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2025 • Issue 41



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TÜRKİYE'S STRATEGIC RISE IN GLOBAL LOGISTICS AND IMPORTANCE OF INTERMODAL MAGAZINE

Türkiye has established a competitive edge across the four main pillars of its logistics industry: maritime and road transport, air cargo, and rail freight. This edge is no coincidence - it is the result of targeted investments in intermodal transportation over the past decade.

Türkiye's strategic geographical position, combined with its intermodal infrastructure, the dynamic evolution of its logistics sector - both at the macro level and within individual companies - and its growing role in international trade corridors, have all contributed to strengthening this competitive landscape.

Maritime transport in Türkiye has been in a state of continuous development, rooted in its historical significance. Meanwhile, the road transport fleet is not only one of the strongest in Europe in terms of size and quality, but is also increasingly capable of operating across a wide geography. Each year, this capability continues to grow. Notably, during times of crisis, the Turkish logistics sector has consistently demonstrated creativity and agility in delivering effective solutions.

From an air cargo perspective, Turkish Cargo has clearly emerged as a global player. The expanding flight network of Turkish Airlines - along with the rapid growth of e-commerce - is fueling Turkish Cargo's growth. With a fleet of 446 passenger aircraft and 23 freighters, Turkish Cargo serves over 340 destinations worldwide, with a bold vision to position Istanbul as a global air logistics hub.

By 2033, Turkish Cargo aims to serve 150 cargo destinations with 44 freighters, expand the capacity of its SMARTIST terminal to 4.5 million tons, and increase its total cargo volume to 3.9 million tons.

There is no doubt that each component of the logistics sector plays a vital role. E-commerce is rapidly becoming synonymous with trade itself. Although air cargo accounts for only about 1% of total shipment volume, it represents nearly 40% of global trade value. At the same time, it is reinforcing the critical importance of warehousing services within the logistics ecosystem. Air cargo is clearly poised to take on an even greater role in global logistics in the years ahead.

It is also clear that road transportation will take bolder steps toward becoming carbon neutral by moving beyond traditional structure. A key milestone will be the rapid adoption of electric vehicles, especially in urban freight transportation. On another front, the integration of rail, road, and port infrastructure - particularly along the Europe-Far East trade corridor - is set to accelerate. In Türkiye, we recognize the strategic importance of railway investment in building a robust intermodal future.

As the logistics industry evolves - particularly in intermodal transport - so too does the relevance and influence of Intermodal Magazine. Through platforms like the Transport Logistic Munich, the magazine reaches readers and industry professionals alike. In every issue, the development dynamics of all transportation modes are explored through expert insights, in-depth analysis, and independent commentary. In this sense, Intermodal Magazine serves as both a witness and a record keeper of the sector's transformation. ■

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Editor-in-Chief

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TÜRKİYE: THE PIONEERING COUNTRY IN THE DIGITAL TRANSFORMATION OF LOGISTICS

Abdulkadir URALOĞLU



► Undoubtedly, digitalization is one of the most powerful driving forces transforming the logistics sector. When combined with intermodal transportation, it enhances the speed, reliability, and sustainability of global trade. Technologies such as data analytics, artificial intelligence, blockchain, and the Internet of Things optimize transportation processes at every stage of the supply chain, increasing transparency and efficiency. However, this transformation is not limited to technological infrastructure alone; it is complemented by physical infrastructure, particularly through the integration of intermodal transportation. Intermodal transportation creates a seamless logistics network by integrating road, rail, sea, and air transport. Over the past 23 years, Türkiye has invested approximately \$300 billion for its transportation and communication infrastructure, implementing mega projects that enhance regional and global connectivity. These efforts have positioned Türkiye as a leading player in digitalization and intermodal transportation, making it an indispensable actor on the global stage. Projects such as Istanbul Airport, which operates with "Simultaneous Triple Runway Operations," smart transportation systems integrated into the Istanbul-Izmir, North Marmara, Ankara-Niğde, and Aydın-Denizli highways, the

award-winning Eurasia Tunnel, Marmaray with its automated signaling systems, and high-speed rail lines form the backbone of intermodal transportation through their integration with digital systems. Furthermore, as a country that places great importance on digitalization in transportation and leads in applications such as e-TIR and e-transport documents, I would like to emphasize that we are ready to share our expertise with other countries. For instance, the e-Permit (Electronic Permit) system, implemented between Türkiye and Uzbekistan, significantly facilitates international road transport. This system eliminates the need for carriers to wait for physical documents, allowing them to access permits electronically from anywhere. We are actively working to expand such applications. In addition, we are achieving groundbreaking innovations in the aviation sector through the use of artificial intelligence and big data technologies. Autonomous flight systems minimize pilot errors, while AI-supported maintenance systems extend aircraft lifespans and reduce costs. For example, our domestically developed İRADE system provides meteorological data, automated terminal information services, and radar images for airports on a single screen. Another system, ÇARE, enables air traffic controllers to view real-time flight data on a map, allowing

for efficient traffic management. Alongside these, our locally developed software, such as Flight Monitoring, Predictive Cyber Attack Prevention System, and Geographic-Based Digital Information Platform, has marked significant progress in the digitalization of flight operations. In the field of civil aviation, Türkiye has also created a new civil aviation model focused on digitalization. The "Corporate Transformation Model" we have implemented integrates safety, efficiency, and sustainability in line with International Civil Aviation Organization regulations. Similarly, digital customs systems in our ports, smart storage solutions in our logistics centers, and automated freight management systems in our railway networks make transportation processes faster, safer, and more environmentally friendly. Through the seamless integration of digitalization and intermodal transportation, Türkiye is emerging not only as a bridge but also as a pioneering hub shaping innovations in the global logistics arena. With smart technologies, data-driven solutions, and integrated transportation networks, we are determined to redefine the dynamics of global trade. As Türkiye, we will continue to work tirelessly to build a sustainable, secure, and rapid logistics future with a vision that transcends borders, carrying the flag of leadership in digitalization. ■



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ROAD TRANSPORT - THE INDISPENSABLE LINK AND THE CHALLENGES AHEAD IN INTERMODAL LOGISTICS

Serafettin ARAS
Chairman



► Global trade has been tested in recent years by the pandemic, geopolitical tensions, and energy crises, yet it continues to grow with resilience. However, today, the success of trade no longer depends merely on the movement of goods, but on the ability to transport them on time, safely, and without interruption. For this reason, intermodal transportation a multimodal system in which road, rail, and maritime modes complement each other has become increasingly important. While intermodal systems promise cost and environmental advantages, road transport remains the backbone of logistics. Every shipment's first and last mile-from production sites to terminals and final destinations-relies on road connections. The European Union, where 77% of freight still moves by road, and Türkiye's 2053 Logistics Master Plan both emphasize this indispensable role. However, efficiency depends not only on infrastructure but also on harmonized regulations and institutional coordination. The World Customs Organization advocates a "single-contact, risk-based control" model, yet in Türkiye and many other countries, multiple authorities still conduct repetitive inspections. According to the OECD's Trade Facilitation Indicators, Türkiye performs well in document simplification but has a 30% improvement potential in border agency coordination. The WTO's Trade Facilitation Agreement also calls for cooperation between border agencies to avoid repeated checks on

the same shipment. In practice, though, overlapping controls by customs, health, and agriculture departments double Türkiye's average border processing time compared with the EU. Studies show that full implementation of trade facilitation reforms could reduce import times by nearly four days and export times by two, saving costs in fuel, labor, and inventory. Another major barrier to intermodal efficiency involves transport quotas, visa delays, and driver shortages. Europe currently faces a deficit of 3.6 million professional drivers, a figure expected to rise sharply by 2030. Meanwhile, Türkiye's international road operations face artificial capacity limits due to restricted transit permits. As the International Transporters Association (ITA) frequently stresses, goods must move freely-and so must the vehicles that carry them-to ensure fair competition in EU-Türkiye trade. Delays in Schengen visa issuance further interrupt transport continuity and increase operating costs. The European Commission's Mobility Package II recommends fast-track visa channels and mutual recognition of driver qualifications for non-EU professionals. Türkiye should consider these steps as part of its logistics diplomacy agenda. Customs penalties also need reform. The WTO and EU both stipulate that penalties should be proportionate and applied only to the responsible party. In Türkiye, uncertainty and excessive fines continue to create administrative risks for logistics

companies. Simplifying the customs penalty system would strengthen investor confidence and create a more predictable business climate.

At the root of many of these challenges lies limited interagency coordination. Closer collaboration among the Ministries of Transport, Trade, Interior, Agriculture, and Foreign Affairs would accelerate customs and border processes. According to OECD data, Türkiye's domestic border agency cooperation index is 0.66 out of 1, indicating substantial room for improvement.

The WCO and UNECE recommend a "one stop, one control" model for coordinated border management. Adopting this approach at Türkiye's crossings with Bulgaria, Georgia, Azerbaijan, and Greece would shorten transit times and strengthen the continuity of intermodal corridors. Ultimately, intermodal transport is the future of logistics, but its effectiveness depends on the strength and efficiency of road transport. To transform its geographic advantage into a lasting logistics power, Türkiye must enhance its road network not only through infrastructure investment but also by improving regulations, workforce policies, and international coordination. Without road transport, there is no logistics chain; without logistics, trade cannot flow; and without trade, development cannot be sustained. As long as Türkiye acts with this awareness, its intermodal network and export economy will continue to drive sustainable growth. ■

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DIGITALIZATION IS SHAPING THE FUTURE OF INTERMODAL TRANSPORTATION

Bilgehan Engin
President



► The logistics industry is changing fast thanks to digital tools. Operations are now quicker, more efficient, and more transparent. Old paper-based processes are being replaced by cloud platforms, smart sensors, and real-time data systems that make the supply chain smoother. With these tools, companies can track shipments instantly, choose better routes, and react quickly to problems. This is not just about convenience; digitalization has become a key advantage. By reducing mistakes and delays, it also lowers costs and makes logistics more affordable.

Intermodal transport, which uses different types of transport together (like rail, sea, and road), shows these benefits very clearly. Intermodal operations are complex because timing and connections must be perfect. Artificial intelligence (AI) and big data help manage this complexity. Smart algorithms analyze large amounts of transport data to find the best routes, schedules, and capacity plans. For example, AI can look at traffic, weather, or port congestion and suggest faster, more efficient routes in real time. Big data also helps predict demand peaks or delays so that shipments can be adjusted before problems occur. These tools reduce waiting times and unused capacity, making intermodal hubs more efficient. We have seen how AI systems remove

much of the guesswork in logistics planning, leading to better on-time performance and smarter use of resources.

Digitalization also strengthens Türkiye's role in global logistics. Türkiye is located between Europe and Asia, making it a natural logistics hub. By investing in intermodal infrastructure-like linking rail with ports and trucking networks-and combining it with advanced digital systems, Türkiye is becoming more competitive worldwide. The Turkish logistics market continues to grow as companies modernize and adopt new technologies. Global logistics firms are partnering with local companies, showing how much efficiency and connectivity are improving through digital intermodal strategies. Technology is helping Türkiye position itself as a key logistics center that connects continents with faster and cheaper supply chains. However, there is still room for improvement. The rail connectivity of the ports needs to be completed to provide the logistics sector with the maneuverability of intermodal operations. The east-west axis of the country is still missing uninterrupted rail freight operations. The Middle Corridor, where Türkiye is centrally located, is a subject where we discuss the efficiency of intermodal operations. We believe that physical corridors need to be

supported with digital corridors where the exchange of data enables smooth freight operations, interoperability is supported among all stakeholders and regulatory bodies encourage and incentivize modal shift. The customs regulations, on the other hand, need to support feasible intermodal operations to its users. We address these challenges in platforms where we voice the requirements of the industry. The subject of digitalization, on the hand, is handled in our Micro Logistics and Digitalization Working Group where we address issues such as technology-driven challenges and opportunities that are at the intersection of logistics processes and digital transformation.

Digital transformation is creating a new age of logistics: faster, more transparent, and more cost-effective. Intermodal transport is central to this progress, as it combines the strengths of each transport mode and uses technology to manage them together. AI and big data are already making intermodal operations more efficient, giving Türkiye a stronger place in global trade. At the same time, these advances help meet environmental goals, showing that efficiency and sustainability can go hand in hand. Intermodal is not just a transport method; it is a foundation for the future of logistics. ■



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THE ROLE OF INTERMODAL IN DIGITALIZED LOGISTICS

Hamdi ERÇELİK
Chairman



► Global logistics is undergoing rapid digital transformation. Ports and supply chains are becoming smart, connected hubs that deploy IoT, big data, AI, and blockchain to enhance efficiency, safety, and sustainability. This transition underpins smoother vessel calls, reduced congestion, and lower energy use, enabling faster throughput and greater resilience.

International bodies such as the World Bank and IAPH/IMO explicitly link port digitalization to data sharing, Maritime Single Window adoption, and “just-in-time” arrivals.

With about 80% of world merchandise trade carried by sea, digitally connected ports are indispensable to global commerce. Real-time visibility across logistics networks increasingly enables predictive decision-making and proactive cargo management.

Digital technologies also serve as the connective tissue of intermodal chains linking sea, rail, and road. IoT-equipped cranes, vehicles, and smart containers with GPS, RFID, and environmental sensors ensure continuous monitoring and traceability, while secure platforms provide reliable records across stakeholders. Research and industry guidance emphasize that such tools, together with terminal automation, raise capacity, punctuality, and safety.

The advantages of digitally enabled intermodal logistics include:

- **Optimized efficiency:** AI-based planning and slot allocation reduce empty moves and operating costs.
- **Real-time visibility:** End-to-end tracking improves coordination and reliability.

- **Automation and throughput:** Automated equipment and decision support increase capacity and safety.

- **Environmental performance:** Modal shift toward electrified rail and efficient shipping lowers emissions, in line with European decarbonization strategies.

Türkiye’s position and recent milestones

Türkiye, strategically located at the crossroads of Europe and Asia, hosts a large, privately operated port system. In 2024, its ports handled 531.7 million tonnes and 13.5 million TEU, according to the Turkish Port Operators Association (TÜRKLİM).

Rail access is growing but uneven. Major ports such as Mersin, İzmir (Alsancak), Derince, İskenderun, Bandırma, Samsun, and Haydarpaşa are rail-linked, while many private terminals still rely primarily on road. Expanding rail connectivity remains a strategic priority.

Recent milestones highlight this direction. The Ankara Intermodal Terminal, opened in 2024 with a 500,000 TEU first-phase capacity, connects central Anatolia’s industries to maritime gateways within 24 hours. The Baku–Tbilisi–Kars (BTK) rail corridor, inaugurated in 2017, anchors Türkiye within the Middle Corridor, while the Marmaray Tunnel enables limited night-time freight under the İstanbul Strait. Plans to activate a rail line on the Yavuz Sultan Selim Bridge are advancing and would further strengthen east-west flows. Regionally, the Zengezur Corridor will link Türkiye with Azerbaijan and Central Asia, while the Türkiye–Iraq “Development Road” project connecting the Grand Faw

Port to Türkiye is expected to open new Gulf–Mediterranean freight pathways.

TÜRKLİM’s perspective

TÜRKLİM, representing nationwide private port operators, stresses that future-ready ports must combine digitalization (AI, IoT, 5G, data interoperability) with green transformation (renewable energy, electrification, OPS). Its 2024 sector reports emphasize “sustainable, secure, digital” priorities and call for incentives and supportive regulation to scale up smart-port and intermodal investments.

Conclusion

Türkiye’s ports are evolving into digitally enabled, environmentally responsible hubs integrating advanced technologies, interoperable data, and smart operational systems. Anchored in intermodal and multimodal logistics, they are positioned to cut costs, emissions, and congestion while ensuring greater transparency, reliability, and resilience. Their transformation aligns with EU and IMO frameworks, harmonizing standards for sustainable, competitive trade. Strategic investment in port–rail last-mile links, digital standardization, and coordinated public–private initiatives will be critical. Building on the BTK railway, Marmaray freight tunnel, and Ankara’s intermodal hub, Türkiye is consolidating its role as a pivotal logistics gateway. Looking ahead, completion of the Yavuz Sultan Selim Bridge rail link will boost cross-straits capacity, reinforcing Türkiye’s role as a digitally connected, regulation-compliant, environmentally friendly bridge between Europe, Asia, the Middle East, and North Africa. ■



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AT THE CORE OF RAIL FREIGHT: DIGITALIZED LOGISTICS

Onur KÜÇÜKAKDERE
Chairman of the Board



► The logistics industry is undergoing a profound transformation. On one side, the digital revolution is reshaping the sector; on the other, a growing emphasis on environmentally conscious and sustainable transport is redefining priorities. At the intersection of these two powerful dynamics stands intermodal transportation, with rail freight-centuries-old yet continuously modernizing-forming its backbone. Today, cargo is no longer moved by a single mode of transport. Instead, it travels across multiple modes in an integrated journey-what we call intermodal transport. A shipment may begin by truck, continue by train, and be completed by sea. The key factor lies in the fact that goods remain sealed and untouched throughout the transfer process. This approach eliminates time loss, reduces the risk of damage, and creates cost advantages. Within this chain, rail stands as the central link-the most effective carrier of long-distance freight-enhancing efficiency across the entire system. Along trade corridors stretching from Europe to Asia, trains do more than carry goods; they connect economies. Türkiye holds a unique position in this landscape. With the Marmaray tunnel, freight departing from China can reach the heart of Europe seamlessly. This strategic advantage strengthens Türkiye's aspiration to become a global logistics hub. By linking distant geographies, rail not only enables trade but also builds cultural and economic bridges. As in every sector, the logistics industry is now driven by the "green transition."

Reducing carbon emissions, consuming less energy, and minimizing environmental harm are no longer optional-they are necessities. Here, rail proves indispensable. Trains emit four times less carbon compared to road transport, making them the environmentally friendly face of intermodal logistics. This provides a competitive edge not only for companies but also for nations, as environmentally responsible logistics solutions increasingly shape the terms of future trade agreements. In essence, freight trains serve not just industry but also the planet's future. A single wagon can replace dozens of trucks, reducing congestion on roads, lowering emissions in cities, and minimizing air pollution. This is precisely why the European Union's Green Deal strongly supports rail freight, paving the way for greater investment in the coming years. Now imagine being able to track exactly where a train is, what it is carrying, and when it will arrive. Thanks to digitalization, this is already a reality. Artificial intelligence enables route optimization, blockchain ensures secure data sharing, and sensors provide real-time monitoring. Information that once took days of confirmation is now accessible within seconds on a single screen. Rail freight is deeply integrated into this digital transformation. Especially in intermodal operations, the seamless flow of information between different modes of transport is critical. Being able to track a container from port to train, and then onto road, through a unified system builds

customer confidence and delivers speed and efficiency for businesses. Digitalization makes rail transport more transparent, flexible, and interconnected than ever before.

Rail-focused intermodal transport has become a silent hero. It alleviates road congestion, simplifies import and export processes, reduces costs, and enables fast connections between ports and factories. The ability to move a container securely across thousands of kilometers within a short time frame is essential for the continuity of trade.

This brings a dual advantage: companies gain competitiveness, while nations secure strategic benefits in global logistics. For Türkiye, this is more than a transportation issue-it represents a concrete step toward its vision of becoming a logistics hub. Increasing transit traffic highlights the country's potential to transform its geopolitical position into economic strength.

When discussing the future of logistics, neither digitalization nor sustainability can be overlooked. At their intersection lies rail freight: with its high capacity, eco-friendly nature, contribution to international trade corridors, and adaptability to digital transformation, rail remains the backbone of intermodal transport.

Perhaps we should stop thinking of rail merely as steel tracks carrying trains. Each train represents the future of logistics itself-delivering a more digital, greener, and more sustainable world. In shaping this vision of tomorrow, rail is not simply an option; it stands as an inevitable necessity. ■

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TÜRKİYE BRINGS TRADE ROUTES CLOSER AND UNITES THEM IN A POWERFUL WAY

İlker ALTUN
Managing Director - Aysberg Group



► The development and transformation of the logistics and transportation sector in Türkiye is undoubtedly closely linked to the expansion and opening of foreign trade. Initially dominated by road transport, international transportation and foreign trade have now evolved into advanced stages of combined or intermodal transportation. Logistics routes have diversified and extended far beyond what was imaginable in the past. When we take Türkiye as a center, it becomes clear that there is no point-north or south, east or west in the globe-that a logistics company cannot reach or serve using any mode of transportation. This is not a linear growth but rather a geometric or strategic one. Of course, it is not possible to claim that this growth has occurred smoothly or along a straight path. As a combination of multiple sectors, logistics is highly sensitive to all economic developments and conjunctural fluctuations. For this reason, it is not easy to define logistics services as a standalone sector. In Türkiye, many stakeholders contribute to the logistics sector. Most notably, the logistics sector is an essential partner of foreign trade. Airports, cargo terminals, seaways, ports, highways, and railways form the infrastructure of the sector. Logistics centers, truck fleets, warehouses and bonded warehouses, digital solutions, tracking systems, skilled human resources, and logistics firms that have a solid grasp of the global rules of the game all shape the sector. Moreover, top-level executives

with international experience also play a significant role in steering the industry. A sector that can produce dynamic solutions to conjunctural developments reinforces its competitive power on the international stage. On the other hand, foreign investment has also increased in the sector through acquisitions and consolidations. Logistics also reflects, to a certain extent, the pace of everyday life and commercial activity. Individual economies and economic blocs are compelled to create new trade routes and corridors to ensure the smooth and healthy flow of trade according to societal needs. Alongside the east-west axis, Türkiye is also emerging as a critical hub and traditional trade route on the north-south axis. Leading professional organizations in the logistics and intermodal transportation sectors consistently affirm Türkiye's strategic role in trade between Europe and Eastern economies, particularly China. The importance of Türkiye in trade corridors-especially the Middle Corridor-is frequently emphasized in every occasion. In today's world, countries can enhance their competitiveness and increase societal welfare by producing more, selling what they produce, and delivering it with appropriate logistics solutions to the intended destinations safely and on time. Roads, bridges, intermodal vehicle fleets, and trade corridors are being developed in line with this vision. Bilateral and multilateral agreements are also signed according to these new structures. Naturally,

wherever agreements exist, disagreements and conflicts also arise as a modern-day reality. In resolving such disputes, both direct and indirect forms of power are utilized, and deterrents like embargoes and sanctions are effectively employed. Türkiye's role as a bridge between Europe and the East through the Middle Corridor is of strategic-not temporary-importance. Additionally, from a rail transportation perspective, this provides a carbon-neutral solution within the scope of the EU Green Deal. In trade with Europe, Türkiye possesses the advantage of a strong seaway infrastructure integrated with both rail and road transportation for the movement of both imports and exports. Considering that a significant portion of world trade in the new era will be concentrated along the east-west and north-south axes, it is clear that Türkiye cannot avoid the strategic role it has been assigned. On the contrary, a logistics structure aligned with this role will bring with it the competitive advantages that Türkiye aims to achieve. If the use of power creates a balancing and competitiveness-enhancing effect in trade and economic relations, then it is clear that Türkiye will benefit not only from its geopolitical position but also from its strategic location in global trade routes and its level of development in logistics. We must no longer forget that Türkiye is not only a historical and geographical bridge between Asia and Europe but also a country that brings trade routes closer and unites them in a powerful way. ■

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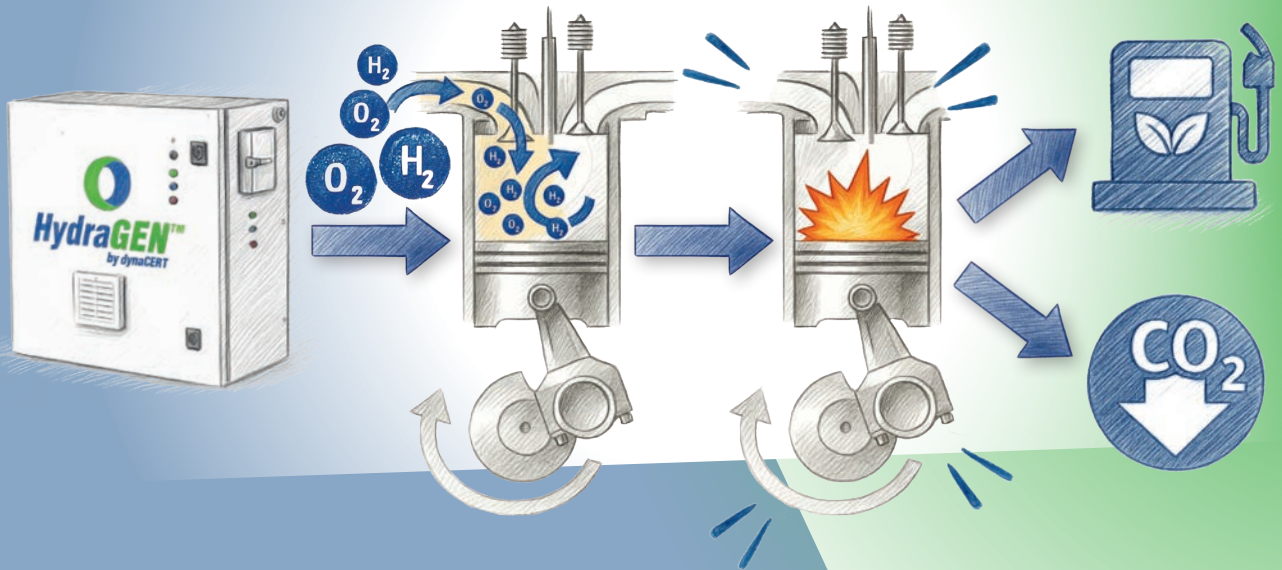
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PROFESSIONALIZATION: KEY TO SOLVING DRIVER SHORTAGES

The rising age of drivers and no interest shown by the young people to the sector indicate a permanent crisis in the transportation sector. The solution mostly lies in professionalisation in the sector.



► The chronic shortage of truck drivers continues to threaten the operational efficiency of transport and logistics operators. The International Road Transport Union (IRU) outlined the importance of professionalisation for resolving this structural problem. IRU shared the steps taken to solve the driver shortage in its presentation at ALACAT 2025 Congress organized in Madrid.

According to the IRU data, there are 3.6 million unfilled truck driver positions across 36 countries, representing 70% of global GDP. 70% of trucking companies operating in these countries face severe difficulties in recruiting drivers.

The changes in structural demographic trends - notably a widening gap between younger and older drivers - are increasingly alarming. Young drivers under 25 make up just 6.5 percent of the total driver workforce,

while those over 55 account for 31.6 percent. Over the next five years, 3.4 million truck drivers are expected to retire, adding to the 3.6 million currently unfilled truck driver positions. Speaking on the panel "From Crisis to Opportunity: How Professionalisation Can Solve the Driver Shortage" at the ALACAT 2025, IRU TIR and Transit Services Senior Manager Lucas Lagier said that the shortage of truck drivers is not a temporary problem but a

structural and global one. Lagier said that "In addition to the low share of young drivers, the number of female drivers is also remarkably low. For example, the ratio of female truck drivers is 1.7% in Argentina and 1.9% in Mexico."

Lagier underlined the importance of internationally recognized training programmes, clear career paths, and continuous skill development in order to make the profession more attractive. Lagier also told that targeted campaigns, financial incentives and female role models and infrastructure and policies such as safe parking areas and maternity protections are also required. Lagier concluded that "Joint efforts between governments, the industry and training institutions can streamline entry into the profession, with a focus on youth and women. Essentially, we need to further professionalize the sector." ■





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ARTIFICIAL INTELLIGENCE ERA IN RAILWAYS

► The railway transportations move with the digital era thanks to artificial intelligence based local and national systems. The Automatic Examination Stations, predictive maintenance technologies and safety oriented monitoring systems accelerate maintenance processes and maximize safety and efficiency.

The railway transportation in Türkiye is integrated into the digital era with artificial intelligence based systems developed with local and national technologies. The Automatic Train Examination Stations, predictive maintenance systems, remote monitoring systems and artificial intelligence supported safety solutions maximize both the passenger safety and operational efficiency.

Automatic train control with artificial intelligence

The Automatic Train Examination Station (OTMI) system developed under the cooperation of the Turkish State Railways and TÜBİTAK can analyze the trains while they are

on the move. This system equipped with image processing technology and sensors scan on a real time basis many elements from wears in wheels and problems in brake discs. The artificial intelligence algorithms evaluate the collected big data and determine the breakdown risks in advance and send early warnings to maintenance teams. This prevents unexpected breakdowns, ensures journey continuity and decreases maintenance costs.

Continuous monitoring with predictive maintenance systems

Railway vehicles equipped with special sensors are used to effectively manage the railway infrastructure. These vehicles determine any cracks or collapses on the rails and potential faults in the electrification systems in advance and ensure fast interventions. Predictive maintenance systems increase business continuity and decrease the costs of potential risks. The artificial intelligence based security systems continuously monitor

the attention of the machinists. Criteria such as face movements, duration of closing eyelids and head position are analyzed and if any attention deficit is identified, the system issues a warning. This practice comes to the forefront at one of the digital safety solutions developed to minimize the risks caused by the human error.

Eryaman Monitoring

Center continuously checks the operations on the high speed train lines. Critical infrastructures such as tunnels, bridges, culverts and viaducts are monitored with smart cameras and sensors 24/7. Moreover, the incidents with a natural disaster risk (wind, flood, earthquake) are analyzed on a real time basis and subjected to risk assessment. When any negative situation is detected with remote monitoring, the teams are informed fast and the response time is minimized.

Thanks to the new generation artificial intelligence practices developed, autonomous trains, artificial intelligence supported signalization systems and energy management systems will become more common in railway transportation. Especially regarding energy management, the trains are aimed to run with minimum energy and maximum efficiency. This will both decrease carbon emissions and operating expenses.

Smart assistants and chatbot systems will also be put into service in order to increase the passenger experience. These systems will analyze the passenger requests and offer personalized travel plans. Transactions such as reservation, ticketing and route recommendations will be performed fast and as user friendly in the digital environment. ■

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TRANSPORTATION CORRIDORS SHAPE THE CENTURY OF TÜRKİYE

The Development Road Project will decrease the travel time between Asia and Europe by 15 days, increase the capacity of the Middle Corridor and launch new transportation connections between Iraq and Türkiye.



► Stating that the Century of Türkiye will be shaped mainly by the transportation corridors, the Minister of Transportation and Infrastructure Abdulkadir Uraloğlu told that they aim for decreasing the travel duration between Asia and Europe by 15 days as compared to the existing sea transportation routes with the Development Road Project. Emphasizing that the final agreement will be concluded with Iraq for the Development Road Project, Uraloğlu told that they plan to pass an important threshold with this project.

Minister Uraloğlu emphasized the critical role of the transportation infrastructure and transportation corridors on economic development, global trade and cooperation between countries in his speech he delivered at OECD Emerging Markets Forum. He also added that this forum is not only a platform for sharing ideas but also a working area where concrete steps are taken. Uraloğlu underlined that the transportation sector is closely connected with the trade and is a critical factor for economic growth. He also said that every investment in the transportation infrastructure will help with decreasing the trade costs, promoting economic growth,



increasing regional integration and achieving sustainable development goals.

Minister told that the sustainable transportation infrastructures are of critical importance not only for economic growth but also for the balanced distribution of economic and social benefits and proper management of environmental impacts. He further added that the geopolitical tensions, regional conflicts and climate change cause logistics difficulties and increase in costs and interruptions in supply chains. He said that in order to tackle these difficulties, it is important to develop new transportation alternatives.

Noting that Türkiye is an important

player in the global transportation networks, Uraloğlu said that Türkiye is a natural bridge between the eastern-western axis and is also located at the heart of the northern-southern corridors. He emphasized that Türkiye forms the backbone of the regional and global trade with projects such as the Development Road Project connecting the Middle Corridor and the Persian Gulf to Europe and Central Asia. He also told that 1.5 billion people live within a flight distance of 4 hours and they have access to 67 countries with an economic volume of 51.2 trillion US dollars and added that they are determined to use this advantage of Türkiye to increase global connectivity. ■

DFDS STANDS OUT WITH ITS STRONG NETWORK CONNECTING TÜRKİYE TO GLOBAL MARKETS

A man in a dark pinstripe suit, white shirt, and dark tie stands in front of a large, metallic, three-dimensional DFDS logo. He has his hands clasped in front of him and is looking directly at the camera. A red patterned pocket square is visible in his jacket.

Lars Hoffmann
VP and Head of DFDS
Business Unit Mediterranean

DFDS has transported more than 1 million units since its establishment, underlining its dedication to supporting Türkiye's global trade ambitions. With a fleet of 17 vessels and over 1,000 employees, DFDS is proudly providing thousands of exporters with fast and secure access to the global markets every year.



► As one of Europe's leading shipping and logistics companies, DFDS offers a unique intermodal network through its Business Unit Mediterranean, seamlessly integrating Türkiye with Europe and North Africa. By combining sea, road, and rail transport under one umbrella, this infrastructure delivers speed, reliability, and cost efficiency to Turkish exporters, while boosting their competitiveness in global trade. Operating across the ports of Pendik, Martaş (Tekirdağ), Yalova, Alsancak (İzmir), and Mersin, DFDS caters exporters across the country. With key connections to Trieste and Bari in Italy, Sète and Marseille in France, Patras in Greece, as well as Tunisia and Egypt and Damietta in Egypt, the company links Türkiye to strategic hubs across the Mediterranean. New route investments such as Martaş (Türkiye)-Trieste (Italy), and Trieste (Italy)- Damietta (Egypt) continue to expand capacity, while daily sailings ensure uninterrupted service to Türkiye's logistics sector.

Driving value through operational excellence

DFDS's strength lies not only in its transport capacity but in

the breadth of its services and the resilience of its operational infrastructure. The company continues to invest in digital innovation to improve efficiency across its network. At the Pendik and Trieste terminals, the rollout of the Terminal Management System has streamlined port operations-delivering faster turnaround times, greater transparency, and smoother processes for customers. Combined with a fleet of 14 Turkish-flagged vessels operated by skilled Turkish seafarers, DFDS showcases Türkiye's maritime capabilities while maintaining high standards of service across its international network.

Lars Hoffmann, VP and Head of DFDS Business Unit Mediterranean, emphasized Türkiye's significance for the company: "With our Turkish seafarers, we proudly showcase the country's maritime capabilities in global markets. Having transported over one million cargos, we've made significant contributions to the competitiveness and foreign trade of Turkish exporters. From Pendik to Mersin, Izmir to Tekirdağ, our operations-combined with strong European connections-build a vital

bridge between Türkiye and key global markets. Our investments in Türkiye will continue to grow, driven by its strategic location and talented workforce."

DFDS's intermodal system integrates sea routes with inland rail networks across Europe. From Trieste, the company operates 60 weekly train services to major logistics centers such as Wels, Duisburg, Cologne, and Bettembourg. This also enables faster delivery times for exporters through rail connections on routes like Yalova-Sète-Calais.

Sustainability at the core

A key differentiator for DFDS is its seamless intermodal solutions, which not only ensure uninterrupted operations but also contribute significantly to environmental protection. Integrating sea and



rail transport drastically reduces carbon emissions compared to road transport. DFDS has committed to cutting emissions by 45% by 2030 and achieving net zero by 2050. Investments in electric trucks and next-generation green vessels are already underway. With its expansive network and advanced intermodal infrastructure, DFDS continues to be a trusted logistics partner for Turkish exporters-delivering efficiency, reliability, and sustainability while connecting Türkiye to global markets. ■

Barış Talay
CEO

EVOLOG HAS INAUGURATED THE ORHANLI LOGISTICS CENTER

EvoLog Logistics, continuing its investments in Europe and Türkiye with integrated logistics solutions, EvoLog has inaugurated the Istanbul-Orhanlı Logistics Center, marking a significant milestone in its growth strategy. Orhanlı Logistics Center, EvoLog's fourth investment in Türkiye and its first on the Asian side of Istanbul, offers sustainable and integrated logistics services with an A-Type bonded warehouse affiliated with the Erenköy Customs Directorate, authorized consignor and consignee areas, and a 400 kW rooftop solar power system.

► Following its facilities in Istanbul Hadımköy, Istanbul Çatalca, and Bursa, EvoLog has launched the Orhanlı Logistics Center, which covers more than 15,000 square meters with 13,500 square meters of indoor space. Alongside its logistics centers in Nuremberg (Germany), Prague (Czech Republic), Herning (Denmark), and Borås (Sweden), the company aims to further strengthen its integrated logistics network in Türkiye and Europe with this new investment. Highlighting that the Orhanlı Logistics Center is a significant part of the company's growth strategy and sustainability vision in Türkiye, EvoLog's Founding CEO Mr. Barış Talay said in his statement on the new investment:

"With our 400 kW solar energy installation and authorized consignor and consignee areas that accelerate customs processes, we provide customers with solutions that are both environmentally friendly and time-saving. Through robotic process automation, AI-based warehouse management, and big data analytics, we are streamlining our warehouse operations. With our authorized consignor and consignee statuses, we are significantly accelerating export and import processes."

Noting that EvoLog has invested a total of 75 million euro this year in fleet, warehouse, and digital infrastructure, Mr. Talay stated that by the end of 2025 they aim to exceed



100,000 square meters of indoor warehouse space and achieve 300 million euro in consolidated revenue. Noting that Türkiye has become one of the most important logistics corridors between Europe and Asia as the global supply chain reshapes in the post-pandemic era, Mr. Talay stated: "The rise of e-commerce, the expectation of faster delivery, and the demand for green logistics will accelerate the sector's growth. At EvoLog, we are turning these developments into opportunities. By expanding our fleet to 2,500 self-owned vehicles, we will extend our intermodal and road transport network from Europe to Central

Asia. We will put into service the eco-friendly, smart warehouse with 23,000 m² of indoor space, currently under construction on Istanbul's European side, in the first quarter of 2026. In addition to our 7,000 m² facility in Herning dedicated to e-commerce logistics, we have two more warehouse investments planned in the Copenhagen and Fredericia regions. The strength of these strategic investments has also been confirmed by our inclusion among Türkiye's Top 500 Companies in 2024, where we ranked 48th among the fastest-growing companies. Our goal is not only to grow, but to become the most reliable logistics partner in the region with digital, sustainable, and innovative solutions." ■



Fatih Yılmazkarasu
General Manager

RAILPORT AS A FIRST INTERMODAL TERMINAL OF TÜRKİYE TO START OPERATIONS

Being the first intermodal terminal of Türkiye, Railport will become operational in Kartepe, Kocaeli and will make Türkiye a strategic location in railway transportation between Asia and Europe.

- Established under the partnership of Arkas Holding and Duisport - the largest land port operator of Germany -, Railport will start operations as the first intermodal terminal of Türkiye. This investment will not only increase the transportation capacity of Türkiye but also makes our country one of the most critical junction points of the global logistics network.

New stop of iron silk road

Railport attracts attention with the strategic connection it establishes between Asia and Europe. The terminal reaching Asia from over Baku - Tbilisi - Kars railway and to European Union countries via the European railway networks strengthens the role of Türkiye on the Iron Silk Road. This ensures a faster, more secure and environmentally friendly intercontinental goods flow and also rises Türkiye to a more effective position in the global supply chain.

Giant capacity over an area of 265 thousand square meters

Established in an area of 265 thousand square meters in Kartepe, Kocaeli, Railport has an annual handling capacity of 360 thousand TEUs, 1.5 million tons of general cargo, 125 thousand trailers and 130 thousand finished vehicles. The terminal also attracts attention with its modern warehouse of 20 thousand square meters which will serve both as a Temporary Storage Area and Type A Warehouse status. Equipped with well developed security systems, efficient handling infrastructure and digital management solutions, this area aims for creating a new standard for the storage of industrial and commercial goods.



Global impact with extensive access network

The service category of Railport is not only limited with Türkiye. The terminal will provide services over an extensive hinterland extending from Balkans to Central Asia and from the CIS countries to the Middle East. Thanks to its structure integrated to the Trans-Asian Railway Network, it connects the lines reaching Russia, Ukraine, Azerbaijan and Georgia with Türkiye and Europe. Its integration with Baku-Tbilisi-Kars line and Marmaray Tunnel accelerates the goods flow, thus, increasing its competitiveness over the Eastern-Western corridor.

“Railport is beyond being just a terminal”

Railport General Manager Fatih Yılmazkarasu defines the Railport investment as a “vision” project and commented as follows: “With Railport - the first intermodal terminal of Türkiye-, we are not only realizing a new facility but are also realizing a vision to strengthen more the role of Türkiye in international transportation. To act as a strategic bridge on the Eastern-Western corridor, Railport will provide speed, trust and cost advantage to our industrialists and also serve for the achievement of our



environmentally sustainability goals thanks to railway transportation decreasing carbon emission. This investment will take Türkiye to a more promising point in the transportation of future.”

New center of sustainable transportation

Railport also draws attention with its environmentally friendly structure aligned with the net zero carbon goals of Türkiye by 2053. Decreasing carbon emissions, the railway transportation is considered as an important step regarding compliance with the European Green Deal. Thanks to its multimodal structure based on road and railway integration, the terminal provides flexibility and efficiency in goods movements. Providing time, cost and sustainability advantage for the manufacturer and exporter companies thanks to these features, Railport continues to move forward to become one of the main centers shaping the intermodal transportation in Türkiye. ■

Alperen Gece
*Business Development
and Operations Manager*

A NEW GATEWAY TO WESTERN EUROPE WITH MURHAK

- ▶ Alp Özler Group continues to strengthen its longstanding presence in international logistics with new strategic investments. Among the Group companies, Alp Özler Logistics stands out particularly on the Balkan corridor - Greece, Bulgaria, and Romania - operating with more than 90 owned trucks. According to official data, we are ranked among the top companies handling the largest export and import volumes from Türkiye to the region.

MURHAK acquisition:

A strategic step

To expand our activities in Western Europe, we took a significant step in the first quarter of 2024: MURHAK, founded in 1981 and well known for its strong customer base and Ankara-centered FTL/PTL operations on the Germany, Belgium, and Netherlands routes, became part of Alp Özler Group. This acquisition was not only a company takeover but also a strategic move that reshaped our operations across Europe.

Strong investments, a younger fleet

Following the acquisition, we invested in 80 new trucks and trailers for MURHAK. This investment rejuvenated our fleet, strengthened our operational capacity, and set a new standard in meeting customer expectations. By 2025, we further expanded our Western Europe operations with the addition of the Italy corridor to our service network.

Services reaching the heart of Europe

Today, MURHAK - with its Ankara-based structure - provides services from Central Anatolia to all of Europe. With an annual volume of 30,000 tons on the Germany line, supported by Ro-Ro operations and PTL shipments, the company is rapidly becoming one of the rising stars of Alp Özler Group.



Vision 2026: End-to-end logistics

By 2026, MURHAK will not only be the center of international transport but also of domestic logistics operations. Our goal is to provide our customers with a truly end-to-end logistics chain, including FTL and LTL transport, warehousing solutions, and Ro-Ro services. In addition, as part of our Western Europe growth strategy, we are planning a new warehouse investment in Germany to further support our LTL operations.

Sales and organizational restructuring

This growth is supported not only by fleet and asset investments but also by the transformation of our sales and marketing structure.

Under MURHAK, we are building regional sales teams that will allow us to manage both domestic and international logistics processes under one roof. Our ultimate aim is clear: to integrate warehousing and Ro-Ro services and become our customers' indispensable partner in door-to-door delivery.

Looking ahead

At Alp Özler Group, our vision is to be a leading player not only in the Balkans but across all of Western Europe - offering reliable, innovative, and integrated logistics solutions. With the acquisition of MURHAK, we have taken a major step forward on this journey, and our investments will continue at full speed. ■

ONGOING INVESTMENTS STRENGTHEN DFDS'S PRESENCE IN TÜRKİYE

"DFDS Türkiye is not only increasing its capacity with its investment in 1,050 trailers within a year, but also advancing its service quality, safety, and operational efficiency"

► DFDS, one of Europe's leading providers of integrated logistics solutions, continues to strengthen its operations in Türkiye. With an investment of 1,050 trailers in less than a year, DFDS Türkiye demonstrates its strong commitment to creating value for customers and enhancing the vital trade links between Türkiye and Europe. "For DFDS Türkiye, this investment is much more than simply adding capacity or renewing the fleet—it represents a significant step forward in service quality, safety, and operational efficiency. With 850

new curtain side trailers dedicated to industrial and automotive customers, and 200 box trailers designed for retail, textile and high-value goods, we are directly supporting sectors where speed, product safety, and 'store-ready' deliveries are critical. With this younger and tailor-made fleet, we are helping our customers build stronger and more resilient supply chains, while at the same time offering them more choice and flexibility."

DFDS Türkiye scales up fleet for fashion and retail logistics

As part of its ongoing efforts to enhance service quality and capacity

in international transport, the company has added 200 new Krone box trailers to its fleet, specifically tailored for the transportation needs of the textile, fast fashion, retail, and high-value goods sectors. These next-generation trailers are equipped with special interior fittings that allow garments to be transported on hangers. This enables fashion products to be delivered in a sale-ready condition, eliminating the need for additional ironing or preparation upon arrival. With advanced insulation, high-grade interior coatings, and modern tracking systems, the new trailers offer superior safety and protection for sensitive and valuable cargo.





A streamlined approach to logistics between Türkiye and Europe

DFDS provides a comprehensive logistics service that covers land, sea, and rail. This multimodal approach mitigates common bottlenecks, such as border congestion, driver visa issues, and roadway restrictions. DFDS's ferry lines, combined with an extensive network of ports and warehouses, are specifically designed to expedite cargo movement while keeping costs in check. Thanks to strategic scheduling and transfers between various transport modes, shipments can reach destinations across Europe more reliably, with less exposure to border delays or congested routes.

Integrated logistics for comprehensive solutions

DFDS's enhanced presence in Türkiye significantly reduces logistical complexities for companies aiming to trade with European markets. Temperature-controlled transport, intermodal connections, and expedited "Speedy" services allow time-sensitive freight to reach destinations in as little



as 36 to 48 hours. This level of speed and flexibility is especially valuable in sectors where just-in-time deliveries and shorter lead times have become the norm.

The expansion of intermodal transportation goes hand in hand with a push to decrease carbon emissions and roadway congestion. In fact, DFDS has begun deploying electric trucks within its fleet and exploring other alternative fuels, reflecting an industry-wide shift toward more sustainable logistics practices. Skivild emphasizes that these efforts are part of a larger vision for reducing the overall carbon footprint:

"We are committed to investing in

cleaner technologies and intermodal solutions. By doing so, we lower fuel consumption, minimize environmental impact, decrease custom procedures and help customers stay ahead of evolving regulations."

Additionally, DFDS Türkiye Logistics offers bonded warehousing for inventory management under customs-approved conditions, simplifying cross-border formalities and driving down operational costs. Meanwhile, digital solutions for cargo tracking and customs clearance ensure transparency across the supply chain, empowering customers to track their freight in real time and adapt quickly to changing requirements. ■

Mine Kaya
General Manager
SGS TransitNet

SGS TRANSITNET:

REDEFINING THE FUTURE OF CUSTOMS AND TRANSIT LOGISTICS

"By combining speed, transparency, and compliance, SGS TransitNet is rewriting the rules of customs operations and giving logistics companies a crucial competitive edge."

► In today's logistics environment, efficiency, reliability, and compliance determine success. SGS TransitNet has emerged as a leader in customs and transit declaration services, introducing a digital-first platform that is reshaping how goods move across borders.

With operations spanning 25 countries and coverage of all 33 member states participating in the NCTS Common Transit System, SGS TransitNet empowers logistics operators to handle shipments with unprecedented speed, transparency, and security.

A new standard in customs operations

"SGS TransitNet is more than a service—it's a breakthrough for the logistics industry," said Mine Kaya, General Manager of SGS TransitNet. "By combining efficiency with complete visibility, we enable our clients to optimize operations while maintaining full compliance and data confidentiality."

Through its user-friendly platform, companies can seamlessly generate T1/T2/TR/BY declarations for cargo departing from any of the 25 partner countries. Fully aligned with EU and Turkish NCTS regulations, SGS TransitNet eliminates common delays, providing a streamlined and dependable customs experience.

Building trust through compliance and integrity

At the heart of SGS TransitNet's model lies independence, transparency, and trust. "Because we operate independently of transport companies, clients can count on unbiased, secure, and confidential services," Kaya explained.

An expert team works 24/7, 365 days a year, with offices in Geneva,



Warsaw, Istanbul, Jezovo-Croatia, Sete-France and Hungary ensuring rapid local response when needed. Backed by insurance coverage of up to EUR 660 million, SGS TransitNet provides clients with peace of mind while minimizing customs risks.

Financial Benefits that deliver real value

Beyond efficiency, SGS TransitNet offers significant cost savings.

Transport operators avoid additional expenses such as bank guarantees or promissory notes, while electronic confirmations speed up the payment cycle. For approved customers, guarantees even extend to high-value and sensitive goods like alcohol and cigarettes.

"Every feature is designed with our clients' bottom line in mind," Kaya noted. "By cutting out unnecessary costs and wait times, SGS TransitNet helps businesses achieve both speed and savings."

Next-Level logistics solutions

The platform is more than just a declaration tool—it's an integrated logistics solution. Clients can manage exports, imports, and transit declarations from one system, track shipments in real time, oversee subcontractor vehicles, and avoid time-consuming ENS procedures.

Strategic partnerships with international logistics providers, along with 24/7 availability in key hubs such as Sete, Kapitan-Andreovo, and Zagreb, ensure clients receive full support whenever and wherever it's needed. Cost-effective corridors, such as Croatia–

Serbia, and priority access at Ro-Ro customs offices further strengthen its value.

Simplifying the customer experience

SGS TransitNet's platform is built for ease of use. Multiple users can access the system, data uploads are simplified with Excel integration, and a newly designed interface enhances speed and functionality. "Our aim is to remove complexity from customs operations, making the process straightforward for every client," Kaya emphasized.

Authorized consignor advantage in Türkiye

One of SGS TransitNet's key differentiators is its Authorized Economic Operator (AEO) and Authorized Consignor status. This unique advantage streamlines export customs declarations in Türkiye, removing the need for goods to be presented at customs offices and saving up to an entire day in transport time. "Our consignor status underlines our commitment to innovation," Kaya said. "It helps our clients cut through red tape and focus on what matters most—expanding their business."

A trusted partner for global trade

From handling T1/T2 documentation across Europe to managing ENS and TIR procedures for Ro-Ro shipments, SGS TransitNet is trusted by logistics operators worldwide. Its tailored services for sensitive goods, port operations, and non-EU transit routes demonstrate its flexibility and expertise in complex scenarios. "SGS TransitNet is not only a solutions provider—we are a long-term partner in growth and success," Kaya concluded. ■

Move to green

Sonia Herzog
CEO of the
JSV Group

JSV IS NOW ALSO A TURKISH COMPANY AND HAS ITS OWN BRANCH IN ISTANBUL

This is the seventh branch of the logistics group and the first international one. This new step reflects the logistics operator's commitment to growth in Türkiye. JSV operates the Road-Sea Türkiye-Spain line, connecting both countries in just 4 days.

► October, 2025.- JSV has announced the opening of a new office in Istanbul, where around ten employees are already working. The multimodal logistics operator strengthens its presence in Türkiye, following the consolidation and growth of its Road-Sea Türkiye–Spain line, which connects both countries in only four days. “The opening of our first international branch in Istanbul represents a decisive step in JSV’s internationalization. Türkiye is a key strategic partner, and with our presence there, we reinforce our commitment to being close to our clients and providing efficient, fast, and personalized solutions,” says Sonia Herzog, CEO of the JSV Group. With this philosophy, they operate the Road-Sea maritime line, offering a connection as fast as road transport, with the same capacity but a much lower environmental impact.



With this opening, JSV confirms its commitment to growth in Türkiye and advances its international expansion plan, which the group has been pursuing for years and accelerated following the entry of Nazca Capital into its capital. “This is a major step forward in our internationalization and also in our growth model. We want to bring to Türkiye the business model that has been so successful in the Canary

Islands: express lines, adapted special containers, comprehensive logistics services, and direct control in all phases,” explains Sonia Herzog.

Own stand at logitrans 2025

This year, now with its own office in Istanbul, JSV announced its presence with its own stand at the international sector fair, Logitrans 2025, held in Istanbul on November 19-21. ■

ABOUT JSV

The JSV Group is a multimodal logistics operator specialized in agile Short Sea Shipping lines and innovative door-to-door tailored solutions using its own resources. It has over 270 employees across seven branches - six in Spain and the latest recently inaugurated in Istanbul. To provide comprehensive, multimodal, and sustainable services, the group has made significant investments in its own terminals (rail and port), modern hubs and dry ports, as well as in the acquisition of its next-generation vessels. These not only ensure compliance with environmental regulations in maritime transport but are also

adapted to future restrictions. JSV also stands out for its investment in containers - in acquiring new units, in maintenance and repair, and in designing its own special equipment. In this way, JSV has created a fleet of over 5,000 containers, with a strong presence of 45' Pallet Wide High Cube and Super High Cube containers, offering the same capacity as a truck. Thanks to its commitment to multimodality for true transport efficiency and reduced environmental impact, JSV invests in containers, which are suitable for all types of transport and allow for customized multimodal

solutions. Following this premise of container-multimodality-efficiency-sustainability, JSV operates train corridors directly connecting its express maritime lines to the Canary Islands and Türkiye, and continues investing in R&D to create improved containers tailored to each type of cargo. They have containers for oversized cargo, open top and open side containers, containers of various heights, fully open containers for oversized goods, hanging garment containers, reels, all types of steel products, vehicles, glass, construction materials, bulk goods... in total more than 50 different types of maritime containers.



logitrans 2025 WILL ILLUMINATE THE PATH OF THE LOGISTICS INDUSTRY

Recognized as the most important and largest gathering platform of the logistics sector in Türkiye, the International logitrans Transport Logistics Exhibition is once again poised for a spectacular opening that makes waves in the industry. The fair not only brings together stakeholders from the logistics sector, but also creates a major agenda with its panels, special sessions, and award ceremonies.

► logitrans 2025 is expected to be one of the exhibitions with the highest number of both domestic and international participants, and with the addition of a new hall, it will reach a record-breaking size in terms of exhibition space. In addition to the sector's leading companies that participate regularly each year, the fresh energy of first-time exhibitors will help solidify logitrans as the shining star of the logistics world. Taking place between November 19–21, 2025 in Istanbul, logitrans

2025 will host numerous companies and institutions from both Türkiye and nearby geographies. With international participation increasing significantly every year, approximately 200 organizations and companies from over 20 countries, including Türkiye, are expected to be represented at the fair. Country pavilions from Germany, Greece and Spain will be among the highlights, opening their doors to visitors and drawing significant attention.

Held at the Eurasia Show and Art Center in Yenikapı, logitrans will host the most comprehensive industry gathering over the course of three days. This year, the number of visitors is expected to reach 20,000.

A new hall added due to high participation

Ekin Seren Altun, CMO of EKO MMI Fair Co., stated that logitrans, whose international status has become more prominent each year, is raising the bar even higher in 2025:

"Every year, we expand the exhibition area with additional square meters. The pavilions, booths, and exhibition spaces of participating companies, contribute greatly to a colorful and dynamic fair environment. Together with our participants and exhibitors we believe we are building a large ecosystem in both Türkiye and nearby geographies through logitrans. This year, we will once again represent the logistics sector at the highest level and welcome our visitors at full capacity."

"We observe that logitrans is close to achieving 100% representation of its sector. The strong interest from logistics companies for the 2025 edition made us happy. Thanks to this high demand, we finalized contracts for a significant part of the 2025 exhibition space during the 2024 event. Taking this into account, and with great effort, we managed to add another hall. logitrans 2025 will break its own record by reaching the largest exhibition area to date."

The middle corridor has strategic importance, and Türkiye plays a central role

Reminding that the fair will take place during a period when new trade routes are on the global agenda, Altun stated: "The Middle Corridor, connecting East and West, Europe, the Far East, and China, is a key route. It is now widely accepted that Türkiye has become a true logistics hub in the region, as the most important country and transit route along this corridor. The

increasing interest and demand from many countries-especially in Europe, Asia, and surrounding regions-fully reflect Türkiye's role as the most significant logistics center both regionally and globally."

Pointing out that Türkiye's importance in the global logistics map has grown as trade routes shift, Altun added: "With its road, air, sea, and railway capacities and infrastructure, Türkiye is rapidly becoming a global logistics hub, not just a regional one." Highlighting the significance of holding logitrans in a constantly changing global context, Altun continued: "Most importantly, Türkiye, with its geographical location and strong logistics infrastructure, sits at the crossroads of the corridors. In this context, logitrans serves as a powerful platform for establishing business relations within the intercontinental supply chain between Europe and Asia, and for bringing together all stakeholders in the logistics sector. With broad international participation, logitrans will further reinforce Türkiye's strategic position in logistics across the Eurasia region.

The strong interest shown by both exhibitors and visitors in logitrans confirms this fact. We believe that logitrans plays a critical role in Türkiye's goal of reaching a logistics market size exceeding \$100 billion, and we strive each year to contribute maximally toward that goal."

"We have strong cooperation with NGOs"

Ekin Seren Altun emphasized that logitrans has become a powerful platform that creates significant added value for the logistics sector with each edition. In addition to enabling participants to establish new customer relationships, the fair offers a dynamic environment for



CMO of EKO MMI Fair Co.
Ekin Seren Altun

strengthening existing ties.

Altun stated that logitrans is the most prominent showcase of the sector's level of development and dynamism: "Alongside international participation, the strong support of the commercial institutions that make up Türkiye's logistics sector contributes greatly to our efforts to make logitrans Türkiye's most important platform in global logistics. The participation and support of industry associations and NGOs are extremely valuable to us."

Ekin Seren Altun also emphasized that logitrans goes far beyond just being a trade fair, acting as a platform for innovation and dialogue on current challenges and future directions in the sector: "Especially the panels organized in cooperation with NGOs offer valuable perspectives for the present and future of the industry. These events significantly contribute to shaping the sector's future vision. As the most important logistics event in Eurasia region, logitrans is a must-attend event for those who want to stay updated on industry developments and gain fresh insights." ■





e-Box
LOGISTIC

logistics without borders

E-Box Logistic is a company specialized in international transport and advanced fleet management solutions. With headquarters in Belgrade, Serbia, and regional offices in North Macedonia, we proudly support clients across Europe in optimizing their logistics operations.

Our mission is simple – to remove barriers in international transport and provide digital solutions that save both time and money. From fuel cards and GPS monitoring to toll services and route optimization, we make every kilometer more efficient.

This year, **in Turkey**, we are presenting our innovative solution:
TOLL FOR ALL – POWERED BY E-BOX LOGISTIC
Imagine covering the entire Balkans with just one TAG device.

With Toll for All, your fleet passes through toll stations quickly and smoothly!

- ✓ One platform
- ✓ One invoice
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Tool for All is currently available in **Serbia, Croatia, North Macedonia, Montenegro**, and **Greece** – with **Bosnia & Herzegovina** joining by the end of 2026.

What does this mean for your business? Faster passage at toll gates, one monthly invoice for all toll expenses, time and cost savings, and secure online payments via bank portal.

With E-Box Logistic, barriers disappear, and your fleet keeps moving forward!

How Toll for All works?

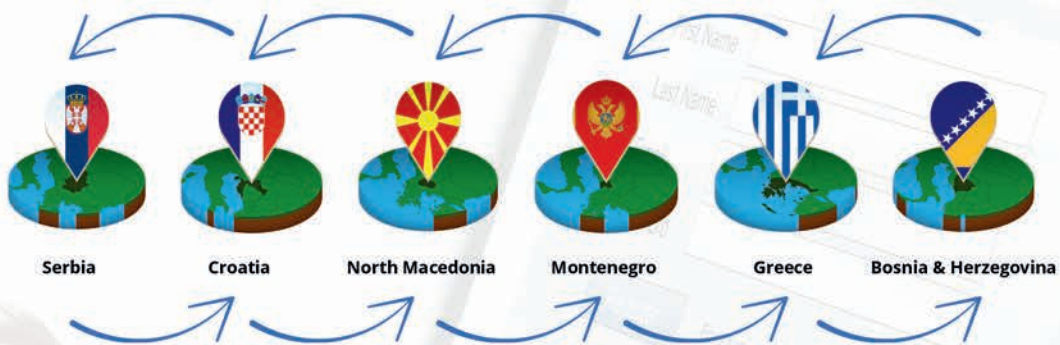
Registration is simple and takes just a few minutes.

All you need to do is **scan the QR code from your contract**, which will take you to the E-Box Logistic platform.

Enter your **company or driver's details**, confirm the **TAG serial number**, and **register your payment card** through a secure bank portal.

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From that moment on, **driving through toll stations becomes fully automated** – no queues, no cash, no complications.



USE CASES

- ✓ **Serbia** – full electronic toll collection on all highways. Simply drive through ENP lanes, tolls are automatically charged from your card.
- ✓ **Croatia** – smooth driving with a postpaid system. No deposits, no bank guarantees – just one invoice at the end of the month.
- ✓ **North Macedonia, Montenegro & Greece** – integrated toll payment with one TAG device.
- ✓ **Bosnia & Herzegovina** – service expansion planned by 2026.

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E-BOX LOGISTIC – WE REMOVE BARRIERS, YOU DRIVE FURTHER!

EUROPE AIMS AT BECOMING THE FIRST CLIMATE-NEUTRAL CONTINENT



European Union implements comprehensive practices to achieve its goal of becoming world's first climate-neutral continent by 2050. The main topics of these regulations are carbon border adjustment, customer sustainability obligations, prevention of deforestation and eco-design rules.

- The European Union extends the scope of its works to achieve its zero greenhouse gas emission goal. The Foreign Economic Relations Board (DEİK) giving information on the studies of the EU regarding the European Green Deal published DEİK Green Transformation page in order to ensure the up-to-date monitoring of the developments regarding the topic. According to the press statement made by DEİK: "We are closely monitoring the decisions, legislation amendments and developments made by the EU countries, one of the most important trade partners of Türkiye, in line with this strategy. The EU implements a growth strategy aiming at becoming the first climate-neutral continent where the greenhouse gas emissions are offset by 2050." The works undertaken for this goal



cover a large area from border carbon adjustment mechanism to corporate sustainability and from deforestation concern to the ready-to-wear and eco-design topics. Information regarding these works is summarized below:

New draft regulation for EU CBAM

The European Commission has prepared a draft including amendments regarding the EU Carbon Border Adjustment Mechanism (CBAM). This draft introduces innovations such as simplification of reporting obligations, scope exemptions, embedded emission calculations and financial obligations. The determination of thresholds for low emission imports, renewal of importer and operator definitions, taking into consideration the carbon prices at third countries, simplification

of emission verification rules and changing the sales of CBAM certificates to February 2027 are the highlights of the Regulation. Moreover, changes are planned to be made in the embedded emission calculations in the sectors such as aluminum, steel and electricity.

EU omnibus package/corporate sustainability

The European Commission announced a new omnibus package (Omnibus I&II) on February 26, 2025 to simplify some legislation together with the Clean Industrial Deal. This omnibus package includes the Carbon Adjustment Mechanism (CBAM), the Corporate Sustainability Due Diligence Directive (CSDDD), the Corporate Sustainability Reporting Directive (CSRD), Taxonomy Amendments and the European Investment Program-InvestEU Regulation. The main amendments introduced with this Regulation in order to make the Corporate Sustainability Reporting Directive (CSRD) more proportionate and to facilitate its implementation for the companies are summarized below:

- The number of companies under the scope of the CSRD was decreased by 80 percent (pursuant to the previous version of the legislation: satisfaction of minimum two of the criteria of net sales revenue of 50 million Euros, asset size of 25 million Euros and 250 personnel for two years in a row) and limited to large-size companies with more than 1,000 personnel.
- A voluntary reporting standard will be created for the SMEs by taking as basis the Voluntary Standard (VSME). This standard limits the information that the companies or banks subject to the CSRD can request from the companies in the value chains with less than 1,000 personnel and ensures protection for the SMEs.
- The European Sustainability Reporting Standards (ESRS) will be reviewed in

order to simplify it.

- The date of enforcement for the reporting requirements which was determined as 2025 for large sized companies and 2026 for the publicly traded SMEs is postponed for two years.

Corporate sustainability regulations

The bag bill proposal announced on February 26, 2025 has introduced important amendments in corporate sustainability report. According to these amendments, the reporting obligation was restricted only to major companies whose number of personnel is one thousand and above. Voluntary reporting standards will be established for the SMEs. Moreover, the date of entry into force of the reporting obligations was postponed for two years. These amendments are expected to annually generate savings of around 4.4 billion Euros on the costs for the EU companies.

Prevention of deforestation

The EU Deforestation Regulation No. 2023/1115 will enter into force as of December 30, 2025. This Regulation will require that a declaration is made to prove that products such as soya, coffee, cacao, palm oil, rubber and

wood do not cause deforestation in production for their entry into the EU market. Only the operators performing customs operations in the EU will have access to declarations to be made from the new information system.

Eco-Design rules in ready-to-wear sector

New eco-design standards are on the agenda for the ready-to-wear sector. Rules are prepared regarding durability, reparability, recyclability and use of toxic chemicals. These studies will introduce new standards to decrease environmental impact in all processes of the sector from production to exports.

Reflections in the logistics sector

The new regulations and practices launched in line with the EU's becoming the world's first climate neutral continent will create direct impact on the foreign trade of Türkiye. Especially the logistics and transportation companies will face new costs due to carbon border adjustment and sustainability reports and will have to accelerate their green transformation investments. The sustainability criteria in the ready-to-wear, automotive and food supply chains will reshape the working models. ■





RECORD LEVEL OF PARTICIPATION IN TRANSPORT LOGISTIC 2025 MUNICH

tt transport
logistic

the leading exhibition

but also with its global access and strategic impact, as well.

The trade fair was officially opened by Germany's new Federal Minister of Transport Patrick Schnieder. Stefan Rummel, the CEO of exhibition organizer Messe München told that "transport logistic 2025 has impressively shown the central role that logistics plays in our connected world. It is the lifeline of the global economy. Without smooth supply chains, our everyday life would come to a standstill. The significant increase in the number of participants led to a very lively and positive atmosphere. This underscores the importance of transport logistic as a world-leading trade fair."

Emphasis on technology and sustainability

Hosting a number of technological innovation from autonomous transport systems to AI-supported control infrastructures, the exhibition discussed the top agenda items in the logistics world with conferences, panels and workshops. The key topics included artificial intelligence, cyber security, digitalization and alternative drive systems.

Etihad Cargo Chief Cargo Officer Stanislas Brun said that: "transport logistic 2025 placed a clear focus on the industry's transition towards greater digitalization, sustainability, and innovation." Kuehne+Nagel CEO Tobias Jerschke added that: "In times of extreme volatility, transport logistic 2025 proves more than ever to be an authoritative platform-one that drives innovation, identifies market trends, fosters customer engagement, and delivers powerful momentum through its strong networking dynamic. For me, this event marks a boost for the industry, particularly in the key areas of technology, AI, and integrated logistics concepts."

Air cargo expands: air cargo Europe occupied two halls

air cargo Europe saw a notable rise in prominence in this year's fair. Due to overwhelming interest, the air freight segment occupied two full exhibition halls. This has emphasized the importance of the air transportation for particularly for medical goods, e-commerce, and other time-critical deliveries.

Munich Airport Director Cargo Development Markus Heinelt stated that: "transport logistic, in conjunction with air cargo Europe, truly deserves its title as the world's leading trade fair for logistics. Nowhere else do all stakeholders in

- Organized in Munich on June 2 to 5, 2025, the transport logistic 2025 shed light on the future of the logistics world on the digitalization, sustainability and artificial intelligence axis. Organized over an area of 150 thousand square meters, the fair received a record number of visitors of more than 2.722 participants from 73 countries and of more than 77.000 visitors from more than 130 counties. The number of international participants reached 65 percent (60 percent in 2023). The fair attracted attention not only with its size

The sector met with a focus on digitalization, artificial intelligence and sustainability. With 2.722 participants from 73 countries and more than 77.000 visitors from more than 130 countries and regions, the world's largest logistics fair of the world tested the pulse of the sector once again.

the supply chain come together with such breadth and quality." Schiphol Commercial Executive Director Arthur Reijnhart added that: "air cargo plays a crucial role in keeping the Netherlands connected to the world - socially and economically. transport logistic provides a valuable opportunity to address shared challenges."

Great interest from decision makers

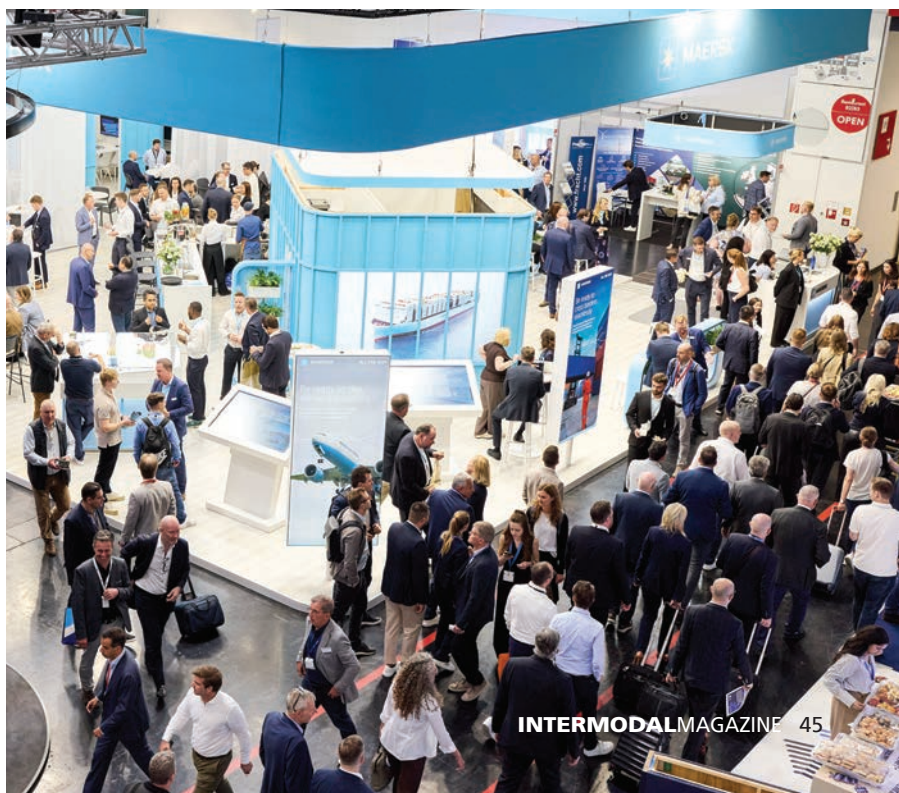
This year the fair received a noticeable improvement in the visitor profile. Both technical specialists and senior executives have shown great interest in the fair. Held over a period of four days, the event was marked by dialogues with strong interaction, business connections and strong networking opportunities. Rhenus Group CCO Tobias König told that "The transport logistic trade fair is an indispensable platform for us at the Rhenus Group to connect directly with customers and partners. The conversations were of exceptionally high quality." KRONE Trailer Managing Director Sales and Marketing Dr. Frank Albers added that: "For us, transport logistic is more than just a trade fair - it is a key industry gathering with global appeal." Panattoni Managing Partner Fred-Markus Bohne said that: "This year, the quality of dialog was especially notable - many of our meetings were with top-level decision-makers and were both in-depth and forward-looking."

Global meeting setting the direction for future

transport logistic 2025 brought together the sector professionals to set the direction of the sector in terms of technology, vision and cooperation and once again raised the bar in the logistics world. Bremenports General Manager Robert Howe described the atmosphere at the fair with the following words: "With around 75 thousand visitors, calling transport logistic a family reunion would probably be the wrong term. But it does feel a bit like that - it is simply that you meet many people who bring genuine passion for the transport and logistics industries. Ultimately, this is what makes

transport logistic the leading trade fair in both sectors."

Andreas Schmid Group CEO Alessandro Cacciola summed it up as follows: "transport logistic was not only a meeting place for the industry, it was also a powerful source of inspiration." The shared opinion of the participants, visitors and speakers was that transport logistic 2025 was not only a fair but a global center of intelligence uniting the today of the logistics sector with its future. Steps taken and cooperations established in numerous topics from digitalization to environment and from artificial intelligence to new transportation models have proven that the sector takes sound steps into the future. ■



YATIRIM ÜLKESİ TÜRKİYE PANELİ

24 EYLÜL 2025



TÜRKİYE AT THE CENTER OF GLOBAL LOGISTICS INVESTMENTS

► In the panels hosted by the HİB Transportation and Logistics Services Committee, Türkiye's strong position in logistics and its investment potential were discussed. The panel titled "Türkiye as an Investment Destination in the Focus of Emerging Global Logistics Networks" was held at the Şehit Ömer Halisdemir Conference Hall in the Foreign Trade Complex with a large turnout. Opening the panel, HİB Transportation and Logistics Services Committee Chairman Murat Baykara noted that the logistics sector accounts for 35 percent of Türkiye's service exports. Baykara stated, "We expect our current exports of 20

billion USD to reach 40 billion USD by 2028."

Baykara: Türkiye's role in global trade is strengthening

Baykara emphasized that despite global geopolitical shifts and trade wars, Türkiye has the potential to contribute to the development of regional and global trade. "We see our country standing out as a global supply hub with its industrial and production strength, flexible export capacity, and logistics capabilities," he said.

He also highlighted that under the European Union's Global Gateway initiative, Türkiye is supported specifically for the Middle Corridor,

and that the development of the logistics sector is strategically prioritized in the 2026-2028 Medium-Term Program.

Addressing financing, Baykara noted that access to finance is critical for the sector to maintain its international competitiveness amid increasing uncertainties and costs. "In today's global economy, where accessing finance is not easy, the opportunities provided to our sector by institutions such as Turkish Eximbank and Export Development Inc. are of vital importance," he added.

Baykara also pointed out that trade along the Europe-Caucasus-Asia corridor, expected to grow by 30 percent by 2030, could be transported

Panels organized by the Service Exporters' Association (HİB) highlighted Türkiye's strategic position in the logistics sector, investment opportunities and financing options. Participants emphasized that Türkiye is a critical force in logistics both regionally and globally.

via Türkiye. He stated that projects like the Development Road and Zangezur Corridor place Türkiye at the center of the most reliable international transport corridors connecting to the Middle East and Gulf countries. Concluding his remarks, Baykara said, "One of the main pillars of the Türkiye Century vision is our logistics sector. Within this vision, as the HİB Transportation and Logistics Committee, we continue our work to position our country as a regional and global superpower."

Kileci: Our greatest advantage is human capital

Ahmet Fikret Kileci, Vice President of the Turkish Exporters Assembly (TİM), highlighted human capital as Türkiye's biggest advantage. In his opening speech, he stated, "There is no other country in the world shaped by as many cultures as ours.

Seventy-two nations have come to these lands, and each civilization left something behind. The advantage comes entirely from experience, history, and our accumulated work. Today, every country faces challenges, especially those we consider advanced and look up to. As Türkiye, we may be affected, but we need to think outside the conventional rules."

Karakaş: Türkiye is not a transit country, but a logistics hub

Dr. Yusuf Karakaş, Deputy General Director of Services Trade at the Ministry of Trade, underlined Türkiye's role in logistics: "A trade corridor without Türkiye is unthinkable. As a Ministry, we closely monitor developments. Our goal is to further enhance Türkiye's investment potential. Türkiye is no longer just a transit country; it is a logistics hub and center."

He also noted that support for the logistics sector continues and that the expansion of these supports is being considered at the presidential level.

Investments and projects discussed

The first panel, titled "Challenges and Investment Opportunities in Türkiye's Logistics Sector Growing with Exports", was moderated by Dr. Hakan Cınar, President of Dışyönder. Panelists included TİM Vice President Ahmet Fikret Kileci, THY Cargo Deputy Chairman Mustafa Erdoğan, LC Waikiki Logistics General Manager Sait Baykara, and YASED Trade Working Group Chairman Sercan Bahadır. Discussions focused on the investments, improvements, and projects needed to further strengthen Türkiye's potential in both export and transit logistics services.

Financing and incentives on the agenda

The second panel, titled "Impact Analysis of Incentives and Support in a Growing Logistics Türkiye", was moderated by HİB Transportation and Logistics Services Committee Chairman Murat Baykara. Speakers included Dr. Yusuf Karakaş from the Ministry of Trade, Fatih Tuğrul Topaç, General Manager of Export Development Inc., and Mehmet Efkân Bingöl, Marketing Director of Turkish Eximbank. The panel focused on diversifying financing options, effective use of incentives and support mechanisms, and solutions to enhance the sector's international competitiveness. ■



TÜRKİYE GAINS STRATEGIC STRENGTH IN LOGISTICS THROUGH COORDINATION

By coordinating road, rail, sea, and air transport networks, Türkiye is turning time advantages in logistics into strategic power. Şerafettin Aras, Chairman of the Assembly and President of UND, emphasized that inter-agency coordination is decisive in reducing trade costs.

► The Türkiye Transport and Logistics Assembly of the Union of Chambers and Commodity Exchanges of Türkiye (TOBB) convened on September 26, 2025, with broad participation from industry representatives. The meeting was attended by Deputy Minister of Transport and Infrastructure Durmuş Ünüvar, TOBB Vice President Tamer Kıran, assembly members, and bureaucrats from the Ministry of Transport and Infrastructure. Speaking at the meeting, Assembly Chairman and UND President Şerafettin Aras highlighted Türkiye's strategic role in trade routes and

drew attention to critical issues facing the logistics sector. He particularly emphasized that accelerating trade is a direct lever for macroeconomic growth.

Aras stated: "Through the Middle Corridor, Development Road, and Zangezur Corridor, Türkiye shapes not only trade routes but also our export speed, the resilience of our supply chains, and the country's reputation. However, the strength of a corridor is not measured merely by asphalt, rails, and port cranes; minutes lost at the border and hours spent at customs determine the real value. Every extra

day lost in customs reduces exports by at least one percent, which translates to millions of dollars in losses."

Aras also referenced analyses of the World Trade Organization's Trade Facilitation Agreement, noting that full implementation could reduce trade costs by more than 14 percent, shorten export and import times by several days, and add between 750 billion and 1 trillion USD in annual trade volume.

He stressed that modern trade is not a competition between modes but a game of complementarity. "Every multimodal transport begins and ends with road. If the first and last kilometer is poorly planned, even the best corridor loses its competitive advantage. The stronger the intermodal design, the faster and more efficient the flow enabled by road flexibility."

Highlighting the strategic importance of the rail backbone, Aras noted that most freight traffic on the European side of Istanbul depends on Halkalı, one of the country's busiest intermodal terminals. He stated that capacity limits affect not only rail planning but also sea, air, and road operations. While



Marmaray integration provides an intercontinental bridge, time windows and safety restrictions for freight trains may constrain capacity. Aras stressed that smooth customs processes and sufficient X-ray and inspection infrastructure are now a necessity. Delays such as a vehicle's crossing record not appearing abroad or errors taking days to correct are unacceptable.

Regarding air transport, Aras noted that İstanbul Airport provides hourly global connections but remains only a fast "island" if not supported by road and rail networks.

Concluding, Aras said: "We are not after competition between modes but the gain of time. When road, rail, sea, air, and warehouses operate in rhythm, Türkiye becomes not just a country through which corridors pass, but one that manages their brain. If we combine road flexibility with rail order,



port capacity with airport speed, warehouse discipline with customs intelligence, a single story emerges: turning logistics into strategic power by capturing time.

Capturing time does not rely solely on technology or intermodal coordination; the decisive factor is how well our institutions hear and

support each other. When inter-agency coordination is strong, trade costs drop dramatically. Institutions that can work simultaneously are the fastest at resolving trade bottlenecks. Türkiye has the capability to achieve this, provided we act together under the principle: 'one table - one goal - one mind.'" ■



AMENDMENTS IN THE ROAD TRANSPORTATION REGULATION

The amendments made in the Road Transportation Regulation introduced innovations in many fields from motorcycle courier activities to the employment of female drivers. New practices aim at increasing the service quality in the sector and decreasing illegal practices.

► The Minister of Transport and Infrastructure Abdulkadir Uraloğlu told that the Regulation Amending the Road entered into force upon publication in the Official Gazette dated May 15, 2025. Minister Uraloğlu announced that with the amended Regulations, new practices covering extensive areas from the employment of female divers to motorcycle courier activities were introduced. Uraloğlu told that motorcycle

couriers are accepted legally for the first time with the amendments made in the Regulation. Uraloğlu noted that they will contribute to improving the service quality with competent and well trained motorcycle couriers in the sector.

P1 authorization certificate requirement for motorcycle couriers

Stating that the motorcycle couriers

are not required to obtain a P1 authorization certificate, Minister Uraloğlu added that "An 85 percent deduction will be made from the authorization certificate fee for the motorcycle couriers to operate with maximum 3 vehicles. The motorcycle couriers who will receive an authorization certificate within the first 6 months from the date of publication of the Regulation will benefit from a decrease of 95





percent.” Uraloğlu also told that couriers can obtain their certificates of authorization with a discount of 5 percent from e-Government portal.

Minister Uraloğlu said that the requirements for the vehicles to be added to the certificate of authorization were also determined. Uraloğlu added that “The Regulation also allows for the motorcycle couriers to use leased vehicles and to use their vehicles of 15 years old which they can register to their authorization certificates in the first 6 months. The individuals hired by the drivers to use their vehicles for courier transportation are also required to obtain a Certificate of Activity for Couriers.”

Uraloğlu further remarked that courier operators are given 1 year to obtain their professional competence certificates (SRC - Moto Courier SRC - Certificate of Activity for Couriers).

Parcels can be controlled during delivery

Noting that it is mandatory to return the undelivered parcels to the sender within the same period of time, Minister Uraloğlu said: “Upon the request of the sender

and the approval of the recipient, the parcels can be controlled during delivery. Services such as delivery time range, contactless delivery or delivery to third persons will be offered. Moreover, it is mandatory to take necessary measures for the transportation of perishable goods.”

Stating that the operators have to provide protective gear to the couriers, Minister Uraloğlu told that: “The reflective vests of the couriers must now bear ‘COURIER’ and U-Net numbers of companies. Besides, the goods which are prohibited to be sold, shipped and traded will no longer be allowed to be transported.”

Support for employment of female drivers

Announcing that they have launched new initiatives to increase employment of female drivers, Uraloğlu noted that: “We will make a discount of 95 percent in the vehicle card fee for each female driver hired. Thanks to this discount, the vehicle card fee will decrease from 3 thousand and 19 Turkish Liras to 150 Turkish Liras. Moreover, we will extend the certificates of authorization of the companies who employ female drivers up to 10 percent of their vehicles in the past one year for three years.”

Regarding the use of tachographs in order to prevent drivers to drive when tired, Uraloğlu told that a sanction of 75 warnings (worth of 44 thousand 325 liras) will be applied if the bus, lorry and truck drivers fail to use tachographs, use the tachographs of others or manipulate their tachographs and added that “Transportation companies are now required to plan the transportation trips of the drivers in advance based on transportation distance.”

Moreover, the exit fee was restricted to the number of passengers at the terminals used as interim stations. ■





THE MARKET FOR COMBINED TRANSPORT BY RAIL IS FORECAST TO GROW BY 3% UNTIL 2040

- The European Union has set ambitious targets to increase the rail share to 30% by 2030 as part of its climate goals. It will be challenging to reach this target without substantial changes and improvements to the current transport system – and a substantial shift from road to rail.

The market for combined transport by rail is forecast to grow by 3% until 2040

SCI Verkehr expects further growth of unaccompanied Combined Transport by rail until 2040. In 2040, the market will be around two thirds bigger than in 2023.

With a compound annual growth rate of 3.7% between 2023 and 2040, continental transport should grow at a higher rate than the overall market and almost double by 2040. This development should be mainly driven by the currently planned and further expected expansion of the continental network, especially



in markets like Spain, France and Poland. In 2040, continental transport's share of the Combined Transport market will be 25% compared to 22% in 2023. After a slight decline from 2013 to 2020, the share of rail freight in the European transport market has stabilised ever since, thanks to Combined Transport growth.

"Today more than ever, European Combined Transport (CT) has the capability and mission to deliver. For their third report issued together on the state of Combined Transport (intermodal rail freight), UIRR and UIC present an in-depth analysis of the sector's current state, recent challenges, and the opportunities ahead.

The target is the transition to more sustainable, low-external cost logistics, and Combined Transport's efficiencies are in perfect alignment with the objectives of competitiveness and resilience underpinning the Clean Industrial Deal.

The report highlights Combined Transport as the only alternative to unimodal road transport. Over half of Europe's Unaccompanied Combined Transport connections are cross-border services, and the growth of intermodal rail freight is predicted by 3% per year until 2040.

However, to deliver this growth, Combined Transport must compete on a level playing field with unimodal road transport, and it must be capable of delivering quality services." said, Ralf-Charley Schultze UIRR Director General.

According to figures the top three rail countries by rail modal share are Latvia (53%), Lithuania (46%)



UIRR's report on Combined Transport highlights the importance of intermodal transportation in the coming years. In 2040, continental transport's share of the Combined Transport market will be 25% compared to 22% in 2023. According to Eurostat figures, Combined Transport accounts for at least one in three tonne-kilometres of rail freight transport.

and Switzerland (34%). However, all three countries have seen a decline in rail share since 2013. While Latvia and Lithuania were impacted by the sanctions against Russia after the invasion of Ukraine, the Swiss transalpine rail transit is negatively affected by the lack of high-capacity feeder lines in Germany and Italy. Only six countries had IWW modal shares over 5%, with the Netherlands reporting by far the biggest share with 41%, followed by Romania (21%) and Bulgaria (17%). None of the six top IWW countries was among the top 10 countries by rail share. The modal share of IWW declined in all countries except Finland. On the one hand, a change in the goods mix negatively affected the bulk transport of coal and ores. On the other, increasingly unreliable water levels, especially on the Rhine river, had a negative impact on IWW transport.

The modal share of rail freight in Europe

The modal share of rail freight is generally higher in Northern and Eastern Europe compared to Western and Southern Europe. The Baltic states (Estonia, Latvia and Lithuania) in particular have historically had a high share of rail freight transport due to transit connections with Russia. As a result, the Baltics were hit especially hard after the Russian invasion of Ukraine. Similarly, Finland saw a decrease in cross-border rail transport with Russia. The EU Member States with the lowest shares for rail freight transport (Spain, Greece and Ireland) have relatively low-density networks of single-track railway lines, usually combined with a low industrial base and a well-developed road freight sector. This impedes the development of a competitive rail freight sector. In general, the modal share of IWW is very low all over Europe. IWW is

mostly concentrated on the Rhine river and its tributaries as well as on the lower Danube.

Four countries have IWW modal shares above 10%: The Netherlands (41%), Romania (21%), Bulgaria (17%) and Belgium (11%). All four countries use big natural waterways (Rhine, Danube and Schelde) as the backbone of their IWW systems.

Due to the necessary fluvial and canal systems, IWW infrastructure is far less common than rail infrastructure in Europe, contributing to its overall smaller modal share. While only two EU Member States have no rail systems (Malta and Cyprus), ten have no IWW infrastructure in use. For Belgium, the institutional context is relevant as well. IWW is regionalised, which has provided access to important financial resources for upgrading the entire fluvial system (almost all bridges were heightened) and which the federal rail sector is lacking.



Rail infrastructure in Europe is more efficient compared to road infrastructure

According to the figures issued by International Union for Road-Rail Combined Transport (UIRR), The European rail network has a length of over 245,000 km. Germany alone accounts for roughly a fifth of the total network with 47,000 km. This is the largest national infrastructure in Europe, followed by France with 31,000 km (13%).

While the absolute network length tends to be correlated with the overall size of countries,

the network density is highest in the Czech Republic with 860 km of transport infrastructure per 1,000 km² of land area, followed by Germany with 813 km. This reflects the role of both countries as European transit and logistics hubs. Bulgaria has the highest share of rail infrastructure with 34%, followed by Hungary with 19% and Belgium with 18%. On average, 15% of all transport infrastructure is rail infrastructure. This is below the current modal share of rail freight transport, resulting in a higher performance per network km for rail

compared to road.

Combined Transport grew by almost 9% between 2018 and 2023, while total rail freight transport decreased by over 8% in the same period

Total rail freight transport performance grew by 10% in absolute terms between 2013 and 2018. After a small decline in 2019, rail freight transport was severely hit during the first year of the Covid-19 pandemic, only to immediately bounce back in 2021. However, in 2023 transport volumes decreased substantially again, mostly due to

VOLUME OF FLEET

- ▶ Combined Transport benefits from a modern wagon fleet that has grown significantly in recent years. Between 2013 and 2023, the intermodal wagon fleet in Europe grew by 40%, while the fleet of other wagon types shrank by 13%. Most of this growth happened in the last 5 years. As a result, Combined Transport is well-supplied with a modern fleet able to cope with growing demand. Within the intermodal wagon fleet,

almost 90% of all wagons are fit for the transport of maritime containers and swap bodies, reflecting the higher share of this segment within the CT market.

Most of the remaining fleet are pocket wagons for the transport of semi-trailers for the continental CT market (which can also be used for the transport of containers and swap bodies). RoLa wagons and wagons suited for horizontal transshipment represent only 1% of the wagon fleet respectively, due to the small role of these segments in the overall market.

Cost effect of cape of good hope

Rerouting of maritime trade around the Cape of Good Hope increased prices and travel times. The attacks on ships along the Bab al-Mandab Strait since December 2023 has led to the rerouting of container ships around the Cape of Good Hope instead of the shorter route through the Suez Canal. This adds about one week to trips between East Asia and Europe.

The longer travel times resulted in a container shortage in East Asia as the duration of round trips for maritime containers increased



the combination of price hikes and a slowing economy. Both factors were caused by the energy crisis that emerged in the aftermath of the Russian invasion of Ukraine. Further contributing factors were the closure of the Fréjus rail tunnel between France and Italy due to a landslide, and strikes in France.

At the same time, Combined Transport by rail grew by 25% between 2013 and 2018 and grew further until 2022 with only a slight decline in 2020. Despite a sharp decrease of -8% in 2023, due to the same factors that affected

the overall rail freight sector, the segment still managed to grow by 8.7% between 2018 and 2023 and increased its share of total rail freight by 33%.

According to Eurostat figures, Combined Transport accounts for at least one in three ton-kilometres of rail freight transport. The market analysis, however, estimates the actual share to be around 50%. Germany is by far the most important rail freight market in Europe in absolute terms, due to the size of the economy and its position in the centre of Europe. The second

largest market, Poland, is less than half Germany's size and the third largest market, France, is less than a quarter its size.

Since 2013, the growth of the rail freight market has been primarily driven by Poland (+32%) and Germany (+11%). However, the biggest growth was reported in Bulgaria (+76%). At country level, the highest shares are reported in Norway (63%), Switzerland (60%) and Italy (58%). With only a 3% marketshare, Finland has the smallest CT sector in Europe in relation to the rail freight market.

accordingly. This situation was less acute in Europe due to the imbalance in trade. As a result, the prices for sea transport reached almost half the level of the price hikes caused by the Covid-19 pandemic in 2021/22.

Prices are expected to fall again in the coming months as new ships and containers are added to the existing fleet, reducing the capacity restraints in the market.

- Due to the longer shipping times and higher prices, rail freight transport between East Asia and Europe along the New Silk Road

increased in volume compared to 2023 and 2024.

Combined Transport helps rail freight transport profit from the shift to individual logistics solutions. For decades, block trains for heavy bulk like coal, ores and petroleum were the backbone of the European rail freight network. Due to de-industrialisation and the shift to a green economy, these segments are increasingly losing volume. Meanwhile, the growth of the consumer market and increasing sourcing from overseas are driving demand for individual, small

volume logistics solutions. Single Wagon Load, the classic rail freight product for small volumes, has a cost disadvantage compared to road and struggles to attract these goods. Combined Transport is a cost and time-effective alternative by enabling tailor-made transport of standardised equipment by rail, road, inland waterways and sea from origin to destination. As a consequence, CT was able to increase its market share between 2013 and 2023 in a growing rail freight market and is expected to further gain market share. ■



Highest growth mode in transportation

Combined Transport showed the highest growth of all transport modes with over 40%. This is more than twice as much as road transport, while transport performances stalled for conventional rail and decreased for IWW.

Without this growth for the CT segment, the non-road sector would

have slipped further behind road transport, as conventional rail and IWW were not able to add more transport volume compared to 2010, despite a growing transport market. This is caused by differences in the markets, with road transport driven by on-time logistics of small shipments, whereas conventional rail and IWW depend on bulk logistics of heavy goods, like coal and

petroleum which will be phased out in coming years. CT combines the advantages of small shipment sizes with the cost advantages of bulk transport, providing an alternative to road transport over longer distances.

In 2022, the United Kingdom had the highest punctuality in Europe with 87% of all freight trains reaching their destination within 15 minutes of the scheduled time of arrival. In general, less crowded networks tend to have higher punctuality rates due to more generous buffer times. Differences in time-table discipline also influence punctuality: While Germany, with a punctuality rate below 60%, is very lenient regarding delays on the point of origin (the train path is reserved for up to 20 hours), France and the United Kingdom have tighter regimes regarding departures.

The On-Time Delivery Rate for CT trains is supposedly higher: 81% of all CT trains in the RNE sample data of a single week in September 2023 reach their destination within 15 minutes of the scheduled time of arrival. However, because of the high number of CT trains in Europe, in this sample alone over 300. ■





TÜRKİYE'S ROLE IN RAIL BORDER CROSSING



- Rail freight links with non-EU states to the East are expanding Combined Transport beyond Europe but are challenged by the war condition in Ukraine.

Transcontinental rail freight transport is possible with Asia via direct rail links. Currently, the New Silk Road via Central Asia is the most important transcontinental connection. Connections to the Middle East and India via Türkiye are currently not viable, but in consideration. The war in Ukraine has had a negative impact on transcontinental rail freight. Several trade links between Russia and the Baltics and Finland were lost and transport along the Northern Corridor of the New Silk Road via Russia declined. At the same time, the Middle

Corridor, which provides access to Europe via Türkiye, gained in relative importance. Belarus is the main transit land for connections with Russia and China. Rail freight to and from Belarus was therefore impacted by the war-imposed decline on the Northern Corridor. The most important border crossings are in Brest (with Poland) and Loshja (with Lithuania). Regarding trade with Ukraine, CT gained in importance when it comes to absolute numbers (especially on the broad-gauge connection to Slawkow in Poland), but grain transport is of even bigger importance. In the future, integration with the European standard-gauge network is planned. Ukraine has important rail border crossings

with Poland, Slovakia, Hungary and Romania.

Despite direct access through the Middle Corridor, rail freight transport to and from Türkiye is still mostly related to trade with Europe via the rail border crossing with Bulgaria. Maritime CT is the most important segment by far.

Both rail freight imports and exports via Türkiye have a high share of maritime Combined Transport. On average, around 90% of flows in recent years were CT. Since the beginning of the war in Ukraine and the reopening of the Kars – Tblissi – Baku railway in May 2024, Türkiye is increasingly gaining importance as a transit country for the Middle Corridor to China via the Caspian Sea. ■



NEW TECHNOLOGICAL EVOLUTIONS ARE CREATING A MARKET THAT PRESENTS A SET OF OPPORTUNITIES

► The importance of intermodal and Combined Transport (CT) for the entire rail market and for the entire logistics system cannot be neglected. This new report on the state of play of combined and intermodal transport in Europe shows that these types of rail freight transport are the ones that have supported the entire sector with growth figures over the last decade. Moreover, we are also convinced that in the coming years intermodal transport will continue to be a sector of growth, as it ties in well with industrial evolutions such as smaller average load sizes and different types of goods that need to be transported. New technological evolutions are creating a market that presents a set of opportunities. One trend that will massively influence the future of rail freight is electrification. It will require space and time. This space can be more easily found on

terminals than in green field locations along transport routes. Battery charging takes time, particularly in a heavy-duty environment like good transportation: time which is available during transit (on the rail wagon) or during dwell time at the terminal. These are two assets which intermodal and Combined Transport can offer to the entire logistics chain. Once wagons



UIC Director General François Davenne

are equipped with charging facilities, a whole new set of markets is open for rail freight transport. One of these is the refrigerated transport of perishables in reefer containers, which could then be charged during transport.

Therefore, the technical interoperability of the rail system remains crucial. Innovations in the wrong direction, towards non-interoperability, could potentially completely offset any positive effect which could occur from electrification due to reverse modal shift. Combined Transport operators reach out to the road sector as a solution provider for the time and space issue which will inherently emerge once electric trucks reach the level of breakthrough in the market. These technological evolutions will only be successful if developed with the vision of a full interoperable system in mind. ■



CUSTOMS PROCESSES SEAL THE FATE OF LOGISTICS IN INTERNATIONAL TRANSPORTATIONS

► The international transportation comes to the forefront at the most complex and sensitive cornerstones of today's logistics sector. The customs processes being at the heart of this structure are accepted as not only routine controls performed at the border gates but also as critical elements in terms of sustainability, efficiency and competitiveness of the supply chains.

The long queues at the border gates, the differences in the legislation applicable in different countries and increasing regulation requests make the customs transactions the most fragile point of the logistics chain. Especially in the road transportation to Europe, the unique procedures, document requests and audit standards of each country cause serious difficulties in the operational planning of the logistics companies.

Any problem in the customs processes not only causes delays in the transportation operations but also serious cost increases and decrease in customer satisfaction. As the waiting times increase, so are the transportation costs and the companies fail to satisfy their contractual

obligations, causing loss of prestige in the sector. These facts require that the customs management should not only be seen as a part of the logistics operations but as a strategic area ensuring competitive edge.

The integration of the technological developments into the logistics and transportation sector also play an important role in the effective management of the customs processes. The electronic document management systems, preliminary declaration practices, automatic data exchange and digital monitoring platforms accelerate the processes and improve transparency. However, the differences in the digitalization speed in each country are one of the biggest challenges preventing the effective use of these technologies. The companies also have to continuously implement a monitoring and training process in order to quickly adapt to the changing regulations and to minimize our legislation risk. Especially the tightening of environmental regulations between the EU countries such as green deal

bring along new challenges such as integrating carbon emission and sustainability criteria into logistics processes.

According to the opinions obtained from the experts operating in the sector, there are three main elements for the effective management of the customs processes. These are: the digitalization of the processes, close monitoring of regulations and ensuring the operational harmony at international standards. These elements not only improve the operational efficiency of the logistics companies but also enable them to provide more reliable and faster services to their customers. Therefore, the future of the customs management in international transportation will be shaped by strengthening the technological infrastructure, increasing cooperation between countries and joint actions by all stakeholders in the sector. The optimization of the customs processes will improve the resilience and flexibility of global supply chains and will make important contributions to the sustainable growth of the logistics sector. ■

"WE SHAPE THE FUTURE OF AVIATION WITH SAFETY, SECURITY, SUSTAINABILITY AND DIGITAL INNOVATION"

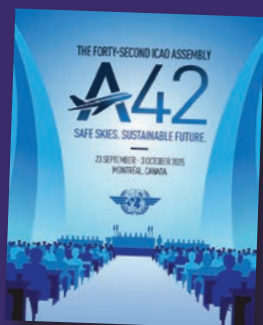
► Every three years, ICAO - the United Nations' civil aviation agency - convenes its Assembly in Montreal. The ICAO Assembly gathered over 2,000 leaders from governments and civil aviation authorities to set international policies, priorities, and standards that govern the civil aviation industry. Key Assembly outcomes pave the way for increased connectivity, improved passenger experience, coordinated aviation security, accelerated airport decarbonization - and more. Airports Council International (ACI) World strongly expressed airport priorities at the International Civil Aviation Organization (ICAO)

Airports Council International (ACI) World achieves major advancements for airports at ICAO 42nd Assembly, positioning airports for capacity growth and rising demand.

42nd Assembly in Montreal (23 September–3 October 2025), calling on regulators to advance safer operations, seamless travel, net-zero pathways, and stronger connectivity as air travel continues to soar. ACI achieved a series of landmark outcomes at the International Civil Aviation Organization (ICAO) 42nd Assembly that will help transform the future of global aviation.

By elevating coordinated, risk-based aviation security, safeguarding recognition of airports' role in decarbonization and their contribution to socio-economic benefits, and promoting connectivity, ACI put airports at the centre of global aviation policy. These key accomplishments were complemented by securing important progress on liberalization





of air transport, digital identity for seamless travel, and aerodrome certification.

"With passenger traffic forecast to double to 18.9 billion by 2047, airports must have been a strong voice. Our proposals put forward practical, collaborative solutions to improve the passenger experience, strengthen safety and security, and enable the socio-economic benefits of aviation to flourish in communities worldwide. This Assembly provided significant support for and resulted in major advancements on important priorities for airports. This is the first step towards turning strategies into measurable actions that will deliver real benefits for travellers, communities, and the global aviation ecosystem. These outcomes confirm airports' role as engines of sustainable growth for the future. We congratulate ICAO for its leadership and collaboration," said ACI World Director General Justin Erbacci.

ACI's advocacy supports a future where airports are empowered to decarbonize via access to renewable energy, passengers benefit from seamless experience, and air connectivity expands-delivering tangible socio-economic benefits for people and communities worldwide. According to the Air Transport



AVIATION INDUSTRY FOCUS ON MEETING GROWING AIRPORTS' ENERGY DEMAND TO ENABLE DECARBONIZATION

Aviation needs to accelerate access to sufficient, reliable, renewable and low-carbon energy to meet growing demand, achieve ICAO and aviation decarbonization goals, and enable future sustainable air transport solutions.

► Airports Council International (ACI), Brazil, the Airport Services Association (ASA World), the International Business Aviation Council (IBAC) and the International Coordinating Council of Aerospace Industries Associations (ICCAIA) have presented main approaches to the energy issue in aviation. This jointly prepared document outlines the importance of energy access for the industry. Aviation needs to accelerate access to sufficient, reliable, renewable and low-carbon energy to meet growing demand, achieve ICAO and aviation decarbonization goals, and enable future sustainable air transport solutions. Some airports face barriers in accessing this energy,

including regulatory constraints, limitations on self-generation capacity, and grid dependency on non-renewable sources. The problem is likely to intensify in the future as traffic increases, and more demand is placed on energy and electricity across multiple sectors. Airports are strategic nodes in the transport system, serving as hubs of economic activity, technological innovation, and energy consumption. As infrastructure operators managing already energy-intensive systems, they will require access to reliable, clean power to meet growing demand, support emerging electricity-dependent technologies, and achieve emissions reductions.

Action Group's (ATAG) latest Aviation: Benefits Beyond Borders report, aviation supports 86.5 million jobs worldwide and contributes USD 4.1 trillion to global GDP (3.9% of global GDP), underscoring the sector's essential role in jobs, trade, and global prosperity

Meanwhile The International Civil Aviation Organization's (ICAO) Strategic Plan 2026-2050 includes the Aspirational Goal of aviation "to serve as an integral part of a thriving, connected, accessible, inclusive, and affordable transport system for people and goods, contributing to socio-economic development, while ensuring no country is left behind."

In addition to rising income levels across the globe, another key driver in the growth of passenger traffic has been a continuous decline in the price of travel, linked to advances in aircraft technologies and efficiencies in service delivery. The deregulation of the aviation market in the 1980s and ongoing liberalization



ACI World Director General Justin Erbacci

of air transport paved the way for increased choice, competition, and connectivity, which has ultimately benefited passengers (consumers) by reducing the overall cost of air transport.

Airline and airport costs

According to ACI official view, despite the demonstrated role of aviation in advancing the SDGs, persistent policy and fiscal barriers continue to undermine air connectivity and impose unjustified

burdens on consumers. Airports are capital-intensive, immobile, inherently risky investments and infrastructure operators face many high fixed costs. This includes the cost of constructing fixed assets, and the cost of financing infrastructure. Similarly, like airports, many airline costs are fixed or semi-fixed. An example of this is aircraft fuel and oil, among others, where prices are largely dictated by global markets. Fuel and oil could make up as much 30% of airlines' operating expenses especially on international scheduled traffic. In consideration of these financial constraints, minimizing the exogenous costs and barriers that are imposed by government on aviation stakeholders will ultimately translate into lower costs for the traveling public.

Limited Implementation of Liberalization hindering connectivity

Today air connectivity becomes an important byproduct of



liberalization. The liberalization of air transport is an enabler of tourism and economic development. Liberalization translates into formalized market access through bilateral agreements that remove restrictions on air transport among States. Reducing protectionist policies leads to greater competition among suppliers of air transport, innovation, and choice for consumers, resulting in traffic growth that stimulates job creation and increases regional gross domestic product (GDP). Industry studies show traffic growth averaged between 12% and 35% after liberalization of air services agreements.

Air travel and high taxation

Aviation industry generally says that international air transport is heavily taxed. Some States use taxes on airline tickets to generate revenues that have the same impact as tariffs on imports or exports. Passengers base their purchasing decision on the all-in airfare; discriminatory and excessive taxation elevates consumer costs and dampens demand for air travel, thereby constraining aviation's contribution to inclusive economic growth.

An important distinction should be made between charges and taxes. As outlined in ICAO's Policies on Charges for Airports and Air Navigation Services (Doc 9082), a "charge is a levy that is designed and applied specifically to recover the costs of providing facilities and services for civil aviation, and a tax is a levy that is designed to raise national or local government revenues, which are generally not applied to civil aviation in their entirety or on a cost-specific basis." Based on an Airports Council International (ACI) study, "removing



Global passenger traffic will more than double by 2053, reaching 22.3 billion

ACI forecasts global passenger traffic will more than double by 2053, reaching 22.3 billion. By 2050, aviation may require 600 to 1,700 terawatt-hours (TWh) of clean electricity annually to support hydrogen and electric aircraft. Meeting this demand could require USD 700 billion to 1.7 trillion in investment across the aviation value chain. Large hub airports could experience a five- to tenfold increase in electricity needs by mid-century for electrification of airport systems and GSE, with some U.S. airports requiring up to five times their current peak power capacity.

Producing or liquefying hydrogen at airports demands a significant amount of energy, often far more than the airport currently uses for all other operations. Peak energy demand will need to be carefully managed, and coordination with energy providers will be essential to ensure grid resiliency and to prevent major power outages or disruptions from affecting airport operations.

Climate change impacts will contribute to higher energy use, due to increased needs for heating and cooling, and airport energy consumption will be driven upward by the growing deployment of electric GSE, airside and landside e-mobility, the adoption of green building standards, and the integration of digital and automated systems across airport facilities. Collectively, these trends underscore the urgent need to plan for renewable and low-carbon energy systems for airports.

Access to renewable and low-carbon energy is fundamental

Reliable access to renewable and low-carbon energy is fundamental for airports seeking to decarbonize their operations and meet the long-term goals of the aviation sector. Airports can pursue renewable energy through on-site generation, such as solar farms and microgrids, or through off-site procurement mechanisms, notably Power Purchase Agreements (PPAs). Airports in some regions may face regulatory barriers that limit on-site renewable energy generation

the US\$90 billion tax burden on air transport would result in an increase of 5.2 million jobs and over US\$180 billion in global GDP.

Infrastructure costs and high concession fees

The large capital outlay and complexities involved in planning, obtaining approvals for, and constructing new airport infrastructure mean that a level of risk is associated with the long-term horizon of these investments. That is, capital investments are concentrated over the short term, whereas cash flows and an expected return on invested capital are perceived over the longer term. In addition to these capital costs, in certain jurisdictions, especially those with private sector involvement, airport operators are often required to pay a fee to governments for the right to occupy land and/or operate. These concession fee payments represent a fixed cost to airport operators.



Lease or concession fee payments to governments amount to as much as 23% of the overall airport costs on average; it is as much as 30% for airports with private stakes as compared to 15% for government-owned and operated entities, and many of the world's largest hubs in places like Asia-Pacific, South America and the Middle East have concession fee payments that represent more than 50% of total operating expenses.

Restrictive visa requirements

On the other hand, international and intra-regional mobility continues to face challenges due

to visa regimes, which may be addressed through harmonized digital solutions and reciprocal arrangements between States, such as mutual visa waivers, regional e-visa platforms, and fast-track entry protocols for frequent and business travellers. According to data from UN Tourism 47% of the world's population is required to obtain a traditional visa prior to travelling. ACI supports a shift away from complex visa and travel authorization frameworks toward interactive digital solutions. While maintaining secure borders is paramount, there exist opportunities to modernize many visa acquisition processes. Several States have made strides by adopting electronic visas, or e-visas, which represent a positive advancement in streamlining travel processes. E-visas serve as effective tools for governments, allowing for improved border management and facilitating seamless mobility for both tourists and business travellers. ■



and use, let alone the sale of excess capacity. Challenges include restrictive grid access, complex permitting, and generation caps. These are often linked to concerns from national utilities about revenue impacts when large customers reduce their grid dependence. In some cases, airports may even be classified as regulated providers, adding further complexity. Balanced policy and regulatory frameworks are essential to support airport decarbonization while safeguarding energy sector stability.

Airports can be turned into energy hubs

Through on-site renewable energy generation and energy storage systems, airports can meet their own operational needs and, in some cases, supply surplus energy to surrounding communities or national grids. Airports can also serve as critical infrastructure platforms for clean mobility and alternative fuels, including electric vehicle (EV) charging, and hydrogen distribution. These roles integrate airports into broader clean energy ecosystems and open opportunities for collaboration with governments, utilities, and the private sector to pilot next-generation technologies like microgrids, vehicle-to-grid systems, and AI-driven energy management.

Airports that have chosen to become energy hubs can thus increase their positive contribution to local communities, by helping these communities at varying scales to accelerate their own energy transition and achieve their decarbonization commitments. However, not all airports can become energy hubs, due to constraints such as limited land availability, outdated grid



infrastructure, constrained capital, or centralized utility control.

Additionally, airports in remote or off-grid locations may require decentralized renewable and low-carbon energy systems, such as standalone solar microgrids, to achieve energy resilience and net zero emissions. Airports that manage their own electricity grids must also plan for sustained investment to keep pace with these evolving energy demands. States can play a key role in facilitating the establishment of energy hubs by creating enabling policy frameworks and providing dedicated support mechanisms to airports.

Facilitating the energy transition of airports to climate goals

Continued commitment to the ICAO Long-Term Aspirational Goal (LTAG) is vital for maintaining credibility and advancing decarbonization. Energy access for airports is a key enabler of this objective, and airports' inclusion in national energy and climate strategies is fundamental. Facilitating the energy transition of airports not only contributes to climate

goals but also drives innovation, strengthens energy resilience, and supports inclusive economic growth.

Expanding renewable and low-carbon energy for airports also supports broader sustainable development goals, such as energy access, poverty reduction, and voluntary technology transfer in under-resourced regions. In addition, renewable energy systems improve energy self-sufficiency and operational continuity, which are critical for climate resilience and for maintaining airport functionality during extreme weather events or grid disruptions. As climate change increasingly disrupts energy infrastructure, especially electricity networks, resilient on-site energy systems and storage become essential. Investing in renewable energies can also contribute to energy security, reducing vulnerability to price volatility and external supply disruptions. By leading in the energy transition, airports strengthen their reputation as innovative and sustainable transport hubs, reinforcing their global competitiveness and long-term viability. ■

A NEW PERSPECTIVE AND VISION FOR AIR CARGO FACILITIES IN AIRPORTS

► It should be emphasized that air cargo industry is undergoing a major transformation, driven by rising trade volumes, evolving customer expectations, regulatory pressures, and the need for greater resilience and sustainability. Traditional cargo facilities, often constrained by aging infrastructure and manual processes, must adapt to meet growing demands for efficiency, scalability, and compliance. IATA The 2025 Vision for the Future of Air Cargo Facilities

addresses these challenges, outlining the technological advancements shaping the next generation of air cargo operations and providing a roadmap for their implementation.

The impact of legacy infrastructure

Cargo facility design has traditionally centered on infrastructure readiness to accommodate growing cargo volumes and increasing automation to enhance operational efficiency and safety. However, shifts in customer

expectations and evolving regulatory requirements have consistently imposed significant challenges on cargo facility operators. Legacy infrastructure and outdated technology can constrict the need for rapid operational adjustments, making it difficult to keep pace with industry changes.

Decades of underinvestment in some locations have resulted in outdated cargo facilities that no longer meet modern operational demands. Some still rely on obsolete technology



Globally airlines transport over 62 million cargo tonnes of goods a year, representing more than 33% of global trade by value but less than 1% of world trade by volume. That is equivalent to \$8.3 trillion worth of goods annually, or \$22.7 billion worth of goods every day. Air cargo is the one of the main forces which enables global trade.

and polluting energy sources, lack the capacity to handle special commodities, or fail to implement modern safety and environmental measures. Without upgrades, these facilities risk becoming bottlenecks in the supply chain, reducing overall efficiency and sustainability. Air cargo facilities must be a core component of airport master planning. Their location should ensure easy access, minimize road congestion, and be designed to accommodate

future growth forecasts. Therefore, it is imperative to design and construct facilities with flexibility and sustainability in mind, ensuring they remain adaptable to industry shifts and technological advancements. The current state of air cargo facilities reflects both progress and persistent challenges.

Safe, secure, sustainable, automated, connected and smart facilities

The future cargo facility will be safe, secure, sustainable, automated, connected, and smart. It will enable seamless data exchange, end-to-end visibility, and AI-driven operational optimization. Technologies such as autonomous ground support systems, real-time tracking, and connected infrastructure will improve efficiency, asset utilization, and shipment flow visibility. Sustainability remains a core priority, with electrification, energy-efficient infrastructure, and carbon reduction initiatives playing a key role in aligning air cargo operations with global environmental targets. As automation and AI adoption accelerate, workforce transformation will be critical, requiring upskilling and new collaboration models between human operators and intelligent systems.

When IATA published the Cargo Facility of the Future In 2018

white paper, as a visionary document outlined air cargo facilities'

transformation through automation, digitalization, and sustainability. The air cargo industry has undergone significant changes since then, influenced by global economic trends, technological advancements. IATA's white paper provides airports, cargo operators and logistics stakeholders with a strategic roadmap for investment, integration, and scalable implementation of these technologies. By leveraging industry-wide innovations and addressing integration challenges, stakeholders can enhance operational resilience, optimize resource allocation, and ensure long-term competitiveness. The document aims to serve as a practical guide to future-proofing air cargo facilities, ensuring they remain efficient, sustainable, and ready to meet the evolving demands of global trade.

Revisiting the cargo facility of the future

The Covid-19 pandemic highlighted the critical role of air cargo in maintaining global supply chains, especially for time-sensitive shipments such as vaccines, medical equipment, and e-commerce deliveries. Throughout this period, cargo emerged as a key revenue driver for airlines, at times representing up to 35% of total airline revenues-double its pre-pandemic share. Although passenger traffic has since rebounded, cargo remains vital to airline profitability, enabling strategic investments in infrastructure,



technology, and process optimization. As of January 2025, the air cargo industry has seen 18 consecutive months of growth, with global Cargo Tonne- Kilometers (CTK) rising by 3.2% year-over-year. While this signifies a moderation from the double-digit peaks observed in 2024, IATA predicts that air cargo volumes will increase by 5.8% in 2025, reaching 72.5 million tonnes. This growth is anticipated to be driven by booming e-commerce and geopolitical factors influencing sea shipments. The industry's long-term growth outlook remains positive, with forecasts of an average annual growth of 3.1% from 2027 to 2043.

A critical sector for global connectivity

However, air cargo's operational environment continues to be complex, shaped by an increasingly volatile, uncertain, complex, and ambiguous

(VUCA) world. The industry encounters challenges such as geopolitical tensions and potential trade policy shifts affecting global commerce flows, disruptions in key trade lanes, sustainability imperatives, and the accelerating shift toward e-commerce. E-commerce continues to be a significant driver of air cargo demand, with projections indicating a 14% annual growth rate through 2026. This surge necessitates advancements in air cargo facilities to handle increased volumes efficiently.

Flying start to 2025 for airfreight, but will the market cool?

As the world navigates new periods of instability, air cargo remains critical for airline profitability and global trade continuity. Airlines and airports are increasingly investing in air cargo infrastructure to capitalize on growth opportunities. Simultaneously, shippers,

freight forwarders, and logistics providers are demanding excellence, simplicity, traceability, sustainability, transparency, and speed in air cargo services. The vision outlined in IATA's 2018 Cargo Facility of the Future white paper has been progressively realized. Over the past years, technologies anticipated in the vision have been adopted by air cargo stakeholders at different levels. The e-commerce boom has significantly contributed to developing new technological solutions for air cargo, as e-retailers focus on optimizing processes along their supply chains and increasing visibility and digitalization. The cargo facility of the future is envisioned to be safe and secure, sustainable, automated, connected, and smart. This evolution ensures that cargo facilities are fit for purpose in size, location, and for the people who use them, aligning with the industry's commitment to efficiency and sustainability.



Challenges and opportunities to evolve

Air cargo facilities act as critical connection points between land and air transportation. They play a vital role in ensuring that shipments are accepted, handled, and prepared for air transport while adhering to strict safety, security, and quality standards, all within tight schedules.

Ensuring that these facilities are suitable for their intended purpose and easily accessible by other transportation modes is essential for the efficiency of the air cargo industry.

Adapting cargo facility models to different needs

Air cargo facilities worldwide follow different models based on location and functional focus. In-airport cargo facilities tend to be more complex than off-airport counterparts. Besides the essential requirement of adequate infrastructure (including cargo buildings, staging and storage areas, landside and airside access) they must also accommodate various stakeholders, such as airline personnel, freight forwarders, truckers, government agencies, and customs authorities. In terms of functionality, in-airport facilities may be designed for transshipment, supporting hub operations for home-based carriers, or they may focus more on local import and export activities. They can have single or multi-story designs depending on spatial constraints and throughput needs. High throughput, rather than staging or storage, is often the primary focus of in-airport facilities, as they are expected to facilitate rapid cargo movement. Conversely, off-airport facilities typically emphasize storage and distribution processes, allowing operators to manage logistics in a more extended timeframe. The level of technology in a facility can range from semi-automated to fully automated,

depending on the interaction between infrastructure, equipment, and personnel.

Sustainability challenges

Staffing issues are one of the most pressing concerns for cargo facility operators. The 2022 IATA Global Skills Survey revealed that 57% of cargo operations stakeholders felt they lacked sufficient staffing for smooth operations. The primary challenges identified were the shortage of experienced personnel, a lower-than-usual number of applicants post-pandemic, and high turnover due to working conditions. Furthermore, 40% of respondents in the cargo operations sector anticipated continued difficulties in recruiting and retaining employees, with this trend being particularly pronounced in Europe and the Americas. Low technology adoption is also a factor for staffing challenges. Young professionals are eager to work in environments that leverage cutting-edge technology; therefore, it is crucial for the air cargo industry to accelerate its modernization efforts to attract and retain young talent.

As sustainability becomes a top priority for aviation, air cargo facilities must align with industry-wide efforts to reduce environmental impact. This requires transitioning away from polluting energy sources, modernizing inefficient infrastructure, optimizing equipment and operations, and minimizing waste generation. Regulators also enforce stricter sustainability standards in some regions, requiring cargo facilities to comply with more rigorous environmental regulations. Financial investors increasingly demand sustainability reporting from facility owners as part of their funding considerations. Beyond operational sustainability, cargo facilities must also prepare for the effects of climate change. Rising

temperatures and extreme weather events can disrupt operations, making climate resilience a crucial aspect of facility planning. Operators must proactively assess climate-related risks and implement mitigation strategies to ensure long-term operational stability. The current state of air cargo facilities reflects both progress and persistent challenges. While advancements in technology and infrastructure have improved efficiency, many facilities remain outdated and need modernization. Ensuring that cargo facilities are well-integrated into airport planning, adaptable to evolving demands, and committed to sustainability will be crucial for the industry's future. Addressing workforce shortages and preparing for climate-related disruptions will ensure that air cargo facilities remain resilient, efficient, and competitive in a rapidly changing logistics landscape.

New transformation approaches for more efficient operations

Who is driving cargo facility transformation? In many cases, government authorities managing airports take a strategic view, considering cargo catchment areas, airspace capacity, and international or domestic flight operating demands when planning facility transformations. However, airlines and ground handling agents also seek to modernize their infrastructure to enhance efficiency and cost-effectiveness without compromising safety and security. Trucking companies and freight forwarders also play a role in shaping cargo facilities, particularly when their operations contribute significantly to cargo volume, product diversity, and frequent utilization of in-airport or off-airport infrastructure. A 2023 IATA survey of 26 cargo facility operators revealed that while the average facility was at least 20 years

old, most respondents had renovated or upgraded their facilities in the last five years or were doing so regularly. Digitalization and process automation were key drivers of these upgrades, with documentation and acceptance/release processes showing the highest level of technological advancement, while apron interactions remained the least developed.

Focus on high-growth cargo segments

The rapid expansion of e-commerce has fundamentally changed the requirements for cargo facilities worldwide, with rising consumer demand for fast deliveries driving investment in automated sorting, tracking, and processing capabilities. Some airports in Europe have expanded their express cargo facilities to accommodate the surge in online retail shipments and developed integrated advanced sorting systems, digital

tracking, and strategic partnerships with leading e-commerce logistics providers to ensure a streamlined, high-speed cargo operation. Similar developments are seen in North America, where some airports have scaled up operations to meet the demands of major e-commerce players. Beyond e-commerce, other high-growth cargo segments are also shaping the industry's future. Pharmaceutical and healthcare logistics have gained prominence, with major hubs investing in temperature-controlled storage and regulatory-compliant handling solutions to support the expanding global pharmaceutical trade. Cold chain logistics for perishable goods, including fresh produce and seafood, drive investment, particularly in Latin America, Africa, and Southeast Asia, where agricultural exports rely on robust refrigeration infrastructure to maintain product integrity. The transportation of high-value

and time-sensitive goods, such as luxury fashion, automotive parts, and aerospace components, has led airports to enhance their security, handling speed, and processes to facilitate customs procedures. Just-in-time manufacturing has increased reliance on air cargo to quickly deliver critical industrial components, further strengthening demand for efficient cargo processing. Another niche but significant segment includes live animal transport, with facility operators adding specialized handling facilities to cater to the movement of livestock, racehorses, and exotic species under strict regulatory oversight. These developments highlight the critical role of cargo facility transformation in supporting both current and future supply chain demands. With growing demand across these diverse cargo segments, airports and logistics providers are prioritizing



IMPORTANCE OF DIGITALIZATION, AUTOMATION AND OPTIMIZATION

► Recent proof-of-concept studies have demonstrated that digitalizing cargo handling at the piece level leads to more accurate flight planning and significant capacity optimization. One study analyzing 262 AWBs across nine flights revealed that only 27.5% had an accurate declared cargo volume, with 72.5% showing discrepancies beyond $\pm 10\%$. Correcting these discrepancies resulted in improved planning, ensuring that available space was utilized more effectively. In another study, using a

digital planning tool over three months reduced build-up operation times by 33.75% per flight while optimizing load capacity, creating an additional 23.6% usable space for cargo. In a separate case study, retrospective analyses of 1,000 global cargo flights demonstrated that, on average, 24.8% of space per flight was underutilized, with 16.4% being viable for additional cargo. The findings underscore the importance of real-time digital visibility and accurate volumetric data in addressing

inefficiencies. By integrating digitalization into Cargo Management Systems (CMS) and airline booking platforms, cargo handlers and airlines can streamline planning, reduce inefficiencies, and optimize revenue potential. With the industry pushing for greater adoption of digital standards such as ONE Record and Interactive Cargo, the air cargo industry is moving toward a future where digitalization, automation, and real-time optimization will define the next generation of air cargo operations. ■

automation, digitalization, and sustainable infrastructure to ensure the continued evolution of air cargo operations, aligning with global industry initiatives.

Evolving market forces shaping facility transformation

The intersection of market demand, technological advancements, and evolving regulatory requirements drives the transformation of air cargo facilities. The global air cargo market is projected to experience steady growth, with IATA forecasting an increase in freight volumes as trade and e-commerce continue to expand. However, macroeconomic uncertainties and geopolitical instabilities are pushing facility operators and investors to build resilience and flexibility into their infrastructure plans.

Regional market trends illustrate varying transformation priorities. In Asia-Pacific, air cargo demand remains strong due to high-volume manufacturing and the rapid expansion of e-commerce logistics. North America is investing in modernizing infrastructure to accommodate express freight and integrated multimodal transport solutions. Meanwhile, European

markets are focusing on automation, digitalization, and sustainability to streamline operations. In emerging regions, such as Africa and Latin America, investment in cargo infrastructure is increasing to support agricultural exports and expand trade networks.

Technology is playing a central role in shaping the future of air cargo facilities. Digitalization and automation are key priorities, with cargo community systems, data exchange, and artificial intelligence being integrated to enhance efficiency and tracking transparency. Automated cargo handling systems and robotics are also being adopted to reduce processing times and minimize labor-intensive operations. These technological shifts align with industry initiatives to standardize processes and improve supply chain visibility. Sustainability is becoming a critical factor in cargo facility transformation. Airports and cargo operators are adopting green technologies such as solar-powered warehouses, electric ground support equipment, and more energy-efficient building designs to align with international environmental goals. Sustainable building materials, such as recycled steel, low-carbon

concrete, and bio-based insulation, are being increasingly utilized in cargo facility construction to reduce environmental impact. Additionally, end-of-life planning for cargo infrastructure is gaining attention, ensuring that decommissioned facilities are dismantled with minimal waste and components are repurposed or recycled where possible.

The potential of off-airport cargo facilities

In regions where export operations rely heavily on shipper-built ULDs (Unit Load Devices) to support volume, off-airport cargo facilities are becoming a more viable solution to enhance efficiency. These facilities often operate under different national aviation regulations while maintaining the same security standards as on-airport locations. By shifting some cargo handling functions away from the airport, overall capacity can be increased, congestion reduced, and processing streamlined.

From a strategic perspective, off-airport facilities offer greater flexibility in handling cargo flows and supporting logistics networks. Warehouses located outside the airport perimeter can serve

as fulfillment centers, allowing logistics providers to optimize their internal networks without being constrained by airport space limitations. This setup enables faster sorting, enhanced supply chain integration, and more efficient last-mile delivery.

However, moving operations off-airport also presents challenges. Ensuring secure and efficient transport between off-airport warehouses and airside operations is critical to maintaining the integrity of the supply chain. Additional considerations include regulatory compliance, the need for dedicated transport corridors, and potential delays caused by off-site processing. Investments in technology, such as automated cargo tracking and secure transport solutions, can help mitigate these challenges.

For exports, the prevalence of shipper-built ULDs directly impacts the feasibility of off-airport activities. The higher the proportion of pre-built ULDs

at an airport, the more opportunities exist for off-airport cargo processing, including security screening and pre-checking of shipments. This also opens the door for more self-service options, where stakeholders can input cargo or truck information before arriving at the cargo facility, further streamlining handling operations.

As demand for air cargo continues to grow, off-airport solutions will play an increasing role in alleviating congestion and optimizing cargo flows. The industry can create a more resilient and scalable air cargo infrastructure by integrating facilities into broader logistics strategies.

Closing the innovation gap with digitalization

The air cargo industry has long struggled with a significant innovation gap, lagging other sectors in digitalization and optimization. Many cargo operations still rely on incomplete or

inaccurate data, limiting operational efficiency and hampering optimization efforts. Underutilized cargo capacity remains a persistent challenge due to outdated processes and the absence of comprehensive data integration, leading to inefficient load planning and revenue loss. Additionally, manual workflow slows cargo handling, making automation an essential requirement for the industry's future. The industry has recognized that transitioning from manual operations to a fully digital and optimized ecosystem is key to this transformation. Technologies such as RFID, data loggers, and IoT-based tracking are increasingly integrated into air cargo operations, providing greater visibility and planning capabilities. The modular nature of digitalization allows for a gradual transition. Organizations can first digitalize cargo, introduce efficiency tools, and progressively implement automation solutions to achieve



optimized cargo processes. This phased approach ensures that facilities can enhance efficiency without causing significant operational disruptions. IATA identified six technological trends that were expected to shape the future of air cargo. Nowadays, many of these technologies have made their way into cargo facilities, significantly transforming how operations are conducted. Some have become essential enablers of efficiency and automation, while others remain in an early adoption phase, offering glimpses of their future impact. The evolution of these six technologies has accelerated the transformation of cargo facilities into hyper-efficient, data-driven, and sustainable environments. Despite limited large-scale deployment, all stakeholders of the industry now have greater clarity on how and when these technologies will begin playing a transformative role in the industry. At the same time, new technological advancements have emerged, disrupting the logistics and air cargo landscape in ways previously unanticipated.

One notable example is Artificial Intelligence (AI), which has rapidly proven its potential to impact cargo operations in the past few years, revolutionizing predictive analytics, automation, and decision-making. This underscores how quickly the technological landscape can evolve, forcing industry leaders to continuously reassess and adapt their strategies.

Conclusion: The air cargo industry is entering a new era

The air cargo industry is entering a new era, fueled by rising trade volumes, uncertainty, evolving customer expectations, and growing demand for efficiency and sustainability. Facilities that once relied on manual processes and outdated infrastructure need now to accelerate their transformation to meet these changing demands.

The emerging technologies outlined in this white paper are key to this evolution. These advancements will improve operational performance, enhance transparency, and reduce the industry's environmental footprint. Yet successful adoption of these technologies requires overcoming significant hurdles, including legacy infrastructure constraints, workforce adaptation, integration complexities, and regulatory compliance.

Cargo stakeholders must strategically address these challenges through proactive investments, workforce training, and collaborative industry-wide standards. By doing so, air cargo facilities will become smarter, more automated, adaptable, and aligned with global sustainability goals. The industry's future resilience and competitiveness depend on making these strategic decisions, ensuring cargo operations are prepared for the future. ■

SIXTH CONSECUTIVE MONTH OF YEAR-ON-YEAR GROWTH IN AIR CARGO

► The International Air Transport Association (IATA) released data for August 2025 global air cargo markets. According to figures total demand, measured in cargo tonne-kilometers (CTK), rose by 4.1% compared to August 2024 levels (+5.1% for international operations). Capacity, measured in available cargo tonne-kilometers (ACTK), increased by 3.7% compared to August 2024 (+5.5% for international operations). "Air cargo demand grew 4.1% in August, marking the sixth consecutive month of year-on-year growth. Volumes continue to grow even as global trade patterns change. Air cargo has benefitted from a shift from sea for some high value goods as shippers try to minimize the risk of tariff changes. And growth patterns indicate some being diverted away from North America, fueling stronger growth for the Europe-Asia, Within Asia, Africa-Asia, and Middle East-Asia trade lanes. This adaptability is vital as shippers navigate the evolving landscape of US tariff policy," said Willie Walsh, IATA's Director General. Trade Lane Growth Meanwhile air freight volumes in August 2025 increased significantly across most

major trade corridors. Europe-Asia and Within Asia posted robust double-digit growth, while Middle East-Asia, North America-Europe, and Africa-Asia also saw notable gains. In contrast, Asia-North America, Middle East-Europe and Within Europe recorded declines. August Regional Performance Asia-Pacific airlines saw a 9.8% year-on-year growth in air cargo demand in August. Capacity increased by 6.9% year-on-year. North American carriers saw a 2.1% year-on-year decrease in growth for air cargo in August, the slowest growth



of all regions. Capacity decreased by 1.0% year-on-year. European carriers saw a 3.2% year-on-year increase in demand for air cargo in August. Capacity increased 4.2% year-on-year. Middle Eastern carriers saw a 2.7% year-on-year increase in demand for air cargo in August. Capacity increased by 4.3% year-on-year. Latin American carriers saw a 2.1% year-on-year increase in demand for air cargo in August. Capacity increased by 5.0% year-on-year. African airlines saw a 11.0% year-on-year increase in demand for air cargo in August, the strongest rise of all regions. Capacity increased by 12.3% year-on-year. ■

ENVIRONMENTAL FRIENDLY PRACTICES SET A NEW COURSE FOR THE LOGISTICS



The logistics sector accelerates its transformation against the global climate crisis with environmental friendly investments. Numerous practices from electric vehicles to smart warehouses, from alternative fuels to intermodal transportation form the basis of sustainable transportation.

► Today the global warming, consumption of natural resources and environmental impacts of carbon emissions challenge all the sectors to develop more sustainable solutions. Being at the center of this transformation, the logistics sector not only contributes to the economic growth but also undertakes the responsibility to minimize environmental impacts. Launching environmentally friendly practices from reducing the carbon footprint in logistics operations, decreasing energy consumption and recyclable packages to vehicles running on alternative fuels are not an option but are now mandatory. The leading companies steering the sector not only have a competitive edge thanks to their investment powers, technological adaptation skills and their visionary approach but also leads the

way for extending the sustainability culture throughout the entire supply chain. The operational efficiency gained from electrical vehicle fleets, solar energy warehouse investments, intermodal transportation solutions and digitalization are the cornerstones of the environmentally friendly logistics approach.

While the global initiatives like the European Green Deal increase the environmental pressure on the logistics sector because of the carbon neutrality goals, the companies continue to develop faster environmentally friendly and efficient business models to satisfy these goals. Accordingly, the green logistics not only protects the environment but also has a strategic importance for decreasing operational costs, supporting sustainable growth and strengthening the corporate reputation.

In this article, we will look closer on how the logistics sector achieve the sustainability goals, how the environmentally friendly transportation models are launched and the best practices of the companies leading this transformation. We will examine concrete steps taken in many fields from technologies reducing carbon emissions to green supply chain management and from the use of alternative energy resources to climate friendly storage solutions.

The company also prefers alternatives with low carbon emissions such as road transportation with Euro 5 and Euro 5 vehicles and intermodal solutions like RO-RO and RO-LA, railway and sea transportation. This ensures both the minimization of its impact on the environment and also increases its operational efficiency. ■

LOGISTICS SECTOR GETS 7% FROM THE TOTAL LOAN VOLUME

- The Banks Association Türkiye (BAT) published a comprehensive report titled "Logistics Sector As An Element of the Competitiveness" shedding light on the economic and strategic importance of the logistics sector. The Report covers the sector's global and national evolution, growth potential, competitiveness level, access to financing and sensitivity to climate and environmental risks from various aspects.

According to the report by BAT, the logistics sector is not just comprised of transportation but is a strategic area shaping the competitiveness of the countries. Türkiye serves as a natural bridge between Europe, Asia and the Middle East thanks to her geographical location and therefore, is globally more advantageous in this area. In a period especially when the supply chains are restructured and production is moved to closer geographies, Türkiye is believed to have the potential to get a higher share from this process.

Protection measures and logistics are reshaped

The Report draws attention to the fact that the conservative trends and geopolitical uncertainties increasing across the world also change the international logistics dynamics. This causes the need for the countries to focus more on their domestic markets and to strengthen their logistics infrastructures in critical sectors. According to the Report, Türkiye has an important advantage thanks to its being close to major markets such as European Union and having a developed transportation infrastructure.

Making a contribution of around 10 percent to the GDP, Türkiye assumes an important role in the Turkish economy and uses 7% percent of the total loan volume.



Emphasizing that the logistics sector assumes a critical role not only in terms of economic but also socially, the Report highlights the importance of the sector regarding especially the fast delivery of urgent help during disasters and the sustainable management of the food supply chain. The pandemic process and the natural disasters which occurred afterwards once again revealed how strategic this areas is.

Strong access to financing, low NPL ratio

One of the interesting sections of the Report is about the data regarding the financial structure of the logistics sector. The Chairman of the Board of the Banks Association of Türkiye Alpaslan Çakar told that the logistics sector gets a share of 7 percent from the total loan volume and this ratio is aligned with the economic weight of the sector. Moreover, the low non-performing loan (NPL) ratio of 1 percent for the sector indicates that financial discipline and repayment

performance of the sector.

Noting that the sector makes a contribution of around 10 percent to the gross domestic product, the Report states that it has a big potential in terms of employment. The logistics sector provides direct and indirect employment opportunities to around 1.7 million people. This indicates that the sector does not only contribute to the economic growth but to the employment, as well.

Türkiye might become a logistics hub

Alpaslan Çakar emphasized that Türkiye has the potential to become a regional logistics hub in his evaluation on the sector. If especially the investments in the port, railway and road infrastructure continue, Türkiye might assume a more effective role in the supply chain of the European Union and the neighboring countries. Çakar said that these developments will have positive impacts on the foreign trade volume of Türkiye. ■

FOREIGN TRADE ACCORDING TO GENERAL TRADE SYSTEM BY TOP TWENTY COUNTRIES, 2024, 2025

	AUGUST					JANUARY-AUGUST				
	2024		2025		Change %	2024		2025		Change %
	Value	Share	Value	Share		Value	Share	Value	Share	
Exports										
Total	22.000.689	100,0	21.729.030	100,0	-1,2	170.704.979	100,0	178.018.370	100,0	4,3
Germany	1.672.660	7,6	1.773.278	8,2	6,0	13.620.902	8,0	14.650.974	8,2	7,6
USA	1.336.912	6,1	1.276.059	5,9	-4,6	10.554.811	6,2	10.672.718	6,0	1,1
United Kingdom	1.239.613	5,6	1.149.891	5,3	-7,2	9.796.929	5,7	11.005.119	6,2	12,3
Italy	844.546	3,8	978.713	4,5	15,9	8.332.938	4,9	8.735.621	4,9	4,8
Iraq	1.115.755	5,1	978.372	4,5	-12,3	8.382.222	4,9	7.574.434	4,3	-9,6
Spain	754.805	3,4	824.494	3,8	9,2	6.606.003	3,9	6.905.773	3,9	4,5
UAE	1.019.696	4,6	806.070	3,7	-20,9	5.566.204	3,3	6.665.371	3,7	19,7
France	704.185	3,2	770.114	3,5	9,4	6.402.725	3,8	7.043.284	4,0	10,0
Netherlands	732.140	3,3	762.960	3,5	4,2	5.800.227	3,4	5.521.966	3,1	-4,8
Romania	681.849	3,1	582.143	2,7	-14,6	5.248.759	3,1	5.598.015	3,1	6,7
Poland	586.108	2,7	545.917	2,5	-6,9	4.007.919	2,3	4.116.817	2,3	2,7
Russia	752.197	3,4	519.677	2,4	-30,9	5.670.298	3,3	4.299.822	2,4	-24,2
Morocco	279.741	1,3	440.715	2,0	57,5	2.140.967	1,3	2.837.448	1,6	32,5
Belgium	359.628	1,6	415.974	1,9	15,7	2.835.707	1,7	3.283.430	1,8	15,8
Bulgaria	416.403	1,9	397.750	1,8	-4,5	3.290.750	1,9	3.538.797	2,0	7,5
Greece	439.069	2,0	362.243	1,7	-17,5	3.203.897	1,9	3.764.982	2,1	17,5
Ukraine	286.412	1,3	333.560	1,5	16,5	2.255.393	1,3	2.539.629	1,4	12,6
Kazakhstan	344.371	1,6	309.884	1,4	-10,0	2.146.568	1,3	2.131.714	1,2	-0,7
Syria	180.492	0,8	301.933	1,4	67,3	1.350.386	0,8	2.098.652	1,2	55,4
Egypt	374.237	1,7	291.806	1,3	-22,0	2.690.263	1,6	2.567.693	1,4	-4,6
Others	7.879.870	35,8	7.907.477	36,4	0,4	60.801.113	35,6	62.466.112	35,1	2,7

Imports										
Total	27.004.525	100,0	25.939.978	100,0	-3,9	225.518.282	100,0	238.158.778	100,0	5,6
China	4.013.070	14,9	3.899.479	15,0	-2,8	29.441.409	13,1	32.489.345	13,6	10,4
Russia	3.415.278	12,6	3.285.754	12,7	-3,8	29.252.734	13,0	28.554.496	12,0	-2,4
Germany	2.043.168	7,6	2.258.344	8,7	10,5	17.319.476	7,7	19.909.912	8,4	15,0
USA	1.338.853	5,0	1.301.407	5,0	-2,8	10.851.854	4,8	11.277.297	4,7	3,9
Italy	1.322.608	4,9	1.147.541	4,4	-13,2	12.398.934	5,5	10.676.313	4,5	-13,9
Switzerland	701.915	2,6	813.943	3,1	16,0	6.554.935	2,9	8.947.575	3,8	36,5
France	1.034.561	3,8	781.637	3,0	-24,4	8.645.476	3,8	8.538.744	3,6	-1,2
South Korea	715.951	2,7	698.883	2,7	-2,4	6.200.652	2,7	6.471.776	2,7	4,4
Spain	694.580	2,6	677.595	2,6	-2,4	6.203.766	2,8	6.430.578	2,7	3,7
United Kingdom	490.586	1,8	513.529	2,0	4,7	4.555.649	2,0	4.632.755	1,9	1,7
Japan	370.242	1,4	511.396	2,0	38,1	3.240.739	1,4	3.294.861	1,4	1,7
UAE	608.101	2,3	492.987	1,9	-18,9	4.285.252	1,9	5.817.026	2,4	35,7
Malaysia	450.411	1,7	394.824	1,5	-12,3	2.932.311	1,3	3.273.879	1,4	11,6
Poland	419.115	1,6	387.618	1,5	-7,5	3.754.992	1,7	3.830.547	1,6	2,0
Netherlands	480.691	1,8	384.761	1,5	-20,0	3.332.375	1,5	3.515.282	1,5	5,5
India	620.052	2,3	373.339	1,4	-39,8	4.619.242	2,0	3.994.091	1,7	-13,5
Belgium	266.899	1,0	328.765	1,3	23,2	2.660.120	1,2	2.740.102	1,2	3,0
Kazakhstan	230.827	0,9	312.800	1,2	35,5	2.297.306	1,0	2.932.821	1,2	27,7
Vietnam	267.482	1,0	283.418	1,1	6,0	1.886.934	0,8	1.929.999	0,8	2,3
Romania	196.970	0,7	260.168	1,0	32,1	2.530.804	1,1	2.982.123	1,3	17,8
Others	7.323.167	27,1	6.831.790	26,3	-6,7	62.553.322	27,7	65.919.258	27,7	5,4

TurkStat, Foreign Trade Statistics, August 2025

** Countries are ranked by February, 2025 figures.

*** Thousand US \$

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