development Plan as part of the EU Green Deal and therefore, provides great opportunities for international investors looking for more environmentally friendly markets. ■



THE ECONOMIC RELATIONS BETWEEN TÜRKİYE AND GERMANY TO IMPROVE FURTHER WITH THE NEW BUSINESS COUNCIL

► The Türkiye-Germany Cooperation Reception hosted by the Foreign Economic Relations Board (DEİK) in İstanbul was organized with the participation of DEİK/Turkish-Germany Business Council members and businessmen. The event was organized on the 100th anniversary of the diplomatic relations between Türkiye and Germany and after the visit of the Frank-Walter Steinmeier, the President of Federal Republic of Germany, to Türkiye.

The foundations of the Germany - Türkiye Business Council were laid and a Memorandum of Understanding was signed at the reception organized with the participation of 10th President of the Federal Republic of Germany Christian Wulff, DEİK Chairman Nail Olpak and DEİK / Türkiye-Germany Business Council Chairman Mehmet Ali Yalçındağ. Christian Wulff was elected as the Chairman of the Board of the Germany - Türkiye Business Council.

Olpak: "Germany - Türkiye Business Council open the path for the development of the economic cooperation between two countries"

DEİK Chairman Nail Olpak made the following comments: "Türkiye and Germany have well-rooted cultural and social connections because of especially the millions of Turkish citizens living in Germany. The presence of Turkish people in Germany both contributes to the economy of both countries and assumes a critical role in the development of economic and commercial relations between two countries. Germany is the most important trade partner of Türkiye in EU. The bilateral trade volume between Türkiye and Germany reached 49.7 billion US dollars in 2023. Türkiye is a reliable partner thanks to her strategic location as a bridge between Europe and Asia and its potential and actual membership to the EU and Customs Union. The Germany -Türkiye Business Council will pave the way for increasing the cooperation opportunities in third countries, partnerships in investment projects and investment opportunities between SMEs and developing the economic cooperation between two countries in many fields".

(Left or right) DEİK Chairman Nail Olpak, 10th President of the Federal Republic of Germany Christian Wulff and DEİK / Türkiye-Germany Business Council Chairman Mehmet Ali Yalçındağ.





Wulff: "Studies for new investments in Türkiye and Germany to be increased"

Christian Wulff, the ex-President of the Federal Republic of Germany, made the following remarks in the speech he gave at the reception: "I am happy to be here today. The cooperation at this forum where the relations between Türkiye and Germany were discussed both with a traditional and innovative approach is a great opportunities for the development of economy and trade between our countries. The trade volume between the Federal Republic of Germany and Türkiye has a higher economic cooperation potential as compared to the current trade volume exceeding 50 billion euros. As the Türkiye - Germany Business Council established recently, we want to focus on and

increase our activities in the fields of R&D, Transformation, bilateral investments etc. We will work towards increasing and realizing the new investments between Türkiye and Germany and ensuring the growth of trade activities between two countries. We as the Business Council can be more successful together with all parties. Underlining that Germany is among the 4 countries making the highest amounts of investments to Türkiye, DEİK/Türkiye - Germany Business Council Chairman Mehmet Ali Yalçındağ made the following comments: "The friendship connections between two countries extending from the past to today are an inseparable whole in various cooperation fields and especially in the fields of trade and economy. The current trade volume between

our countries is 50 billion US dollars and this figure makes Germany our biggest trade partner."

DEİK/Türkiye-Germany Business Council Chairman Yalçındağ told that the mutual commercial relations will gain momentum with the counter institution Germany - Türkiye Business Council established in Germany and noted that Türkiye is the largest potential partner of Türkiye.

Yalçındağ further added the following: "As DEİK / Türkiye-Germany Business Council, we aim to take the commercial and economic relations between two countries to another dimension. We have set our roadmap for this purpose. This strategy is a strategy that considers Türkiye and Germany as a shared market and displays them as a great industrial and economic power." ■

LOGISTICS OF THE FUTURE: RE-SHAPING OF THE SUPPLY CHAIN WITH WEARABLE TECHNOLOGY

► One of the crucial ways of keeping up with the changing dynamics in the logistics sector and increasing the competitiveness is to ensure the agility of the supply chain. This agility includes strategic elements such as operations management, logistics planning and modeling, warehouse and inventory management, logistics operation process and industrial automation technologies. The agility of the supply chain ensures the continuity of uninterrupted operations by foreseeing unexpected problems and creating fast alternative solutions.

The interactive management of processes such as operations management, logistics planning and modeling, warehouse and inventory management allow for the provision of more efficient services. This approach provides concrete benefits such as decrease in freight costs and increase in timely delivery ratios. Moreover, this strategic approach manages the logistics operations more effectively and reinforces the business continuity and competitive advantage.

Monitoring the innovations in wearable technology and logistics

sector is an important way of increasing the agility of the supply chain. The businesses using these technologies will always be one step ahead in competition and satisfy the customer expectations completely and increase the operational efficiency to extraordinary levels. You can further increase the agility of your supply chain and give a competitive advantage to your business by exploring the integration of wearable technologies and logistics solutions. Therefore, you can manage your logistics operations more efficiently and effectively, ensure business continuity and improve your competitive advantage.

The integration of the Internet of Things (IoT) changes the rules of the game in the up-tempo world of the supply chain management. IoT reshapes the scenery by providing a comprehensive solutions for visibility and monitorability, which are comprehensive challenges. The technologies using QR codes such as Smart Labels or RFID technology are among the key tools in this transformation. The businesses develop advanced monitorability and smooth inventory management processes by providing real time information to their supply chains by benefiting from these innovations.



Digital transformation era in logistics sector

The logistics sector takes a step towards the new era with digital transformation. The innovations such as developing technologies, data analytics, artificial intelligence, blockchain and IoT create big changes in logistics processes. This change plays a critical role in order to increase the customer satisfaction, maximize the operational efficiency and decrease the costs.

Thanks to especially the artificial intelligence supported route optimization and IoT devices, the transportation processes became more efficient and the cargoes can be monitored on a real time basis. This decreases the loss and damage ratios. These technological advancements provide a competitive edge to the logistics companies and also enable them to achieve their sustainability goals.

The digital transformation also changes the customer experience. Advanced analytical tools and digital platforms provide the customers with personalized services, increasing their satisfaction. The blockchain technology also increases security and transparency in the logistics processes and strengthens the customer trust. The logistics sector takes big steps in the fields of automation and robotic systems, IoT, artificial intelligence and big data analytics thanks to the impact of the Industry 4.0. These steps aim for more effective management of operations, decrease in costs and increase in customer satisfaction.

The companies in the sector are expected to increase their competitiveness and adapt to the continuously changing market conditions thanks to the major impacts of the digital transformation in the logistics sector. ■

IMPACTS OF DIGITALIZATION ON THE LOGISTICS SECTOR

Digitalization has deep and transforming impacts on the logistics processes and reshapes the industry by making these processes more efficient, transparent and customer oriented. We can examine the impacts of digitalization on the logistics sector under the following headings:

Operational efficiency and cost decrease

Digital tools and automation decrease manual transactions and increase operational efficiency. Advanced data analytics and artificial intelligence supported systems decrease costs regarding inventory management, warehouse operations and transportation management. These technologies significantly mitigate unnecessary inventories and over-transportation and thus, optimize the resource utilization.

Increased customer satisfaction

Digitalization provides the customers with real time monitoring opportunity and improves customer experience in innovative services such as personalized delivery options. Customers can get real time information on the status of their orders and better plan their delivery processes. This increases customer loyalty and satisfaction.

Transparency and security

Technologies such as blockchain increase transparency over the supply chain and enable the monitoring of the resource of the products throughout the supply chain. This has a critical importance in terms of the struggle against frauds and verification of sustainable supply chain practices.



Moreover, cybersecurity solutions safeguard data security and privacy in logistics processes.

Sustainability

Digital technologies help with the environmental footsteps of the logistics operations. The route optimization and transportation management tools decrease fuel consumption and thus, the carbon emissions. Moreover, digitalization decreases the use of paper and supports environmental sustainability.

Flexibility and competitive advantage

Digital technologies provide the logistics companies the capability to adapt quickly to the market changes and to carry out flexible operations. This especially provides competitive advantage against the fast changing consumer requests and global supply chain interruptions.

Innovation and new business models

Digitalization promotes innovation in the logistics sector and allows for the emergence of new business models. For instance, innovations such as sharing economy models in transportation, online logistics platforms and smart agreements transform the way of doing business in the sector.

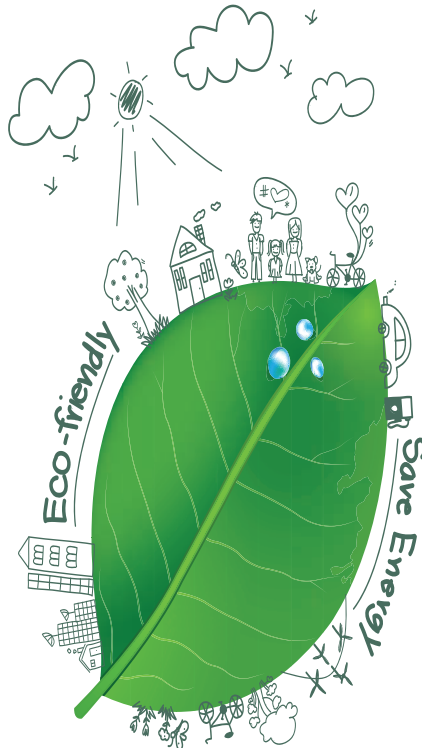
THE LOGISTICS LEGISLATION ENACTED AND STEPS TAKEN IN GREEN LOGISTICS BY TÜRKİYE ARE OF CRITICAL IMPORTANCE

UTİKAD President Bilgehan Engin evaluated the legislation, competition and sustainability strategies in the sector.

► UTİKAD President Bilgehan Engin made important remarks on the legislation enacted, the competition increasing strategies and environmental sustainability regarding the logistics sector of Türkiye. Engin gave information on the current situation and future developments in the sector.

The legislation of logistics sector of Türkiye: regulations and guidance

Engin explained how the legislation applicable in the logistics sector of Türkiye benefited from the geopolitical advantages of the country and guided the sector. Engin added that the Turkish legislation covering all transportation modes are aligned with national and international agreements. He especially drew attention to the importance of international regulations regarding railway transportation such as the



Convention concerning International Carriage by Rail (COTIF) and Regulation concerning the International Carriage of Dangerous Goods by Rail (RID) concluded in 1980.

Regarding the road transportation, Engin emphasized that the regulations such as the Road Transportation Law and Regulation on the Transportation of Dangerous Goods by Road set the security and quality standards in the sector. He evaluated the impacts of European Agreement Concerning the Work of Crews of Vehicles Engaged in International Road Transport (AETR) and Agreement concerning the International Carriage of Dangerous Goods by Road (ADR) being among the international agreements on the sector. Regarding the air transportation, Engin noted that the Turkish Civil Aviation Law No. 2920 and other related



legislation shaped the role of Türkiye in the international air transportation. He also emphasized the importance of regulations such as the Turkish Code of Commerce and Regulation of Ship Agents in the sea transportation.

Strategies to increase competition

Noting that the entry conditions should be made easier to increase the competition in the logistics sector, Engin stated that the high fees for the certificates of authorization make the entry of small and medium sized companies in the market. The competitiveness of the small and medium sized companies will increase with the regulations to be made in this regard. He also commented on the importance of the regulations that will ensure that the private sector take a more active role in rail transportation.

Environmental sustainability and legislation

Commenting also on the new and amended legislation in Türkiye in terms of environmental sustainability, Engin noted that the Combined Transportation Regulation was enacted in 2022 and this Regulation encouraged the green logistics practices. He told that the Green Logistics Certificate supports the environmentally friendly logistics practices and provides the companies with various advantages. He added that the Zero Waste Regulation aims for the protection of the environment and human health. Stating that the goal of net zero emission by 2053 as set for Türkiye under the EU Green Deal and Paris Convention plays an important role in the fight against the carbon emissions



**Association of International Forwarding
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in the maritime sector, he told that projects such as the "Green Port" and the "Decarbonization of the Maritime Sector" will contribute to the development of environmentally friendly port facilities.

Remarking that as UTİKAD, they will continue to support the investments made in environmentally friendly technologies and the strengthening of the railway infrastructure and promotion of the intermodal transportation, Engin emphasized that they closely monitor the developments in the sector and the regulations have to be continuously updated. ■

THE DEVELOPMENT ROAD PROJECT IS CRUCIAL FOR GLOBAL SUPPLY

The Minister of Transportation and Infrastructure Abdulkadir Uraloğlu told that they evaluated the Development Road Project known as the New Silk Road with Iraq, United Arab Emirates and Qatar. Uraloğlu emphasized that the project is of critical importance for the regional and global supply chains.

► The Minister of Transportation and Infrastructure Abdulkadir Uraloğlu made comments after the 1st Meeting of the Council of Ministers organized with the participation of Iraq, United Arab Emirates and Qatar hosted by Türkiye for the Development Road Project called as the New Silk Road. Noting that the main feature of the modern economy is that the size of multinational production, intercountry financial

flows and international trade volume have reached great volumes, Minister Uraloğlu further commented as follows: "Nobody is rich alone or is self-sufficient. If you shut your doors, close your eyes and look at the developments in the world from afar and do not have any friends, then you do not have any place in today's world. Everyone has a sweet flavor they will add to the cake and a share that they will take from the cake.

This era is a "win-win" era.. And the transportation sector is the most important power unit of this era." Stating that they came together not only for the future of the transportation and logistics sectors but also the economic and socio-cultural future of 4 countries, Minister Uraloğlu further commented as follows: "That is because it is of great importance that the transportation facilities are safe, uninterrupted and





fast in order to establish economic cooperation being indispensable for our countries and to improve foreign trade activities." Reminding that Türkiye, Iraq, the United Arab Emirates and Qatar signed the "Memorandum of Understanding for Joint Cooperation on the Development Road" at the visit paid to Iraq by the President Recep Tayyip Erdoğan on April 22, 2024, Uraloğlu commented as follows: "We as four countries decided to establish the Council of Ministers for the Development Road Project with this Memorandum of Understanding. We as Türkiye hosted the first meeting of this Council today. We had the chance to evaluate this project together and thoroughly via this Council by taking the cooperation regarding the Development Road Project to the highest level with the cooperation of these four countries."

Steps to Be Taken are Determined

Emphasizing that they discussed the contribution of the uninterrupted and fast transportation via Türkiye and Iraq to the transportation

corridors, Uraloğlu stated that "We determined the steps to be taken to reveal the concrete outputs of our cooperation in this field in future period. We place great importance on the activities of the Council in order to act together and to realize our plans fast. We also discussed the determination of the administration and operation mechanisms of the Council of Ministers established within the scope of the Development Road Project as this was our first meeting."

Underlining that this Council established for the Development Road Project will continue to organize meetings, Uraloğlu further commented as follows: "I thoroughly believe that our cooperation under the Project will improve more and get stronger. The Development Road Project is an important project not only for these four countries but also for the geography of the region and the global supply chains." Noting that the Project is not only a development project but is a more comprehensive project that will increase the welfare and

sustainability of the region, Uraloğlu further stated that: "We will provide uninterrupted transportation of each country in Europe from the FAV Port constructed in Iraq to London via road and railway transportation with the Development Road Project. We will significantly decrease the journey time between Asia and Europe via Türkiye. The duration of the journey of a ship setting sail from FAV Port to Europe via Suez Canal will decrease by 15 days if the goods are transported to Europe on the Development Road."

"The Ships Setting Sail from China and Passing by the Cape of Good Hope Arrive at London in Around 45 Days Which They Used to Reach in 35 Days"

Remarking that the transformation which started in the global supply chains with the Covid-19 pandemic and followed by the war between Russia and Ukraine which outbreak at the beginning of 2022 have accelerated the transformation of the logistics of the map of the region where Türkiye is located, Uraloğlu added the following: "The commercial ship passings from the Suez Canal became problematic due to the security crisis in the Red Sea region with the war between the Israel and Palestine having started in October 2023. The global maritime companies no longer prefer this route and instead directed their course to the Cape of Good Hope. The ships setting sail from China and passing by the Cape of Good Hope arrive at London in around 45 days, which they used to reach in 35 days. This means an increase of 10 days and a cost increase of around 30 percent. Therefore, if the Development Road Corridor were completed today, these costs would have decreased." ■

CRANE AND TRANSPORTATION INDUSTRY COME TOGETHER AT ESTA MEETING

► European Association of Abnormal Road Transport and Mobile Cranes (ESTA), which has 110 members from Türkiye including Load Engineering Association, Tırsan-Kassbohrer, Hareket, Aydıntaş, Yılınak and Öznakliyat companies, held its 2024 Autumn Meetings at Istanbul Swissotel on October 24-25, 2024 with the invitation of YMB. Representatives of 54 ESTA Member companies attended the meetings held in three sessions: Crane, Transportation and General Assembly.

Belli: "We attach importance to Load Engineering expertise."

In his speech, ESTA President Fabio Belli said: "The business area referred to as abnormal lifting and handling services is actually a Load Engineering specialty. It is an important and exemplary behavior for YMB to include this expertise in its name. We are really pleased with this. We also see that the contribution of Load Engineering services to the world economy is increasing day by day. As ESTA, we need to further strengthen our cooperation in this field in order to make common legal arrangements in all countries, especially in the EU, and to increase business facilities."

Altunkum: "Türkiye is on its way to becoming a regional transit point for heavy transportation and lifting"

Ahmet Altunkum, Chairman of the Board of Directors of the Load Engineering Association (YMB), stated that he hoped the meeting would be productive and enjoyable and said, "We are extremely happy that this year's general assembly meeting of ESTA is being held in Istanbul, which is located at the intersection of Europe and Asia with its historical heritage."

Emphasizing that Türkiye, which is a bridge between two continents, has become an important transit point for the Middle East and Asian markets thanks to its ever-growing economy, Altunkum said, "There are approximately 10 thousand large, medium and small enterprises carrying out crane rental, heavy lifting and

heavy transportation activities in Türkiye. In the business line of these companies, which contributes more than 12 billion dollars to the country's economy; we have brought together the largest multinational and national manufacturers, sellers, suppliers and companies and suppliers that provide engineering expertise in services such as crane rental, heavy lifting and heavy transportation under the roof of YMB."

Stating that YMB is the first and only professional solidarity organization operating in the field of lifting and transportation services requiring Load Engineering in Türkiye, Altunkum explained that the association consists of 212 member companies. He emphasized that its members include heavy lifting, heavy transport and crane rental companies, as well as crane, trailer and tire manufacturers, suppliers and insurance companies. ■

(From left) Taner İçten, Chief Executive Officer of Load Engineering Association, Fabio Belli, President of ESTA, İffet Türken, Head of Transportation of ESTA, Ahmet Altunkum, Chairman of the Board of Directors of Load Engineering Association, Ton Klijn, Director of ESTA



WOMEN EMPLOYMENT RATIO IN LOGISTICS SECTOR INCREASED TO 11.2 PERCENT

The studies carried out by WiLAT (Women in Logistics and Transportation), the woman related part of the Chartered Institute of Logistics and Transport (CILT), one of the biggest logistics organizations in the world, in order to increase the number of women in the logistics sector of Türkiye started to yield its fruits.

WiLAT, the woman related part of CILT, has prioritized awareness studies that will increase female employment since its establishment. The number of women employees in the logistics and transportation sector increased from 9.1 percent to 11.2 percent in the last 3 years.

The increase in the number of woman employees will ensure that the logistics sector considered as male dominant changes and develops. WiLAT, the woman related part of the Chartered Institute of Logistics and Transport, one of the largest logistics organizations of the world, launched a new project to increase the number of woman drivers in the Logistics and Transportation sector and to change the belief that the sector is male dominant.

The Woman Drivers Project CILT Türkiye Chair and WiLAT founding chair Berna Akyıldız made the following comments in her speech at the opening ceremony of the project: "CILT as a global institution shows great efforts in the last 3 years in order to increase the employment of women in the Turkish logistics



*The Woman Drivers Project
CILT Türkiye Chair and WiLAT
founding chair Berna Akyıldız*

sector and raise awareness among the companies in the sector, under the leadership of WiLAT. We see that the female employment increased from 9.1 percent at the time of our foundation to 11.2 percent in the last 3 years according to the latest TurkStat data. This improvement is satisfying but the women employment is still very low in our sector. One of the most important reasons behind this is that the ratio of women among blue collar workers is very low."

Berna Akyıldız further added that: "We aim to determine and train women driver candidates with the Woman Drivers Project. We also established cooperation with the companies that will employ drivers and we will also defend this at very platform."

WiLAT Chair Esra Kıvrak shared information regarding the roadmap

of the project. Esra Kıvrak made the following comments:

"The Woman Drivers Project is an important step to increase the employment of women in the sector. It is also a commercial need for our sector suffering from driver shortage. Women are needed as drivers. We believe that "creating labor force" for driving which is a male dominant profession and convincing the other half of the population for the sector is an important need. This need is felt across the entire world, like in our country. WiLAT has very successful examples in similar topics in different countries at the global level. We believe that the project to be carried out in Türkiye will inspire the sector and hope that it will extend to a bigger field. We, therefore, invite all our stakeholders with a similar mission to contribute to the project."

WOMAN DRIVERS PROJECT WILL TRAIN DRIVERS IN 4 DIFFERENT FIELDS:

Phase 1: Intracity cargo, courier, distribution by panel van, school bus driver etc.

Phase 2: Transportation jobs to be carried out with a small vehicle to abroad

Phase 3: Heavy vehicle driver for short distances

Phase 4: Heavy vehicle driver for long distances

FOREIGN TRADE ACCORDING TO GENERAL TRADE SYSTEM BY TOP TWENTY COUNTRIES (2023-2024)

	SEPTEMBER					JANUARY-SEPTEMBER				
	2023		2024		Change %	2023		2024		Change %
	Value	Share	Value	Share		Value	Share	Value	Share	
Exports										
Total	22.411.386	100,0	1.679.804	100,0	-1,9	186.864.108	100,0	192.763.755	100,0	3,2
Germany	1.744.331	7,8	1.679.804	7,6	-3,7	15.901.358	8,5	15.303.319	7,9	-3,8
United Kingdom	1.067.779	4,8	1.399.630	6,4	31,1	9.080.364	4,9	11.200.739	5,8	23,4
USA	1.199.393	5,4	1.263.407	5,7	5,3	11.001.494	5,9	11.819.962	6,1	7,4
Iraq	1.191.084	5,3	1.132.785	5,2	-4,9	8.909.195	4,8	9.528.622	4,9	7,0
Italy	1.121.531	5,0	1.048.367	4,8	-6,5	9.153.296	4,9	9.380.218	4,9	2,5
Russia	858.083	3,8	803.477	3,7	-6,4	8.311.319	4,4	6.475.994	3,4	-22,1
France	841.745	3,8	799.279	3,6	-5,0	7.708.005	4,1	7.203.372	3,7	-6,5
Spain	733.806	3,3	772.531	3,5	5,3	7.500.608	4,0	7.379.361	3,8	-1,6
Netherlands	760.379	3,4	630.993	2,9	-17,0	5.702.836	3,1	6.441.334	3,3	12,9
Romania	621.995	2,8	628.835	2,9	1,1	5.230.062	2,8	5.895.530	3,1	12,7
Poland	521.318	2,3	602.810	2,7	15,6	4.349.418	2,3	4.611.434	2,4	6,0
UAE	938.647	4,2	574.121	2,6	-38,8	5.325.879	2,9	6.141.641	3,2	15,3
Belgium	416.078	1,9	410.273	1,9	-1,4	3.356.131	1,8	3.249.042	1,7	-3,2
Bulgaria	370.562	1,7	380.305	1,7	2,6	3.191.826	1,7	3.671.400	1,9	15,0
Greece	418.039	1,9	374.728	1,7	-10,4	3.105.924	1,7	3.581.438	1,9	15,3
Egypt	312.820	1,4	342.970	1,6	9,6	2.359.924	1,3	3.034.083	1,6	28,6
Kazakhstan	277.461	1,2	327.216	1,5	17,9	2.154.603	1,2	2.474.098	1,3	14,8
Saudi Arabia	196.572	0,9	315.401	1,4	60,5	1.812.976	1,0	2.903.069	1,5	60,1
Morocco	272.410	1,2	300.825	1,4	10,4	2.238.615	1,2	2.441.925	1,3	9,1
Slovenia	144.206	0,6	271.052	1,2	88,0	1.520.181	0,8	1.840.922	1,0	21,1
Others	8.403.145	37,5	7.928.199	36,1	-5,7	68.950.094	36,9	68.186.251	35,4	-1,1

Imports										
Total	27.506.433	100,0	27.115.745	100,0	-1,4	274.527.797	100,0	252.637.802	100,0	-8,0
China	3.729.638	13,6	3.737.113	13,8	0,2	34.434.920	12,5	33.181.271	13,1	-3,6
Russia	3.130.194	11,4	3.303.596	12,2	5,5	34.702.274	12,6	32.555.580	12,9	-6,2
Germany	2.357.046	8,6	2.520.529	9,3	6,9	21.192.812	7,7	19.840.038	7,9	-6,4
Italy	998.464	3,6	1.412.136	5,2	41,4	10.893.638	4,0	13.811.195	5,5	26,8
USA	1.248.781	4,5	1.391.668	5,1	11,4	11.840.199	4,3	12.247.931	4,8	3,4
France	797.444	2,9	890.216	3,3	11,6	8.543.653	3,1	9.535.798	3,8	11,6
Switzerland	865.273	3,1	818.420	3,0	-5,4	16.565.829	6,0	7.373.356	2,9	-55,5
South Korea	788.119	2,9	728.723	2,7	-7,5	7.234.747	2,6	6.929.393	2,7	-4,2
India	618.353	2,2	676.865	2,5	9,5	6.028.551	2,2	5.296.176	2,1	-12,1
Spain	728.980	2,7	668.696	2,5	-8,3	6.975.073	2,5	6.872.042	2,7	-1,5
UAE	1.175.132	4,3	603.051	2,2	-48,7	8.307.482	3,0	4.888.303	1,9	-41,2
United Kingdom	553.037	2,0	538.366	2,0	-2,7	4.785.084	1,7	5.093.994	2,0	6,5
Poland	408.682	1,5	454.766	1,7	11,3	3.719.783	1,4	4.209.661	1,7	13,2
Netherlands	335.507	1,2	407.850	1,5	21,6	3.303.460	1,2	3.740.215	1,5	13,2
Egypt	341.901	1,2	361.652	1,3	5,8	2.733.542	1,0	3.309.674	1,3	21,1
Japan	441.602	1,6	359.117	1,3	-18,7	4.051.872	1,5	3.600.869	1,4	-11,1
Saudi Arabia	263.986	1,0	342.082	1,3	29,6	2.347.194	0,9	2.171.649	0,9	-7,5
Czech Republic	306.680	1,1	337.557	1,2	10,1	2.756.765	1,0	2.768.834	1,1	0,4
Malaysia	417.767	1,5	334.879	1,2	-19,8	3.190.016	1,2	3.267.715	1,3	2,4
Romania	279.804	1,0	327.579	1,2	17,1	2.771.921	1,0	2.858.471	1,1	3,1
Others	7.720.044	28,1	6.900.885	25,4	-10,6	78.148.984	28,5	69.085.638	27,3	-11,6

* TurkStat, Foreign Trade Statistics, March 2024

** Countries are ranked by March, 2024 figures.

*** Thousand US \$

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