



PRESIDENCY OF
THE REPUBLIC OF TÜRKİYE
**INVESTMENT &
FINANCE OFFICE**

**Global Change:
How International Trade Is
Reshaping The Global Economy**

Türkiye's Logistics Capabilities

invest.gov.tr

July 2025

Agenda



**OUTLOOK TO
GLOBAL TRADE
& LOGISTICS**



**OUTLOOK TO
TRADE &
LOGISTICS IN
TÜRKİYE**



**LOGISTICS
CAPABILITIES
OF TÜRKİYE**



**GLOBAL
TRENDS IN
TÜRKİYE**



Factors Global Supply Chains Are Struggling With

Global Outlook



Global Economic Uncertainty



Shifting Geopolitical Relations



Regulatory Compliance



Sustainability Urgency



Changing Consumer Demands



Labor Shortages



Cybersecurity

To Address The Supply Chain Challenges

Global Outlook



Foster Supply Chain Resilience



Prepare Contingency Plans



Embrace Cutting-Edge Technology



Fortify Cyber Defenses



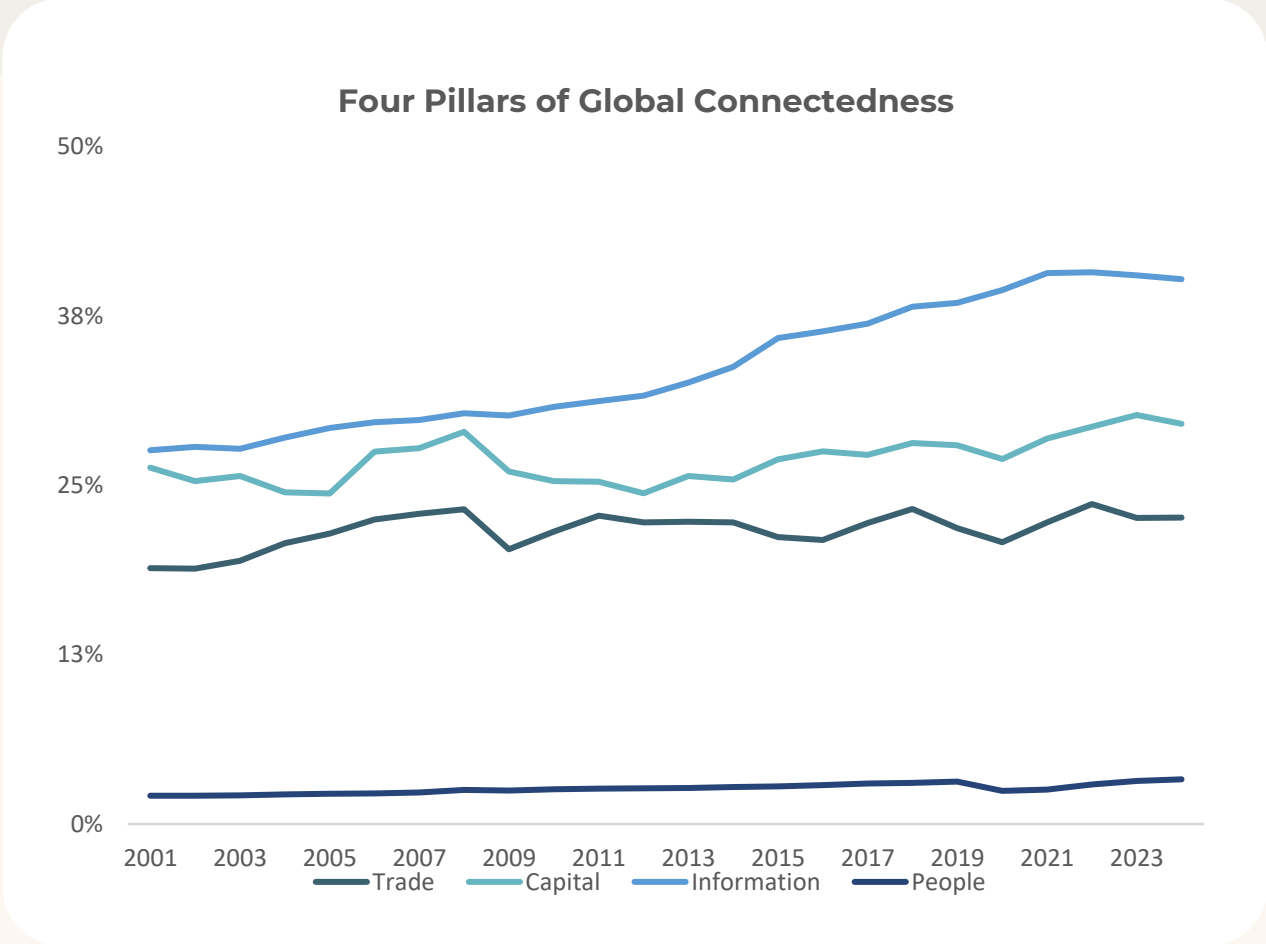
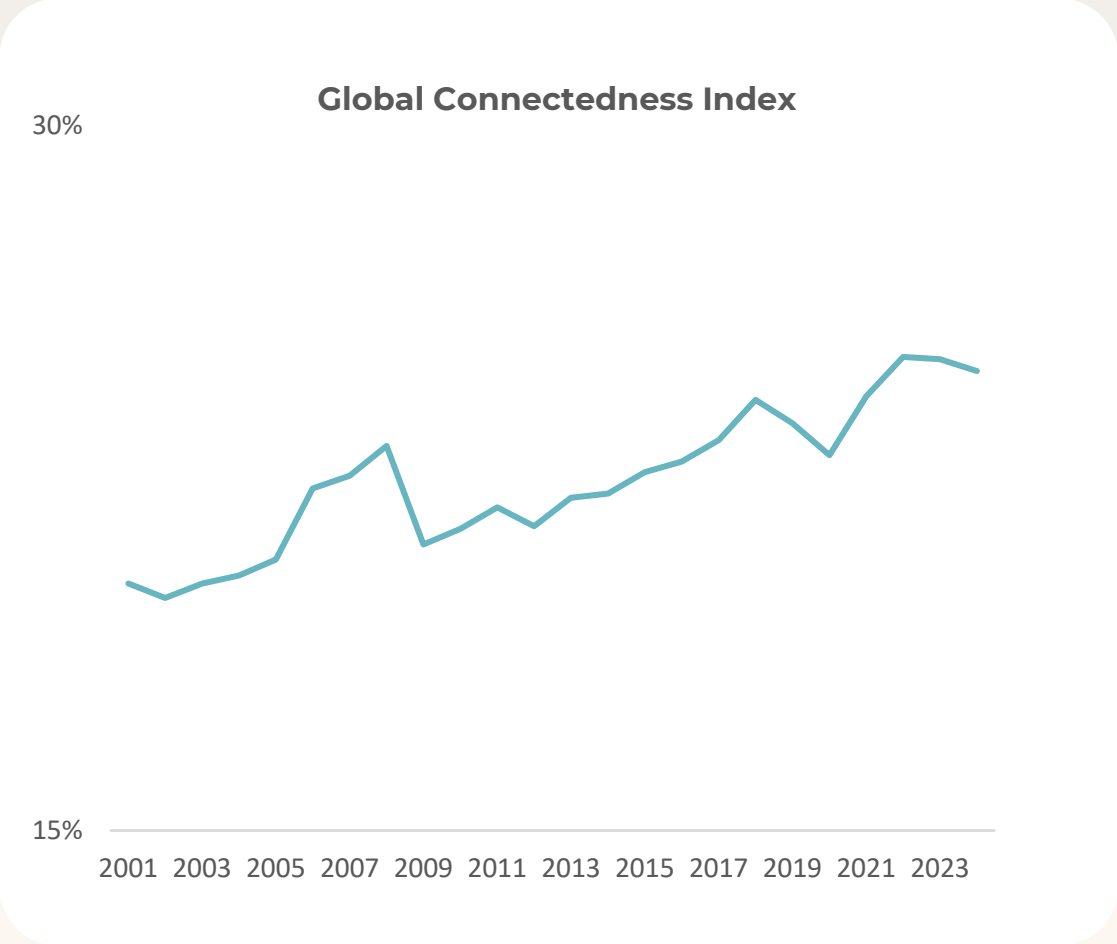
Diversify Sourcing & Fulfillment
(On-Shoring and Near-Shoring)



Keep Liquidity in Your Business

What Happened: Globalization or Deglobalization

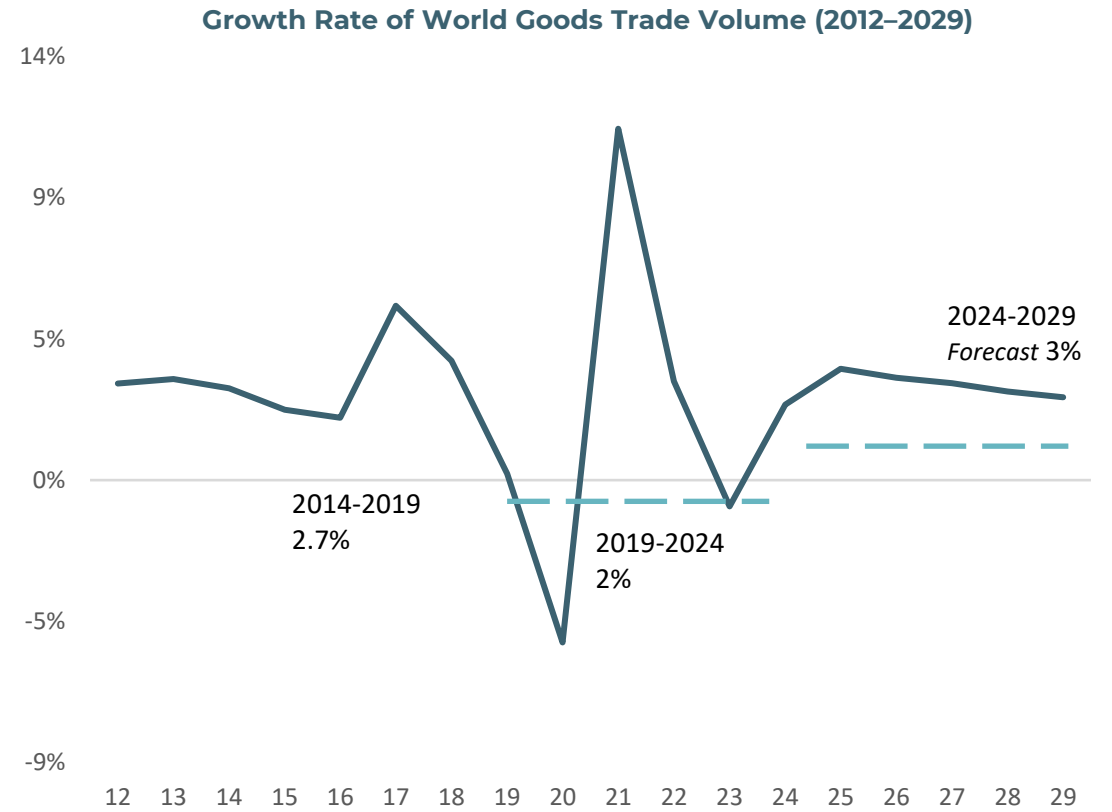
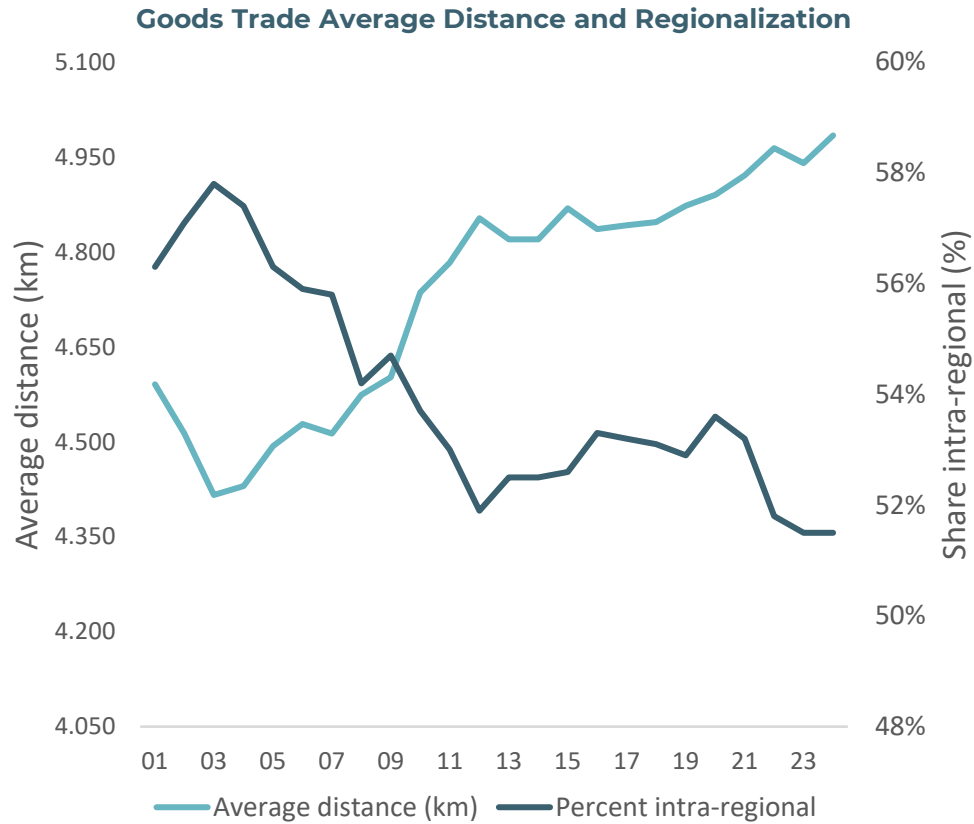
The growth of international flows is keeping pace with the growth of domestic activity.



Source: DHL *2024 projected data

What Happened: World Trade Activity

Resilience of global trade through successive shocks



Logistics Sector Global Outlook

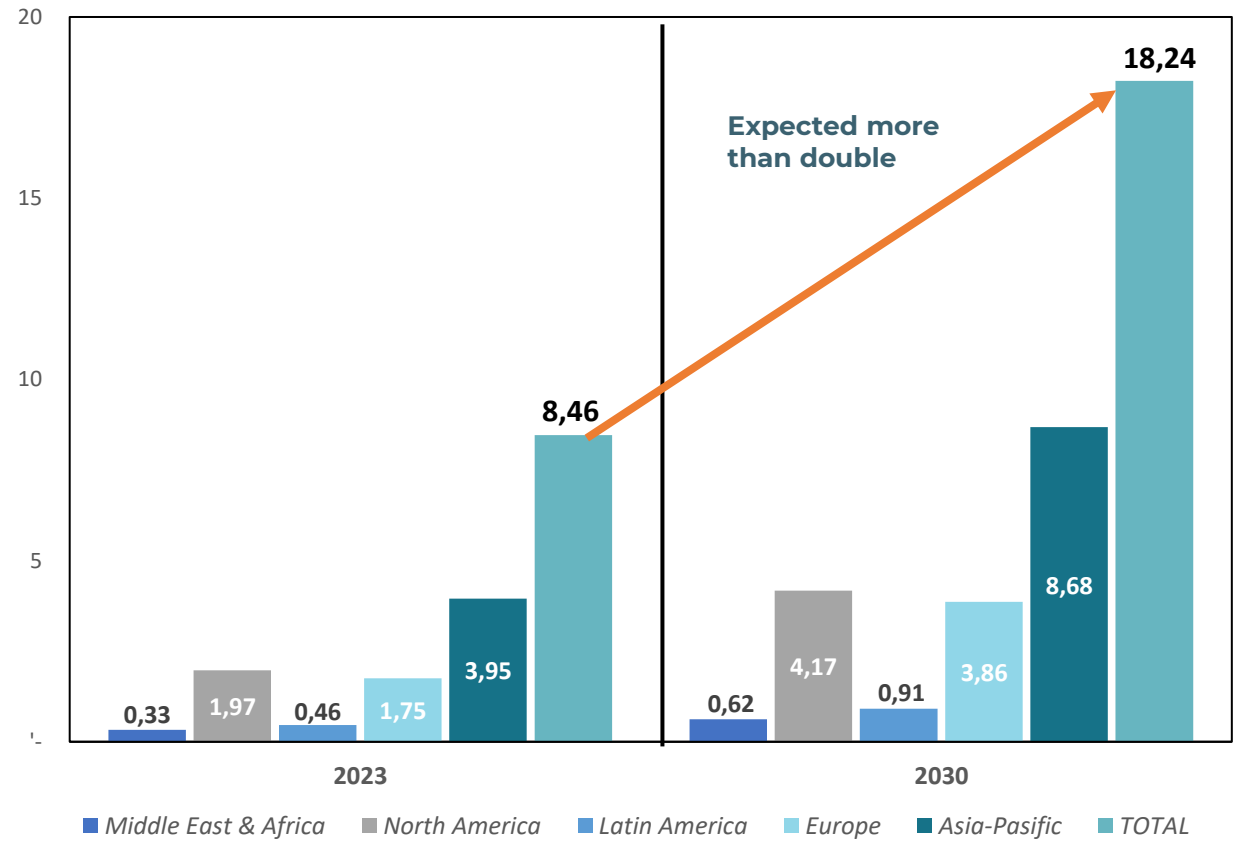
A Seismic Shift In Supply Chain Strategy

11.6% of CAGR is expected from 2023 to 2030

	CAGR (2023-2030)
Middle East & Africa	9.4%
North America	11.3%
Latin America	10.2%
Europe	12.0%
Asia-Pasific	11.9%
TOTAL	11.6%

Logistics sector continues to grow strongly on a global scale

The Global Logistics Market Size, trillion USD



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Strategic Location

Hub for Multinationals to Manufacture, Export and Manage

Working Hours Intersect with 16 Time Zones

- PROXIMITY TO MAJOR MARKETS**
1.3 billion people, \$10.3T import and \$32.1T GDP in Europe, MENA and Central Asia at 4-hour flight-distance
- CONNECTIVITY**
Turkish Airlines connects you to 353 destinations in 131 countries
- MANUFACTURING & EXPORT HUB FOR MULTINATIONALS**
- AS WELL AS MANAGEMENT, LOGISTICS, PROCUREMENT & TRAINING HUB FOR MULTINATIONALS**

 66 countries	 70 countries	 Production base for MENA	 Its largest production facility worldwide	 89 countries	 22 countries
 Exporting 75% of its production	 80 countries	 Exporting 85% of its production	 Exporting 87% of its production	 103 countries	 30 countries

Domestic + Accessible Markets

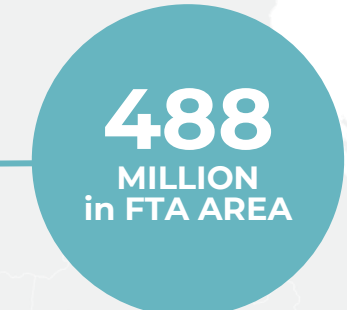
Domestic Market + EU Market + Free Trade Area

Customs Union with the EU
allows direct access to the EU Market

NORWAY ISRAEL *SUDAN
LIECHTENSTEIN
SWITZERLAND ICELAND
BOSNIA AND HERZEGOVINA
PALESTINE MACEDONIA
MOROCCO TUNISIA
ALBANIA EGYPT
GEORGIA MONTENEGRO
SERBIA CHILE
MAURITIUS SOUTH KOREA
MALAYSIA *LEBANON MOLDOVA
FAROE ISLANDS
SINGAPORE VENEZUELA
UNITED KINGDOM
*QATAR KOSOVO
UAE UKRAINE



+



in 30 countries
with Free Trade
Agreements

+

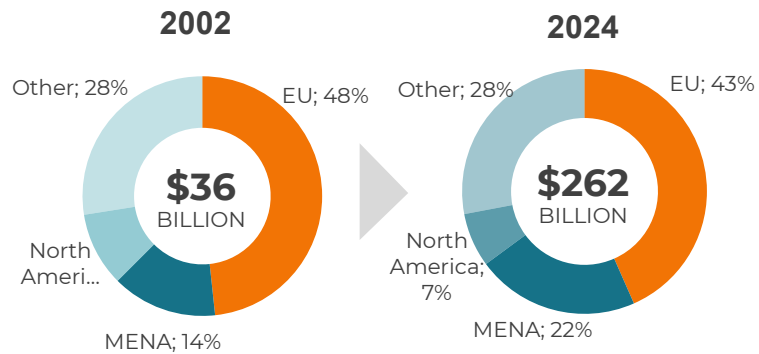


Source: IMF; Ministry of Trade, TurkStat, World Bank, Population as of 2023
*in ratification process

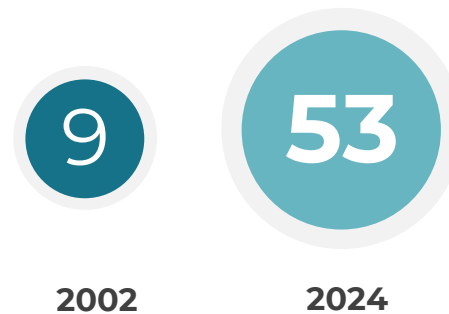
Trade Activity

Strategic location and enhanced production capabilities attracting multinationals to invest for export

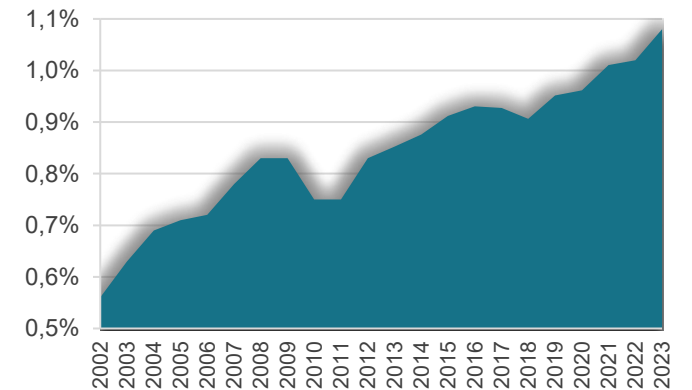
MERCHANDISE EXPORTS BY GEOGRAPHY



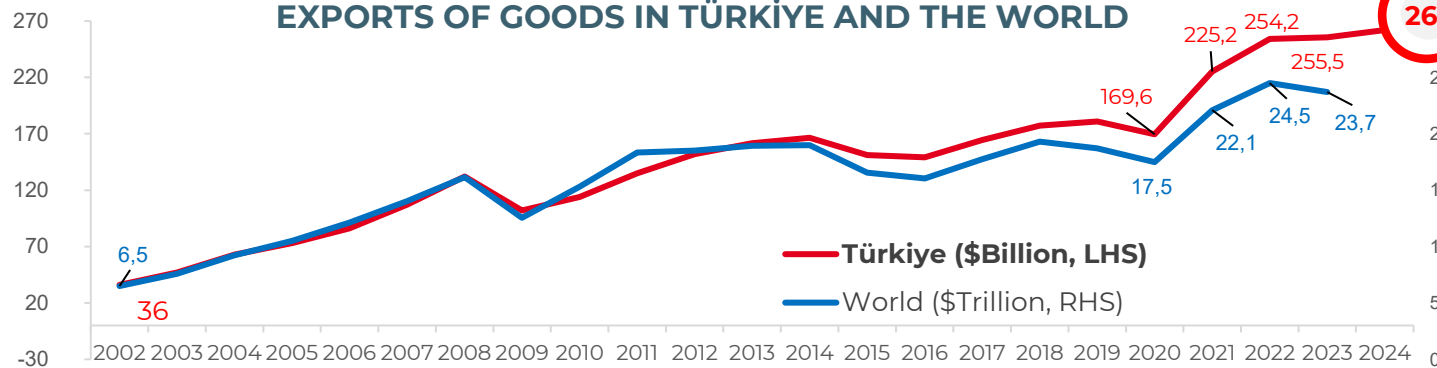
NUMBER OF EXPORT PRODUCTS OVER USD 1 BILLION



TÜRKİYE'S SHARE IN GLOBAL EXPORTS OF GOODS



EXPORTS OF GOODS IN TÜRKİYE AND THE WORLD



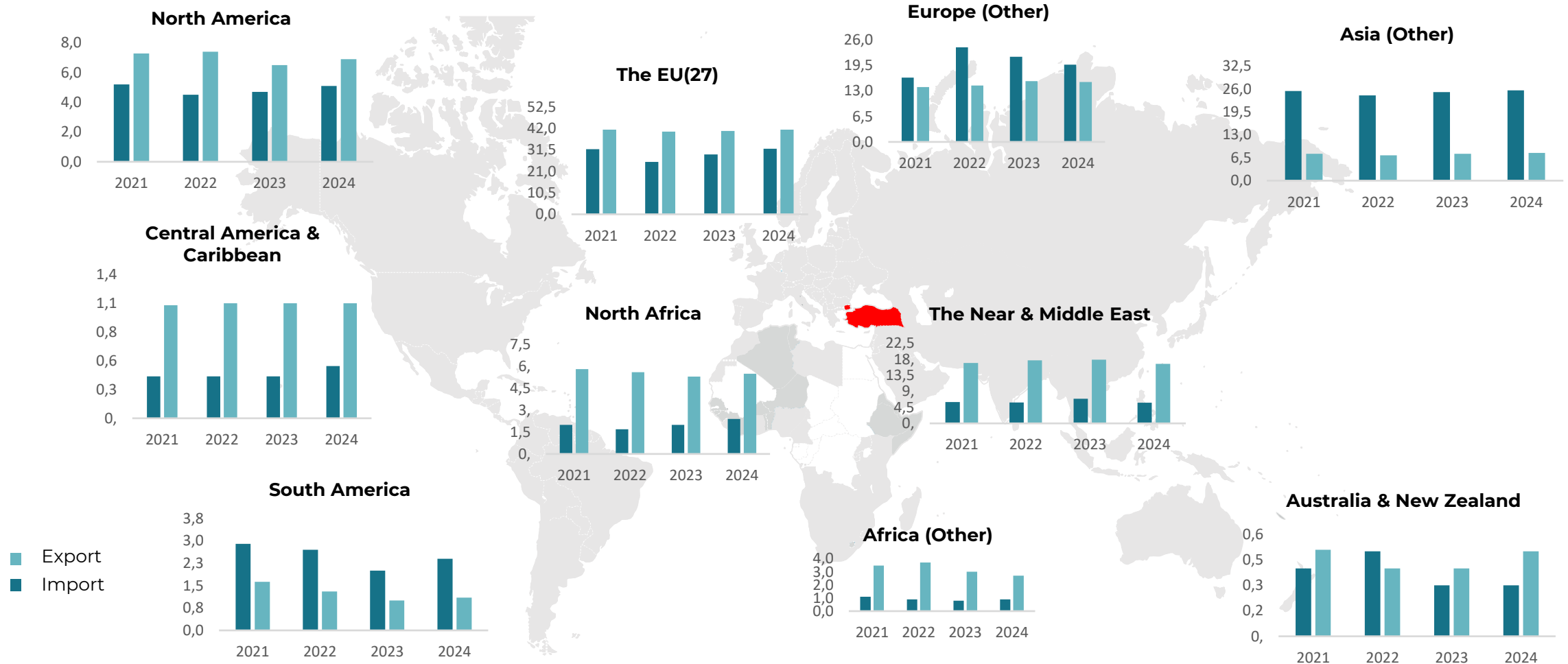
Türkiye Records All-Time High Exports in 2024

ANNUAL AVERAGE GROWTH OF EXPORTS (2002-2023)



Trade Activity with Country Groups

Upgraded logistics infrastructure increased foreign trade activities across the globe

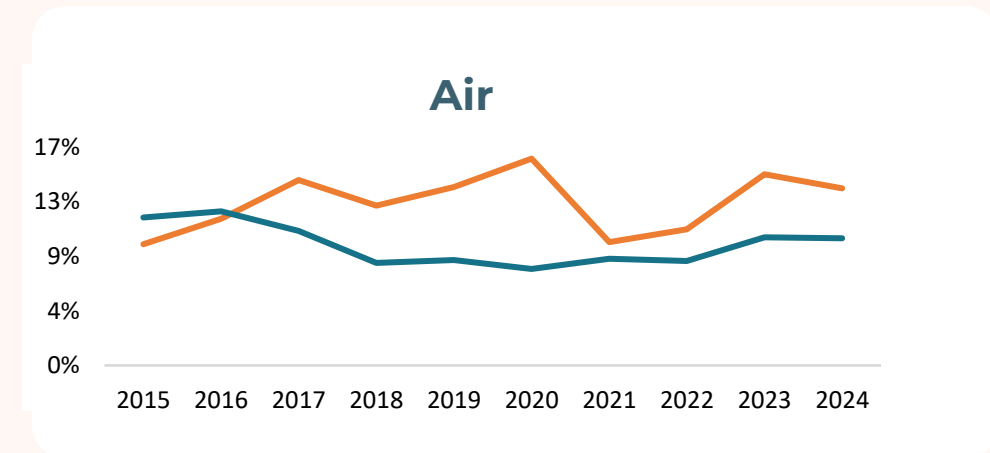
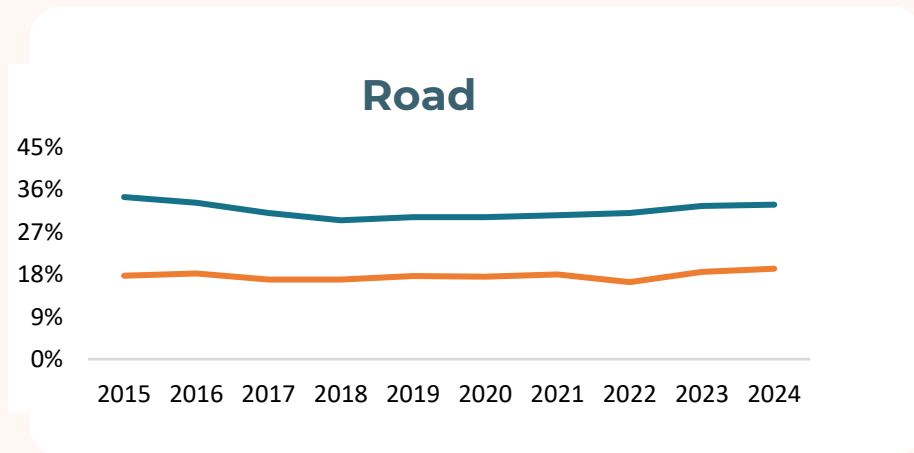
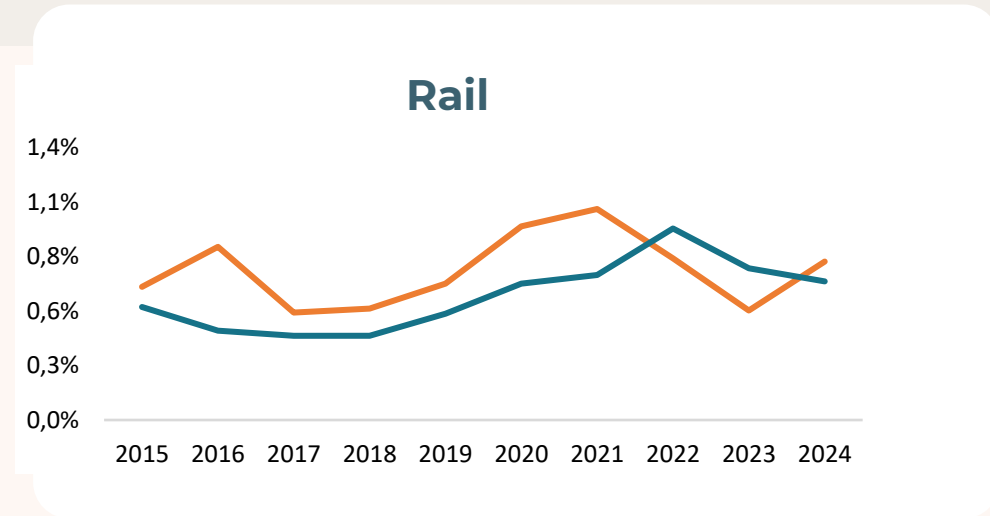
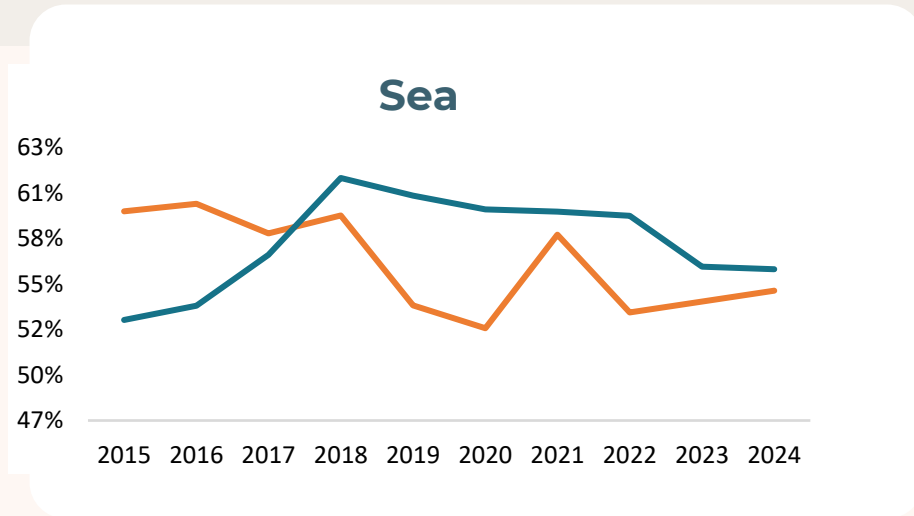


Source: Turkstat, Ministry of Trade

*Shares in Total

Logistics Activity in Türkiye

Exports and imports by value of goods and by mode of transportation



Import (by value of goods)

Export (by value of goods)

Source: Turkstat

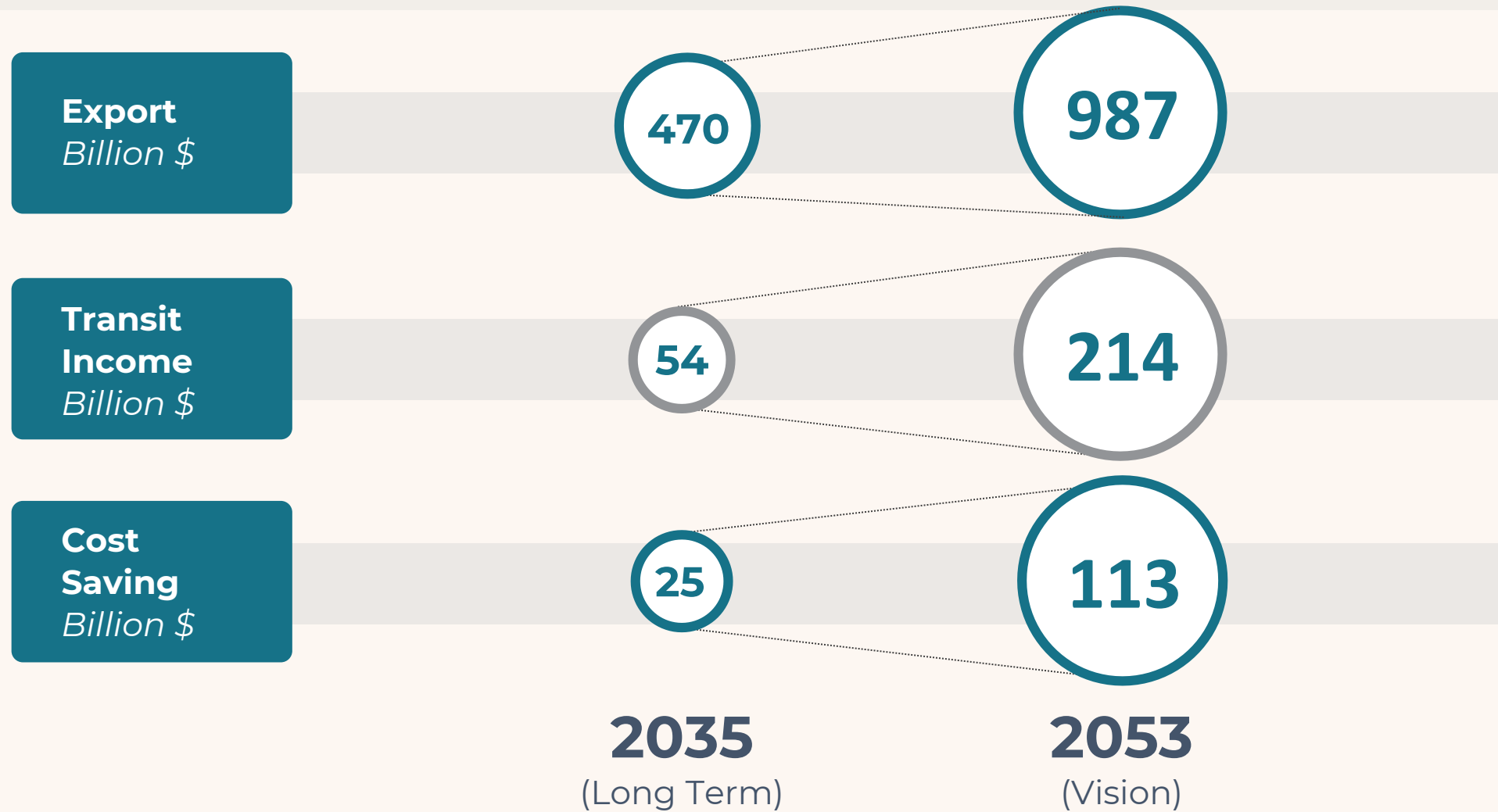
Note: Share of other modes (Postal and courier activities) are about 0,7% in export and 11,7% in import for 2024.

Major Players in Logistics Industry



New Logistics Master Plan

Logistics master plan outlines ambitious targets



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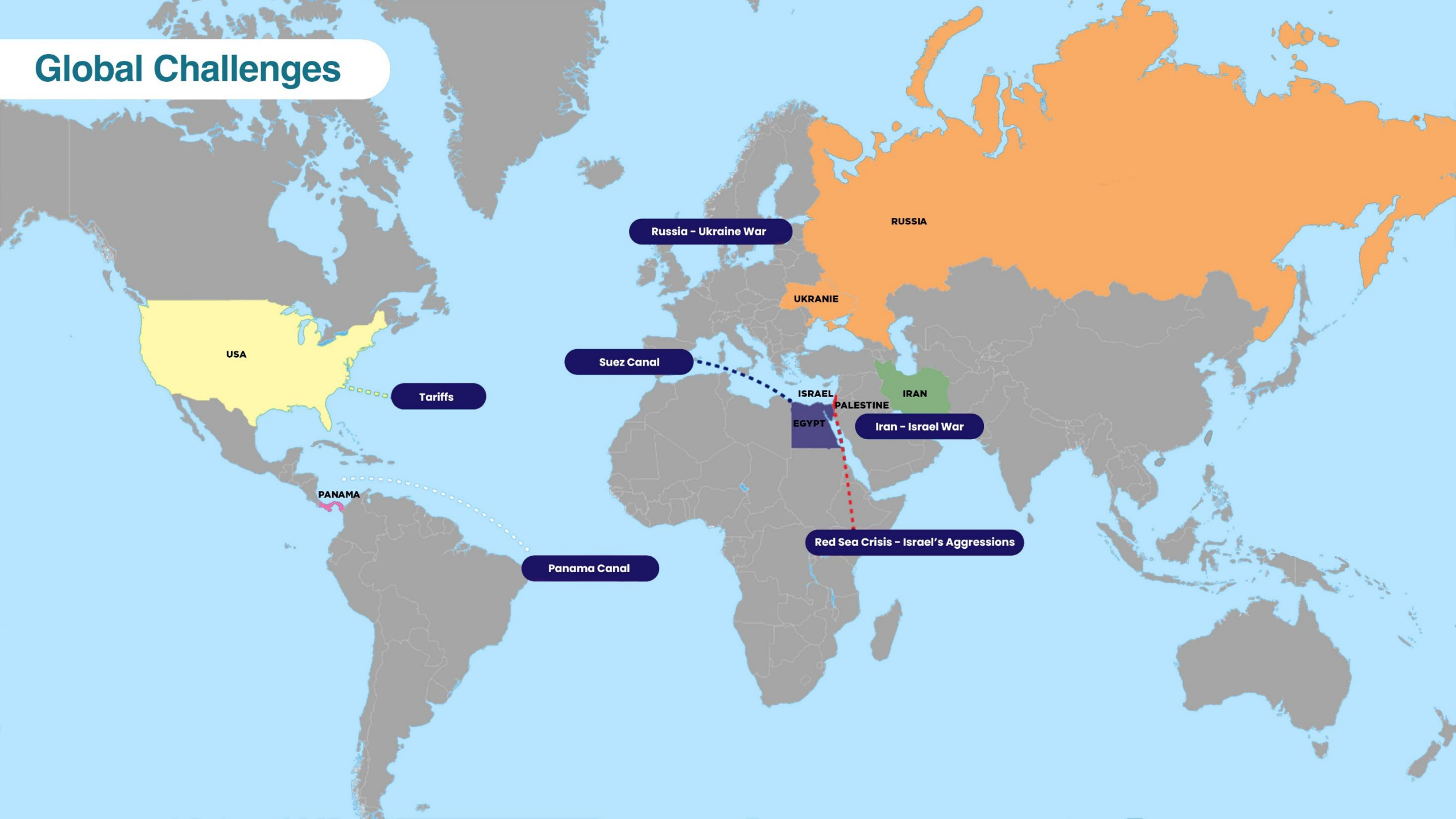
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Global Challenges



Russia - Ukraine War

UKRANIE

RUSSIA

Suez Canal

ISRAEL

IRAN

PALESTINE

EGYPT

Iran - Israel War

Red Sea Crisis - Israel's Aggressions

USA

Tariffs

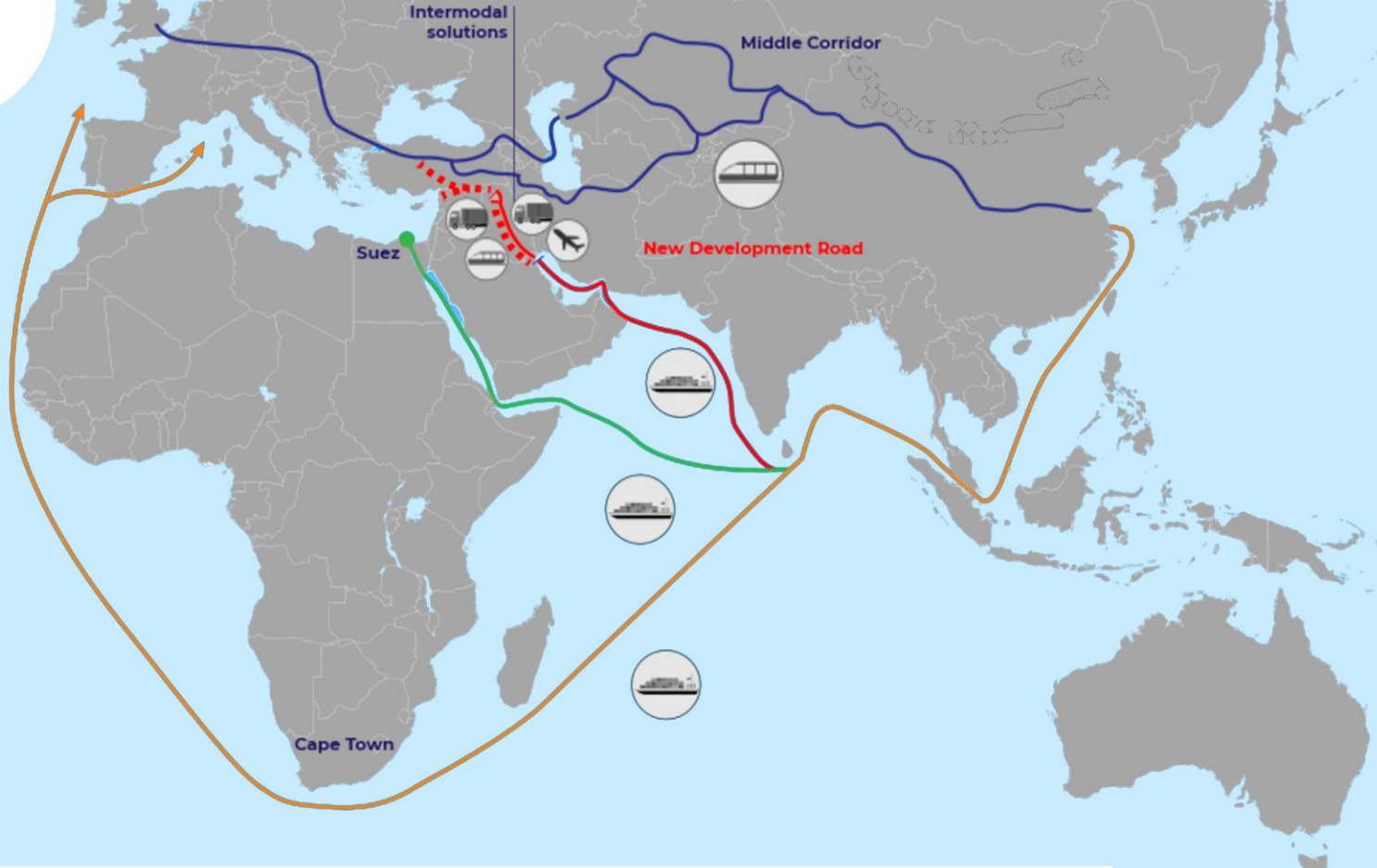
PANAMA

Panama Canal

Türkiye's Logistics Advantages

Türkiye; a resilient partner, providing diverse routes, skirting pressing crisis surrounding the region

Drewry WCI: Shanghai to Rotterdam



SUEZ CANAL ROUTE	THE CAPE ROUTE	MIDDLE CORRIDOR
11.011 MIL	14.327 MIL	11.500 KM
35 Days	45 Days	12 Days

The Rise of The Middle Corridor

- Offers Diversification to The Traditional Routes
- Europe–Asia in 15 Days

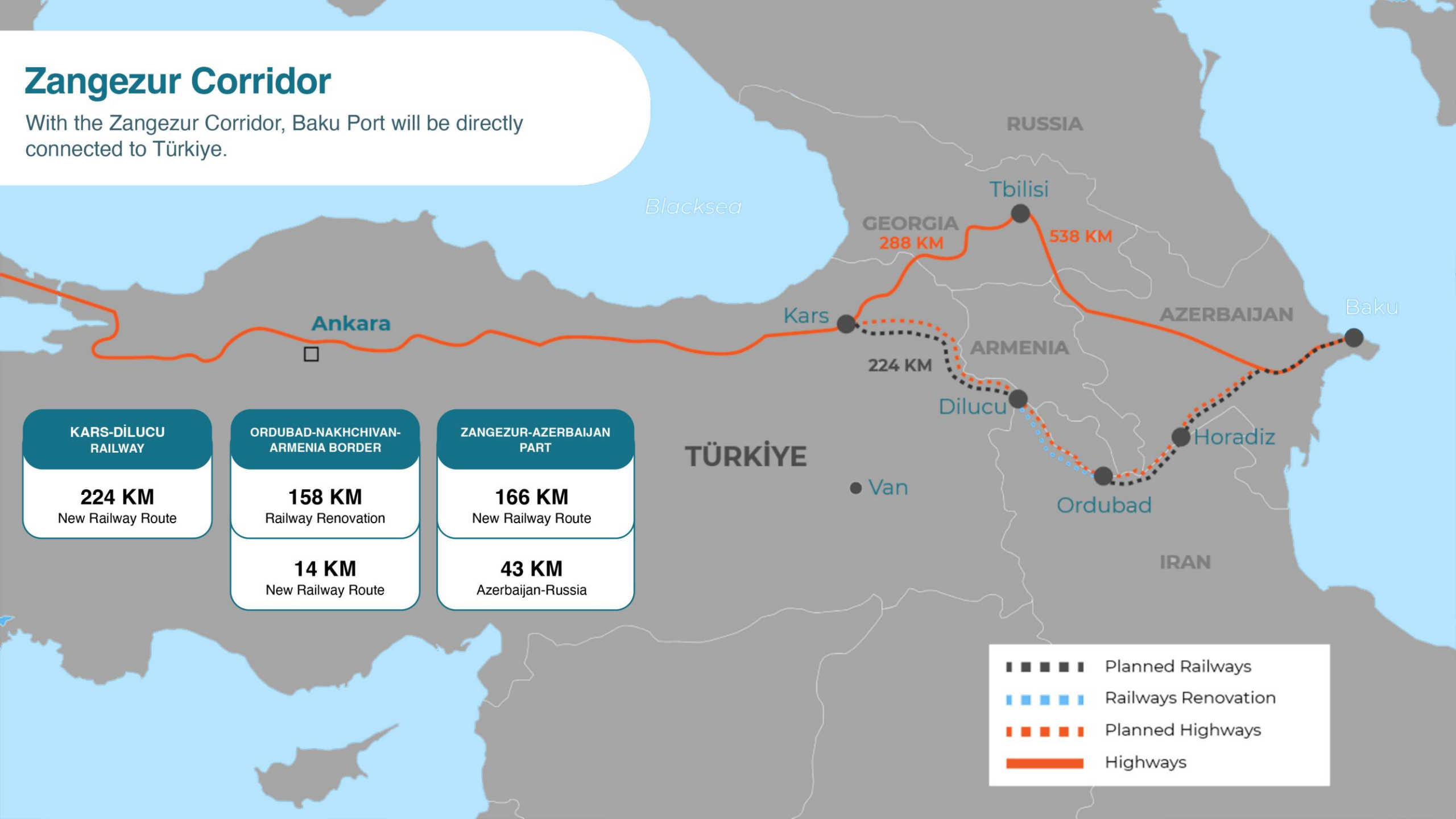
Strengths	Weaknesses
Strategic Location	Complex Logistics
Diversification	Infrastructure Limitations
Growing Market	Regulatory Hurdles
Governmental Supports	Financial Constraints
	Operational Efficiency
Opportunities	Threats
Infrastructure Development	Geopolitical Tensions
Trade Growth	Competition
Economic Initiatives	Economic Fluctuations
Shift in Trade Patterns	Environmental Concerns



Potential of 130,000 TEU/year
4.5 million ton; 55,000 TEU in 2024

Zangezur Corridor

With the Zangezur Corridor, Baku Port will be directly connected to Türkiye.



KARS-DİLUCU RAILWAY

224 KM
New Railway Route

ORDUBAD-NAKHCHIVAN-ARMENIA BORDER

158 KM
Railway Renovation

14 KM
New Railway Route

ZANGEZUR-AZERBAIJAN PART

166 KM
New Railway Route

43 KM
Azerbaijan-Russia

■ ■ ■ ■ ■ Planned Railways

■ ■ ■ ■ ■ Railways Renovation

■ ■ ■ ■ ■ Planned Highways

————— Highways

The Development Road

This new route will enable the cargo to be transported from India and East Asia to Europe via Iraq and Türkiye.

Mediterranean Sea

Blacksea

Ankara

TÜRKIYE

Van

Ovaköy

Mosul

Erbil

Kirkuk

Tikrit

Baghdad

Kerbela

Necef

■ ■ ■ ■ ■ Railways
— Highways

REPUBLIC OF TÜRKIYE INVESTMENTS

615 KM
Railway

320 KM
Highway

7,8 Billion \$
Total Investment

REPUBLIC OF IRAQ INVESTMENTS

1200 KM
Railway + Highway

2X3
Highway

16 Billion \$
Total Investment

ANNUAL CAPACITY

4.7 Million
TEU Container

28,5 Million Ton
Bulk Cargo

ROMANIA
SERBIA
BULGARIA
NORTH MACEDONIA

GREECE

Basra



Logistics Capabilities of Türkiye

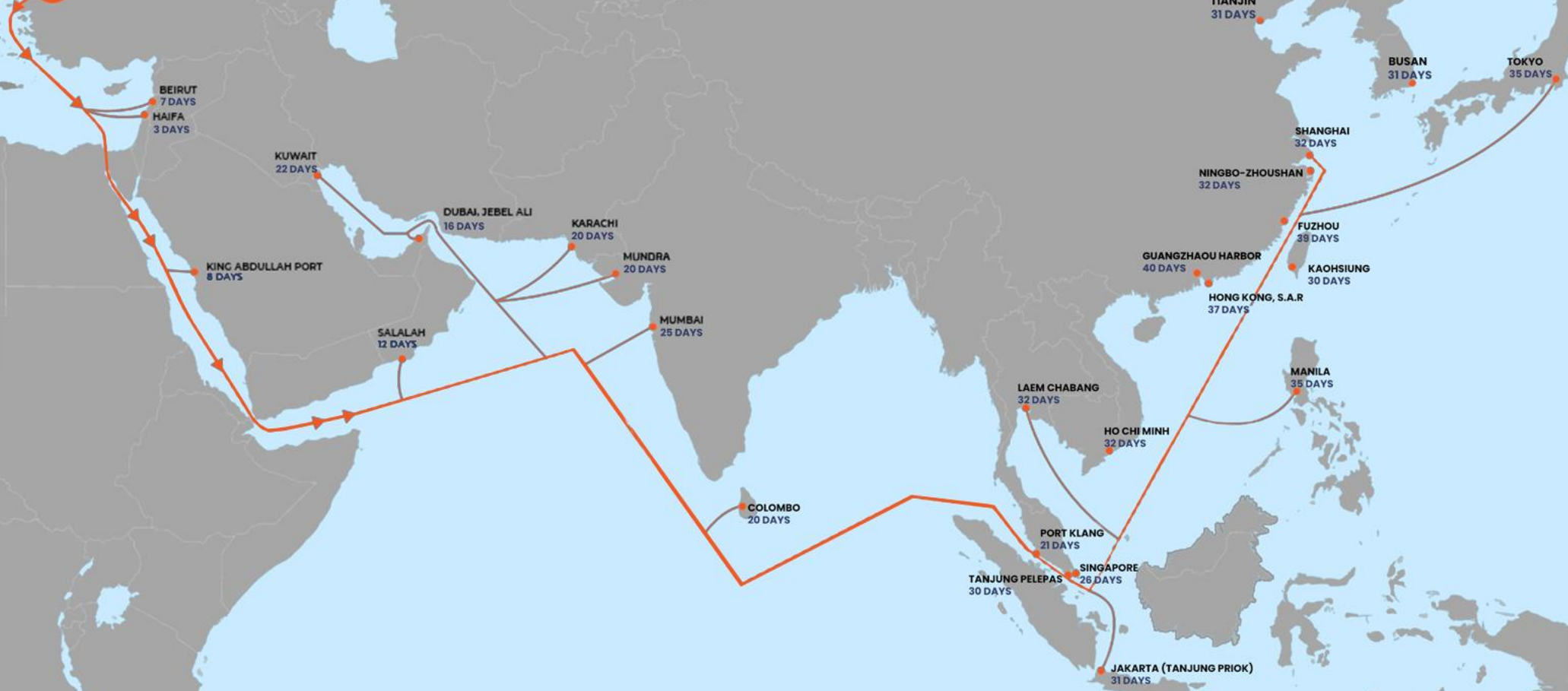
Europe | Sea / Export





Logistics Capabilities of Türkiye

Asia | Sea / Export





Logistics Capabilities of Türkiye

Africa | Sea / Export





Logistics Capabilities of Türkiye

North America | Sea / Export

VANCOUVER
37 DAYS

SEATTLE-TACOMA NORTHWEST
28 DAYS

LOS ANGELES
27 DAYS

VERACRUZ
33 DAYS

SAVANNAH
18 DAYS

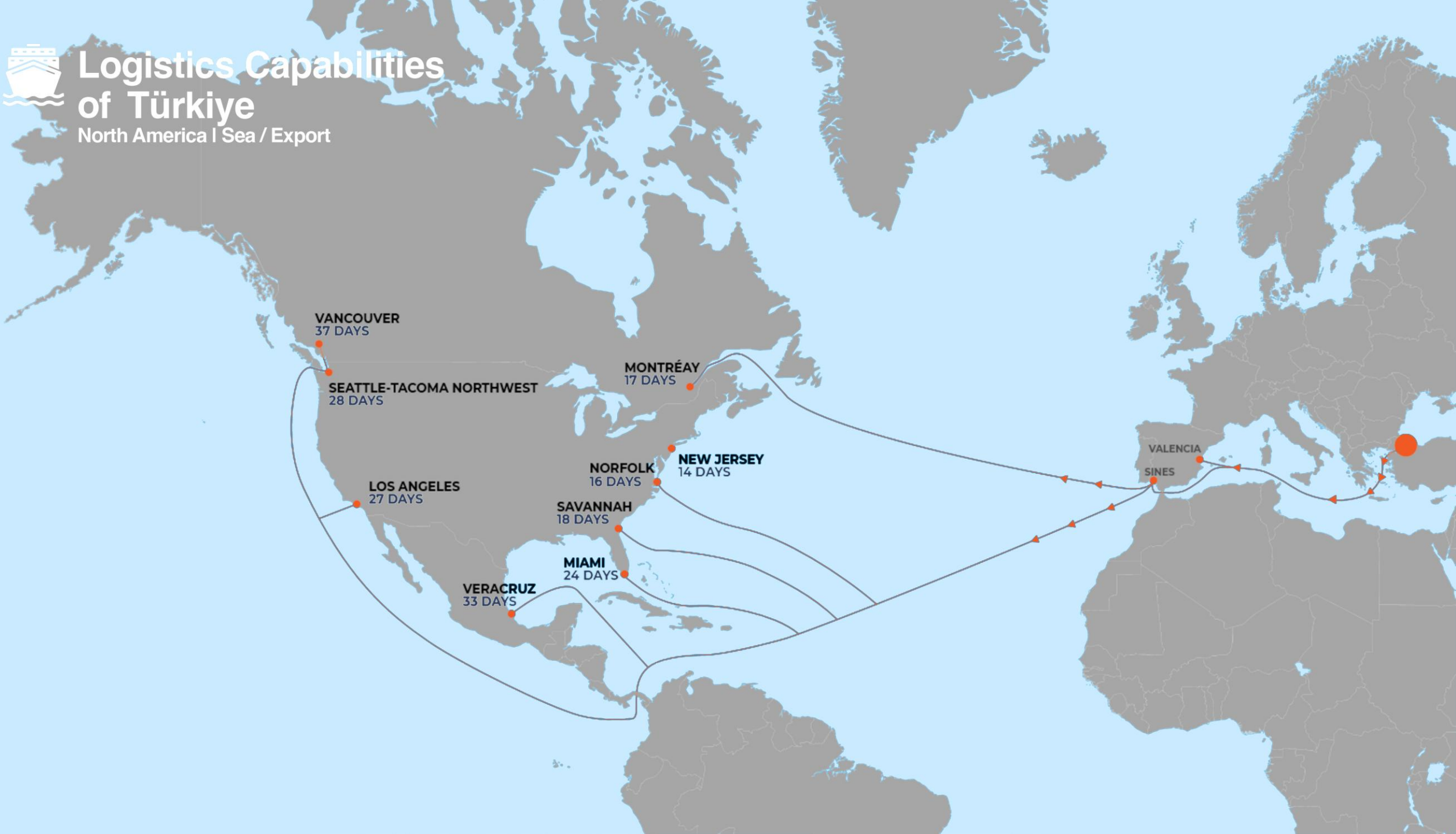
MIAMI
24 DAYS

NORFOLK
16 DAYS

NEW JERSEY
14 DAYS

MONTRÉAY
17 DAYS

VALENCIA
SINES





Logistics Capabilities of Türkiye

South America | Sea / Export

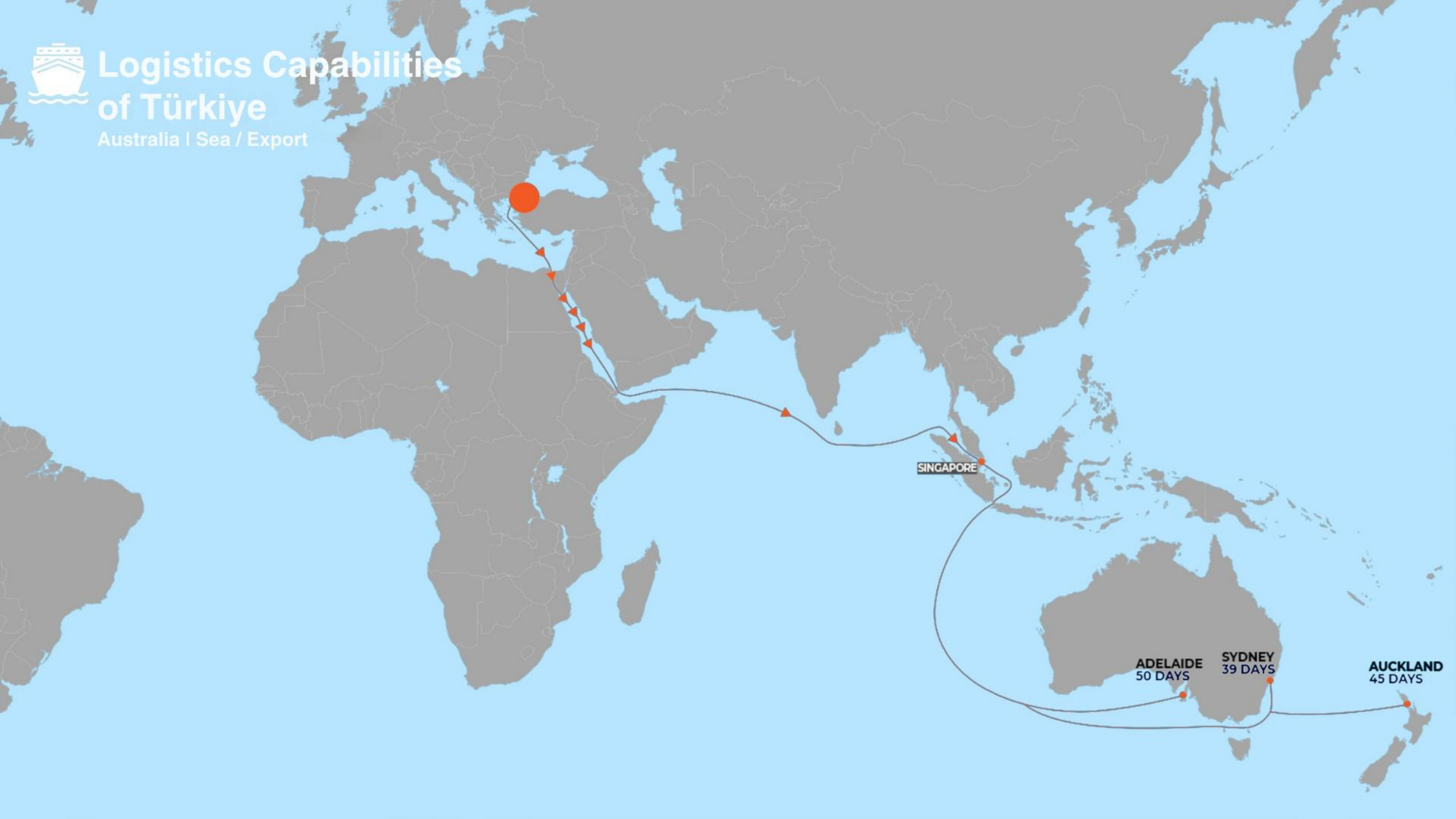


SINES VALENCIA



Logistics Capabilities of Türkiye

Australia | Sea / Export





Logistics Capabilities of Türkiye

Europe | Road / Export





Logistics Capabilities of Türkiye

Asia | Road / Export



TBILISI
2 DAYS

BAKU
3 DAYS

TEHRAN
4 DAYS

BAGHDAD
6 DAYS

AMMAN
6 DAYS

RIYADH
8 DAYS

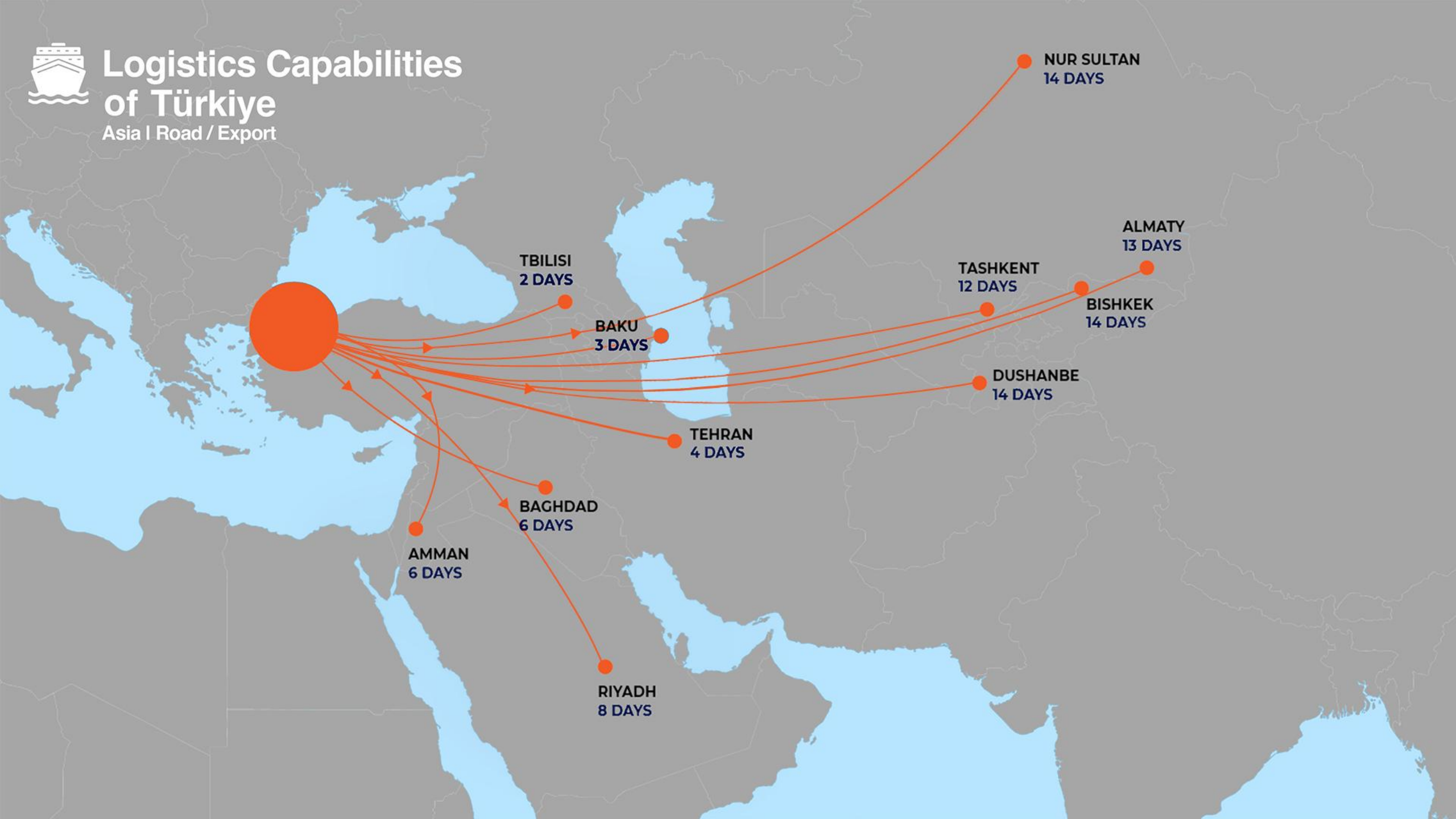
TASHKENT
12 DAYS

DUSHANBE
14 DAYS

NUR SULTAN
14 DAYS

BISHKEK
14 DAYS

ALMATY
13 DAYS





Logistics Capabilities of Türkiye

Europe | Ro – Ro + Road





Logistics Capabilities of Türkiye

Europe | Train / Export





Logistics Capabilities of Türkiye

Europe | Ro – Ro + Block Train





Logistics Capabilities of Türkiye

Asia | Train / Export



BAKU
6 DAYS

TURKMENBASHI
12 DAYS

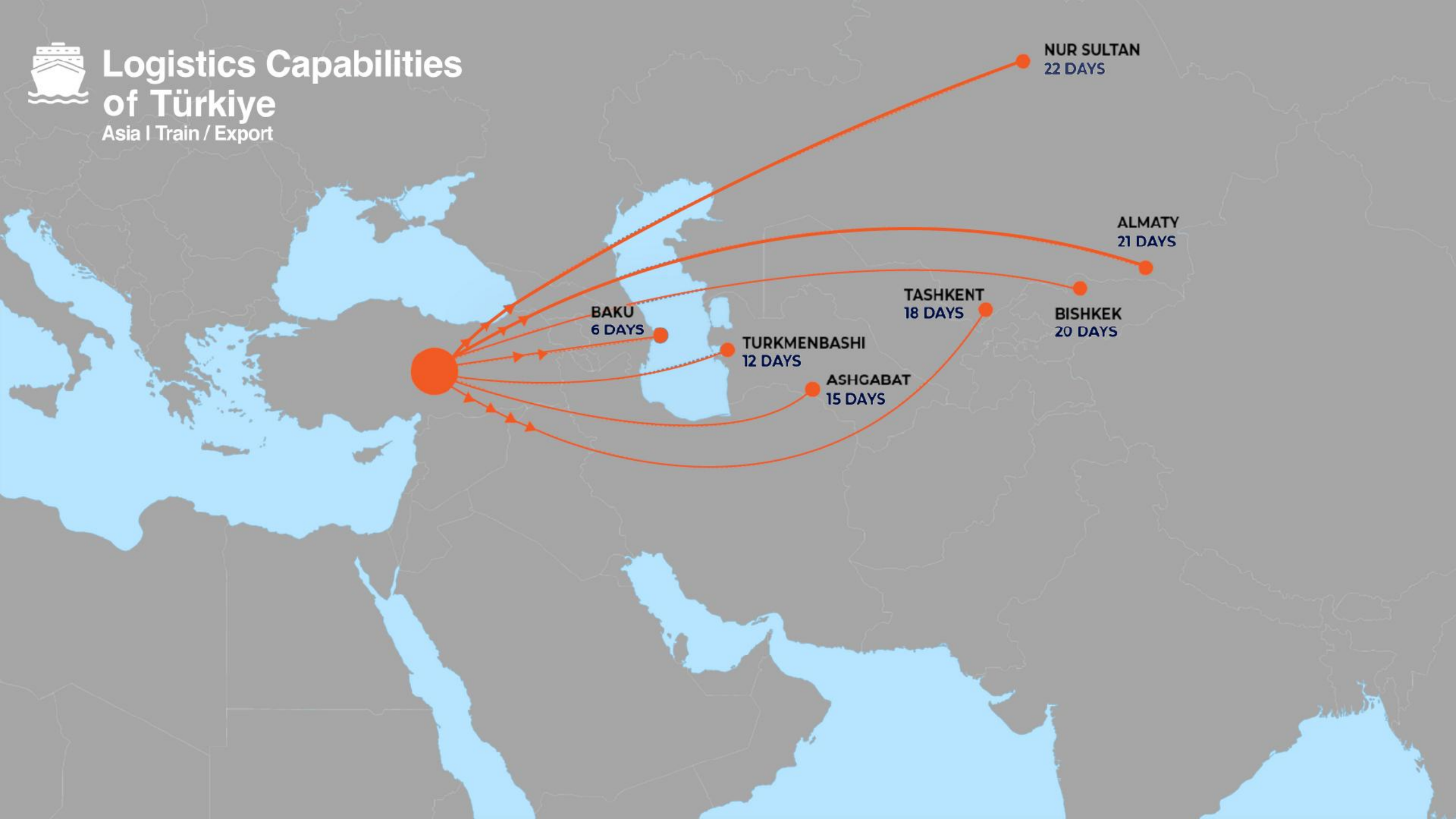
ASHGABAT
15 DAYS

TASHKENT
18 DAYS

BISHKEK
20 DAYS

ALMATY
21 DAYS

NUR SULTAN
22 DAYS





Logistics Capabilities of Türkiye

Asia | Sea / Import





Logistics Capabilities of Türkiye

Europe / N. Africa | Sea / Import





Logistics Capabilities of Türkiye

America | Sea / Import

LONG BEACH
60 DAYS

NORFOLK
25 DAYS

BUENAVENTURA
32 DAYS

SANTOS
27 DAYS



Istanbul as a Mega Hub

Wide Body Range

B777F Range
~14 Hours

Fleet

294 Narrow Body
119 Wide Body
24 Freighter

104 freighter destinations

*It is expected to reach **120** destinations by 2028*

In 7 hours flight distance:

- **40%** of World's **passenger & cargo traffic**
- **Over 60 capitals**

Narrow Body Range

~2 Hours

~5 Hours

~10 Hours

A330F Range

~12 Hours

B777F Range

7 Hours Distance

- Freighter
- Wide-Body Aircraft
- Narrow-Body Aircraft



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Nearshoring

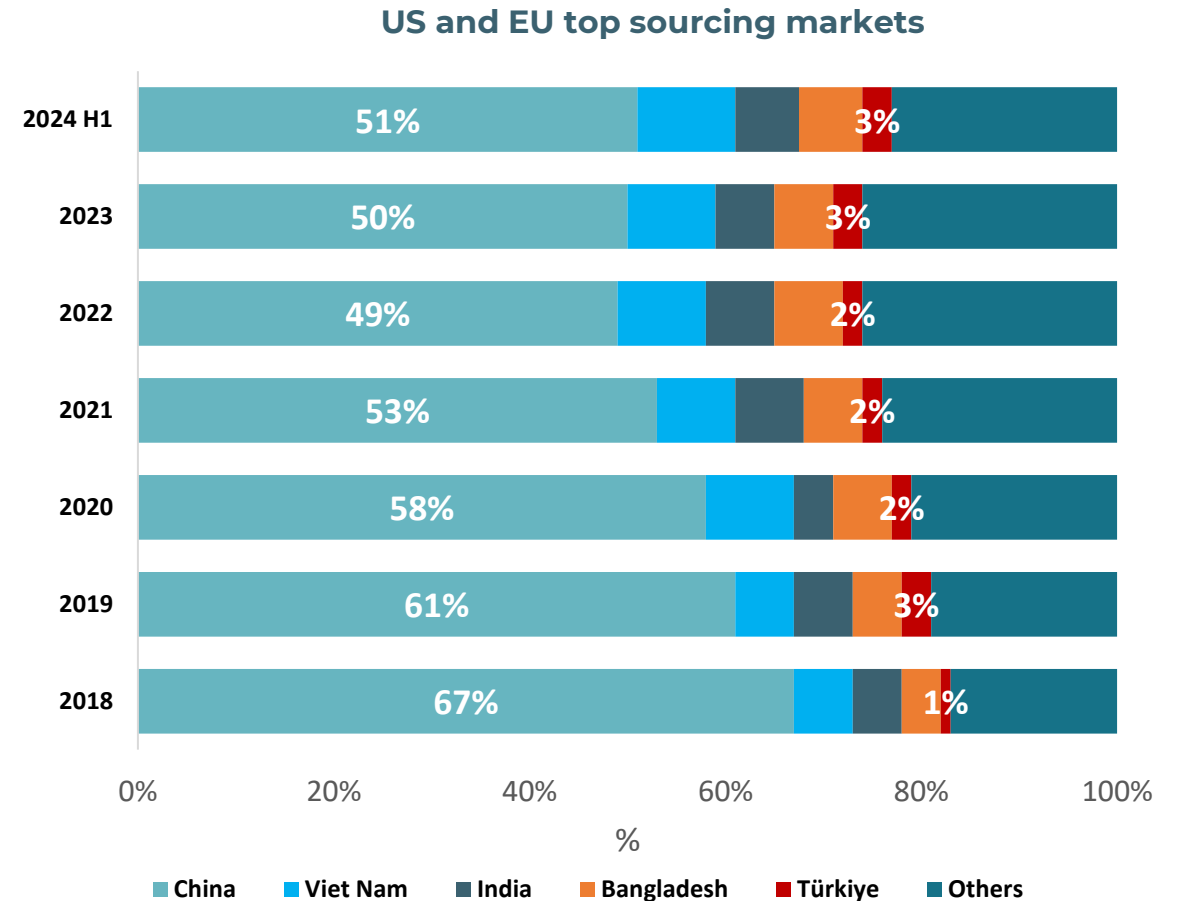
Türkiye Offers a Reliable Nearshoring Hub

Thanks to

- its geographic proximity to Europe,
- competitive production costs,
- evolving industrial capacity,
- political stability, and
- peaceful international relations,

TÜRKİYE

has become an increasingly attractive hub for nearshoring and friendshoring strategies.

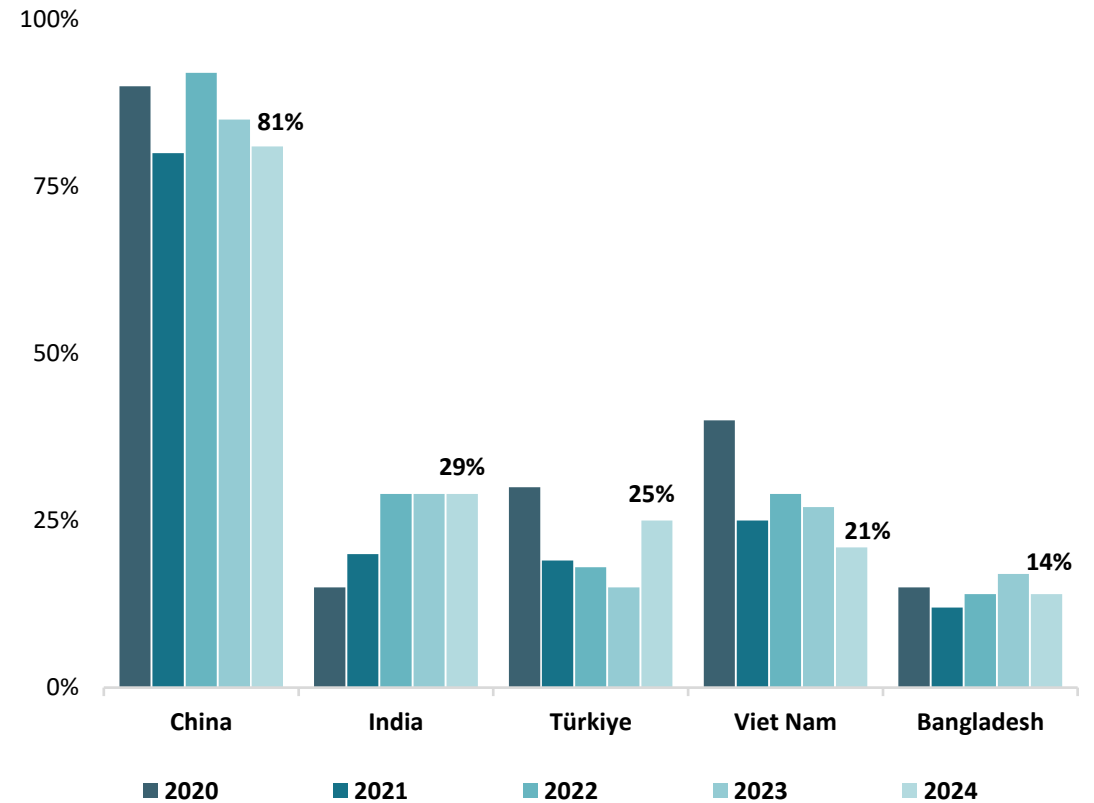


Nearshoring

Türkiye Offers a Reliable Nearshoring Hub

Amid rising global economic uncertainty
Türkiye distinguishes itself among its peers as a
favorable nearshoring destination.

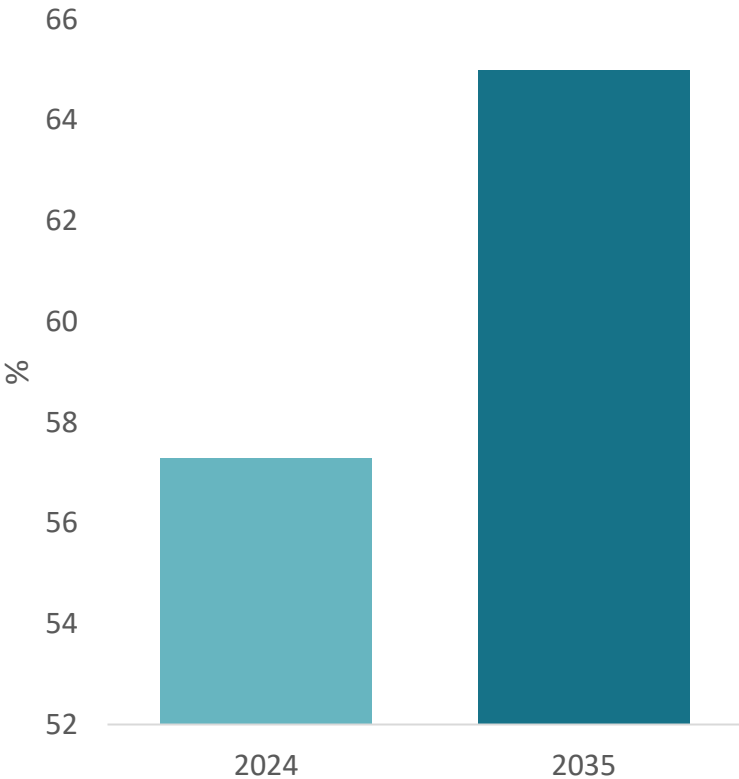
Top Sourcing Partners of the EU-based Businesses



Twin Transition

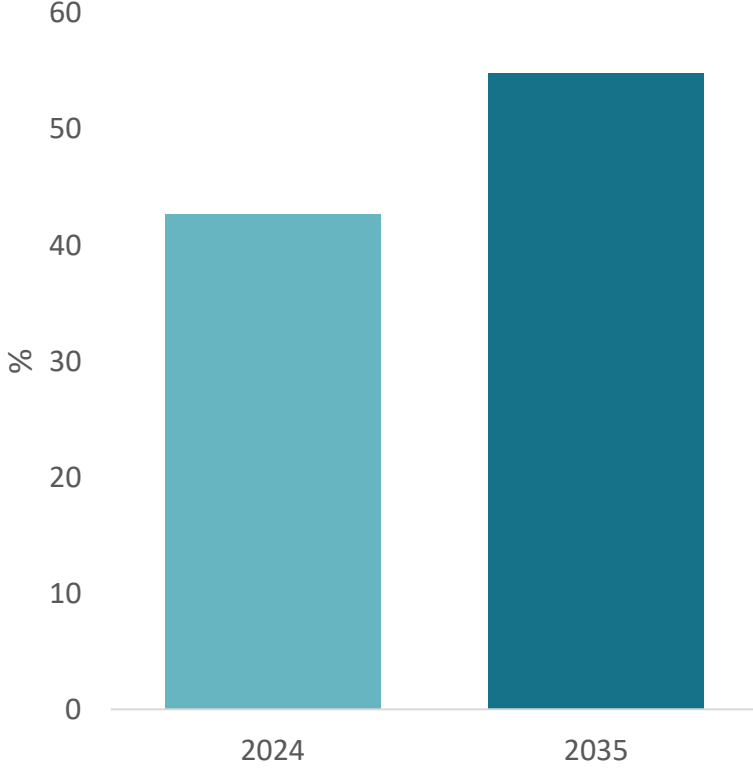
The logistics and transportation sector promotes Türkiye’s twin transition.

Share of Renewable Energy in Installed Power



	2024	2035
Installed Capacity	117 GW	189.7 GW
Share of Renewables	57.3%	64.7%
Solar	20.3 GW	52.9 GW
Wind	13 GW	29.6 GW
Nuclear	-	7.2 GW
Hydro	32.2 GW	35.1 GW
Geothermal	1.7 GW	5.1 GW

Share of Renewable Energy in Electricity Generation

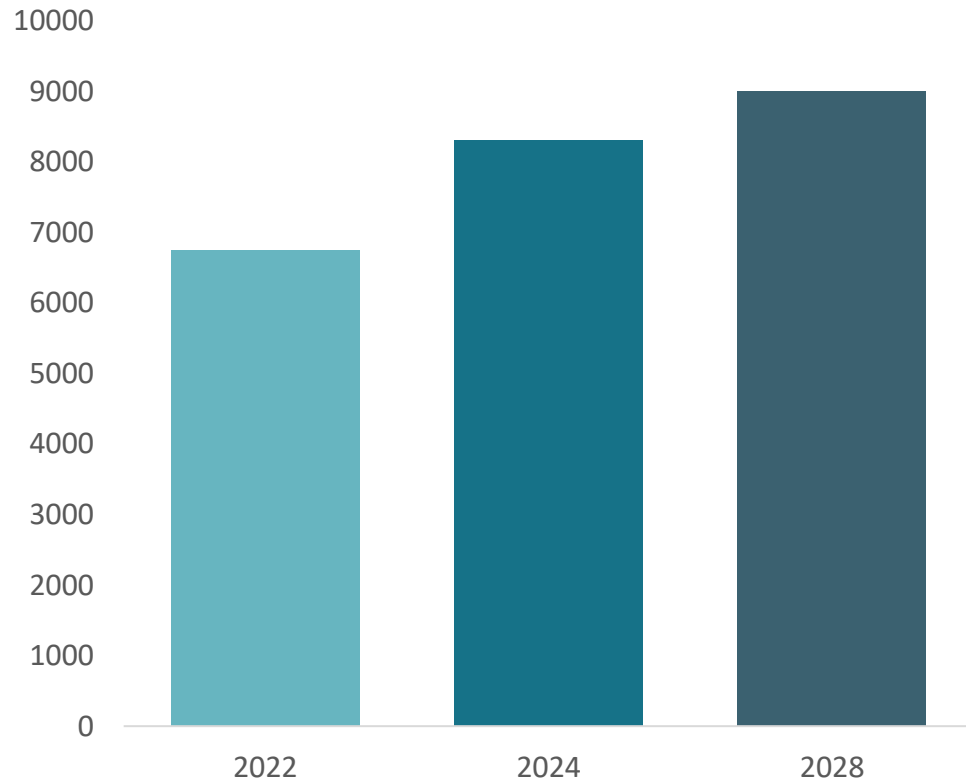


Source: Ministry of Energy and Resources

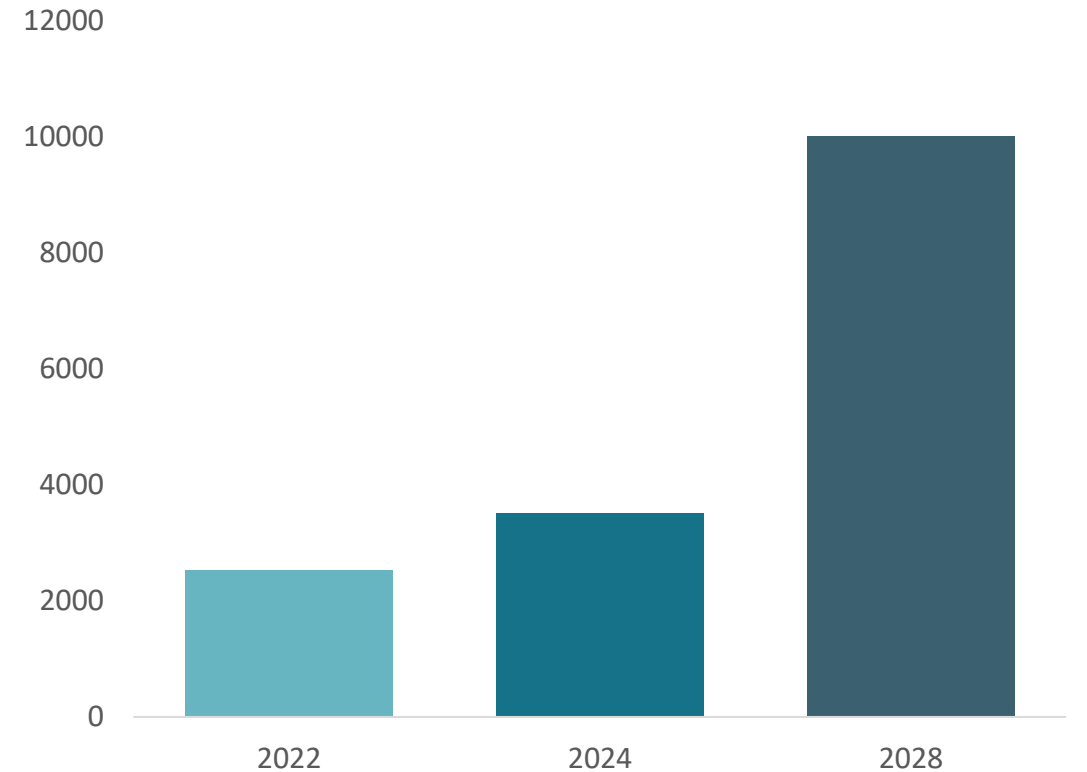
Twin Transition

Türkiye has expanded its e-government services, making public services more accessible and efficient online.

Number of Services Provided through e-Government Portal



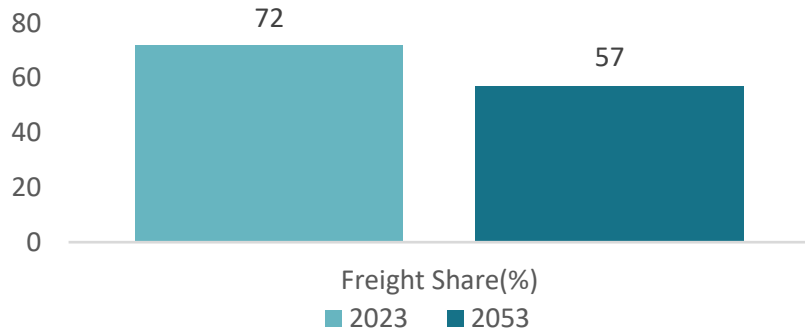
Number of Registered Valid Patents Related to Twin Transition



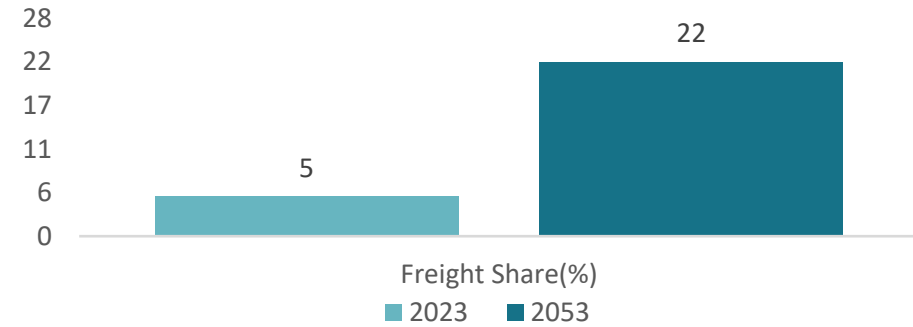
Green Deal

Türkiye 2053 Net Zero Emissions Target

Share of Road in Freight Transportation



Share of Rail in Freight Transportation



• MEGA PROJECTS LESSEN CARBON EMISSIONS



25
Million
Ton



Green Deal

Türkiye's Competitive Advantages in The Green Deal Period



1

Growing
renewables
sector



2

Less shipping
distance
provides less
carbon
footprint



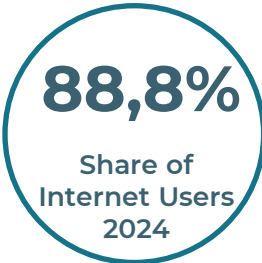
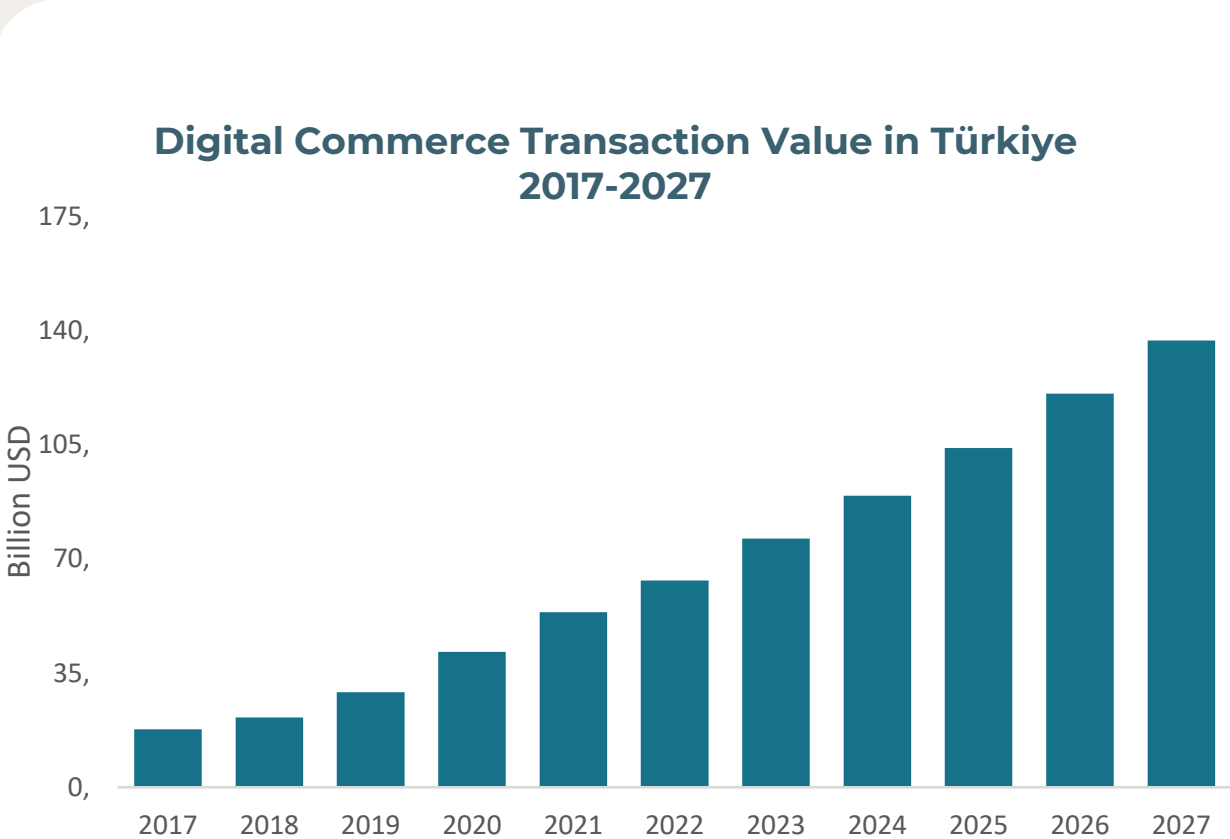
3

Growing
infrastructure
investments

Türkiye to be *more lucrative*
location for **three reasons**

City Logistics

Digital solutions in the field of city logistics continue to shape the industry.

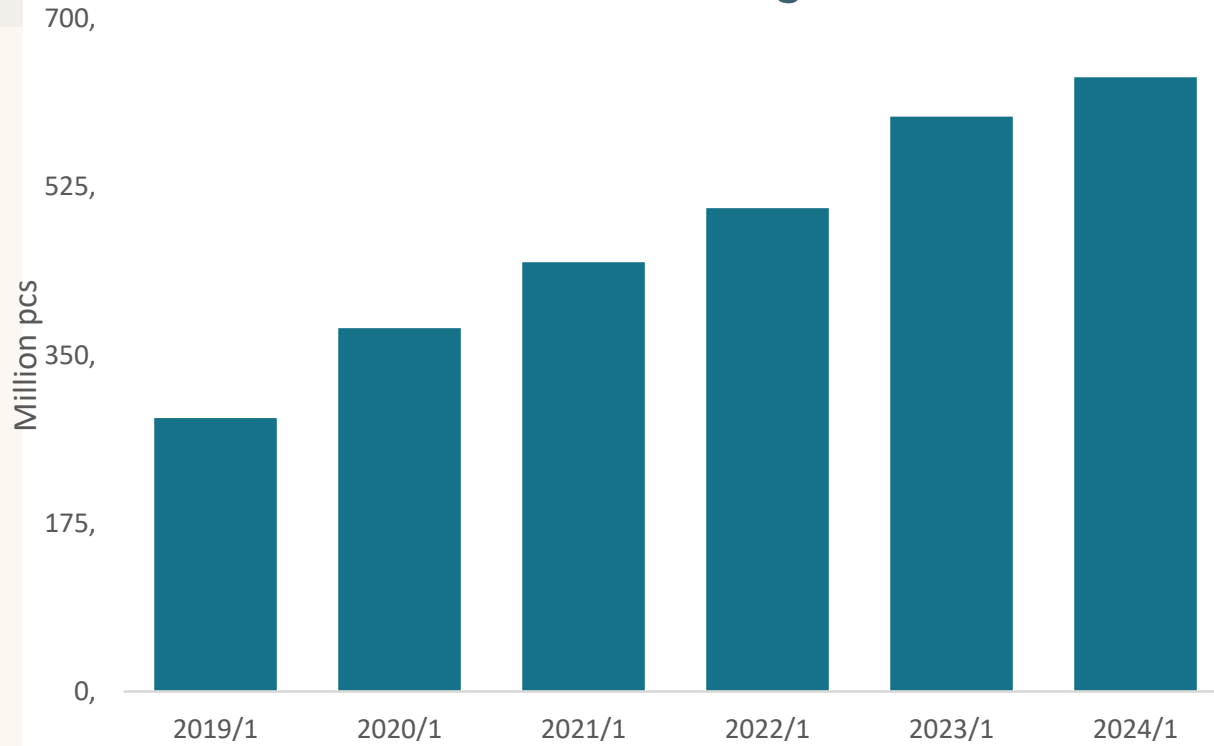


Source: Statistica, TÜİK, TÜSİAD Transportation and Logistics Working Group

City Logistics

Growing market demands more investment

Postal & Parcel Cargo



Major Retailers



3PL Logistics

2053 Vision: A global hub for transportation and logistics.

\$100b Turkish Logistics Market

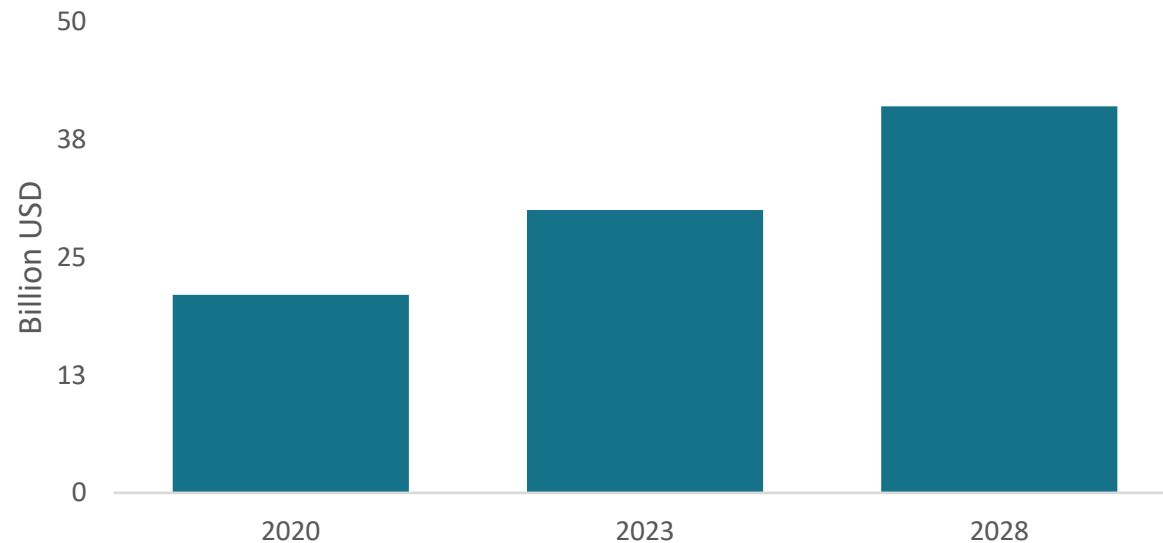
-Road
-Maritime

-Railway
-Multi-modal







-Air

The logistics and transportation sector in Türkiye comprises 2.5 percent of global logistics exports, ranking 11th worldwide

3PL Market Size in Türkiye



Major International 3PL Providers

Companies	Distribution Freight out of TÜRKİYE
	Europe & Middle East & Russia
	Europe & Middle East
	Europe
	Europe & Russia
	Europe & Russia & Middle East
	Europe & Middle East & Central Asia

3PL Logistics

Recent Outstanding Deals in Logistics Sector (2023-2025)



Acquisition



Acquisition



Acquisition



Acquisition

Transocean Shipping
Boğaziçi Express



Merger



Acquisition



Joint Venture



Acquisition

ACT Global



PRESIDENCY OF
THE REPUBLIC OF TÜRKİYE
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