

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

Türkiye's Logistics Sector

March 2026



nexus
OF THE WORLD

AGENDA



1

**OUTLOOK TO GLOBAL
TRADE & LOGISTICS**

**OUTLOOK TO TRADE &
LOGISTICS IN TÜRKİYE**

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3

**LOGISTICS CAPABILITIES
OF TÜRKİYE**

**GLOBAL TRENDS
IN TÜRKİYE**

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OUTLOOK ON GLOBAL TRADE & LOGISTICS



PRESIDENCY OF
THE REPUBLIC OF TÜRKİYE

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Global Challenges





Foster Supply
Chain
Resilience



Prepare
Contingency
Plans



Embrace Cutting-
Edge Technology

Solutions & Strategies



Fortify Cyber
Defenses



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

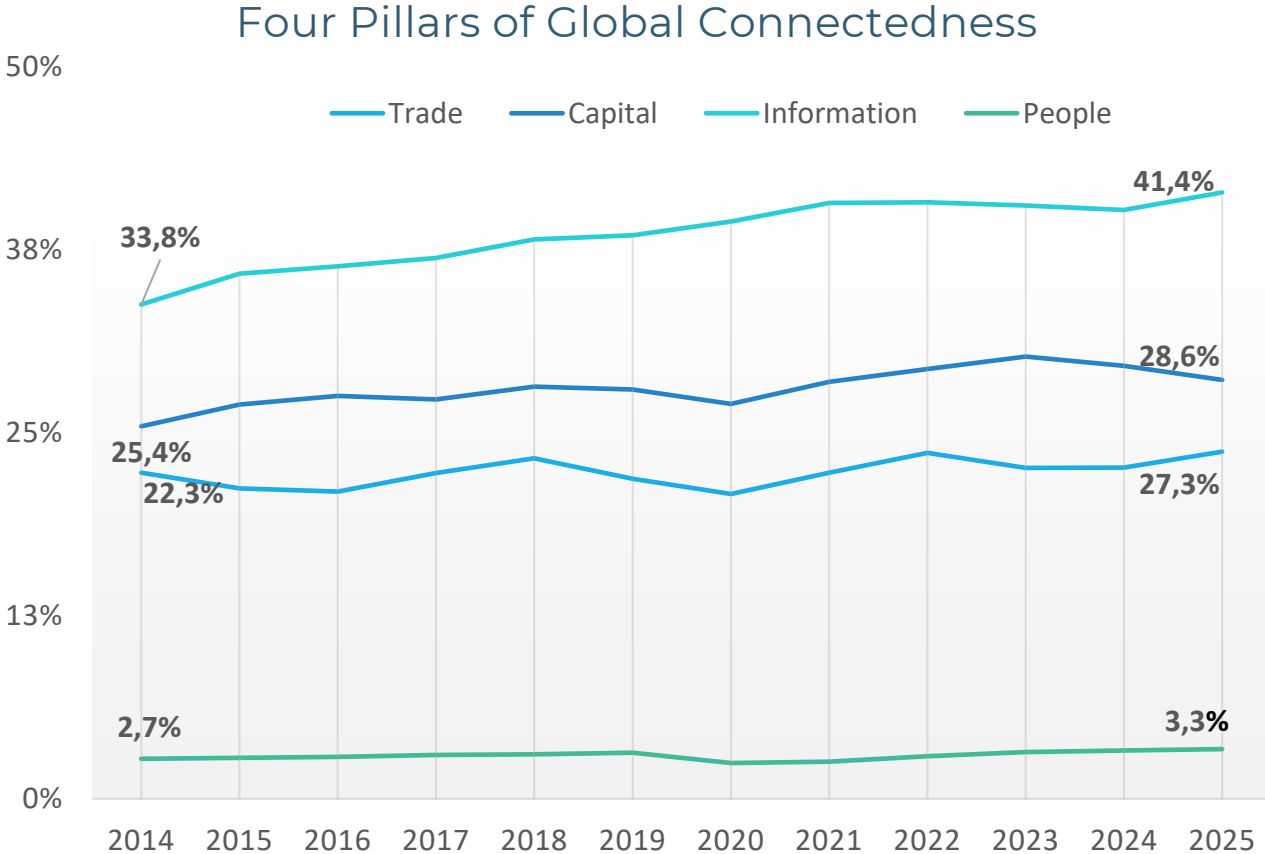
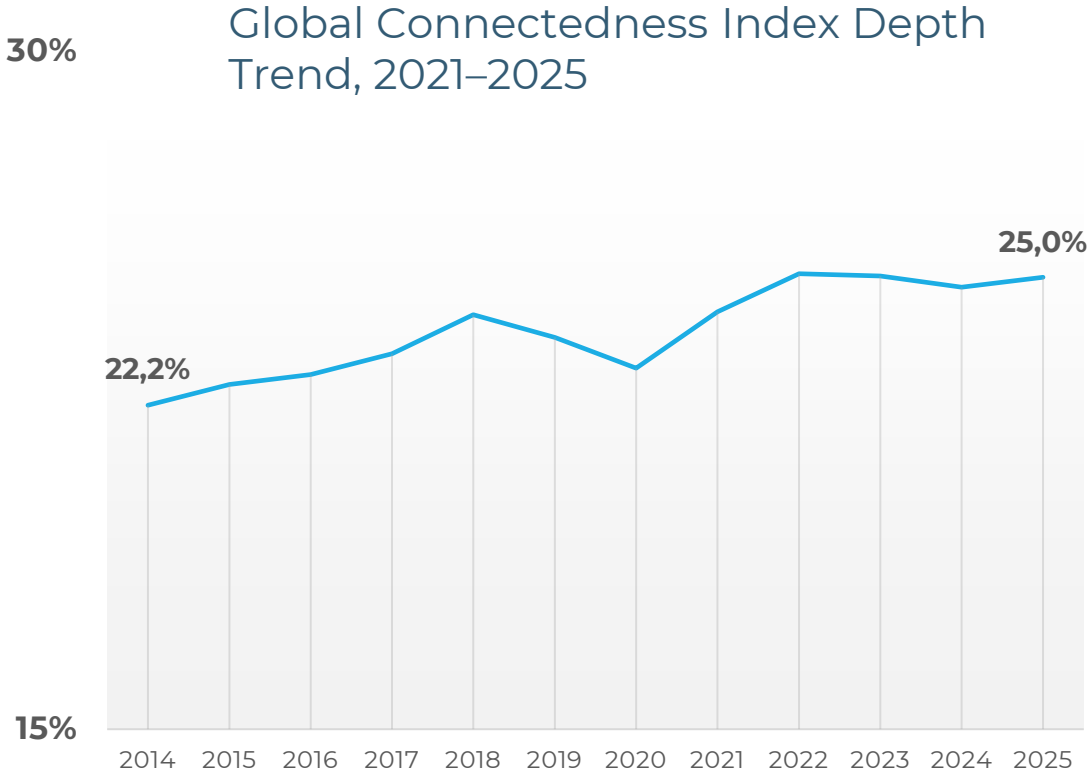


Keep Liquidity in
Your Business

Global Outlook

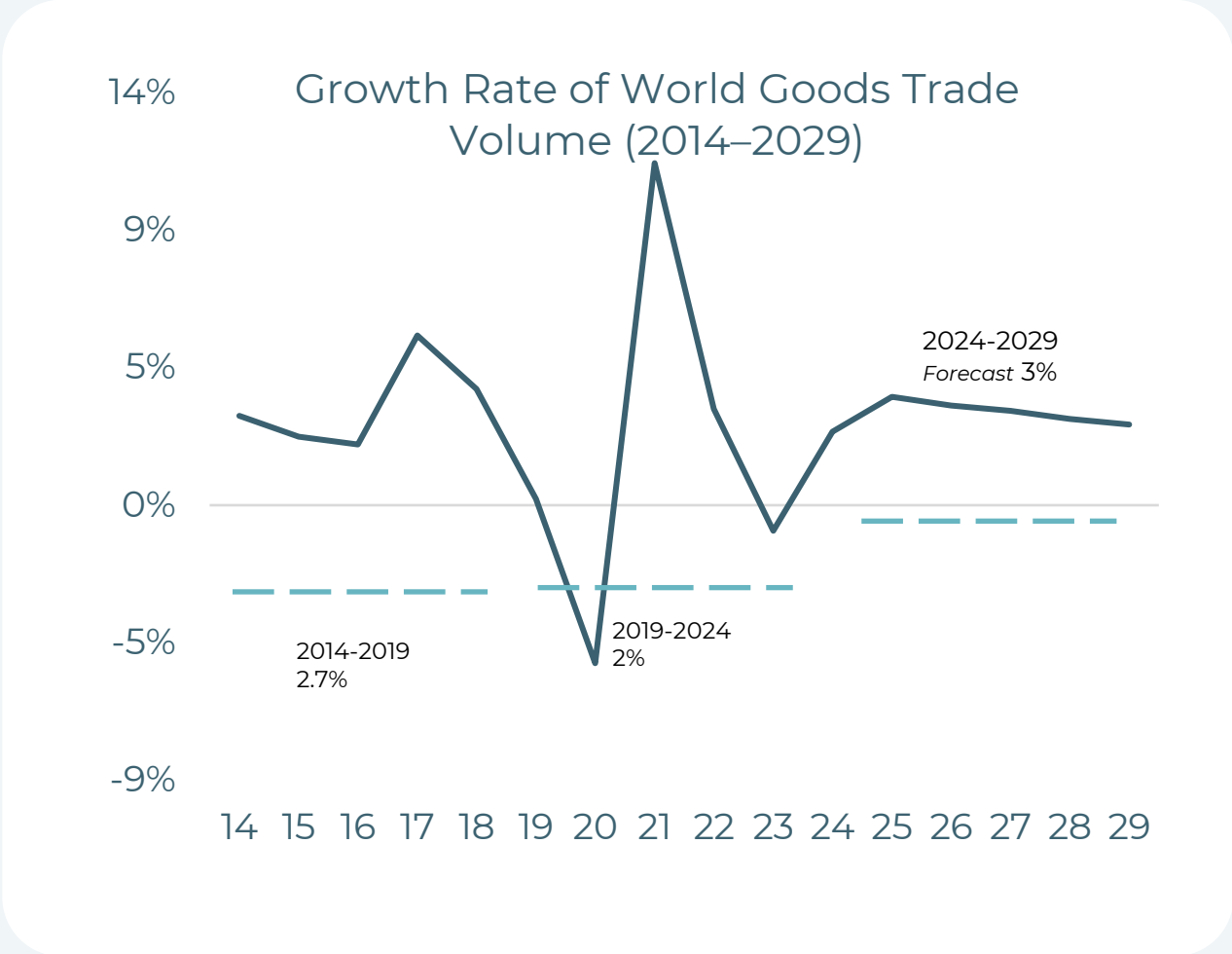
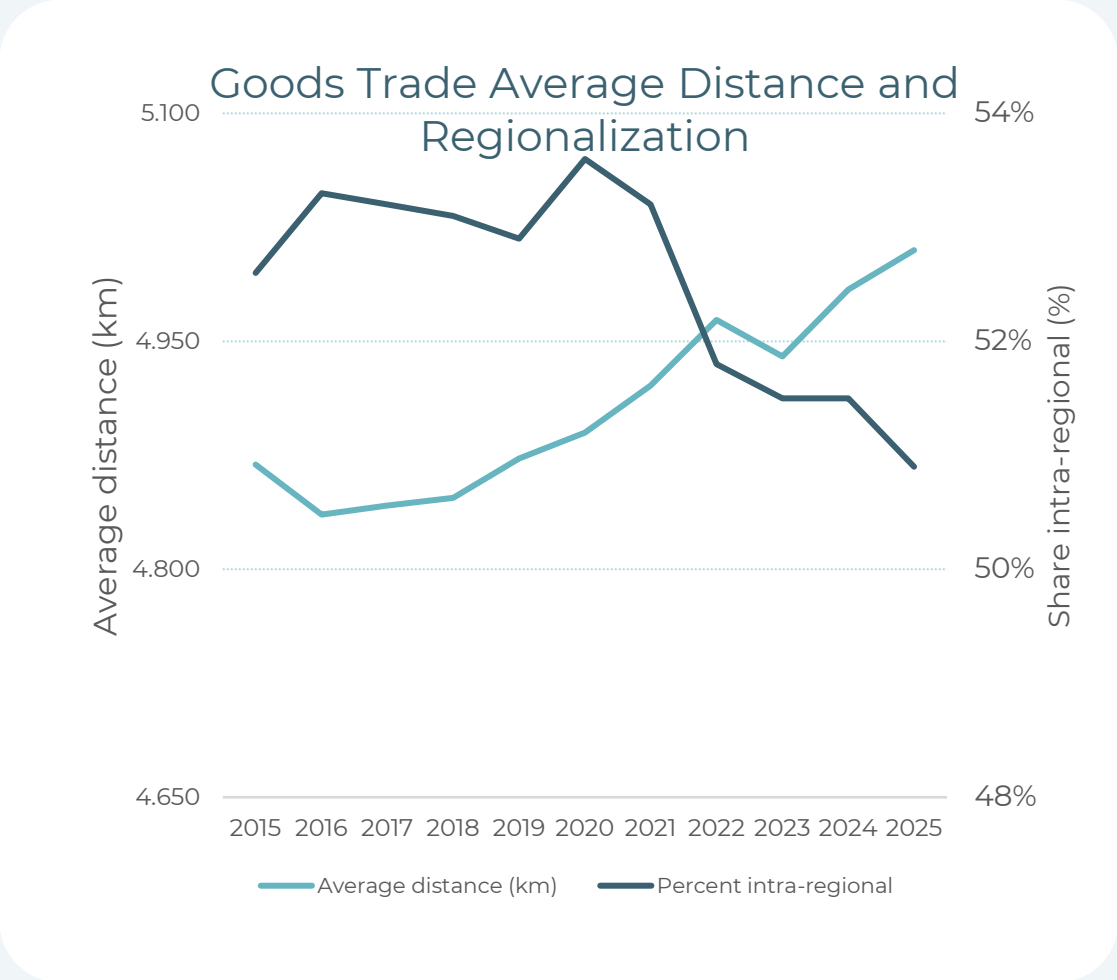
Globalization or Deglobalization

The growth of international flows is keeping pace.



Global Outlook

The growth of international flows is keeping pace.



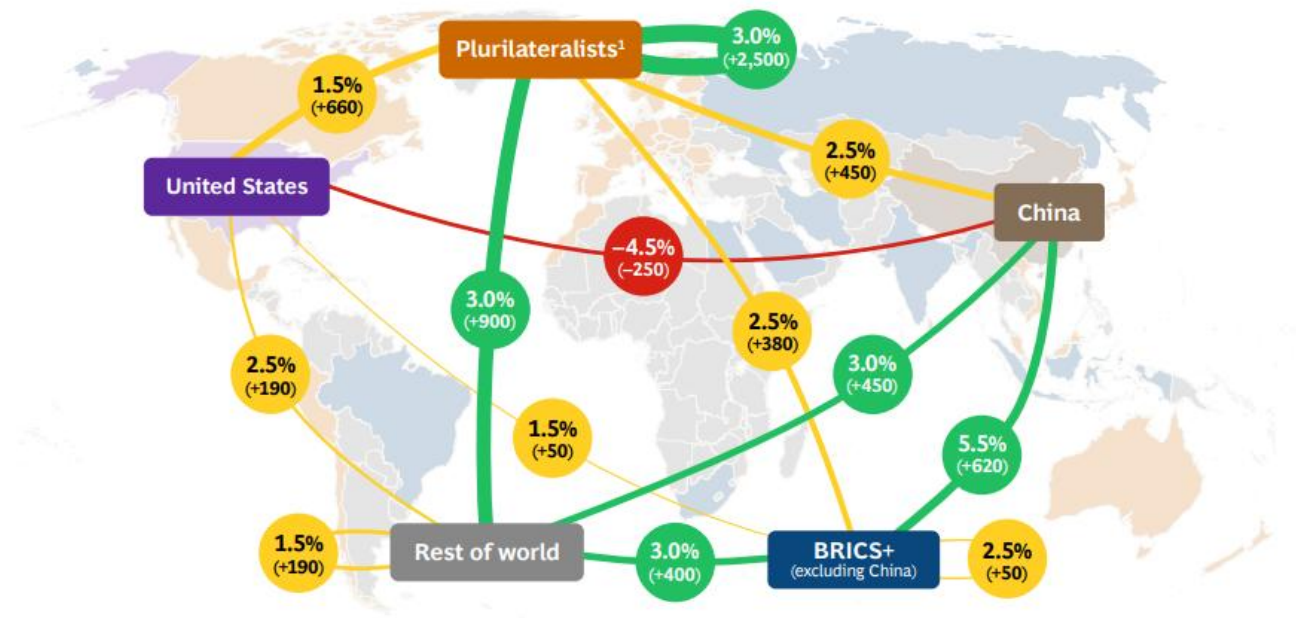
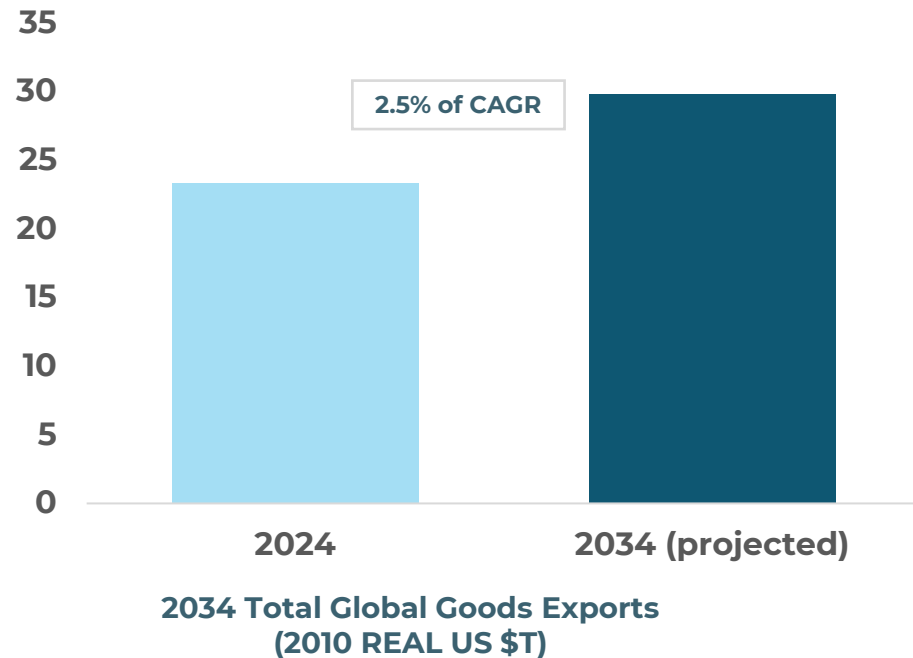
Source: DHL Trade Growth Atlas 2025 *2025 projected data

Global Outlook

Despite uncertainties, global trade volume continues to increase.

- India and ASEAN are rising as new power centres in global trade
- China is shifting away from the West and deepening ties with emerging markets

Global Export of Goods



Estimated Change in Trade of Goods (2034 VS. 2024, REAL 2010 US \$B)

Line color represents total global trade CAGR (%) from 2024 to 2034.

Line width and number in parentheses represent total change in trade flows 2034 vs 2024 ● <0% ● 0-2,5% ● >2.5%

¹ Plurilateralists include members of the EU, the European Free Trade Association, the Comprehensive and Progressive Agreement for Trans-Pacific Partnership, Costa Rica, Morocco, and South Korea. Intra-plurilateralist trade excludes intra-EU trade.

Global Outlook

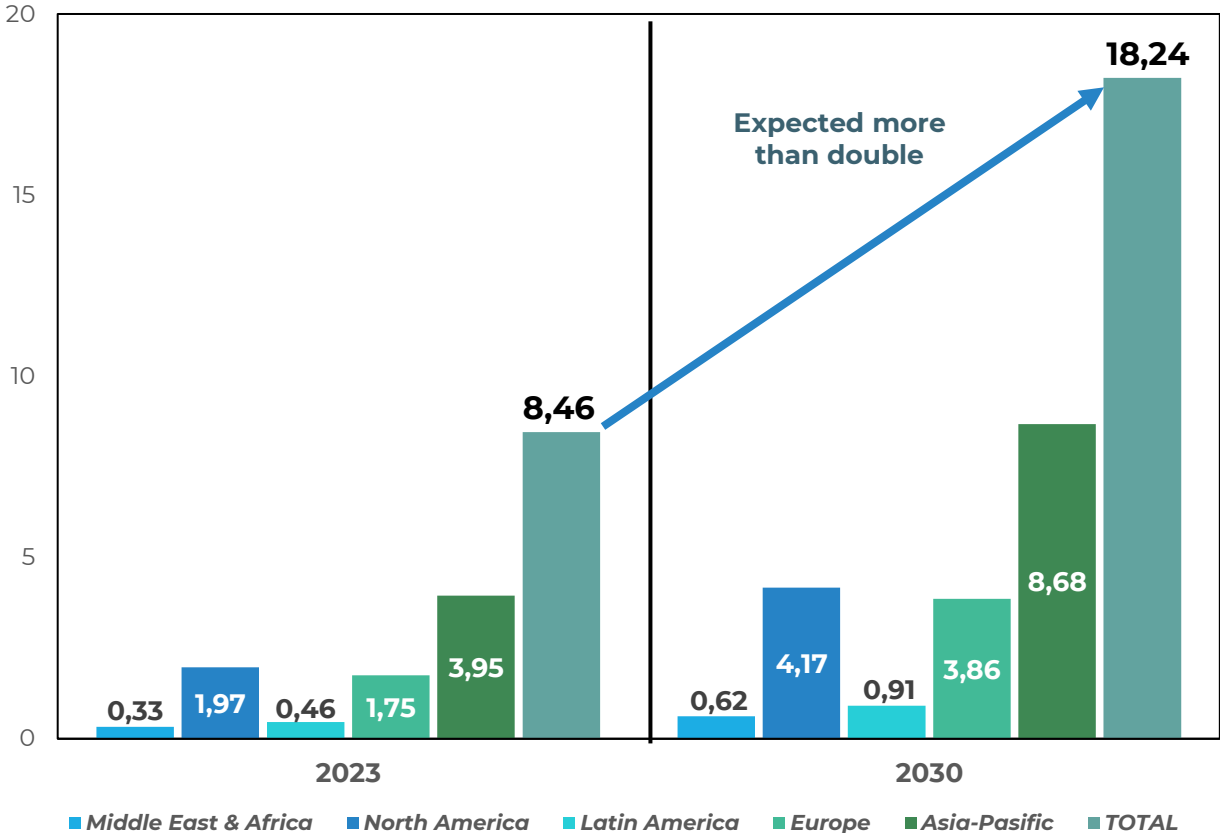
Global logistics is set to more than double in size by 2030.

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



OUTLOOK TO TRADE & LOGISTICS IN TÜRKİYE



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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



Cargill
66 countries



Microsoft
70 countries



Nestlé
Production base for MENA



BOSS HUGO BOSS
Its largest production facility worldwide



B/S/H/
89 countries



GE Healthcare
22 countries



RENAULT
Exporting 75% of its production



KNAUF
80 countries



TOYOTA
Exporting 85% of its production



Ford
Exporting 87% of its production



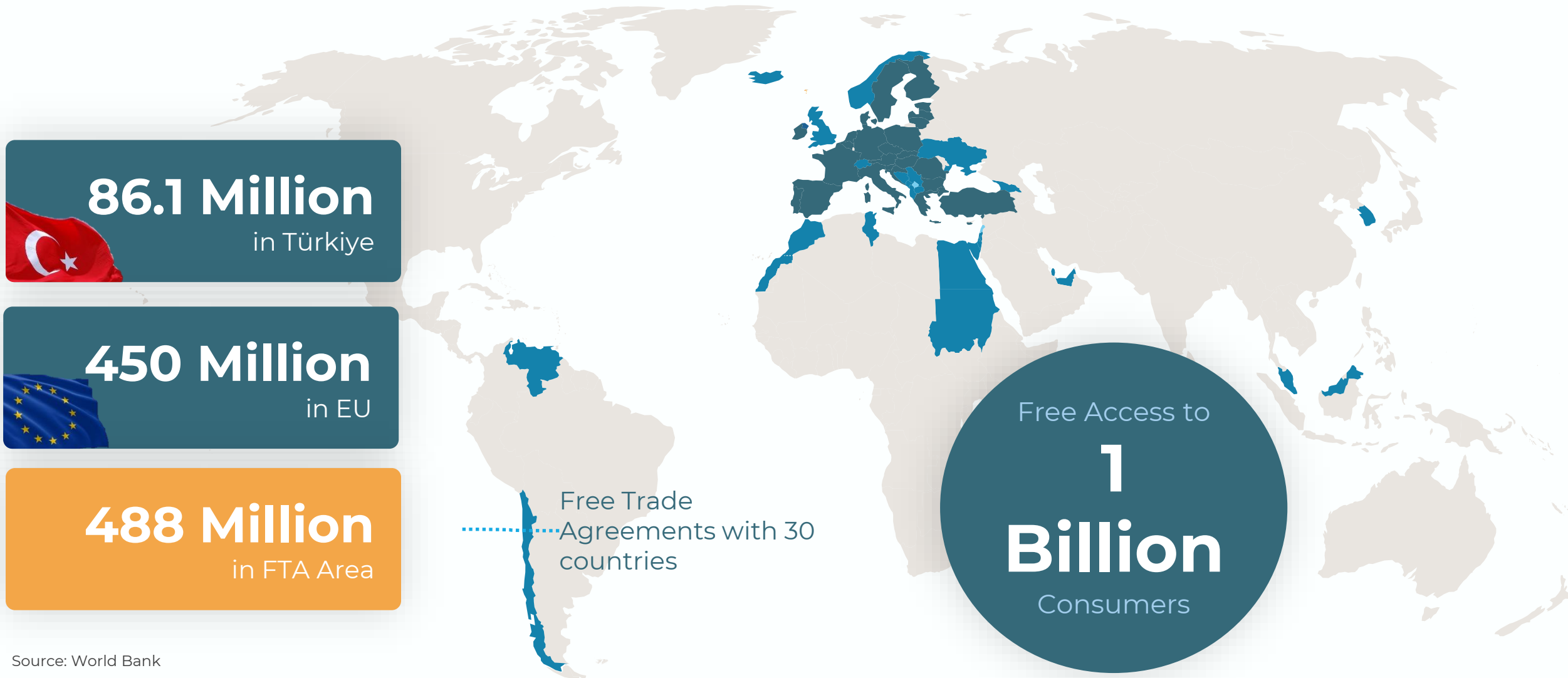
Novo Nordisk
103 countries



GSK
30 countries

Domestic + Accessible Markets

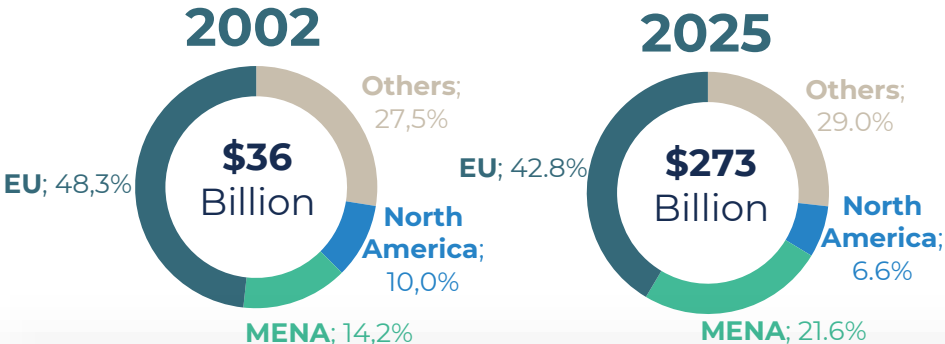
Domestic Market + EU Market + Free Trade Area



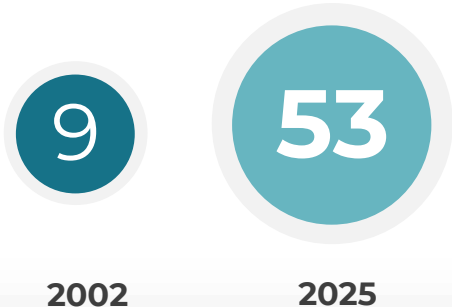
Trade Activity

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

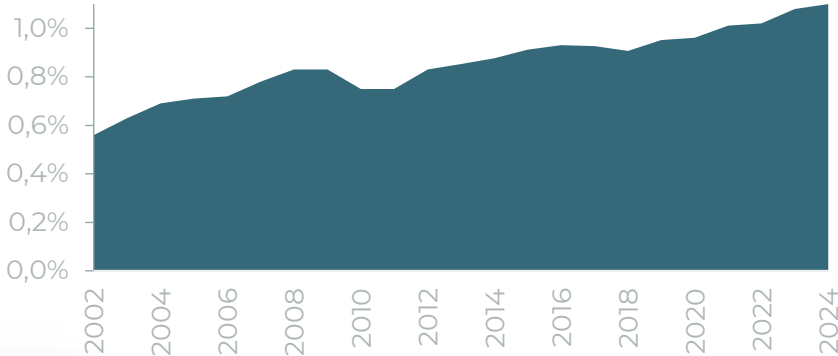
MERCHANDISE EXPORTS BY GEOGRAPHY



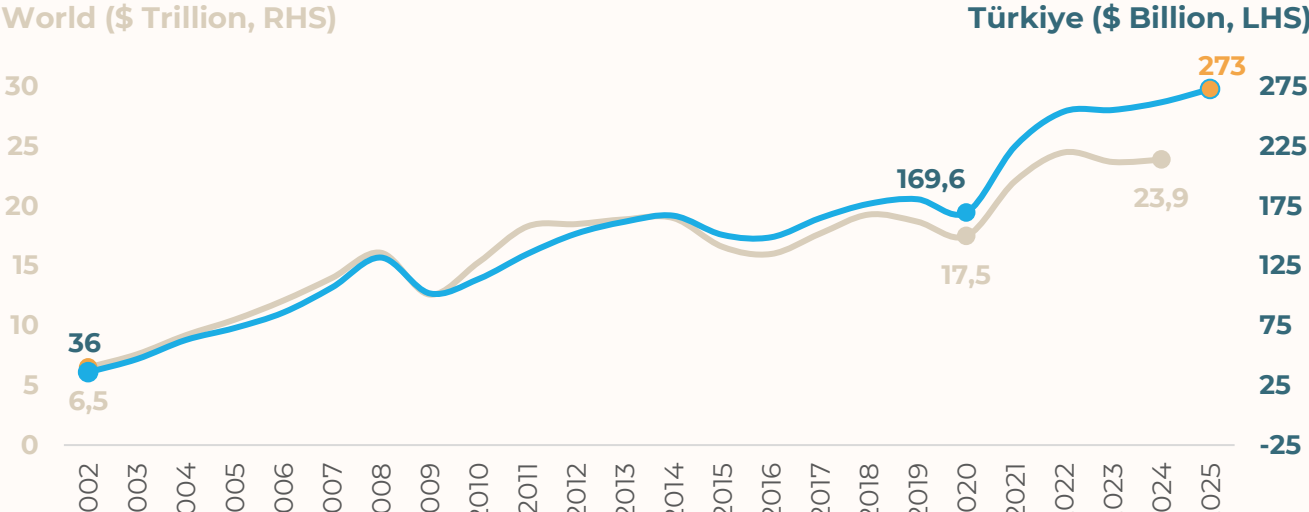
NUMBER OF EXPORT PRODUCTS OVER USD 1 BILLION



TÜRKIYE'S SHARE IN GLOBAL EXPORTS OF GOODS



Exports of Goods in Türkiye and the World

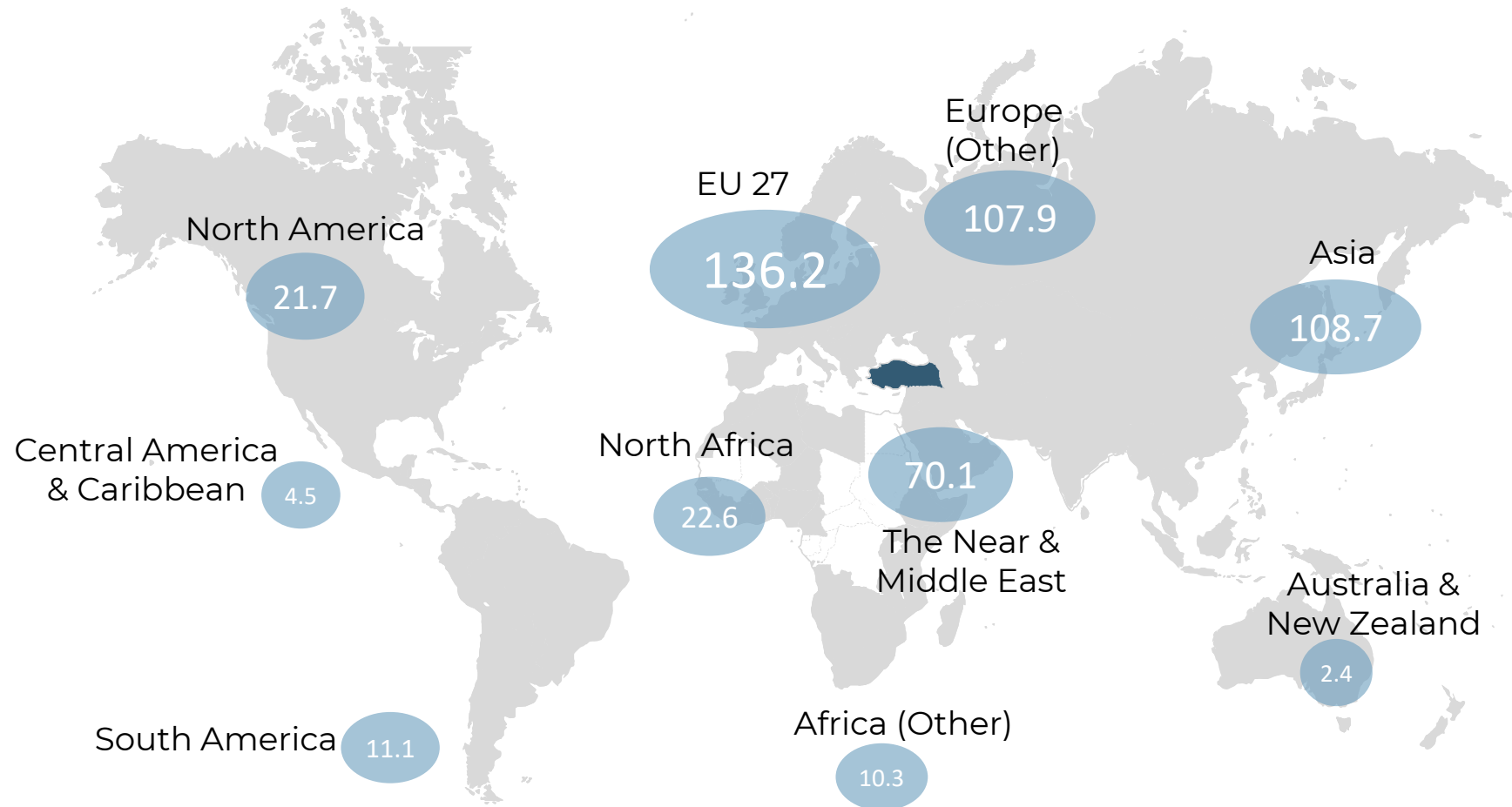


+9.0%
Türkiye
Average Annual Growth Rate (2002-2024)

+6.1%
World
Average Annual Growth Rate (2002-2024)

Trade Volume with Country Groups

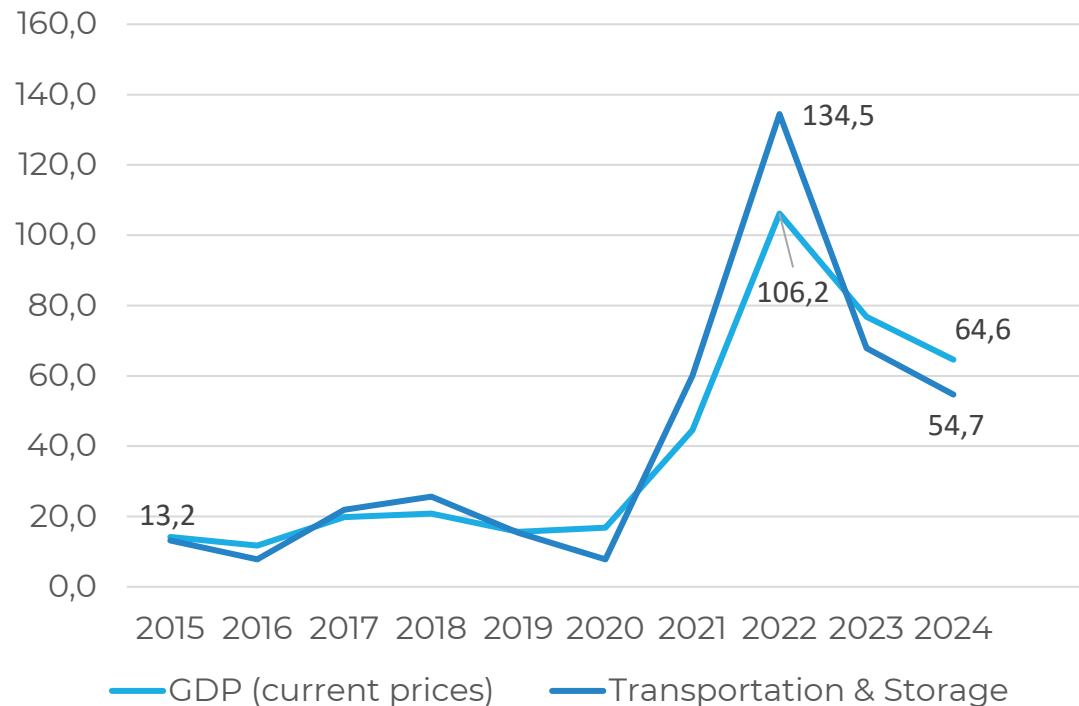
Enhanced logistics infrastructure contributes to the growth of international trade.



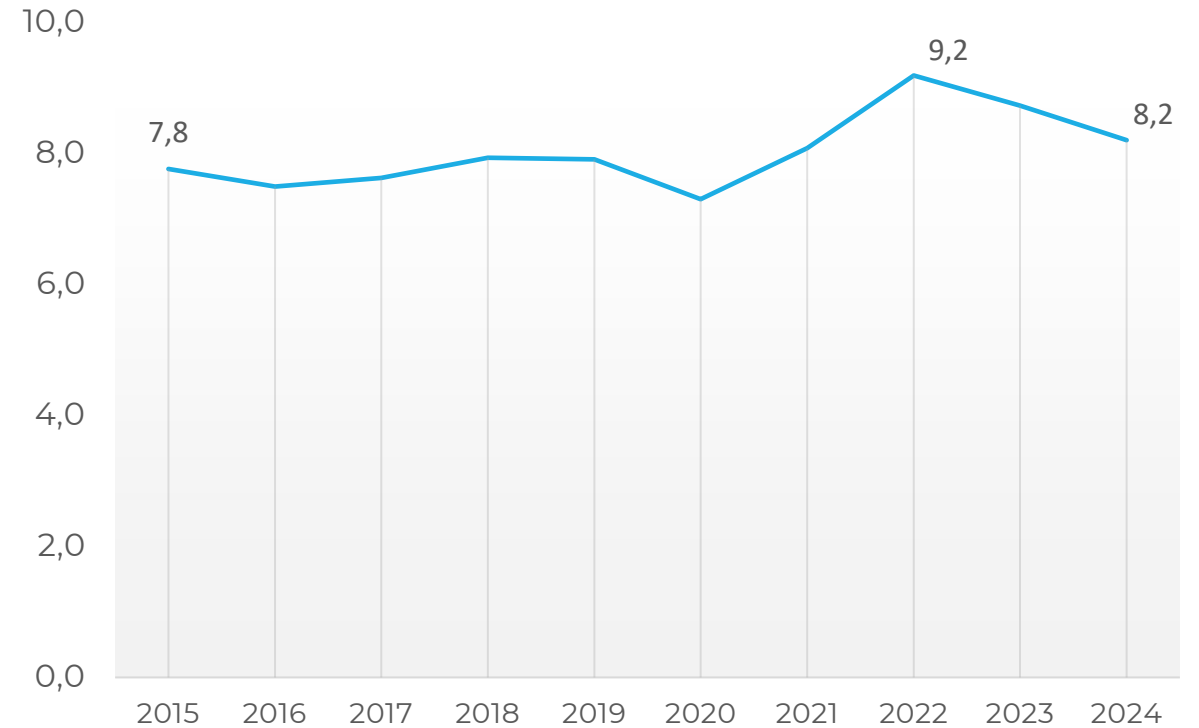
Logistics Activity in Türkiye

With a strong positive correlation, both GDP and the Transport and Storage sector have been growing steadily.

Change Ratio of GDP and Transport and Storage (%)

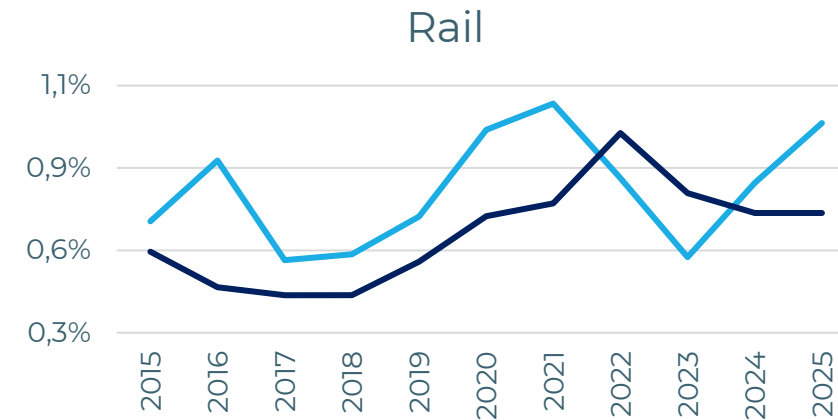
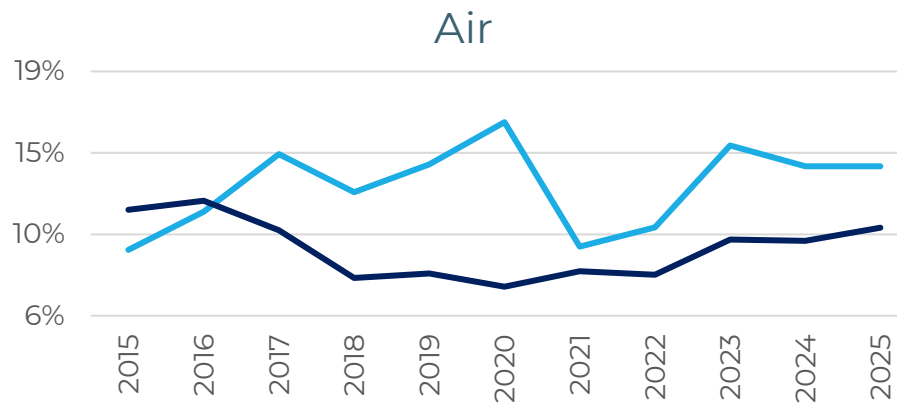
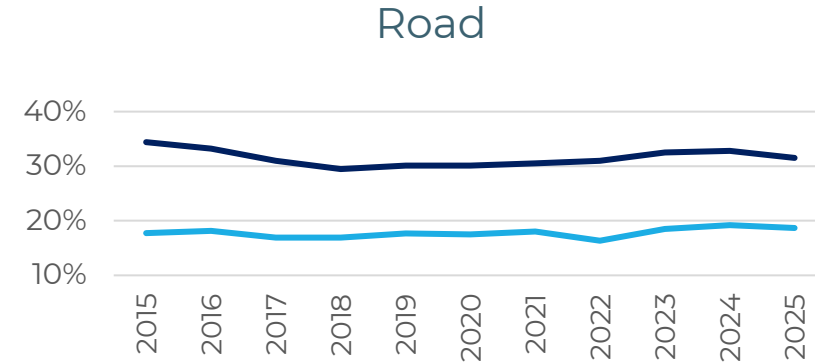
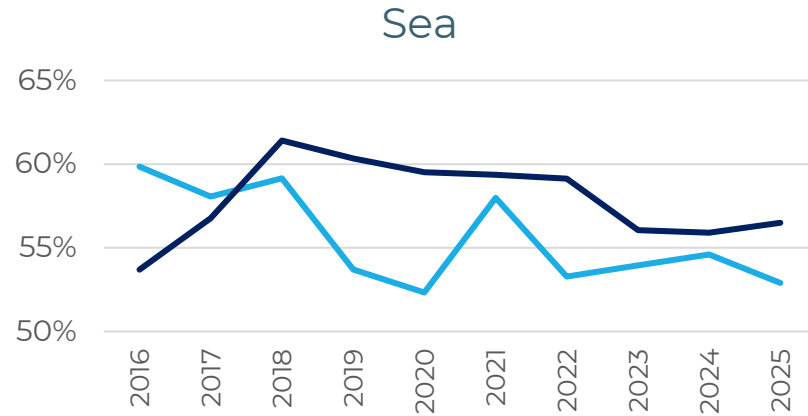


Share of Transport and Storage Sector in GDP (%)



Logistics Activity in Türkiye

Türkiye provides favorable opportunities in all transportation modes.



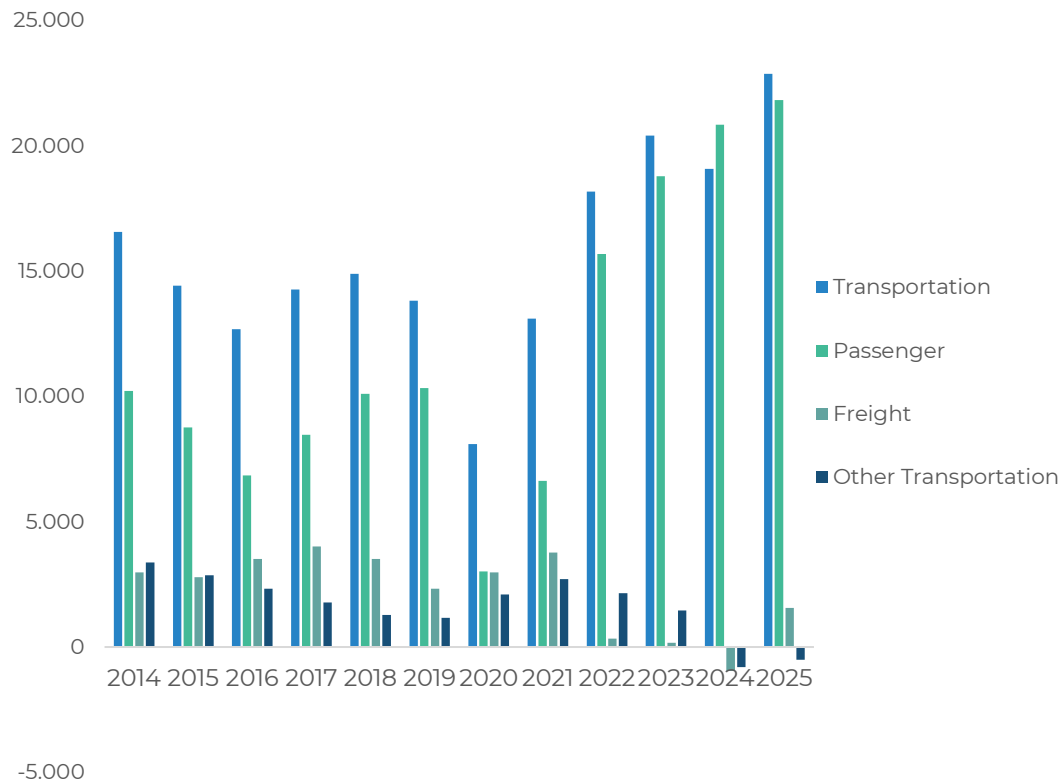
■ Import (by value of goods)

■ Export (by value of goods)

Logistics Activity in Türkiye

Since 2010, transportation sector has higher revenue than the expense.

Transport Activities in Balance of Payments
(Million \$)
(2013-2025)



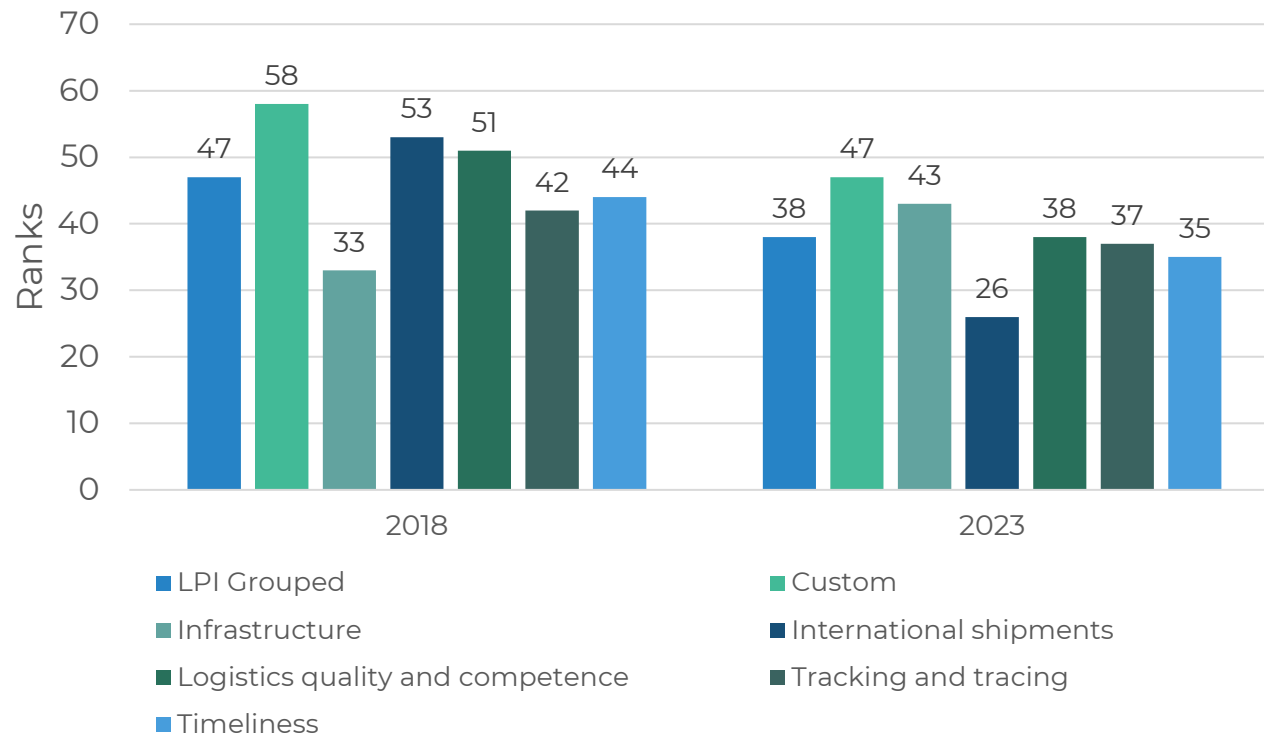
International Service Trade Statistics
(2018-2024)
(Travel excluded)



Logistics Activity in Türkiye

Türkiye's logistics sector aims to rank among the top 25 globally by 2028.*

Logistics Performance Index (LPI) Ranks 2018-2023



Türkiye is ranked **38th** best country in logistics out of 139 economies.

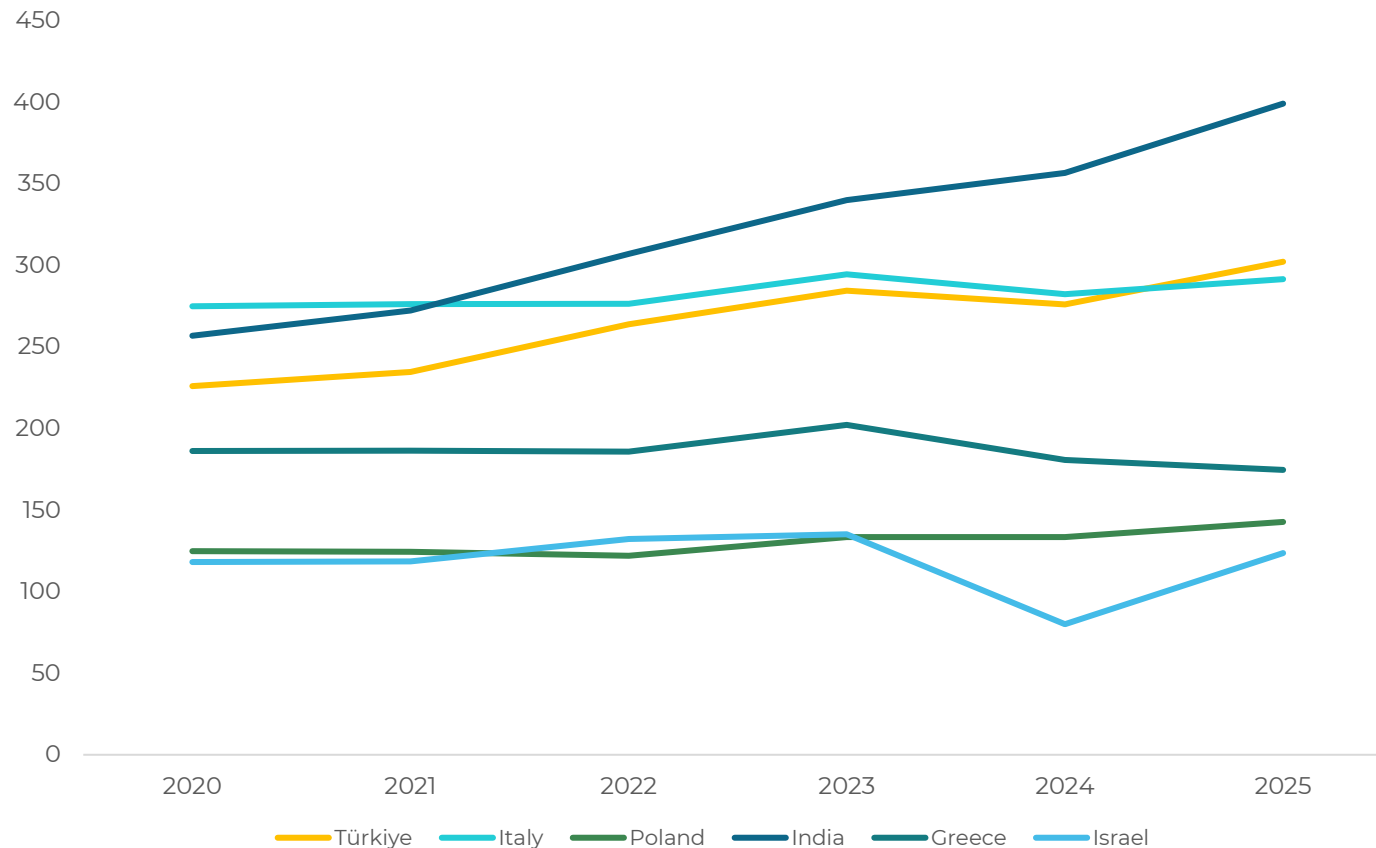
Rank	Category	Score
1	Customs score	3.0
2	Infrastructure score	3.4
3	International shipments score	3.4
4	Logistics competence and quality score	3.5
5	Timeliness score	3.6
6	Tracking and Tracing score	3.5

Source: Logistics Performance Index (LPI) 2023
* Goals set in the 12th Development Plan

Logistics Activity in Türkiye

Connectivity and logistics capabilities of Türkiye has been steadily growing over the past 5 years.

Liner Shipping Connectivity Index (LSCI)



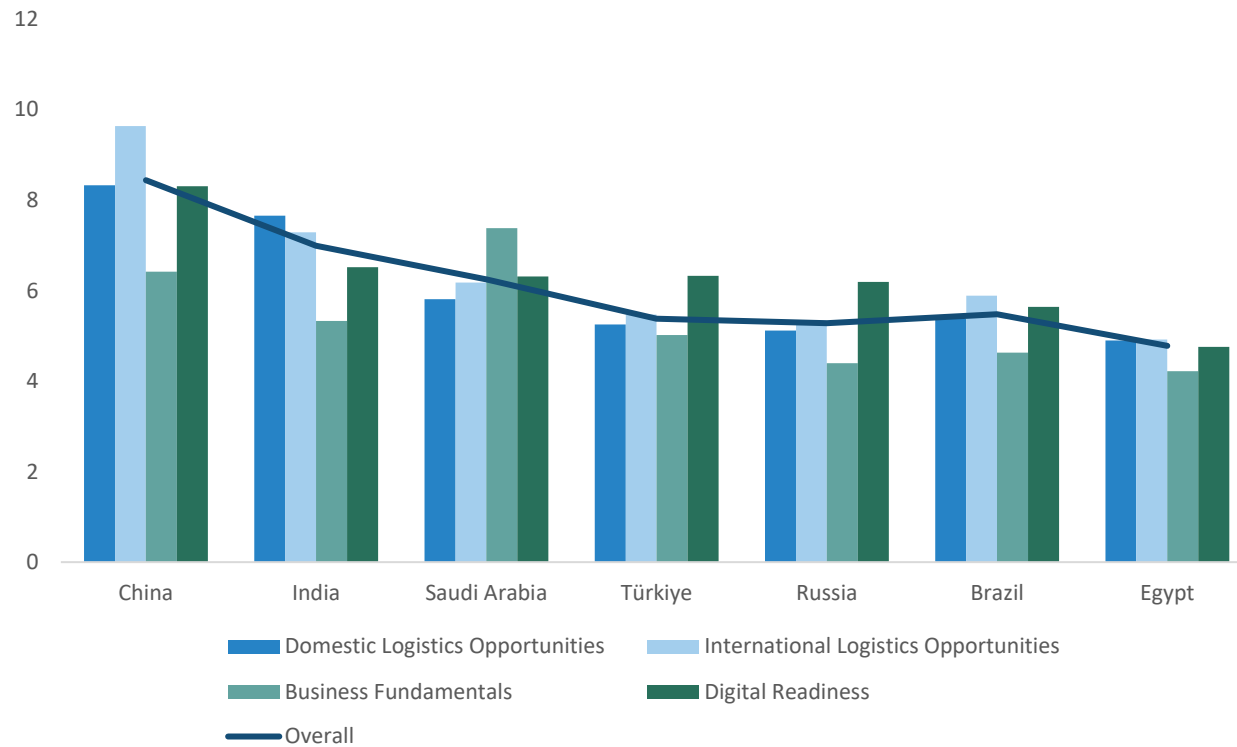
The Six Components of LSCI

- 1 The number of scheduled ships
- 2 The total deployed annual capacity in TEU
- 3 The number of regular liner shipping services from and to the country
- 4 The number of liner shipping companies that provide services from and to the country
- 5 The number of other countries that are connected to the country through direct liner shipping services
- 6 The average size in TEU of the ships deployed by the scheduled service

Logistics Activity in Türkiye

Connectivity and logistics capabilities of Türkiye has been steadily growing over the past 5 years.

Agility Emerging Markets Logistics Index 2026



Türkiye is ranked **12th** best country in logistics out of 50 emerging markets.

Score

5.43

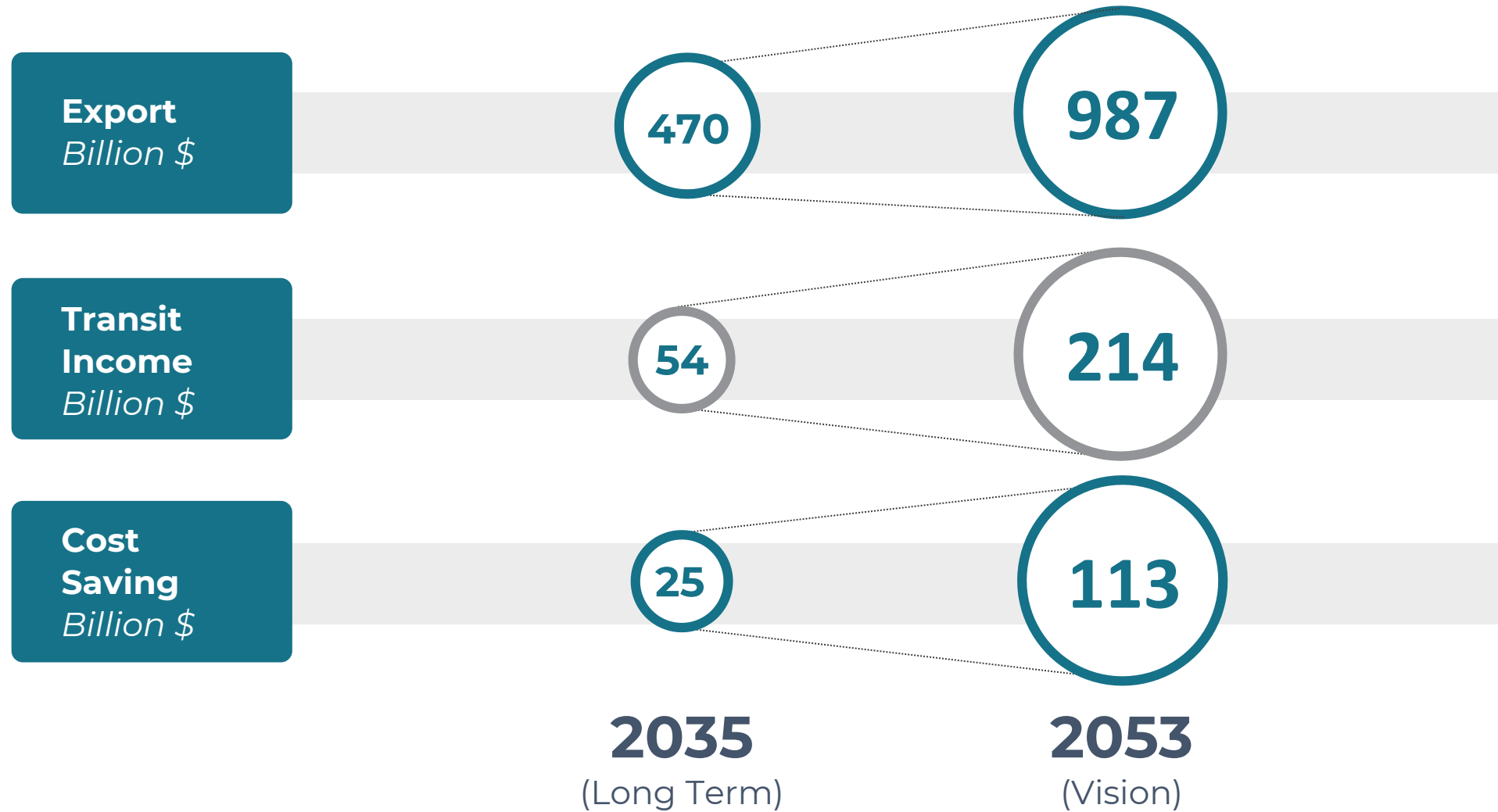


Major Players in Logistics Industry



New Logistics Master Plan

Logistics master plan outlines ambitious targets



TÜRKİYE'S LOGISTICS CAPABILITIES



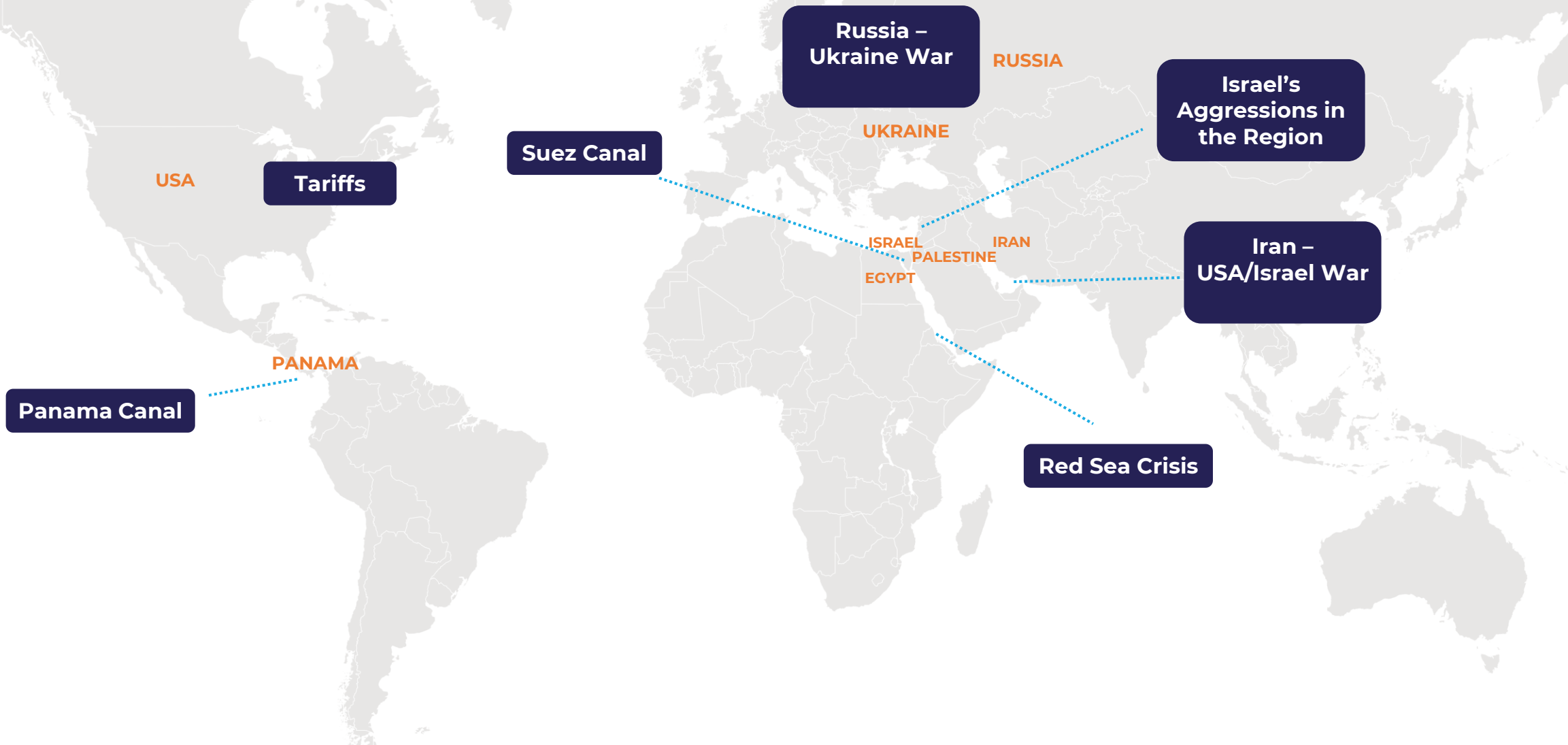
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GLOBAL CHALLENGES

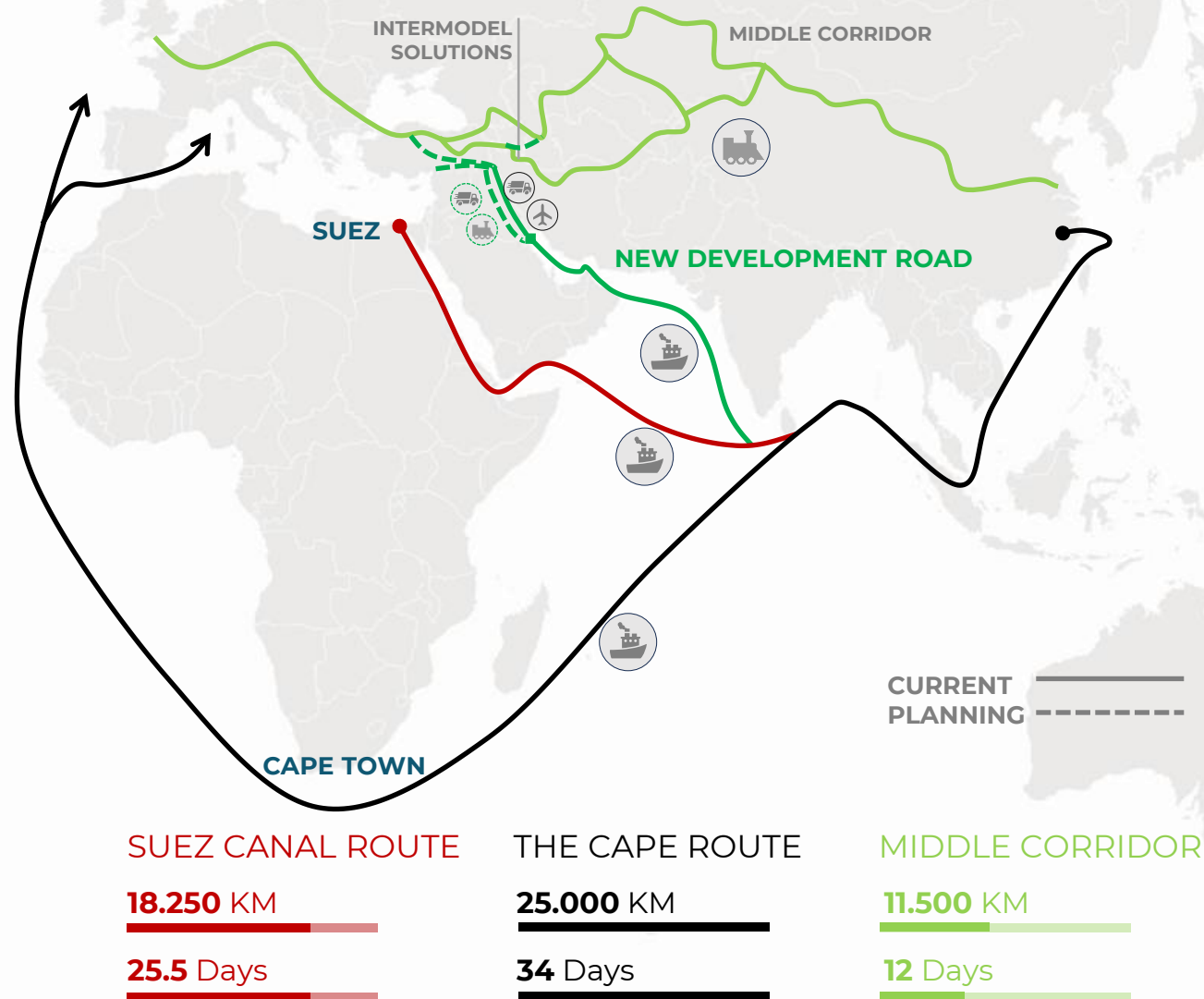
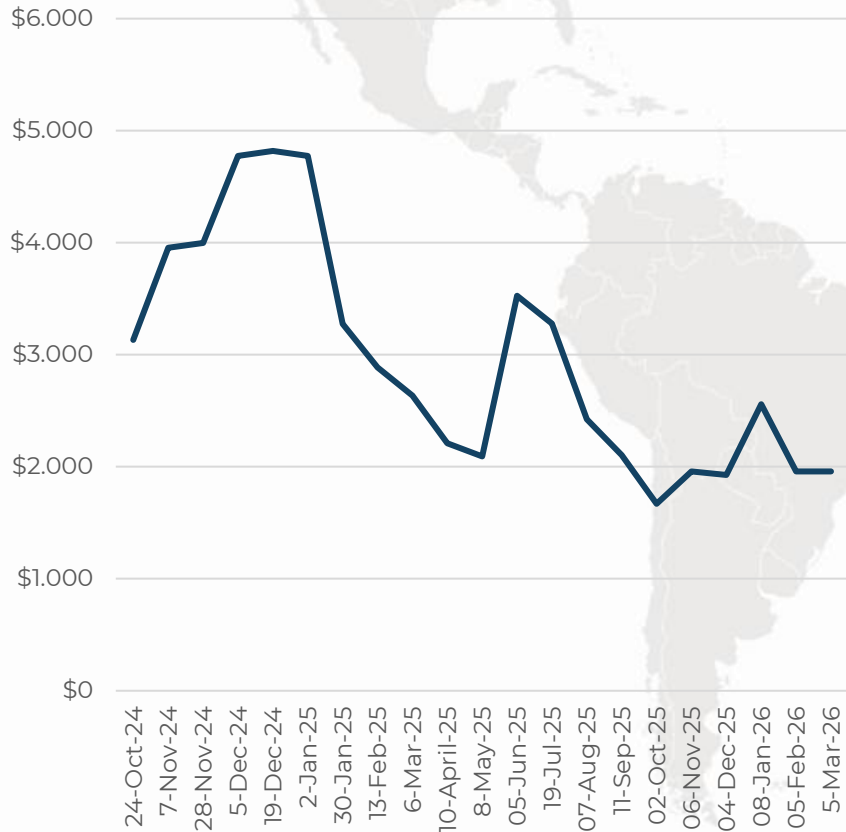




TÜRKİYE'S LOGISTICS ADVANTAGES

Türkiye; your resilient partner, providing diverse routes through every crisis

Drewry WCI: Shanghai to Rotterdam



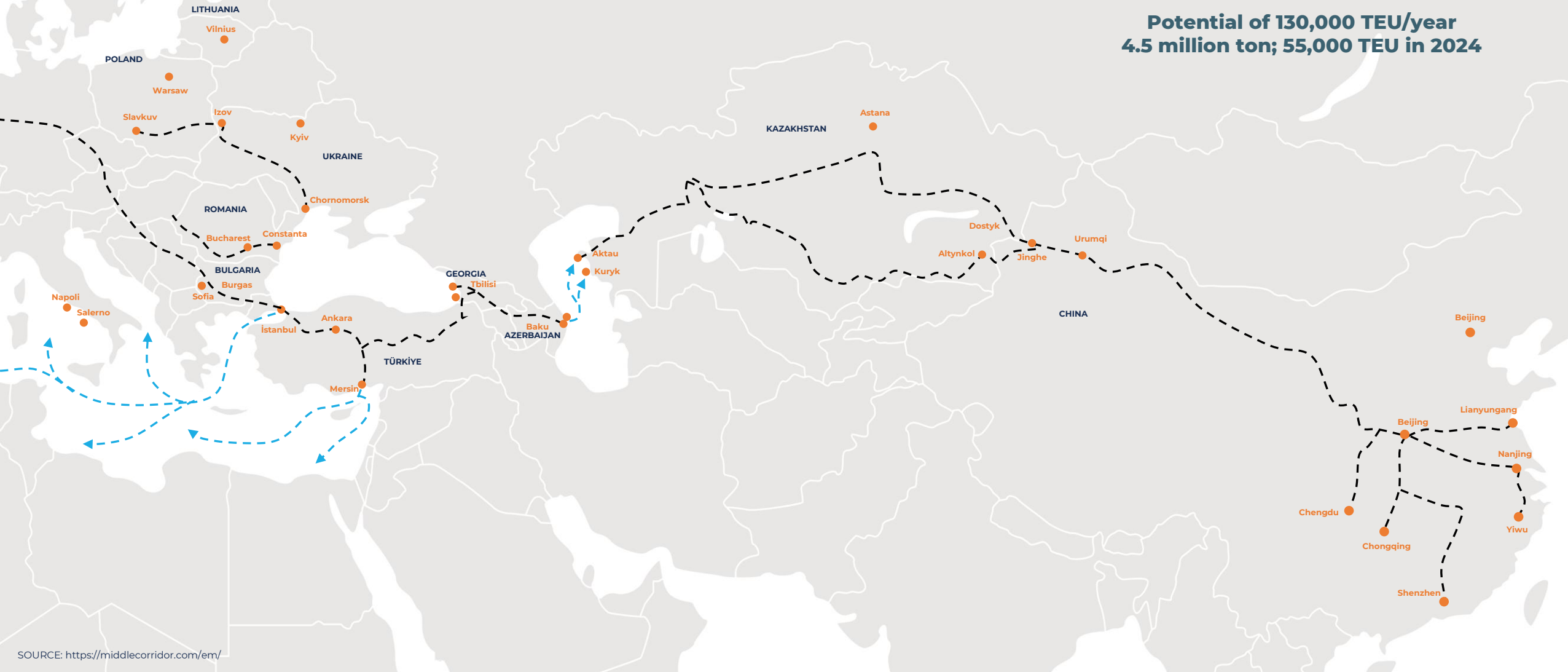


THE RISE OF THE MIDDLE CORRIDOR

- Offers diversification to the traditional routes
- Europe-Asia in 15 days

Strengths	Opportunities
Strategic Location Diversification Growing Market Governmental Supports	Infrastructure Development Trade Growth Economic Initiatives Shift in Trade Patterns

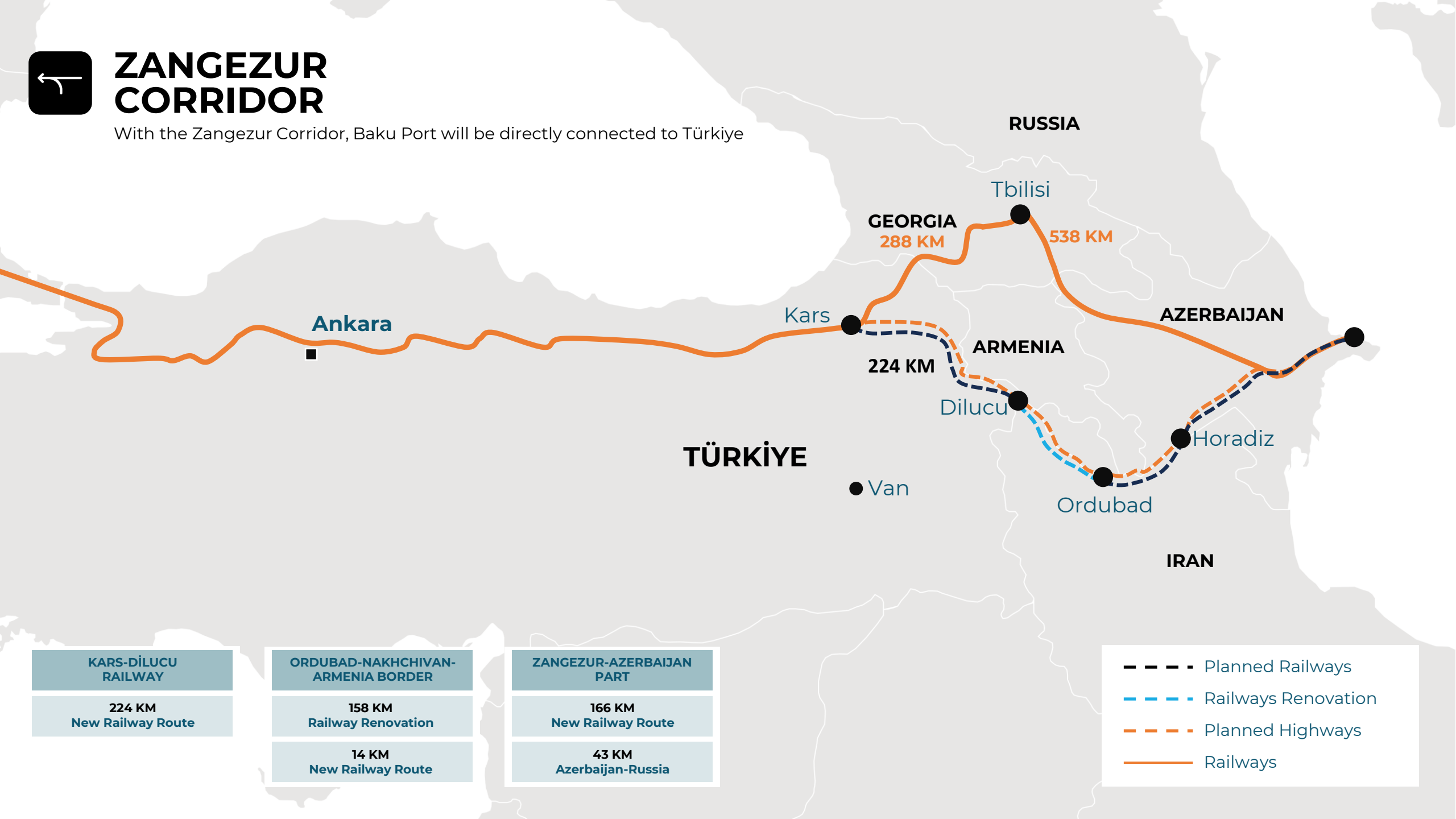
Potential of 130,000 TEU/year
4.5 million ton; 55,000 TEU in 2024





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

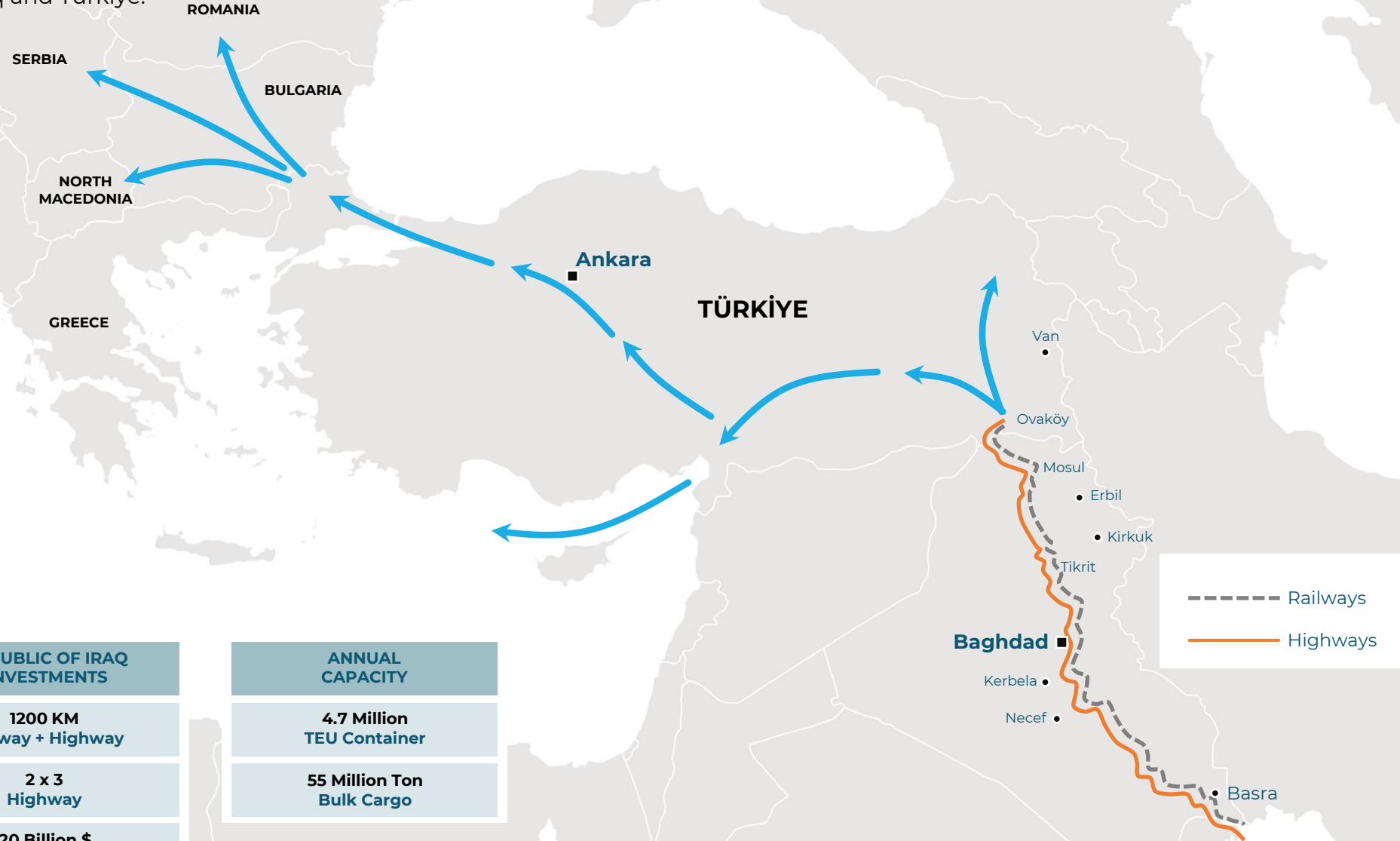
43 KM
Azerbaijan-Russia

- Planned Railways
- - - Railways Renovation
- - - Planned Highways
- Railways



THE DEVELOPMENT ROAD

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



REPUBLIC OF TÜRKİYE INVESTMENTS

615 KM
Railway

615 KM
Railway

7,8 Billion \$
Total Investment

REPUBLIC OF IRAQ INVESTMENTS

1200 KM
Railway + Highway

2 x 3
Highway

20 Billion \$
Total Investment

ANNUAL CAPACITY

4.7 Million
TEU Container

55 Million Ton
Bulk Cargo



TÜRKİYE'S LOGISTICS CAPABILITIES

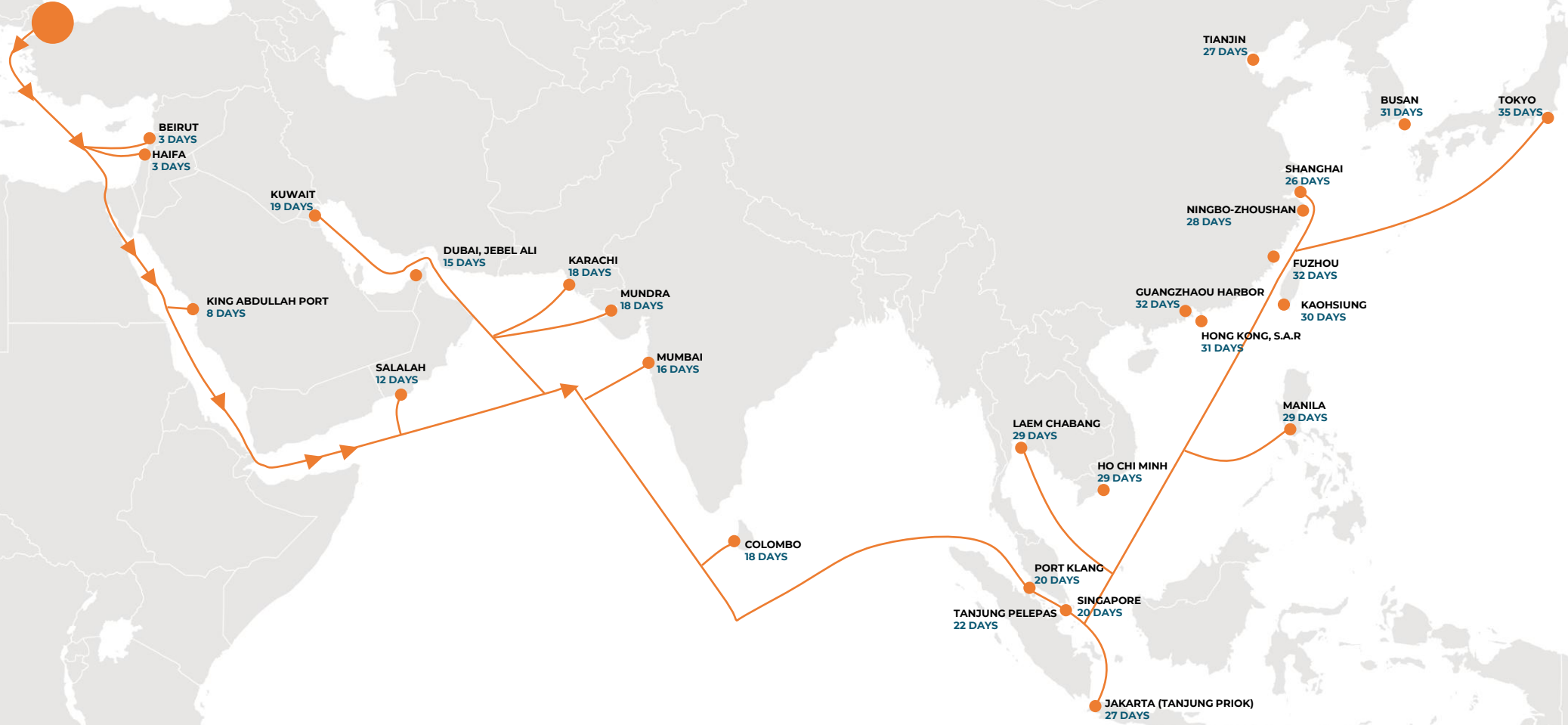
EUROPE SEA / EXPORT





TÜRKİYE'S LOGISTICS CAPABILITIES

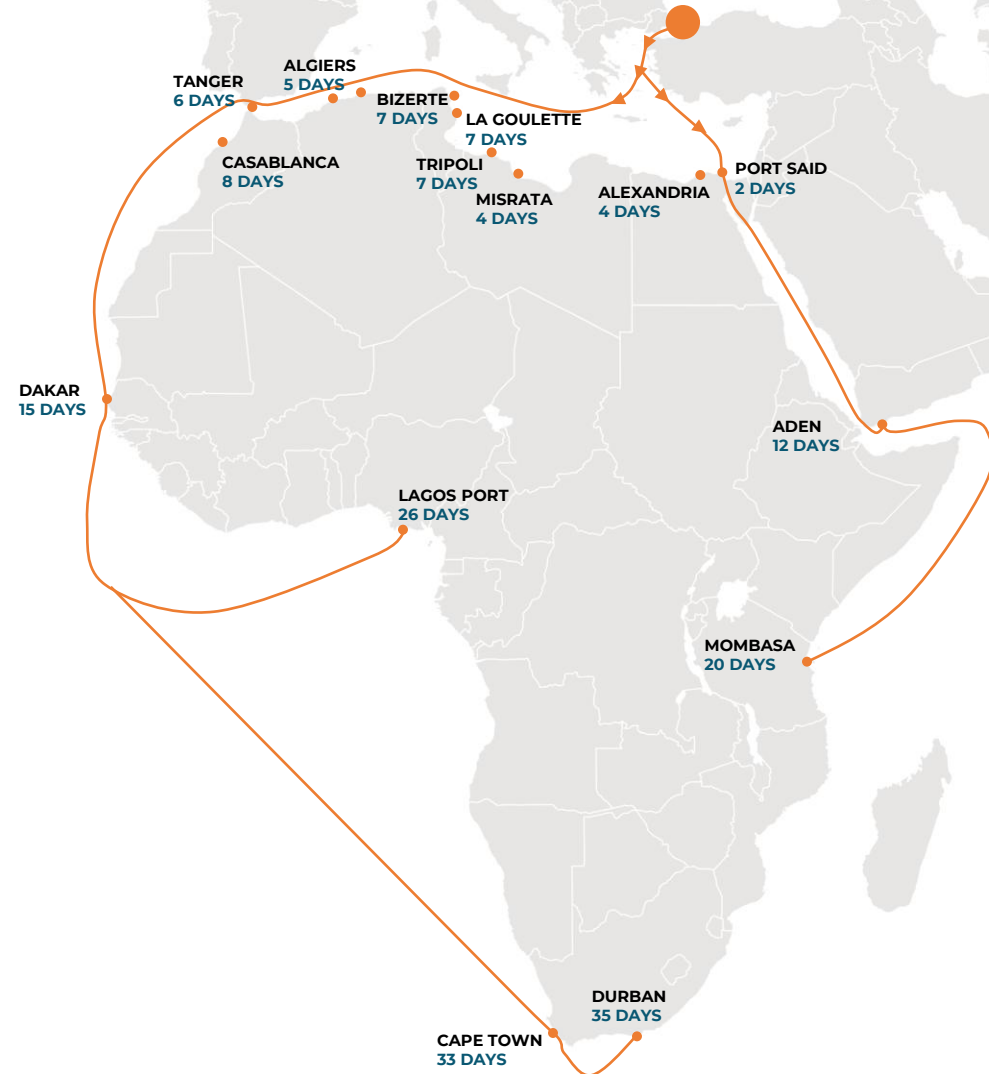
ASIA SEA / EXPORT





TÜRKİYE'S LOGISTICS CAPABILITIES

AFRICA SEA / EXPORT





TÜRKİYE'S LOGISTICS CAPABILITIES

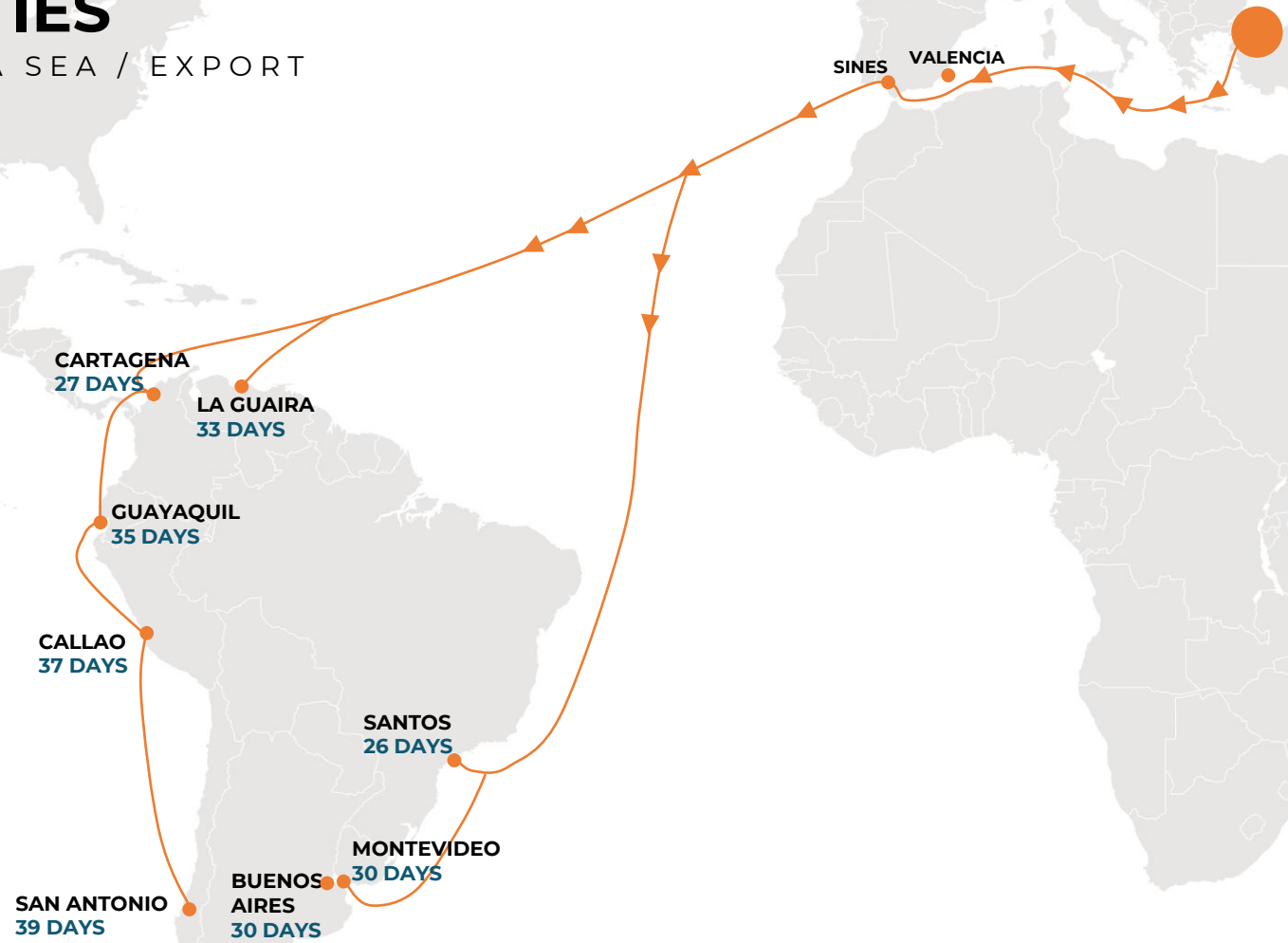
NORTH AMERICA SEA / EXPORT





TÜRKİYE'S LOGISTICS CAPABILITIES

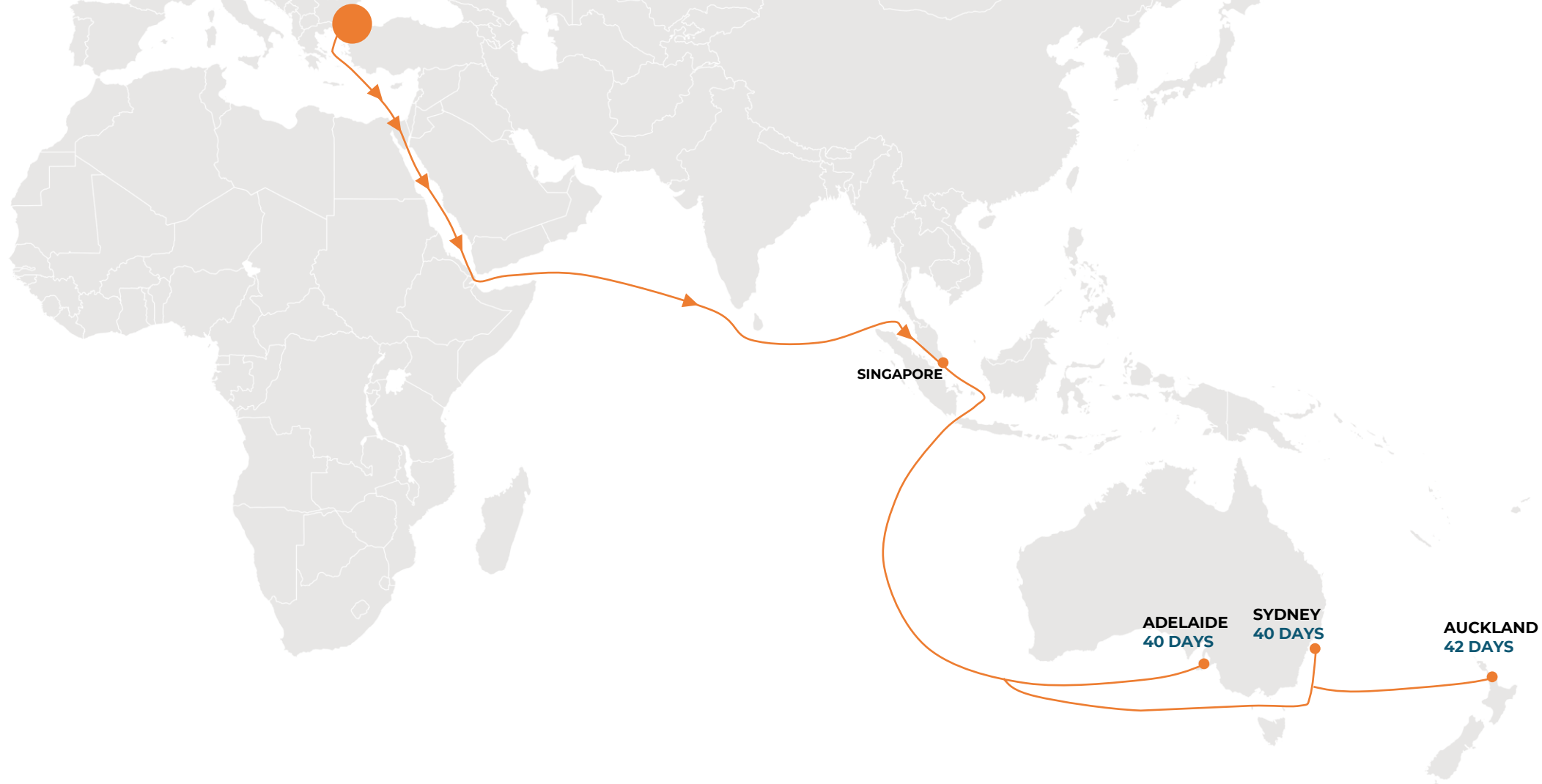
SOUTH AMERICA SEA / EXPORT





TÜRKİYE'S LOGISTICS CAPABILITIES

AUSTRALIA SEA / EXPORT





TÜRKİYE'S LOGISTICS CAPABILITIES

EUROPE ROAD / EXPORT

MANCHESTER
10 DAYS

LONDON
9 DAYS

DUSSELDORF
4 DAYS

BERLIN
4 DAYS

WARSAW
3 DAYS

RIGA
5 DAYS

MOSCOW
5 DAYS

MINSK
4 DAYS

PRAGUE
3 DAYS

KIEV
2 DAYS

MUNICH
4 DAYS

VIENNA
3 DAYS

BUDAPEST
2 DAYS

LYON
4 DAYS

ZAGREB
3 DAYS

BELGRAD
2 DAYS

BUCHAREST
2 DAYS

SARAJEVO
3 DAYS

SOFIA
1 DAY

SKOPJE
1 DAY

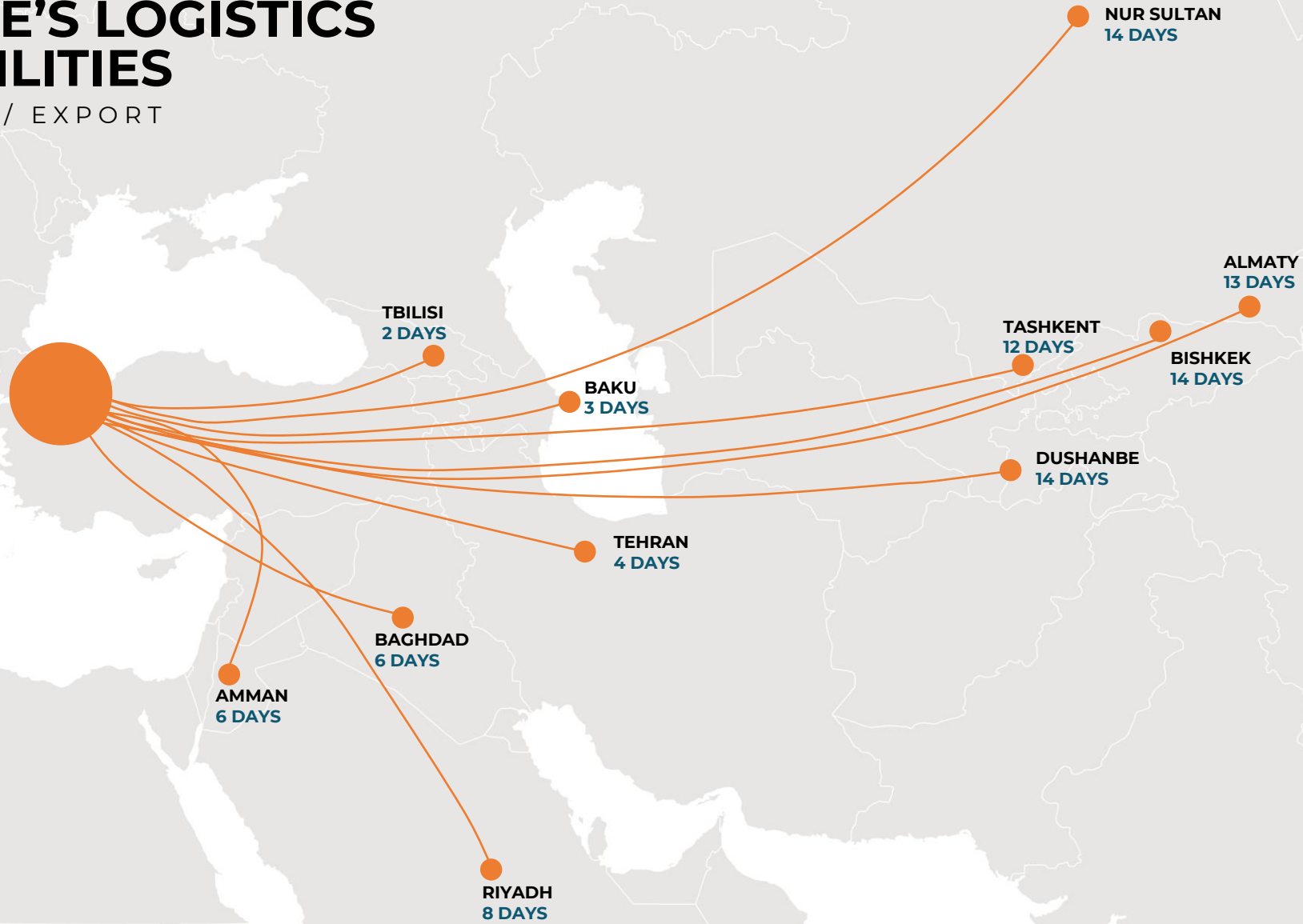
TIRANA
2 DAYS





TÜRKİYE'S LOGISTICS CAPABILITIES

ASIA ROAD / EXPORT





TÜRKİYE'S LOGISTICS CAPABILITIES

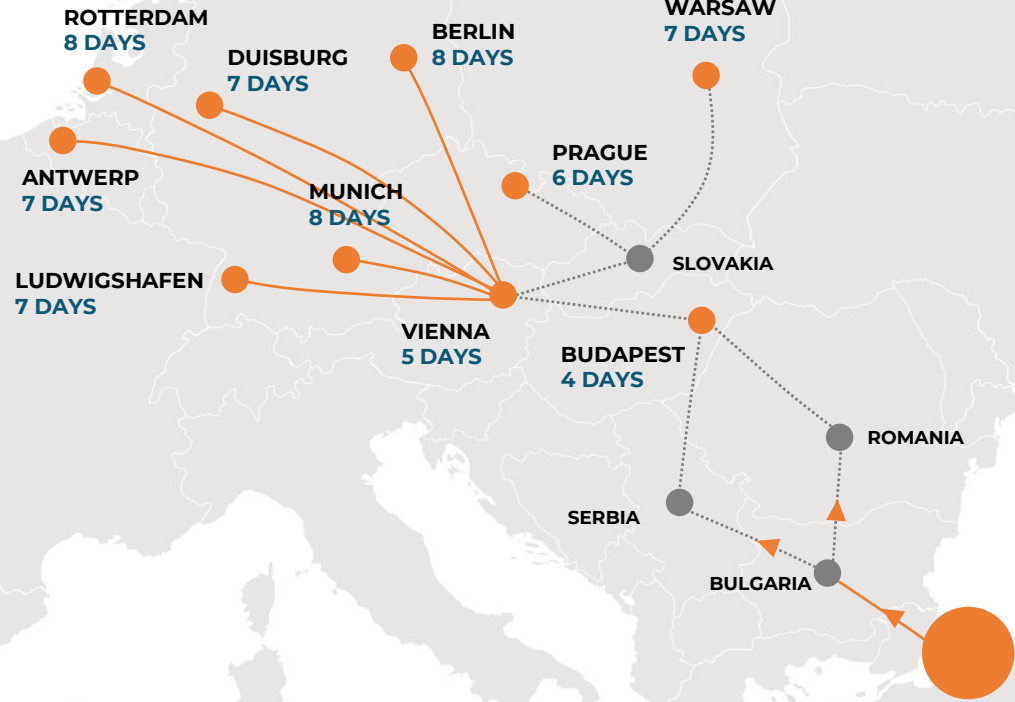
EUROPE RO - RO + ROAD





TÜRKİYE'S LOGISTICS CAPABILITIES

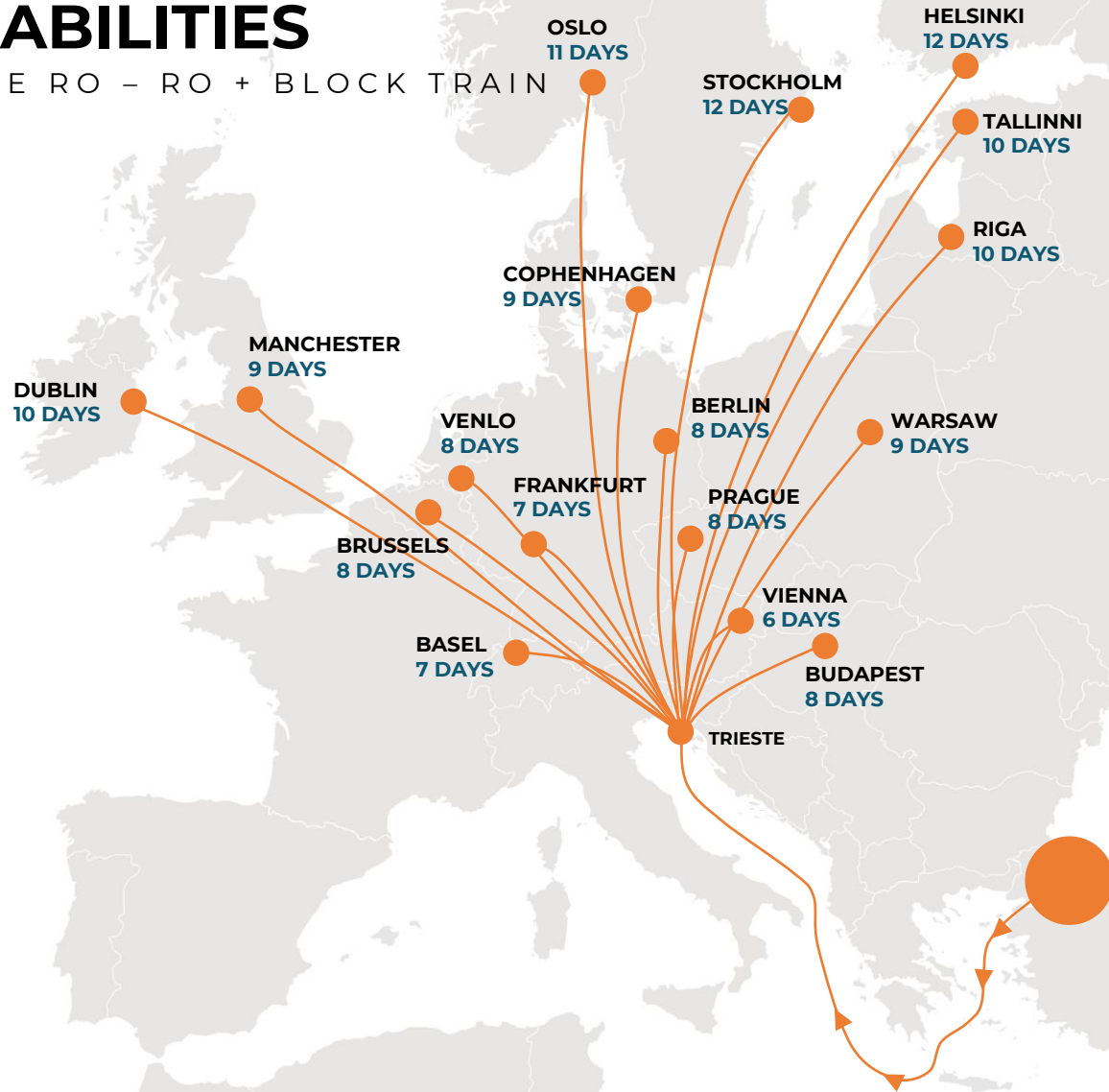
EUROPE TRAIN / EXPORT





TÜRKİYE'S LOGISTICS CAPABILITIES

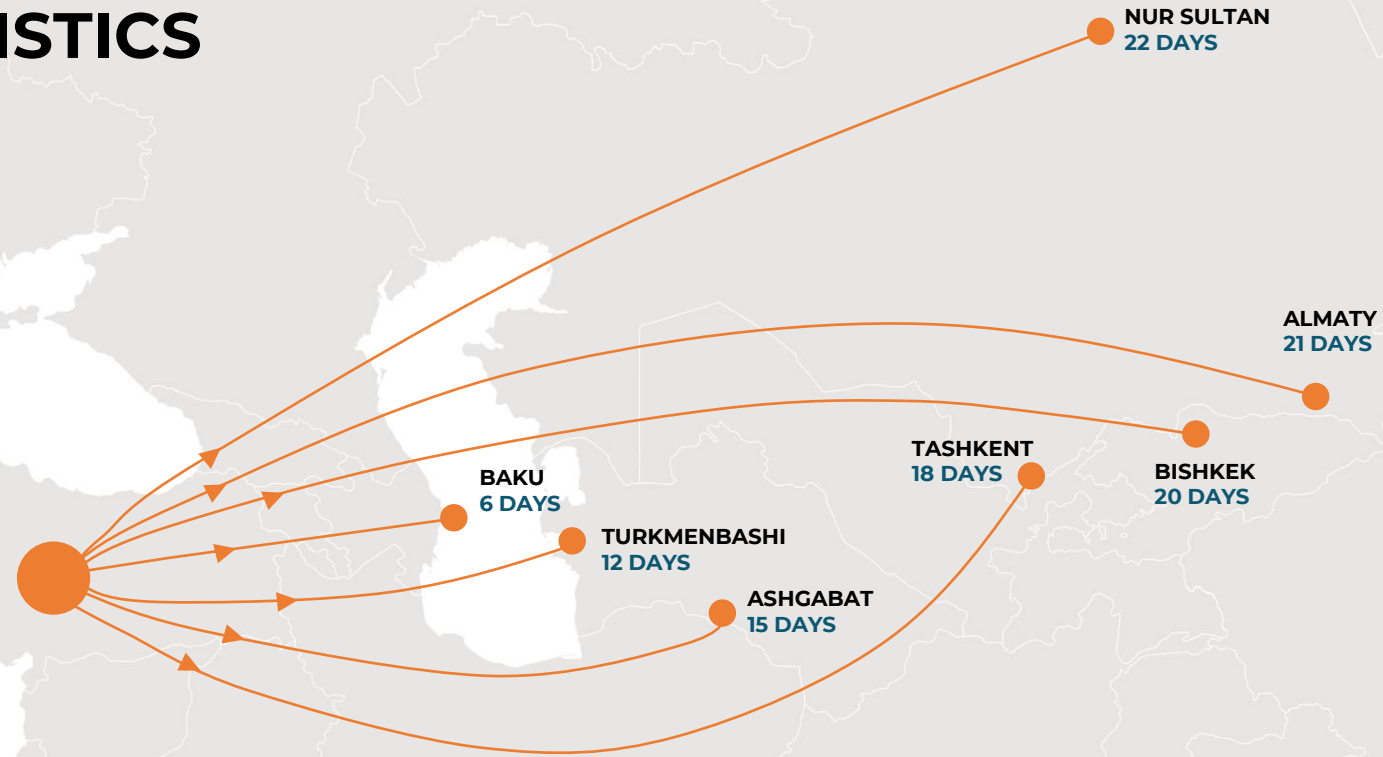
EUROPE RO - RO + BLOCK TRAIN





TÜRKİYE'S LOGISTICS CAPABILITIES

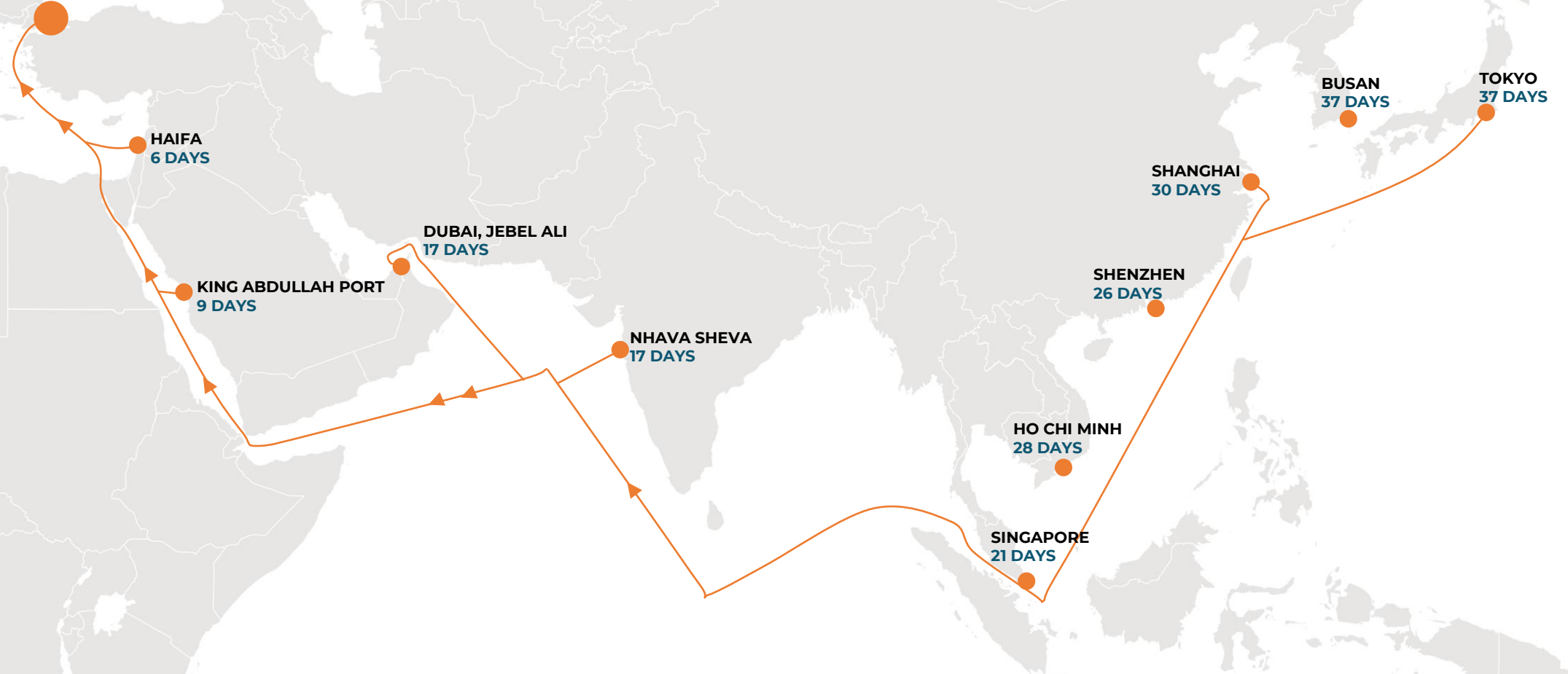
ASIA TRAIN / EXPORT





TÜRKİYE'S LOGISTICS CAPABILITIES

ASIA SEA / IMPORT





TÜRKİYE'S LOGISTICS CAPABILITIES

EUROPE- N. AFRICA SEA / IMPORT





TÜRKİYE'S LOGISTICS CAPABILITIES

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



GLOBAL TRENDS IN TÜRKİYE



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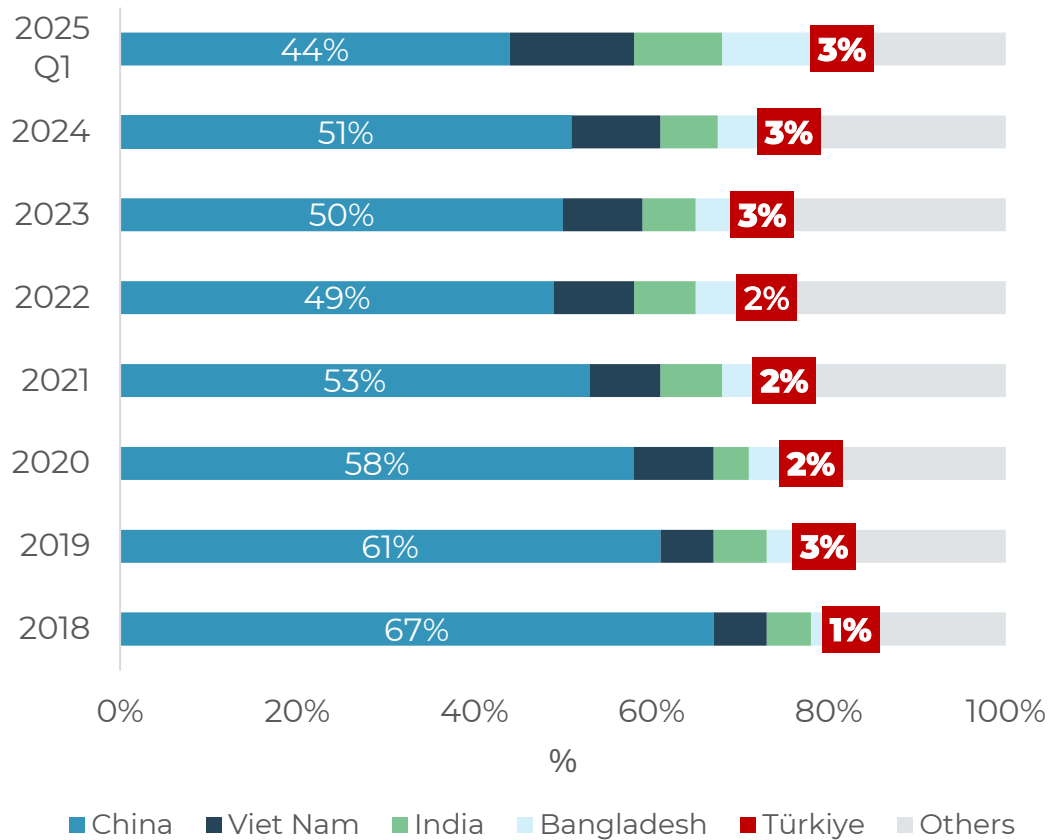
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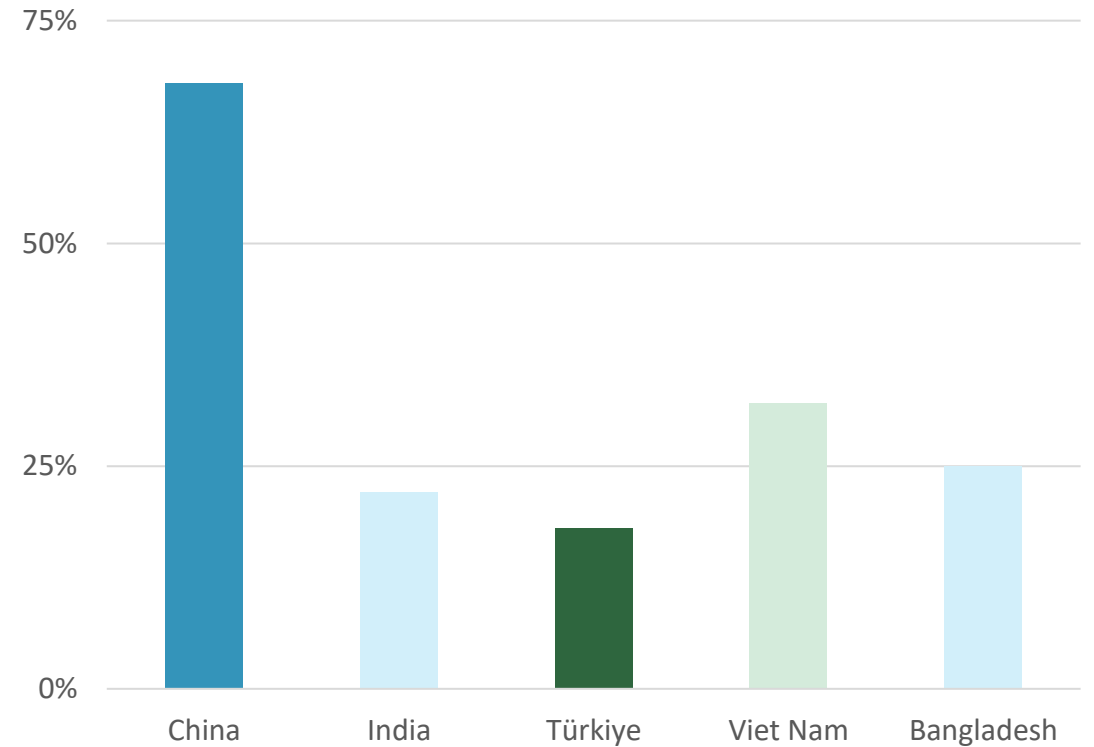
Nearshoring

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

Top sourcing countries for US and EU



Top 5 Sourcing Partners of the EU-based Businesses by 2025



Nearshoring

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



Signed an agreement to invest \$1 billion in Türkiye to establish a production facility with an annual capacity of 150,000 vehicles and an R&D center, aiming to start production by the end of 2026.



Have indicate their plans for new investments in Türkiye in the near future.



Has opened up a 23,000-square-meter facility in the Istanbul Airport Cargo Zone, which is a hub that integrates operations on three continents.



Inaugurated its R&D center at Istanbul Airport, marking a pioneering milestone in the fast air cargo transportation industry.



Plans to build a logistics hub adjacent to Türkiye's Istanbul Airport and a data center in capital Ankara with an investment of more than USD 1 billion.



Has been manufacturing the Volkswagen Transporter at the Ford Otosan plant in Kocaeli, Türkiye since 2022, exporting these vehicles to various international markets.



Opened the factory in Avclar.



Has started production in Tekirdağ.



Continuing its investments in Türkiye, unveiled its Yeniköy Factory, which it expanded and modernized.



Has opened up its first logistics center in Türkiye in Tuzla,.



Announced a \$1.6 billion investment in Türkiye.

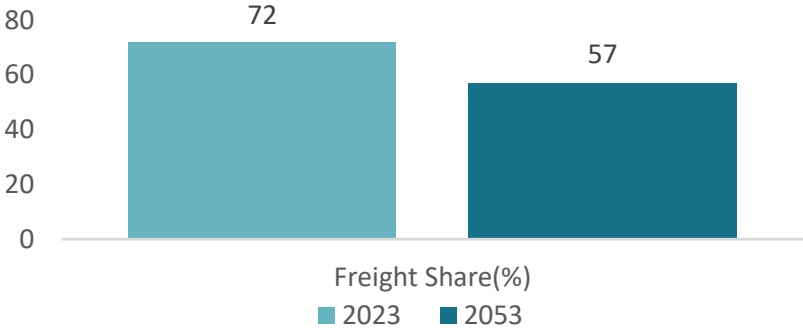


Has been producing buses at the Hoşdere plant in Istanbul since 1995, exporting 83% of them to over 70 countries across Europe and the Middle East.

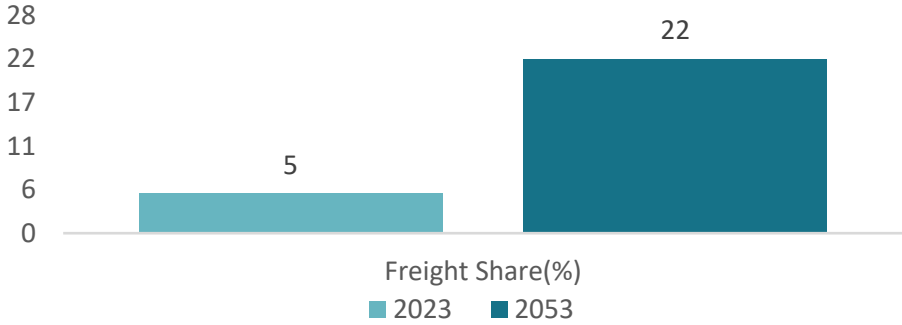
Green Deal

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



Source: Ministry of Transport and Infrastructure

Green Deal

Türkiye's Competitive Advantages in The Green Deal



1

Growing
renewables
sector



2

Less shipping
distance
provides less
carbon
footprint



3

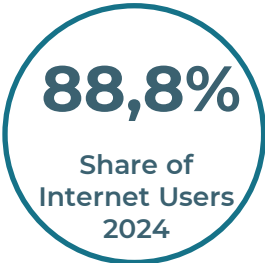
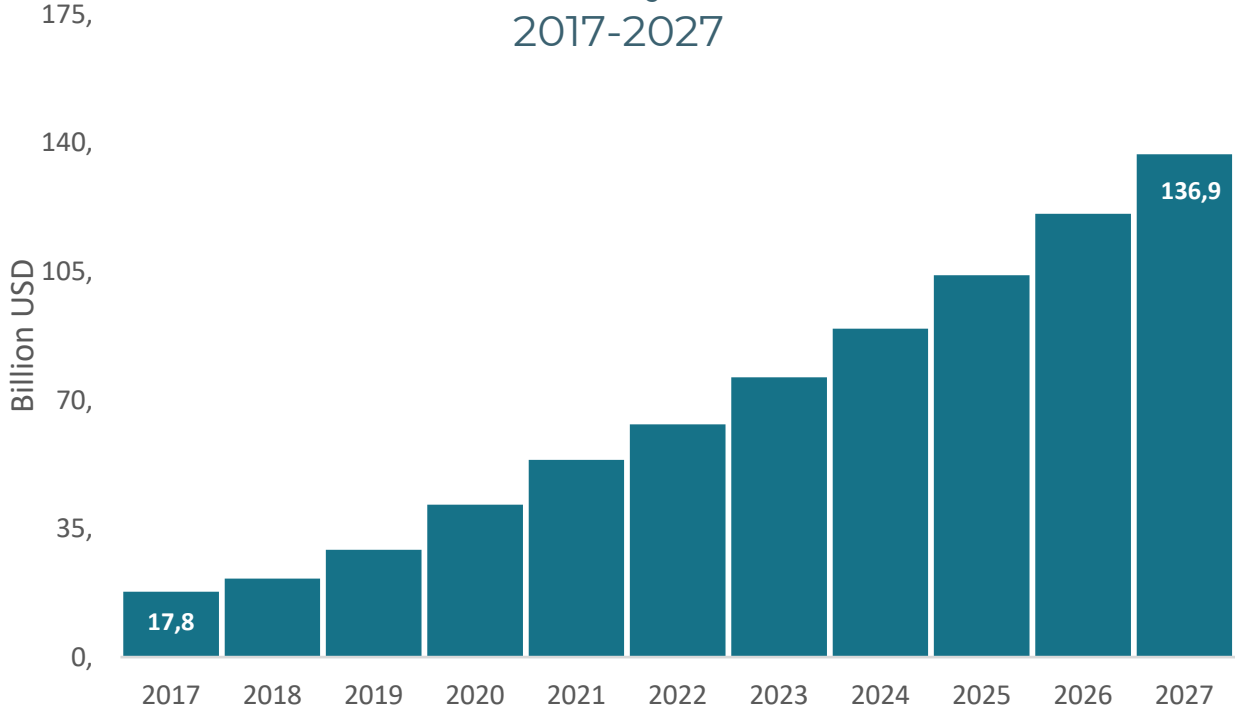
Growing
infrastructure
investments

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

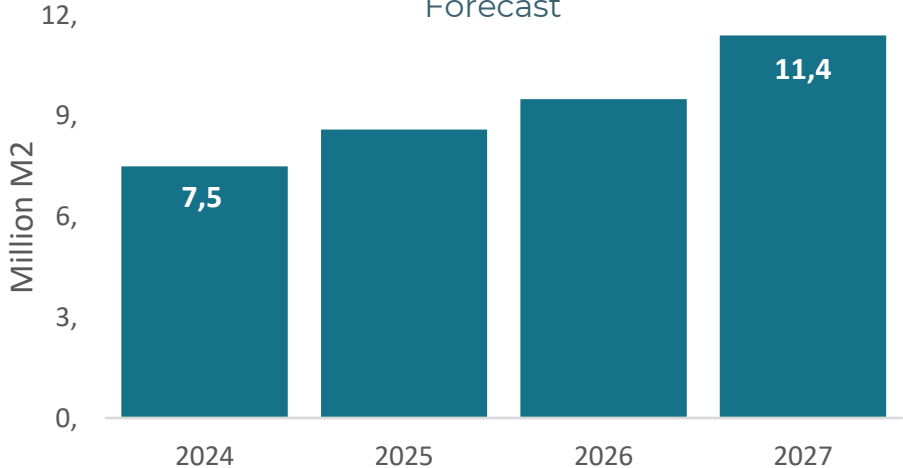
City Logistics

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

Digital Commerce Transaction Value in Türkiye 2017-2027



E-Commerce Warehouse Capacity Growth Forecast

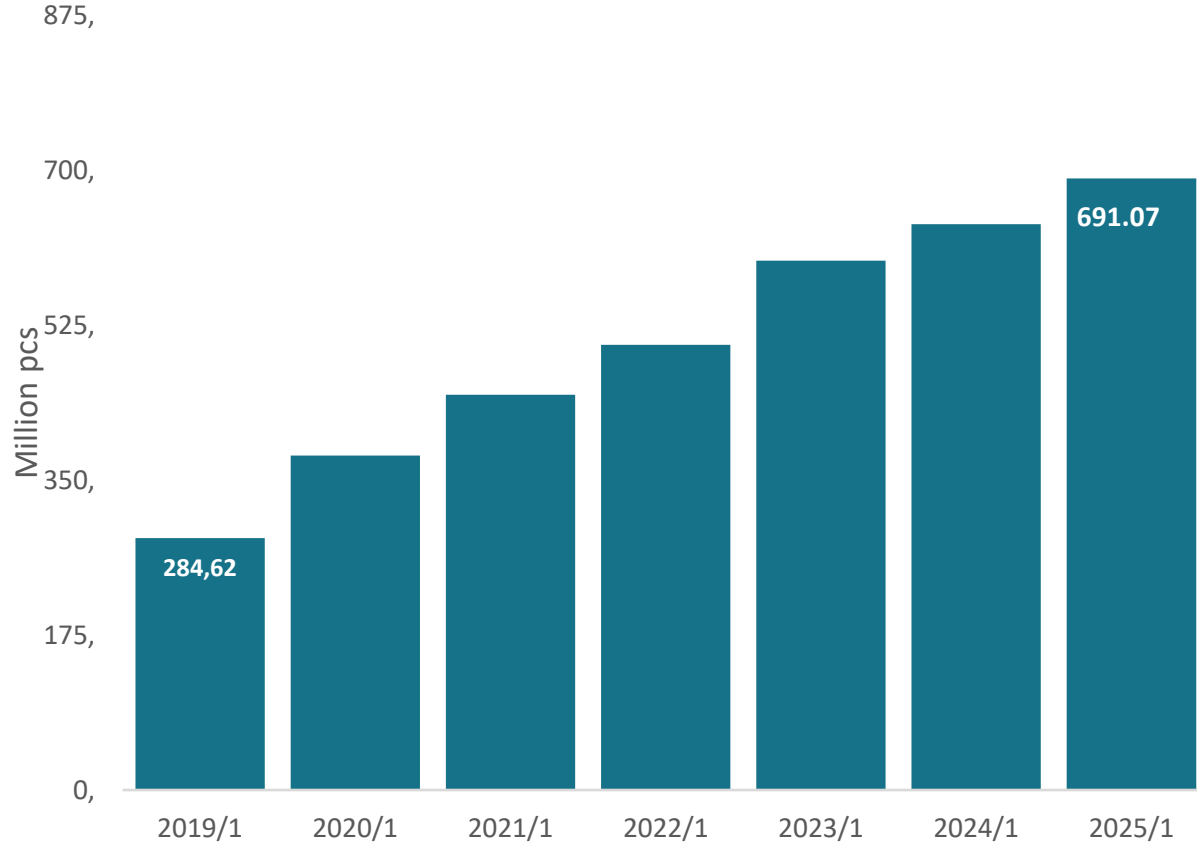


Source: Statistica, TurkStat, TÜSİAD Transportation and Logistics Working Group

City Logistics

As the market grows, it attracts more investment.

Postal & Parcel Cargo



Major Retailers



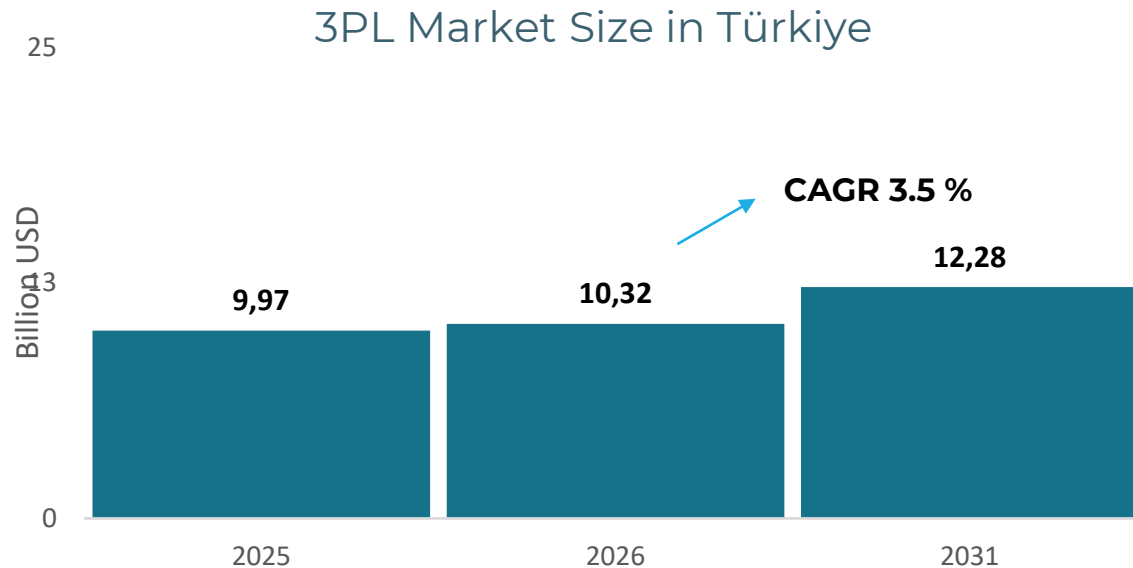
3PL Logistics

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%** of global logistics exports, ranking **11th** worldwide.



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



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**INVESTMENT &
FINANCE OFFICE**

