



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

LOGISTICS AND TRANSPORTATION INDUSTRY IN TÜRKİYE

March 2025

[INVEST.GOV.TR](https://invest.gov.tr)



AGENDA



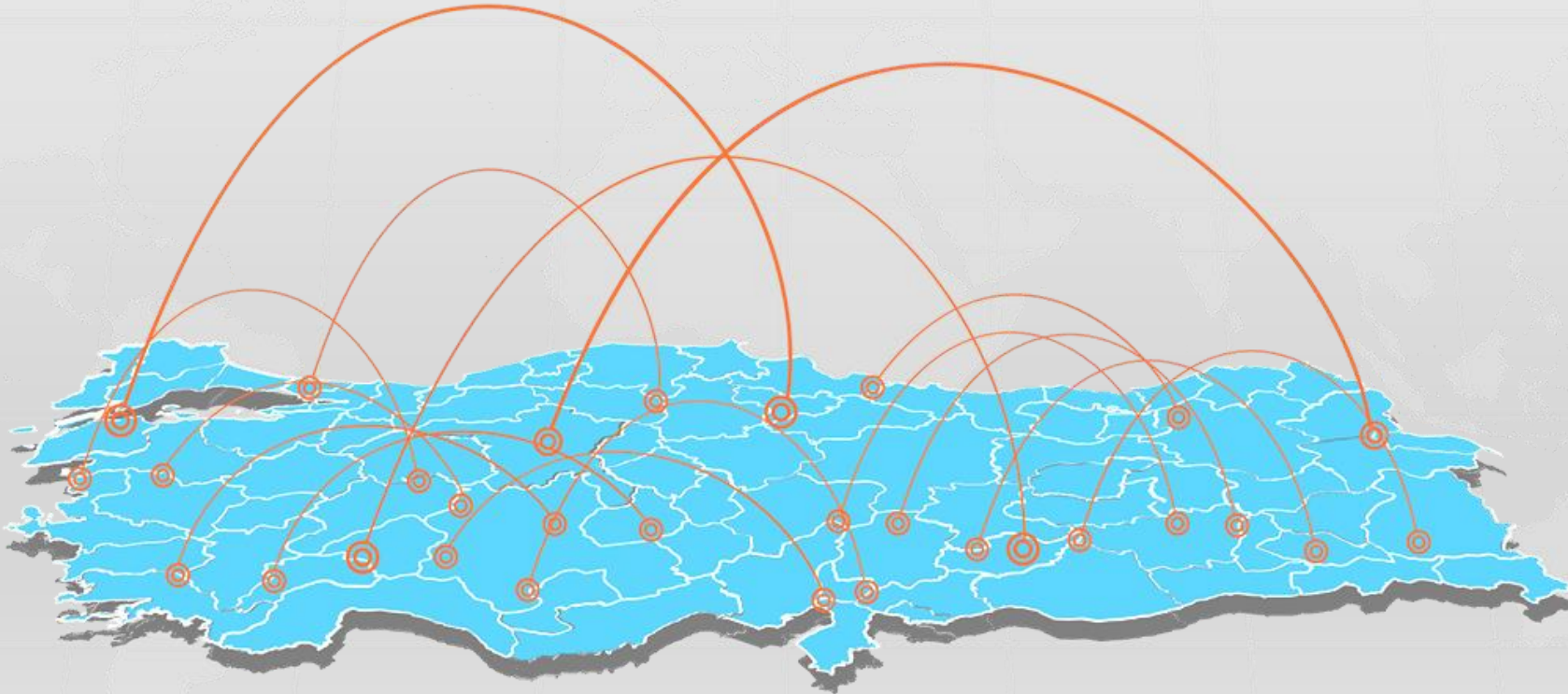
WHY INVEST IN TÜRKİYE



LOGISTICS INDUSTRY
IN TÜRKİYE



TRANSPORTATION INDUSTRY
IN TÜRKİYE



WHY INVEST IN TÜRKİYE?

10 REASONS TO INVEST IN TÜRKİYE



10 reasons to invest in Türkiye



**ROBUST
ECONOMY**



**DOMESTIC
+ ACCESSIBLE
MARKETS**



**STRATEGIC
LOCATION**



**FAVOURABLE
DEMOGRAPHICS**



**SKILLED
AND
COMPETITIVE
LABOR FORCE**



**CONTINUOUS
REFORM PROCESS**



BUSINESS-FRIENDLINESS



**LUCRATIVE
INCENTIVES**



**BENIGN R&D
ECOSYSTEM**



**SECTORAL
OPPORTUNITIES**

WHY INVEST IN LOGISTICS?

3 MAIN REASONS TO INVEST IN LOGISTICS IN TÜRKİYE



3 main reasons to invest in Logistics



ROBUST ECONOMY

TRACK RECORD GROWTH AND BRIGHT
FUTURE WITH PROVEN RESILIENCE

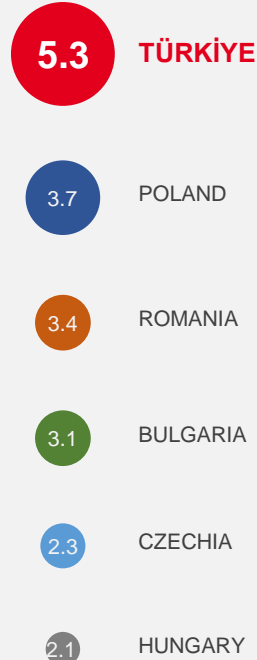


12th largest economy in the World

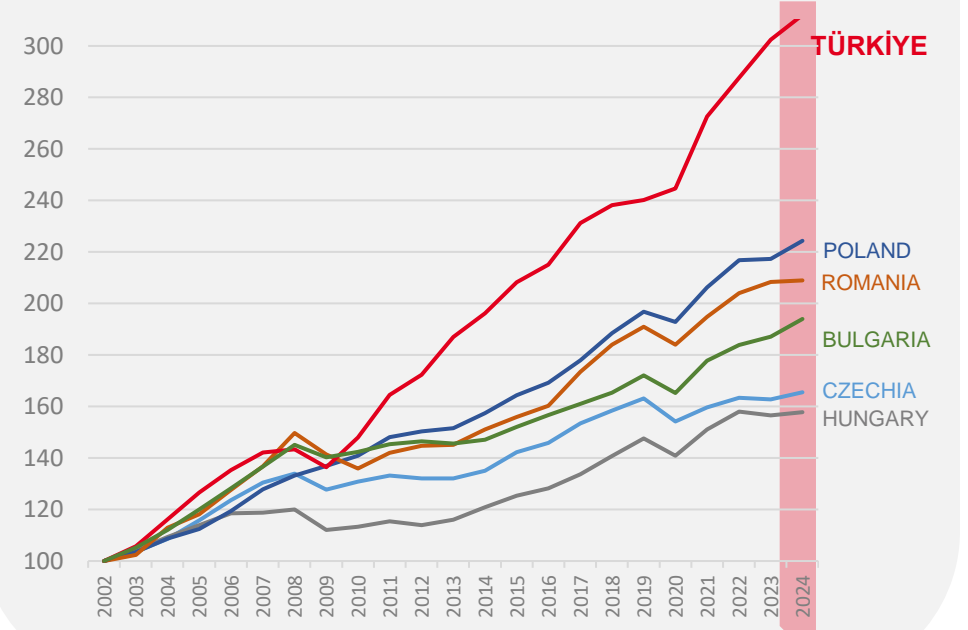
RANKING OF ECONOMIES BY GDP AT PPP

2003	2019	2023
1. USA	1. CHINA	1. CHINA
2. CHINA	2. USA	2. USA
3. JAPAN	3. INDIA	3. INDIA
4. GERMANY	4. JAPAN	4. RUSSIA
5. INDIA	5. GERMANY	5. JAPAN
6. RUSSIA	6. RUSSIA	6. GERMANY
7. FRANCE	7. INDONESIA	7. BRAZIL
8. UK	8. BRAZIL	8. INDONESIA
9. BRAZIL	9. UK	9. FRANCE
10. ITALY	10. FRANCE	10. UK
11. MEXICO	11. MEXICO	11. ITALY
12. INDONESIA	12. ITALY	12. TÜRKİYE
13. SPAIN	13. TÜRKİYE	13. MEXICO
14. CANADA	14. S.KOREA	14. S. KOREA
15. S.KOREA	15. SPAIN	15. SPAIN
16. S. ARABIA	16. CANADA	16. CANADA
17. IRAN	17. S. ARABIA	17. EGYPT
18. TÜRKİYE	18. IRAN	18. S. ARABIA

AVERAGE ANNUAL GDP GROWTH (%) 2002-2024



REAL GDP GROWTH (INDEX: 2002=100)



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 \$30.6T GDP in
Europe, MENA and CentralAsia
at 4 hour flight-distance

CONNECTIVITY
Turkish Airlines
connects you to 349
destinations in 130
countries

**MANUFACTURING
& EXPORT HUB
FOR
MULTINATIONALS**

**AS WELL AS
MANAGEMENT, LOGISTICS,
PROCUREMENT &
TRAINING HUB FOR
MULTINATIONALS**



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



Exporting 75%
of its production



80 countries



TOYOTA

Exporting 85%
of its production



Exporting 87%
of its production



novo nordisk®
103 countries



30 countries

DOMESTIC + ACCESSIBLE MARKETS

DOMESTIC MARKET + EU MARKET + FREE TRADE AREA



IMPRESSIVE ECONOMIC GROWTH LEADING TO A SIZEBLE MIDDLE CLASS WITH INCREASING PURCHASING POWER



\$10,998

2002



\$42,064

2023

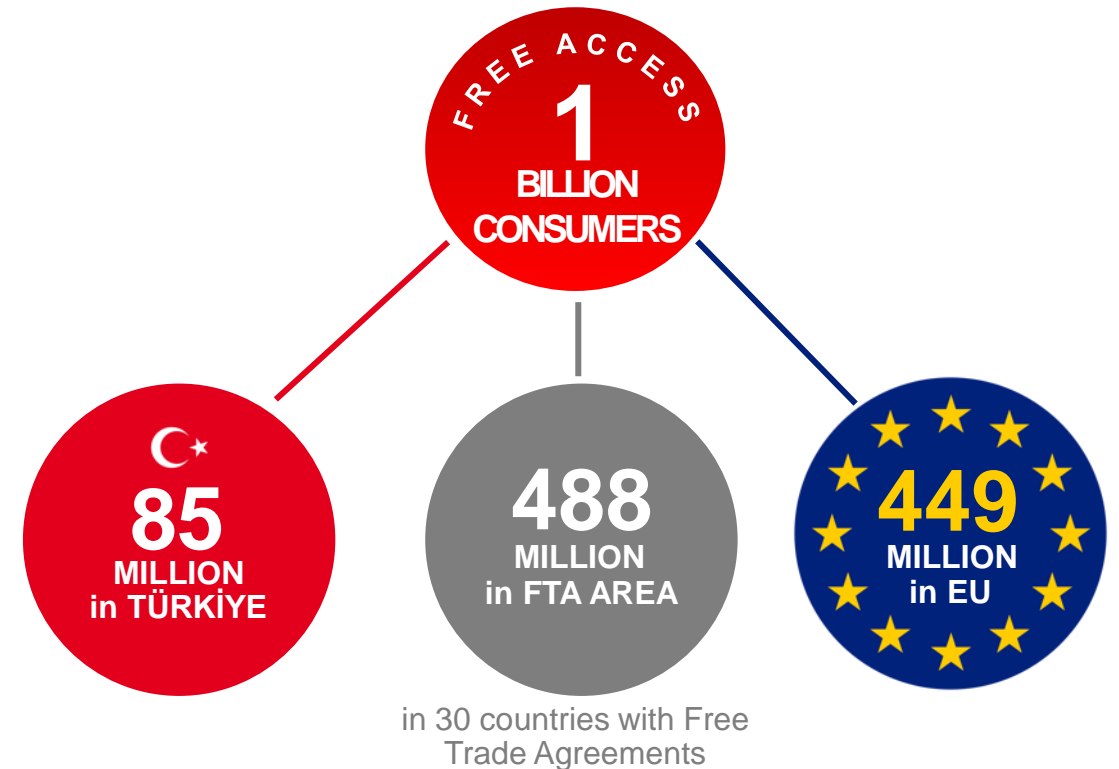
DOMESTIC MARKET FURTHER SUPPORTED BY EMERGING URBAN CENTERS



24 urban centers
with population
over 1 million

DOMESTIC MARKET + EU MARKET + FREE TRADE AREA

Customs Union with the EU allows direct access to the market



AGENDA



WHY INVEST IN TÜRKİYE



**LOGISTICS INDUSTRY
IN TÜRKİYE**



TRANSPORTATION INDUSTRY
IN TÜRKİYE

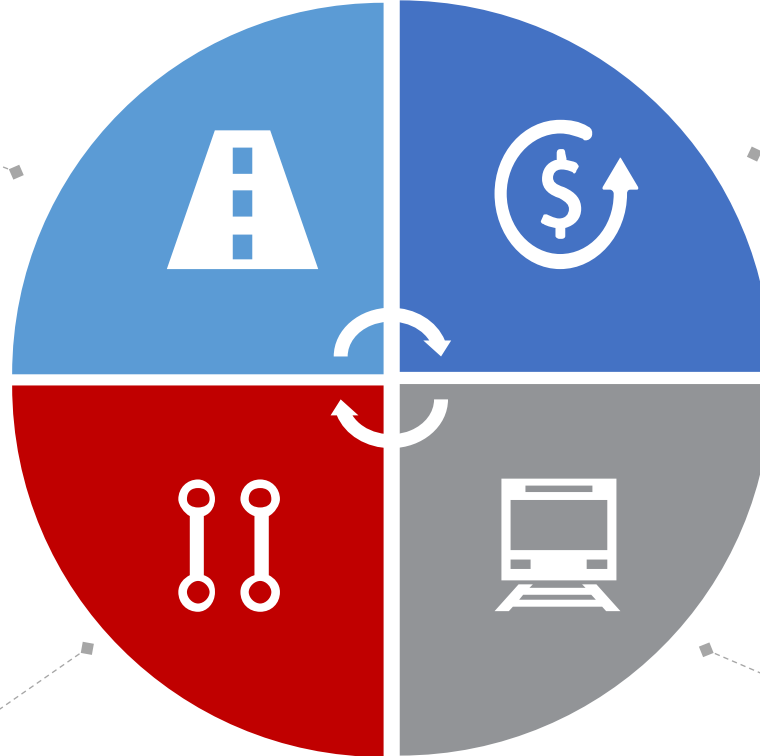


LOGISTICS PLAN AND POLICIES

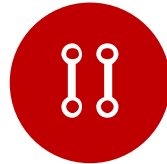
PILLARS OF LOGISTICS MASTER PLAN



Making Türkiye regional logistics hub by attracting transit cargo to Türkiye



Decreasing logistics costs



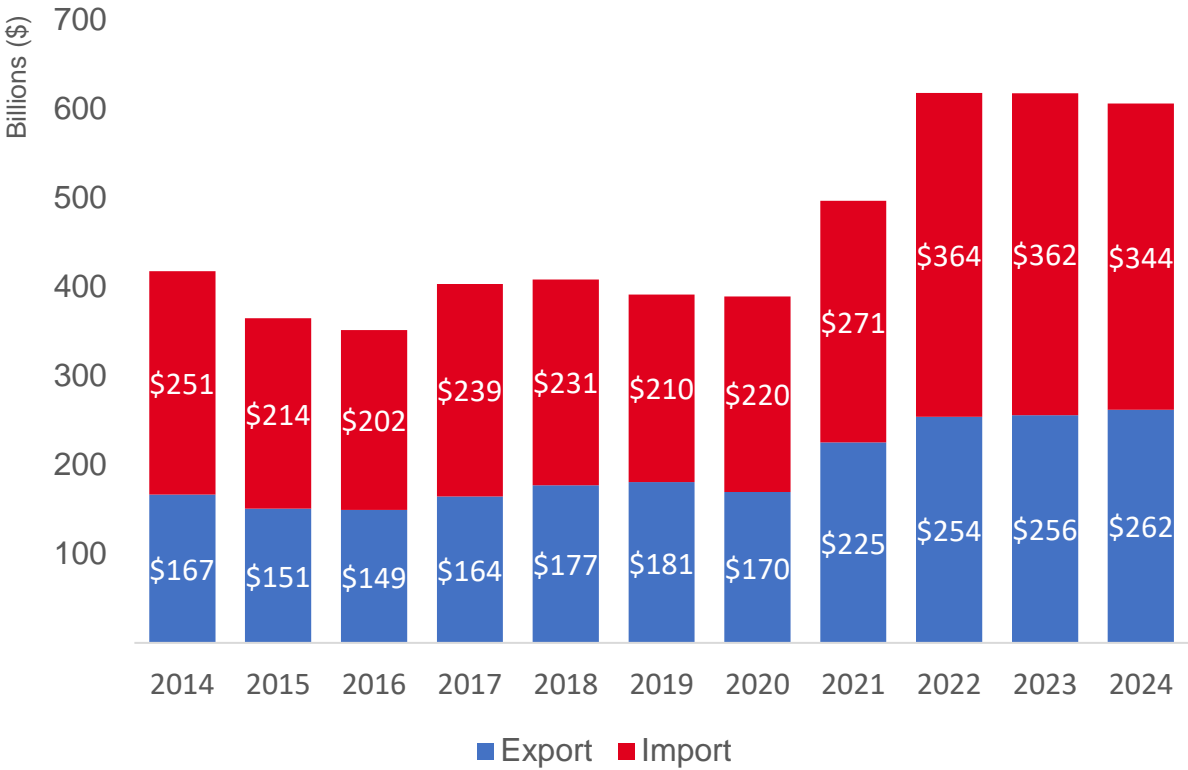
Directing resources to productive investments and prioritizing

Increasing logistics maturity, improving technology and human capacity

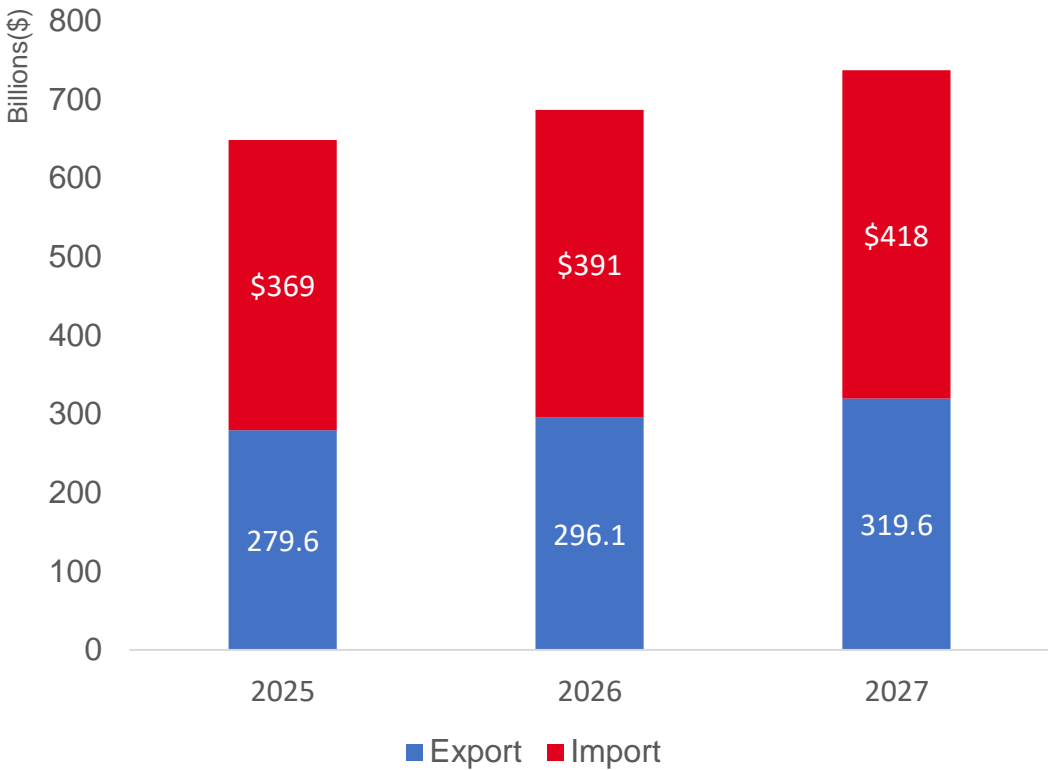




Foreign Trade Statistics, 2013-2024



Foreign Trade Growth Estimate, 2025-2027



TRADE ACTIVITY WITH COUNTRY GROUPS

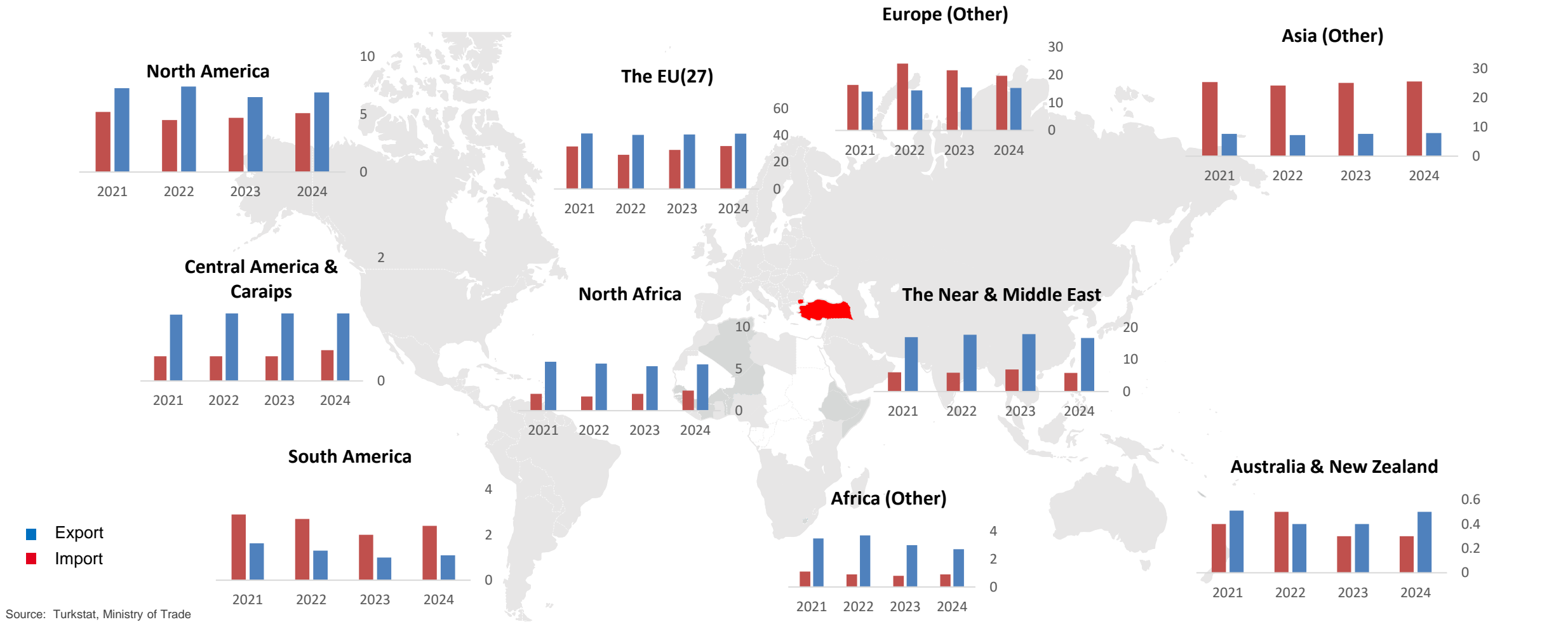
UPGRADED
INCREASED
ACROSS THE GLOBE

LOGISTIC
FOREIGN
ACTIVITIES

INFRASTRUCTURE
TRADE
ACTIVITIES



- ❖ Main export partners of Türkiye: Germany, the USA, the UK, Iraq and Italy.
- ❖ Main import partners of Türkiye: China, Russia, Germany, the USA and Italy.



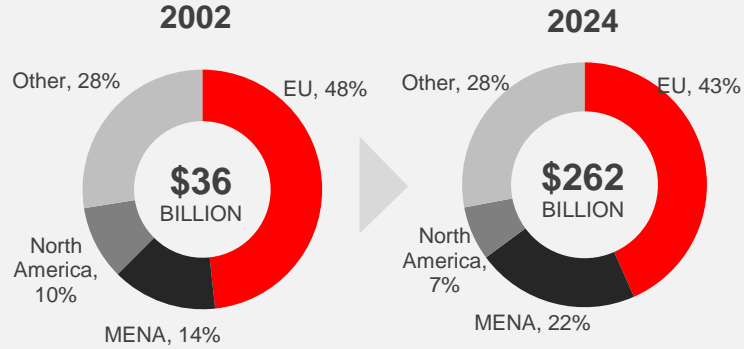
Source: Turkstat, Ministry of Trade
*Shares in Total

TRADE ACTIVITY

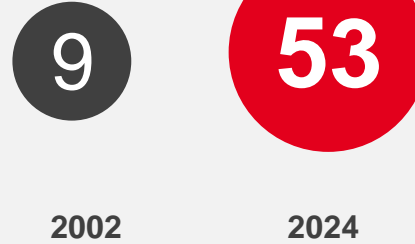
STRATEGIC LOCATION AND ENHANCED PRODUCTION CAPABILITIES ATTRACTING MULTINATIONALS TO INVEST FOR EXPORT



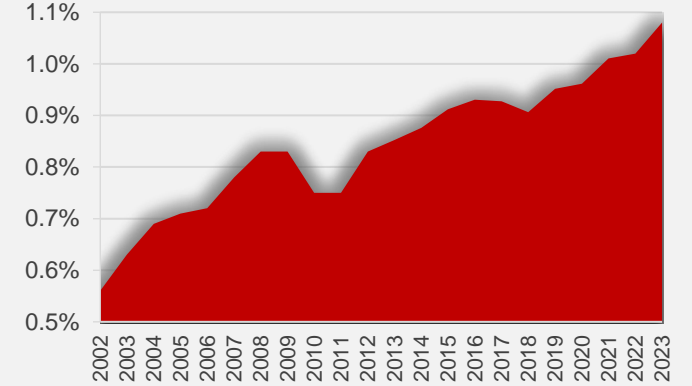
MERCHANDISE EXPORTS BY GEOGRAPHY



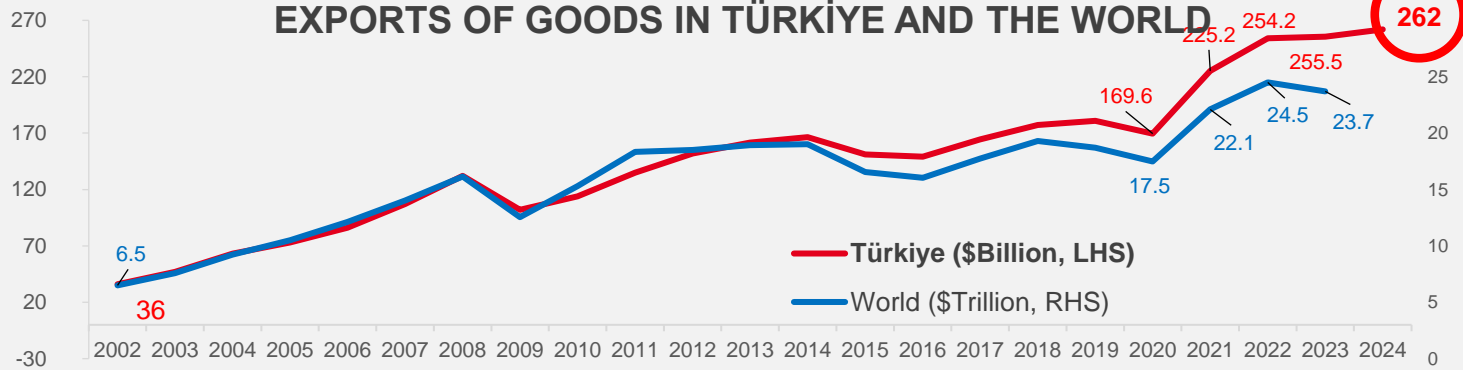
NUMBER OF EXPORT PRODUCTS OVER USD 1 BILLION



TÜRKİYE'S SHARE IN GLOBAL EXPORTS OF GOODS



EXPORTS OF GOODS IN TÜRKİYE AND THE WORLD



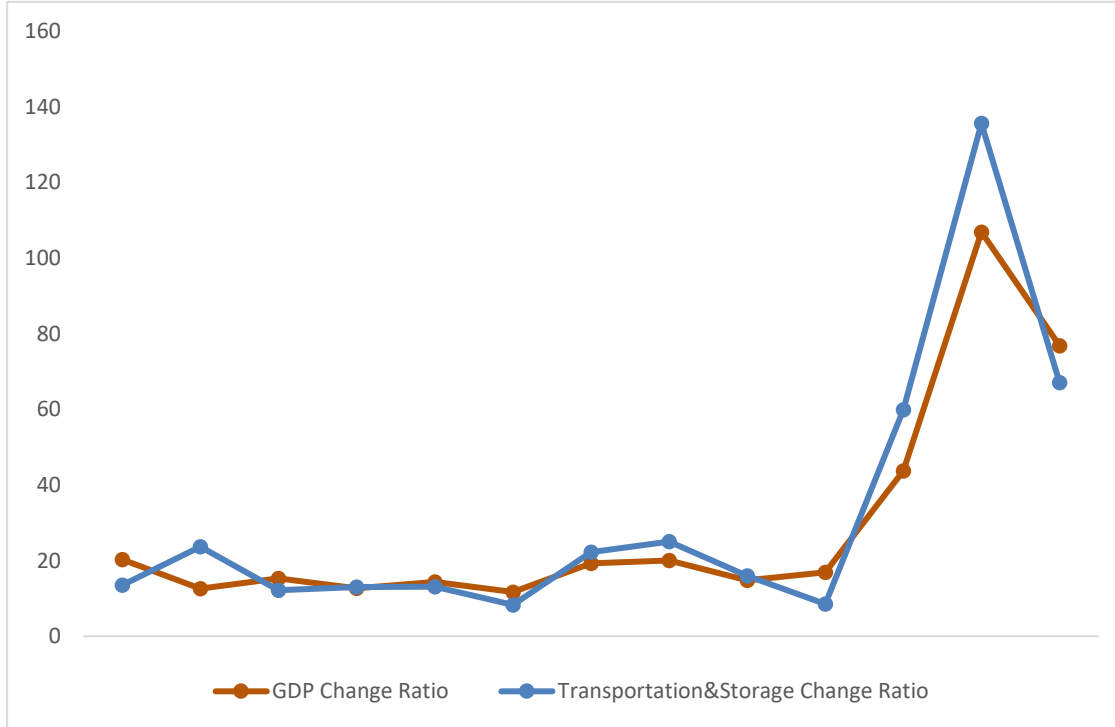
**Türkiye
Records
All-Time
High
Exports
in 2024**

ANNUAL AVERAGE GROWTH OF EXPORTS (2002-2023)

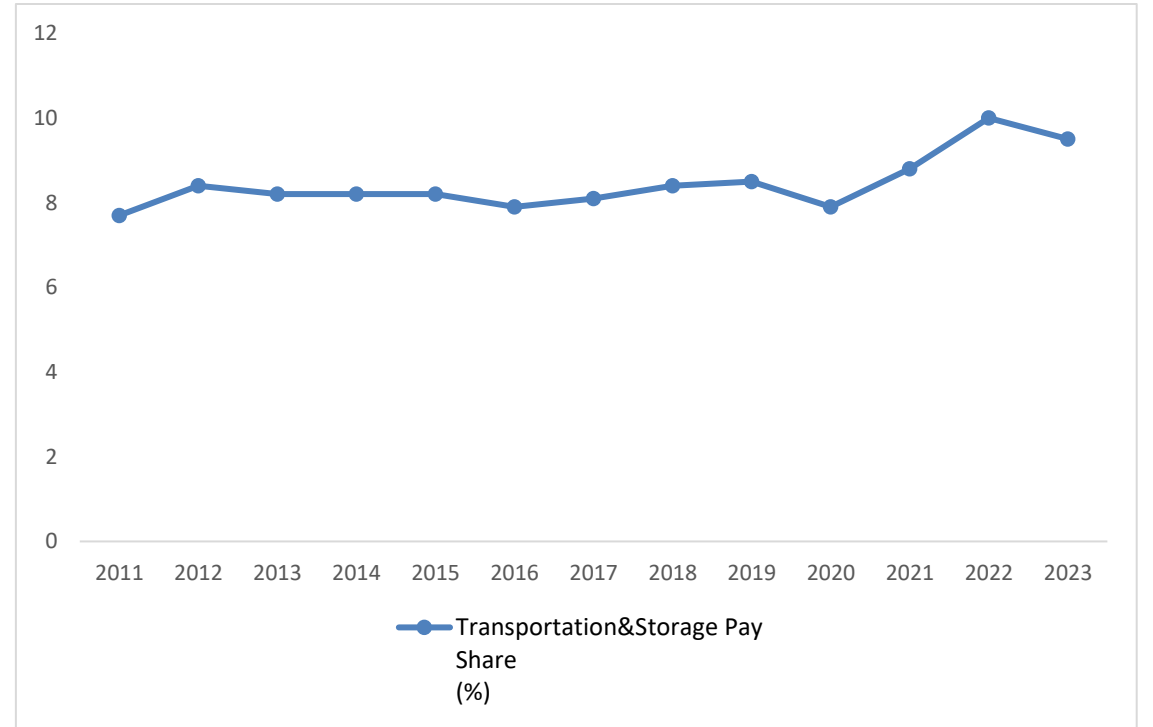




Change Ratio of GDP and Transport and Storage (%)

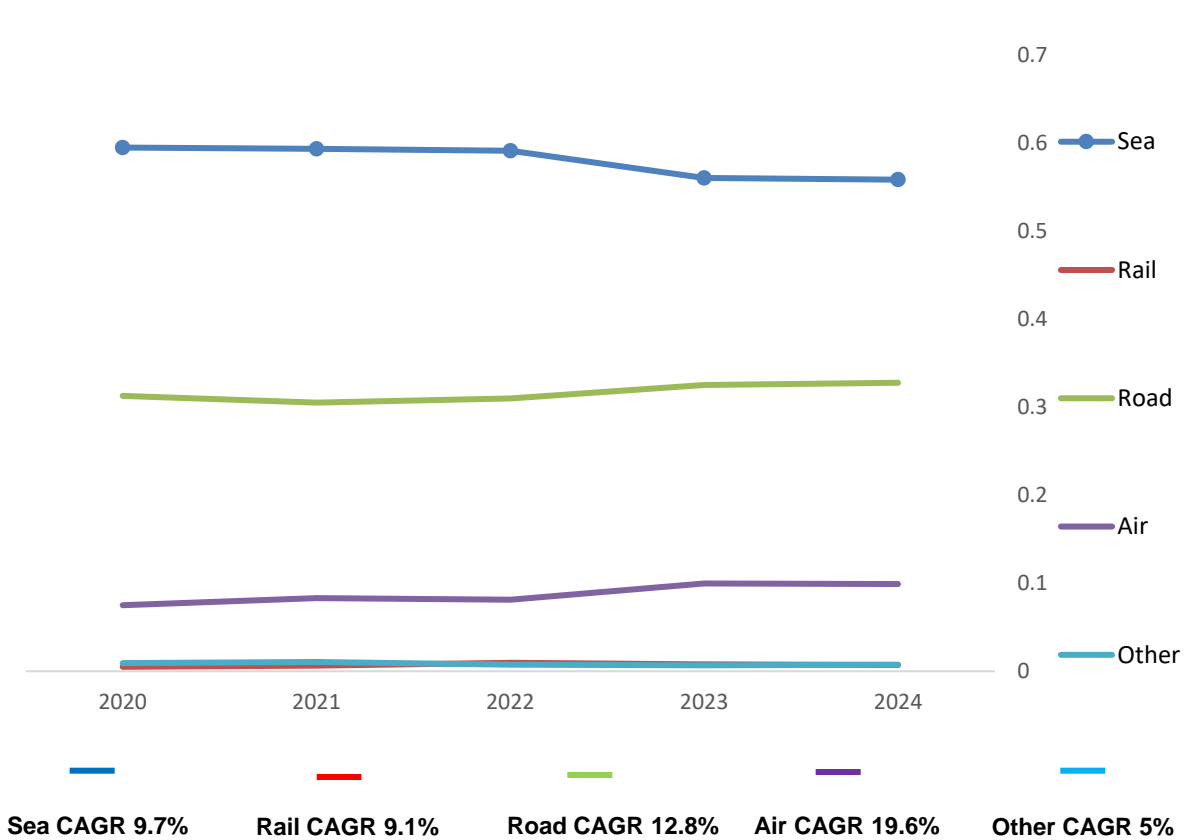


Share of Transport and Storage in GDP (%)

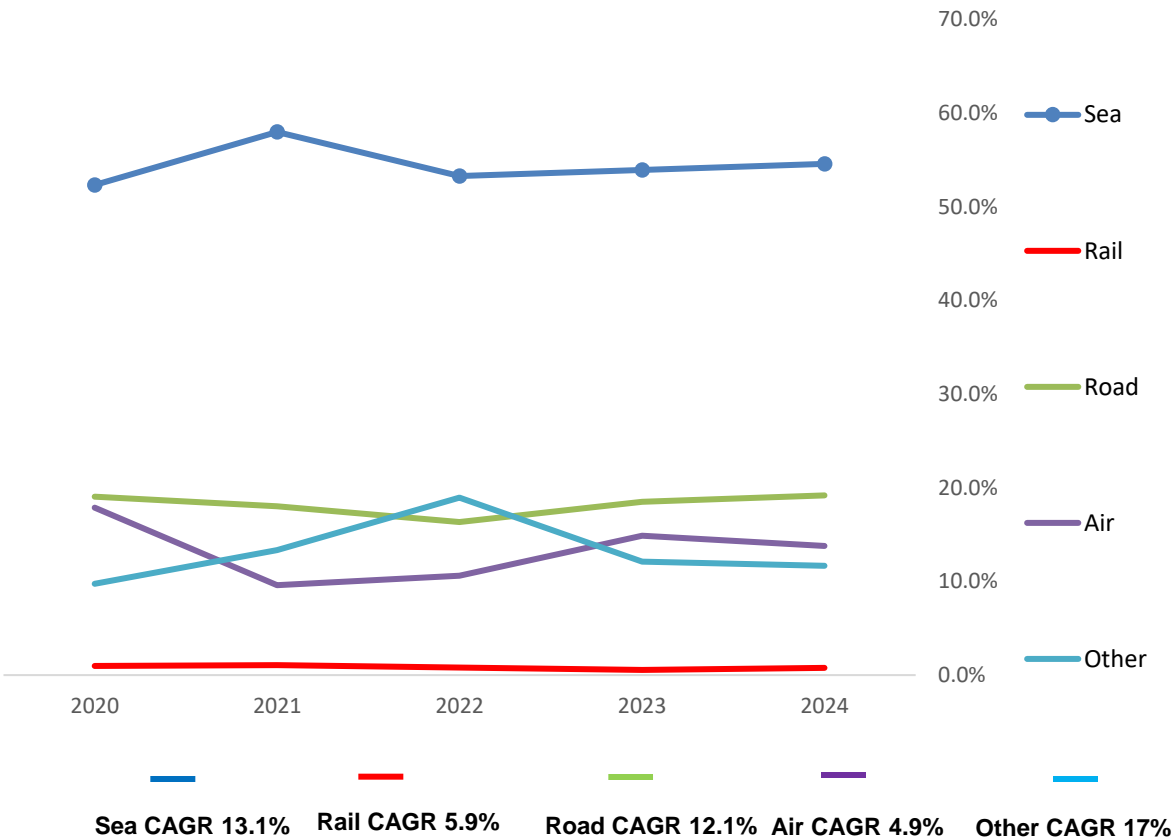




EXPORTS BY MODE OF TRANSPORTATION, 2019-2023

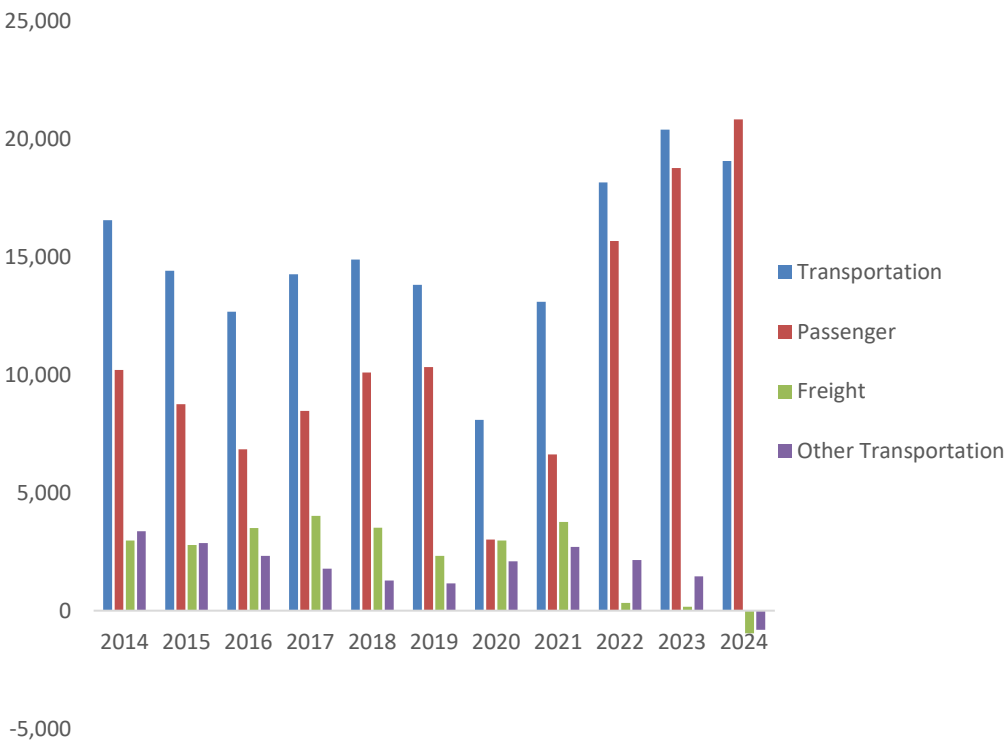


IMPORTS BY MODE OF TRANSPORTATION, 2019-2023

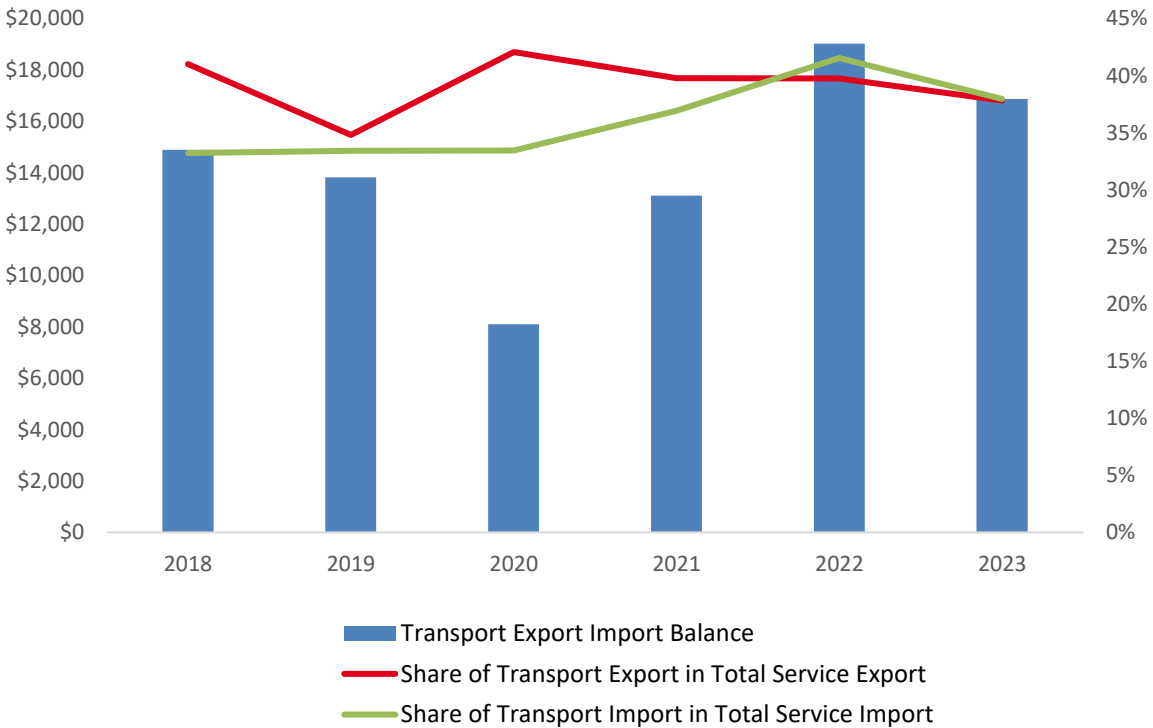




Transport Activities in Balance of Payments
(Million \$)
(2013-2024)



International Service Trade Statistics
(2018-2023)
(Travel excluded)



LOGISTICS INDEX

TÜRKİYE'S LOGISTICS SECTOR AIMS FOR TOP 25TH
GLOBAL RANK BY 2028*



Logistics Performance Index(LPI) Ranks 2018-2023



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

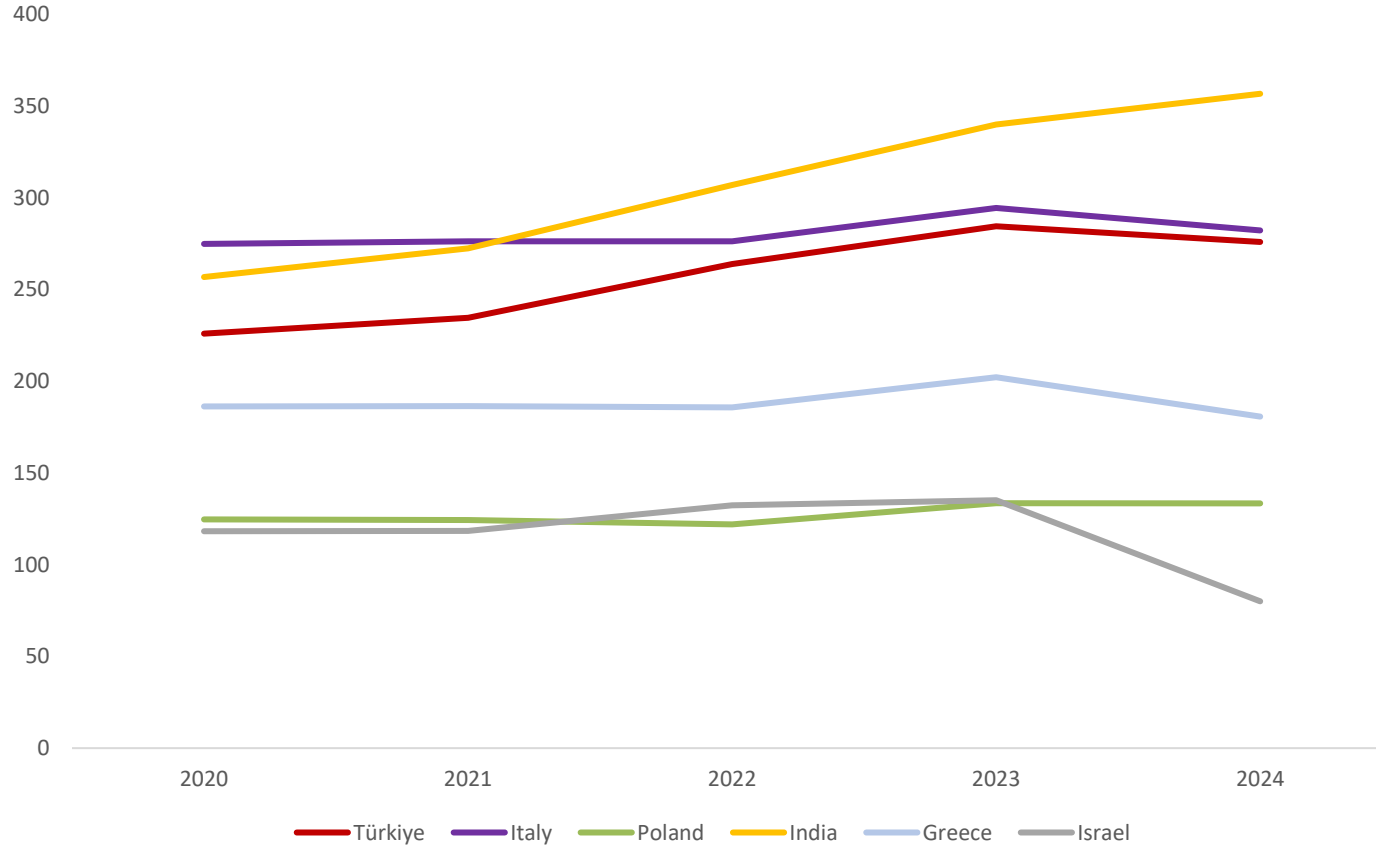
Score

3.4





Liner Shipping Connectivity Index (LSCI)



The Six Components of LSCI

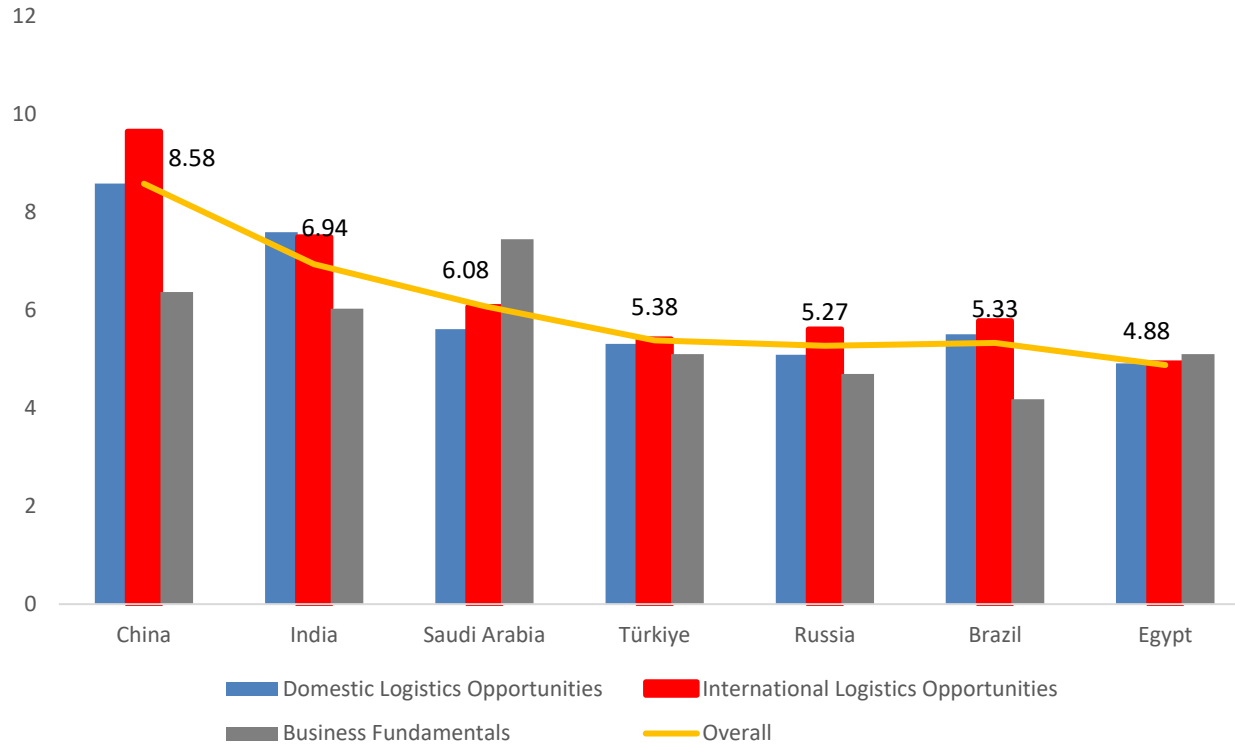
- 1 The number of scheduled ships
- 2 The total deployed annual capacity in TEU
- 3 The number of regular liner shipping services from and to the country
- 4 The number of liner shipping companies that provide services from and to the country
- 5 The number of other countries that are connected to the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

LOGISTICS INDEX

TÜRKİYE OFFERS A STABLE ENVIRONMENT AND FAST GROWTH FOR THE LOGISTICS INDUSTRY AS A WHOLE



Agility Emerging Markets Logistics Index 2025



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

Score

5.38

1

Domestic opportunities

5.31

2

International opportunities

5.41

3

Business fundamentals

5.10

4

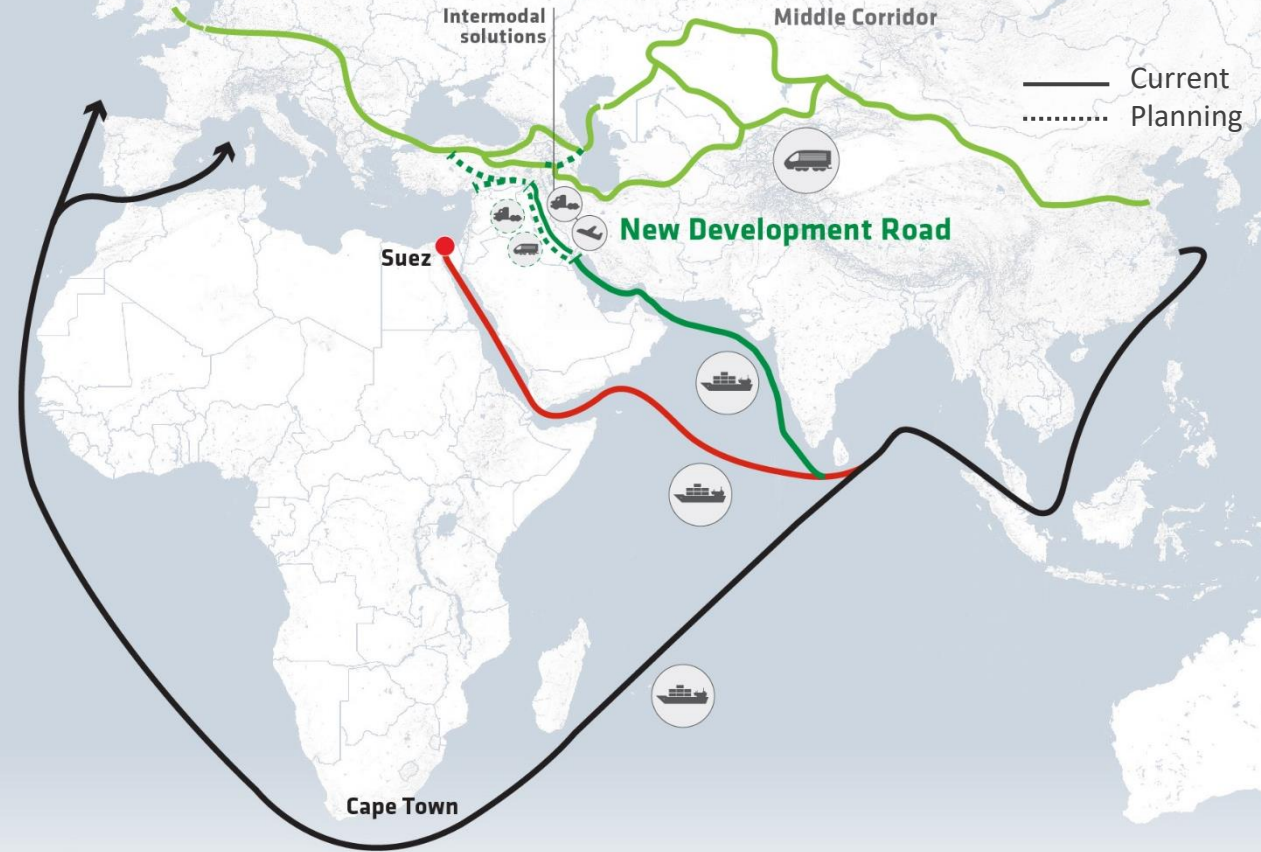
Digital Readiness

5.66

TÜRKİYE'S LOGISTICS ADVANTAGES

TÜRKİYE; YOUR RESILIENT PARTNER, PROVIDING DIVERSE ROUTES THROUGH EVERY CRISIS

Drewry WCI: Shanghai to Rotterdam



SUEZ CANAL ROUTE

18.250 KM

25.5 Days

THE CAPE ROUTE

25.000 KM

34 Days

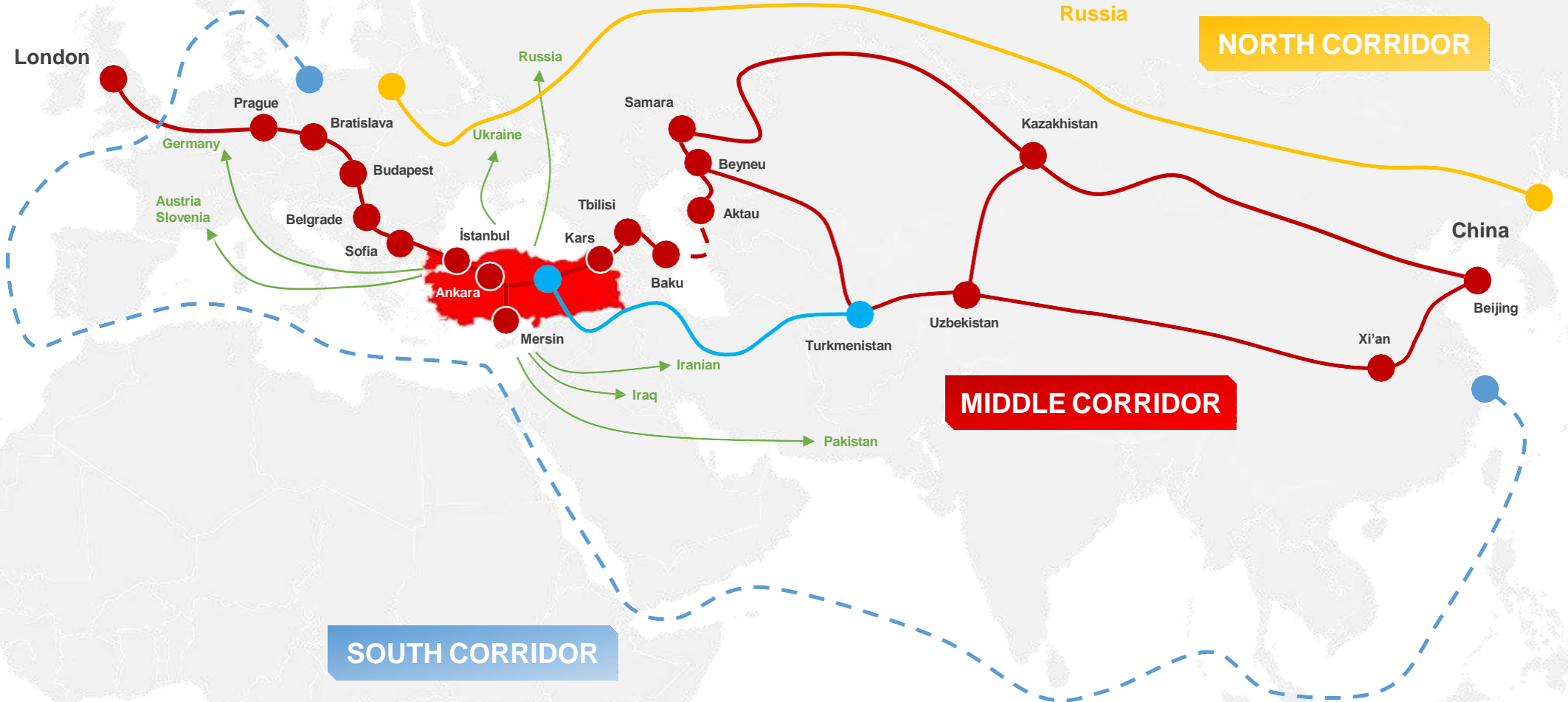
MIDDLE CORRIDOR

11.500 KM

12 Days

LOGISTICS ADVANTAGES OF TÜRKİYE

THE MIDDLE CORRIDOR IS MORE ECONOMICAL AND
FASTER COMPARED TO THE NORTHERN CORRIDOR



LOGISTICS ADVANTAGES OF TÜRKİYE

ON 7TH NOVEMBER 2019, FREIGHT TRAIN DEPARTED CHINA AND WENT CENTRAL EUROPE BY PASSING BELOW THE BOSPHORUS VIA ISTANBUL'S MARMARAY TUNNEL FOR THE FIRST TIME.



London

Prague

Bratislava

Budapest

Belgrade

Sofia

İstanbul

Ankara

Kars

Tbilisi

Baku

Aktau

Altinkol

Xi'an

~700.000
tons freight
~600 trains

Route of First Train (11,500 km)

Xi'an(China)-Kazakhstan-Türkiye-Azerbaijan-Georgia-Bulgaria-Serbia-Hungary-Slovakia-Czech Republic (Prague)

LOGISTICS ADVANTAGES OF TÜRKİYE

DEVELOPMENT ROAD THAT WILL TRANSPORT THE CARGO COMING TO IRAQ VIA INDIA, EAST ASIA AND THE PERSIAN GULF TO EUROPE.



REPUBLIC OF TÜRKİYE 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



LOGISTICS CAPABILITIES OF TÜRKİYE

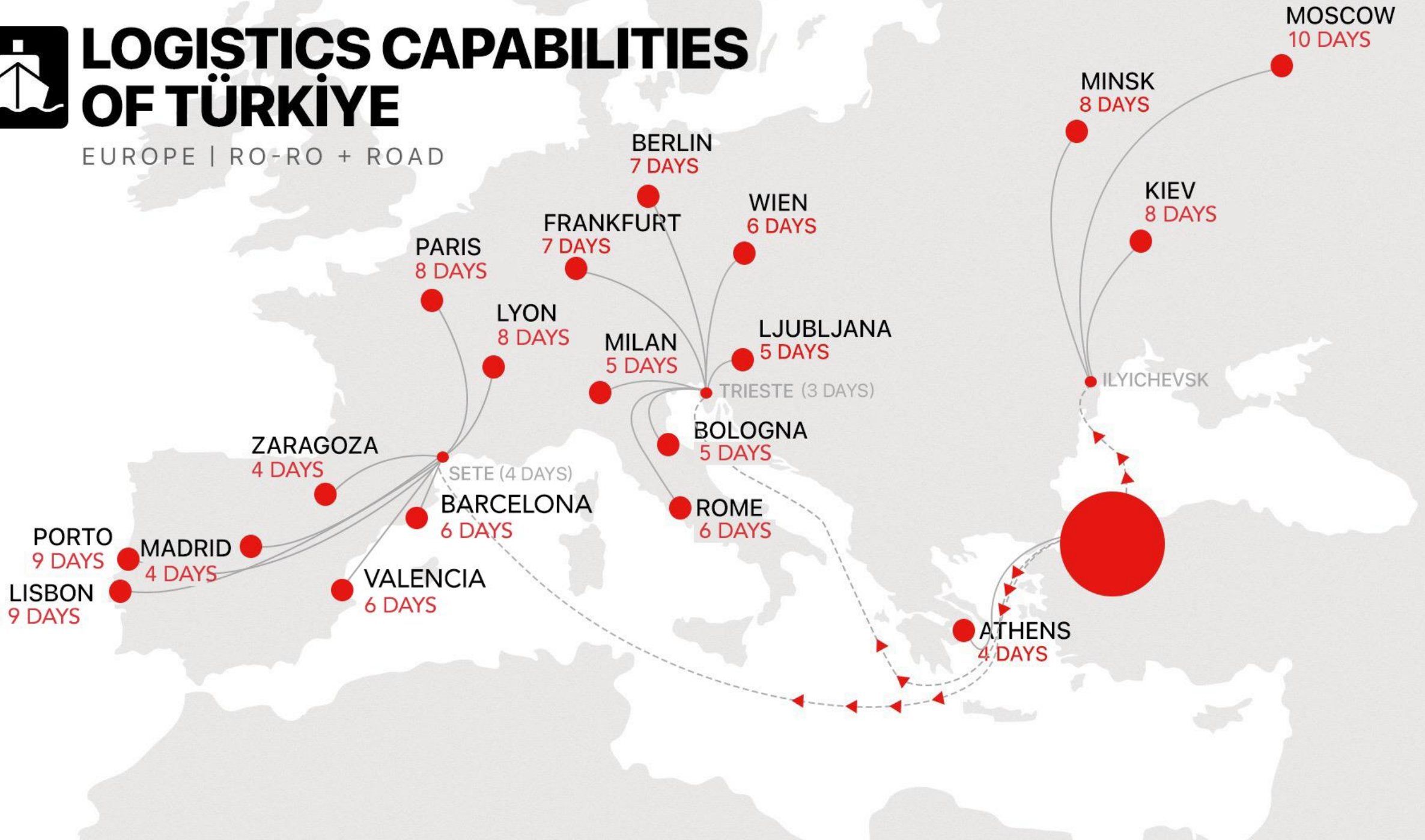
EUROPE | SEA / EXPORT





LOGISTICS CAPABILITIES OF TÜRKİYE

EUROPE | RO-RO + ROAD





LOGISTICS CAPABILITIES OF TÜRKİYE

EUROPE | RO-RO + BLOCK TRAIN





LOGISTICS CAPABILITIES OF TÜRKİYE

EUROPE | ROAD / EXPORT





LOGISTICS CAPABILITIES OF TÜRKİYE

ASIA | SEA / IMPORT



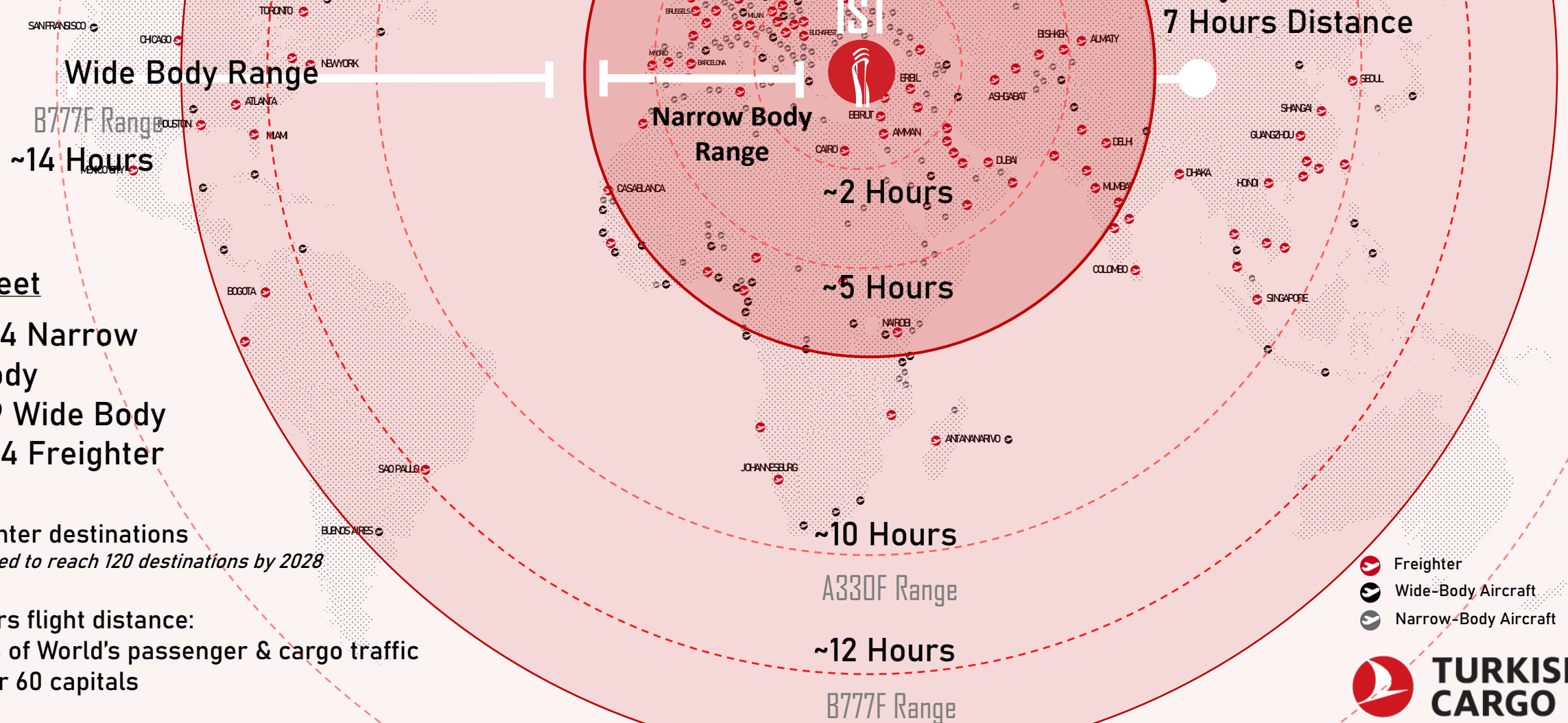


LOGISTICS CAPABILITIES OF TÜRKİYE

EUROPE / N. AFRICA | SEA / IMPORT



ISTANBUL AS A MEGA HUB



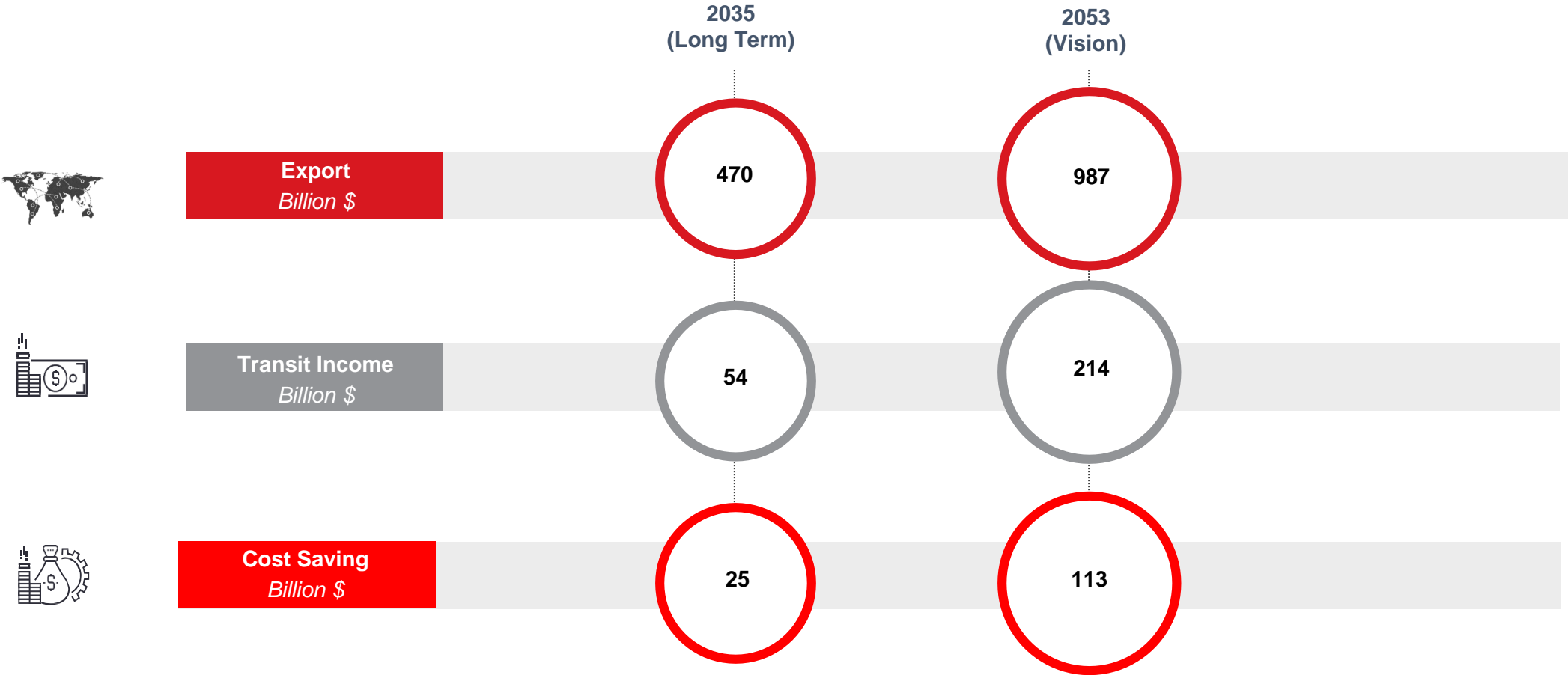


**Türkiye will be more
lucrative location for
three reasons**



NEW LOGISTICS MASTER PLAN

SIGNIFICANT CONTRIBUTIONS IS EXPECTED FROM LOGISTICS MASTER PLAN



AGENDA



WHY INVEST IN TÜRKİYE



LOGISTICS INDUSTRY
IN TÜRKİYE



**TRANSPORTATION INDUSTRY
IN TÜRKİYE**

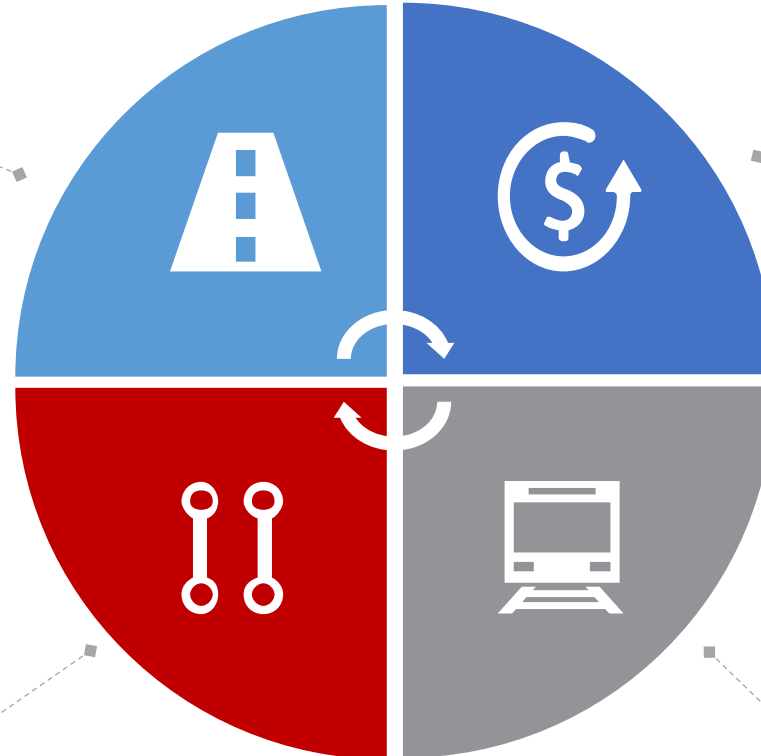


TRANSPORTATION POLICIES

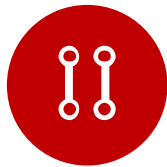
PILLARS OF TRANSPORTATION POLICIES



Creating a sustainable transportation infrastructure



Providing alternative financing for realization of transport projects by utilizing PPP and External Credit public investment models



Prioritizing transportation investments with the corridor approach and strengthening international connections

Supporting multimodal and balanced transportation by increasing rail freight and passenger transportation

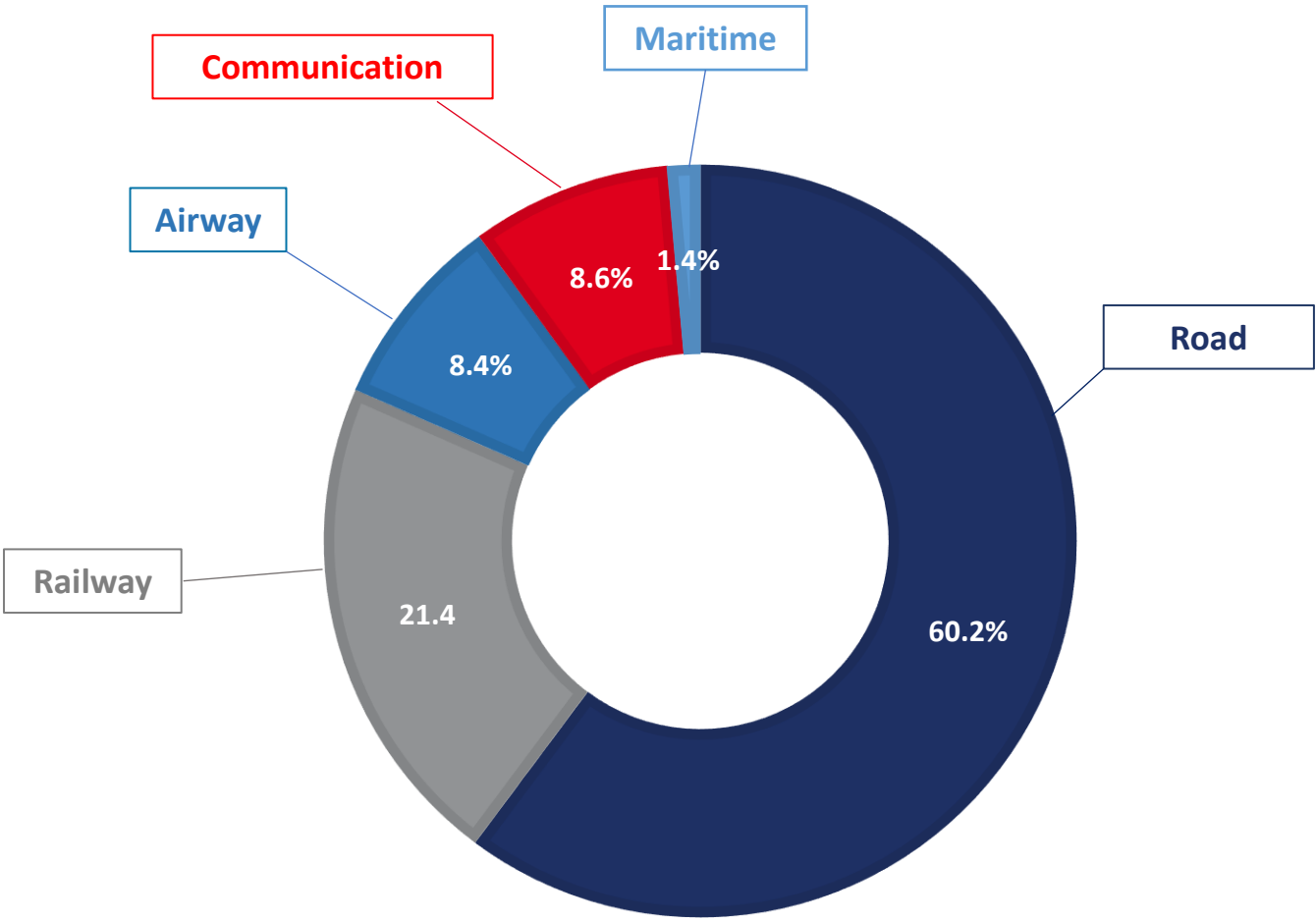


INVESTMENTS IN TRANSPORT

SECTORAL SHARE OF INVESTMENTS IN TRANSPORTATION AND COMMUNICATION (2003-2024)

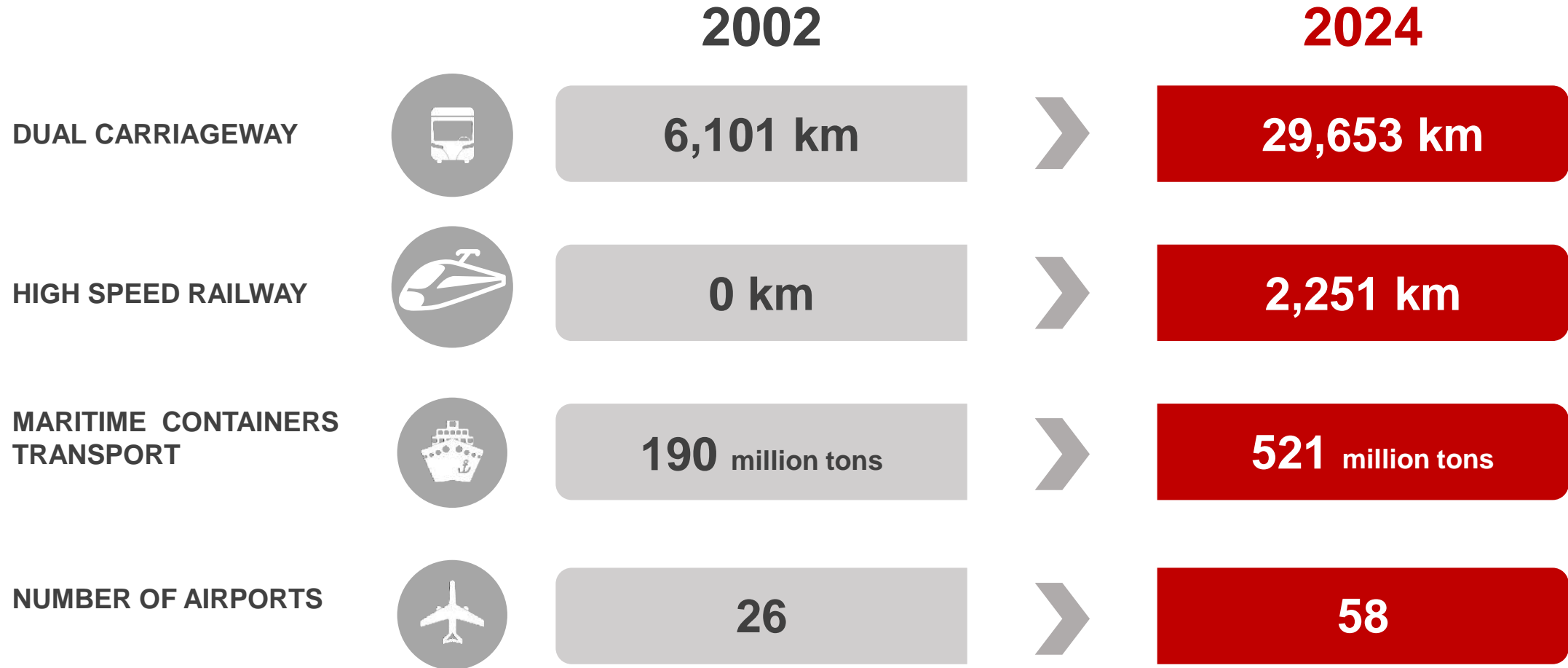


Sectors	Billion \$
Road 	168.8
Railway 	60.2
Airway 	23.5
Maritime 	3.9
Communication 	24.2
Total	280.6



INFRASTRUCTURE INVESTMENTS IN TRANSPORT

INVESTING IN TRANSPORTATION HAS REMARKABLY
TRANSFORMED TÜRKİYE'S INFRASTRUCTURE LANDSCAPE
YET TÜRKİYE IS DETERMINED TO IMPROVE IT FURTHER

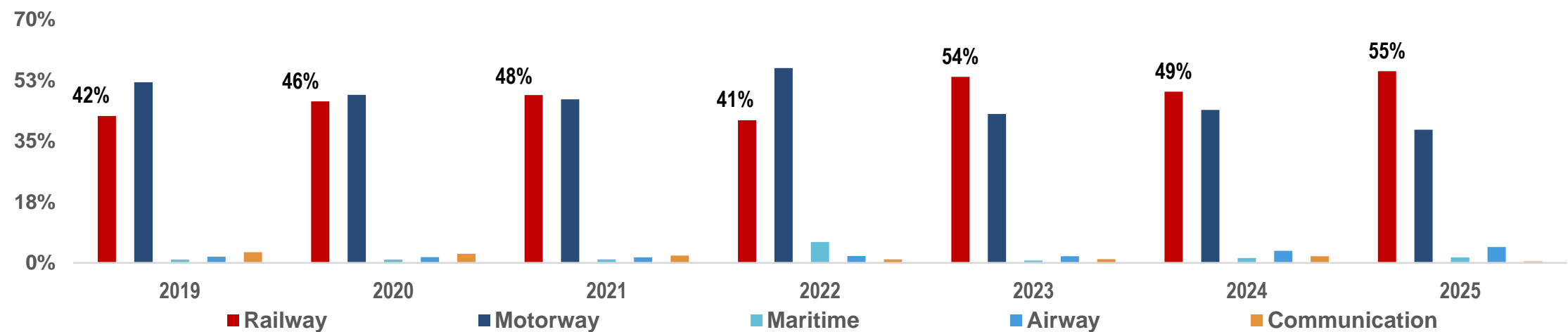


INVESTMENT IN RAIL NETWORK

THE SHARE OF RAIL IN TRANSPORT INVESTMENTS
CONTINUE TO RISE



Investment Budget Percentages of Transport Subsectors

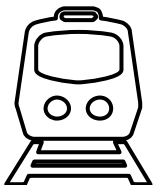


2035
(Long Term)

2053
(Vision)

77

82



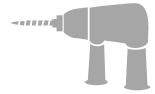







Investment
Billion \$

INVESTMENTS IN TRANSPORTATION

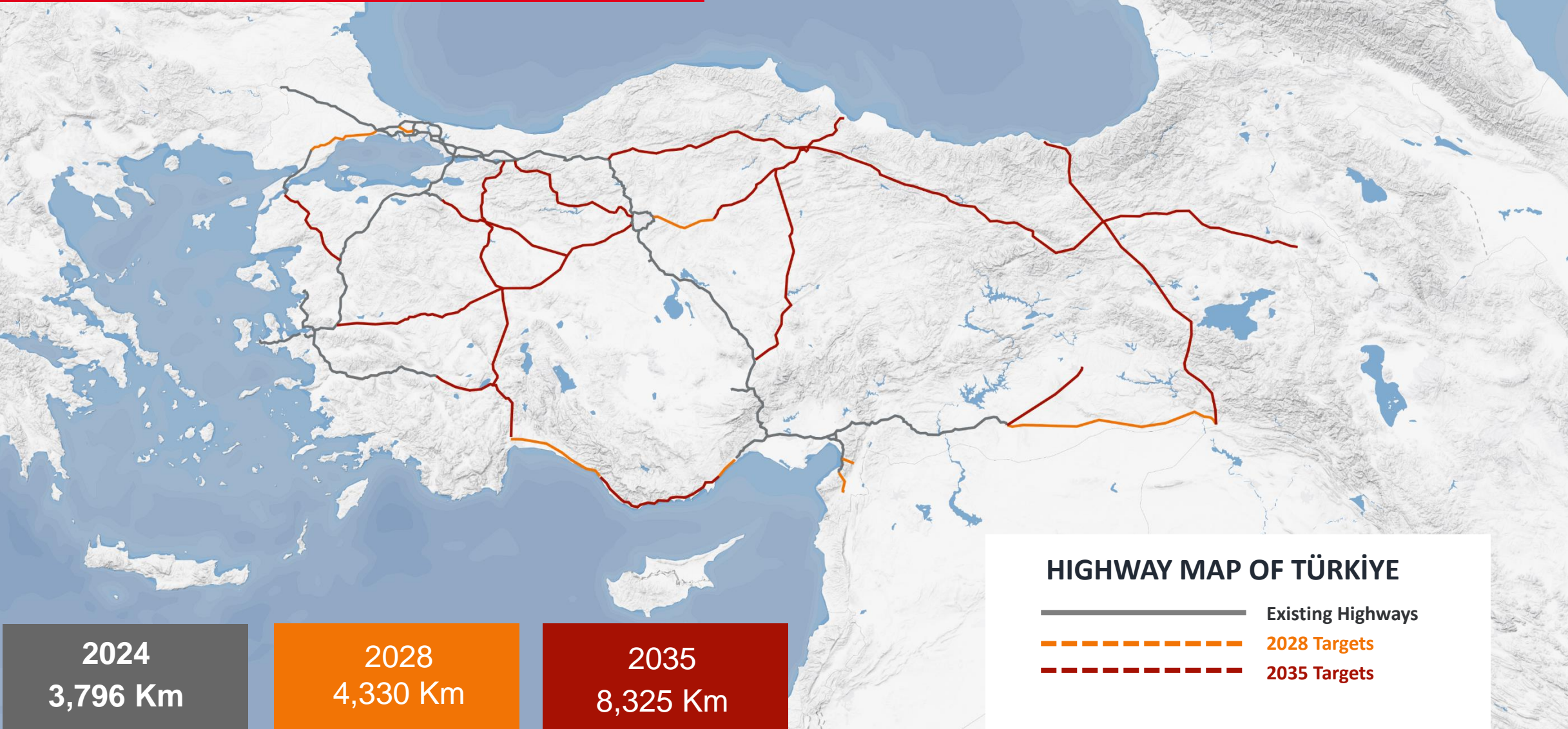
ECONOMIC BENEFITS OF TRANSPORTATION INVESTMENTS (2003-2022)



SECTORS		 Investment (Billion \$)	 GDP Contribution (Billion \$)	 Production Effects (Billion \$)	 Employment Effects (Annual average, Thousand people)
Road Transport 	➤ Highway	112.4	124.5	225.5	215
	➤ Divided road				
	➤ Other motorway				
Rail Transport 	➤ High speed lines	36.8	38.5	83.4	88.8
	➤ Speed lines				
	➤ Conventional lines				
Air Transport 	➤ Airport related investments	16.2	201.5	439.5	386.4
Maritime Transport 	➤ Marinas	2	22.1	41.8	27.6
	➤ Freight ports				
	➤ Fishing shelters and yards				
TOTAL		167.4	386.6	832.7	784.2

OPPORTUNITIES IN TRANSPORTATION

MOTORWAYS (TOLL ROADS) ARE KEY TO TÜRKİYE'S ROAD TRANSPORTATION. AROUND 5,000 KM IS IN THE PIPELINE OFFERING SIGNIFICANT PPP OPPORTUNITIES



OPPORTUNITIES IN TRANSPORTATION

TÜRKİYE IS COMMITTED TO TRANSFORMING
ITS RAIL TRANSPORT INFRASTRUCTURE FROM
CONVENTIONAL TO HIGH SPEED



2024
13,919 Km

2028
17,011 Km

2053
28,600 Km

RAILWAY MAP OF TÜRKİYE

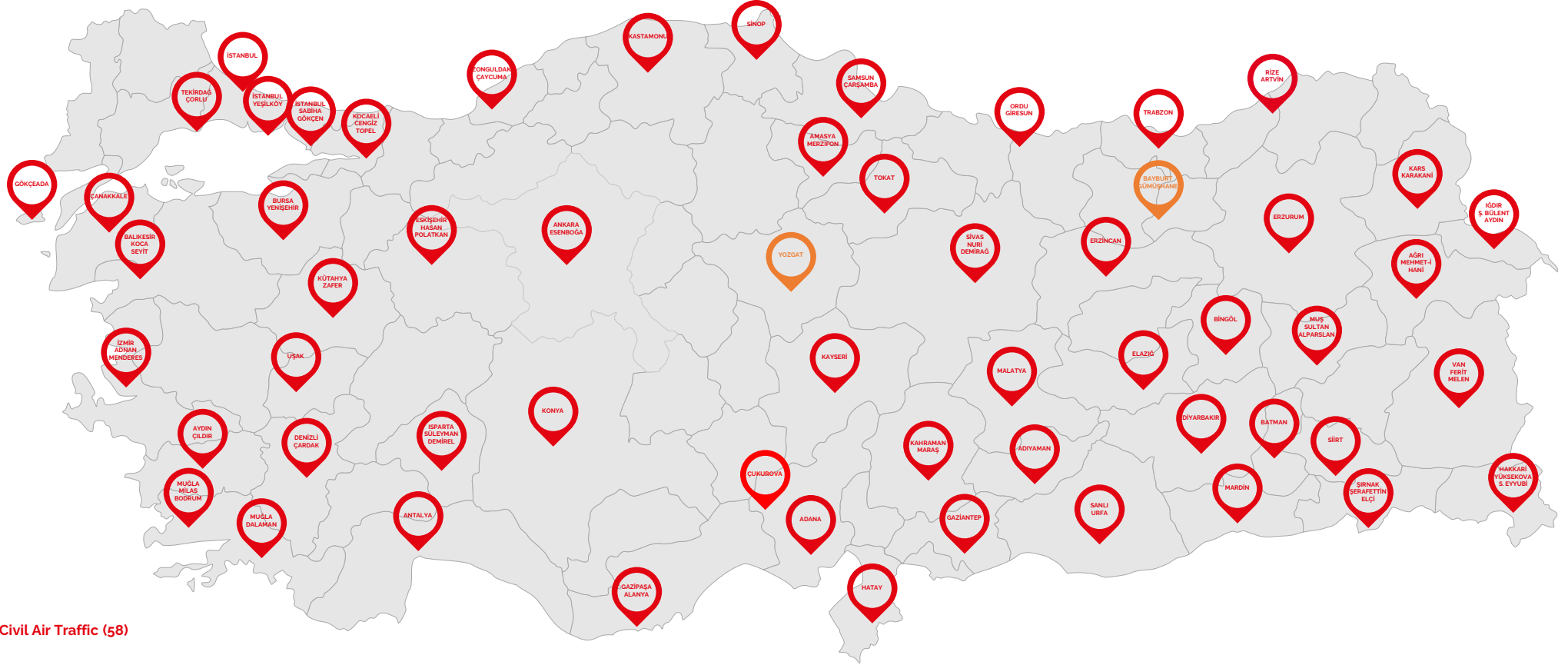
- Existing Railways
- 2028 Targets
- 2035 Targets
- 2053 Targets

OPPORTUNITIES IN TRANSPORTATION

TÜRKİYE HAS SIGNIFICANTLY IMPROVED AND UPGRADED ITS AIRPORT INFRASTRUCTURE AND CONTINUES TO INVEST IN AIRPORTS



AIRPORT MAP OF TÜRKİYE



Open to Civil Air Traffic (58)



Under Construction (AYGM) (2)

OPPORTUNITIES IN TRANSPORTATION

LOGISTICS IS AN INTEGRAL PART OF TÜRKİYE'S TRANSPORT INFRASTRUCTURE. TÜRKİYE HAS ESTABLISHED INTERMODAL LOGISTICS CENTERS ALONGSIDE THE TRANS-ASIAN RAILWAY NETWORK TO LOWER COSTS AND INCREASE EFFICIENCY OF LOGISTICS NETWORKS



LOGISTICS CENTERS



28 logistics centers



73.2 million tons additional transport capacity



19 million m² container storage and handling area



In Service and Completed (14)



Planned (10)

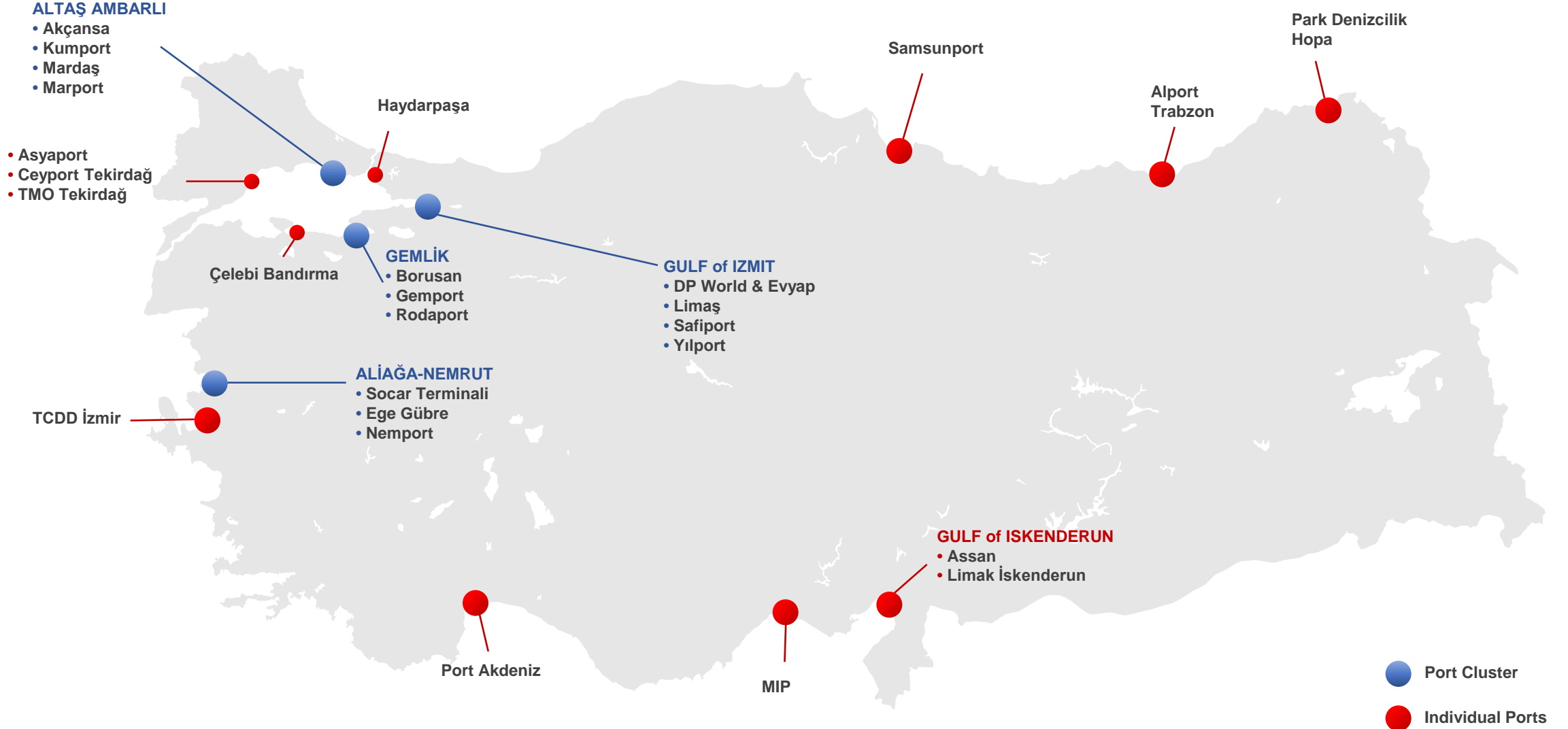


Under Construction (4)



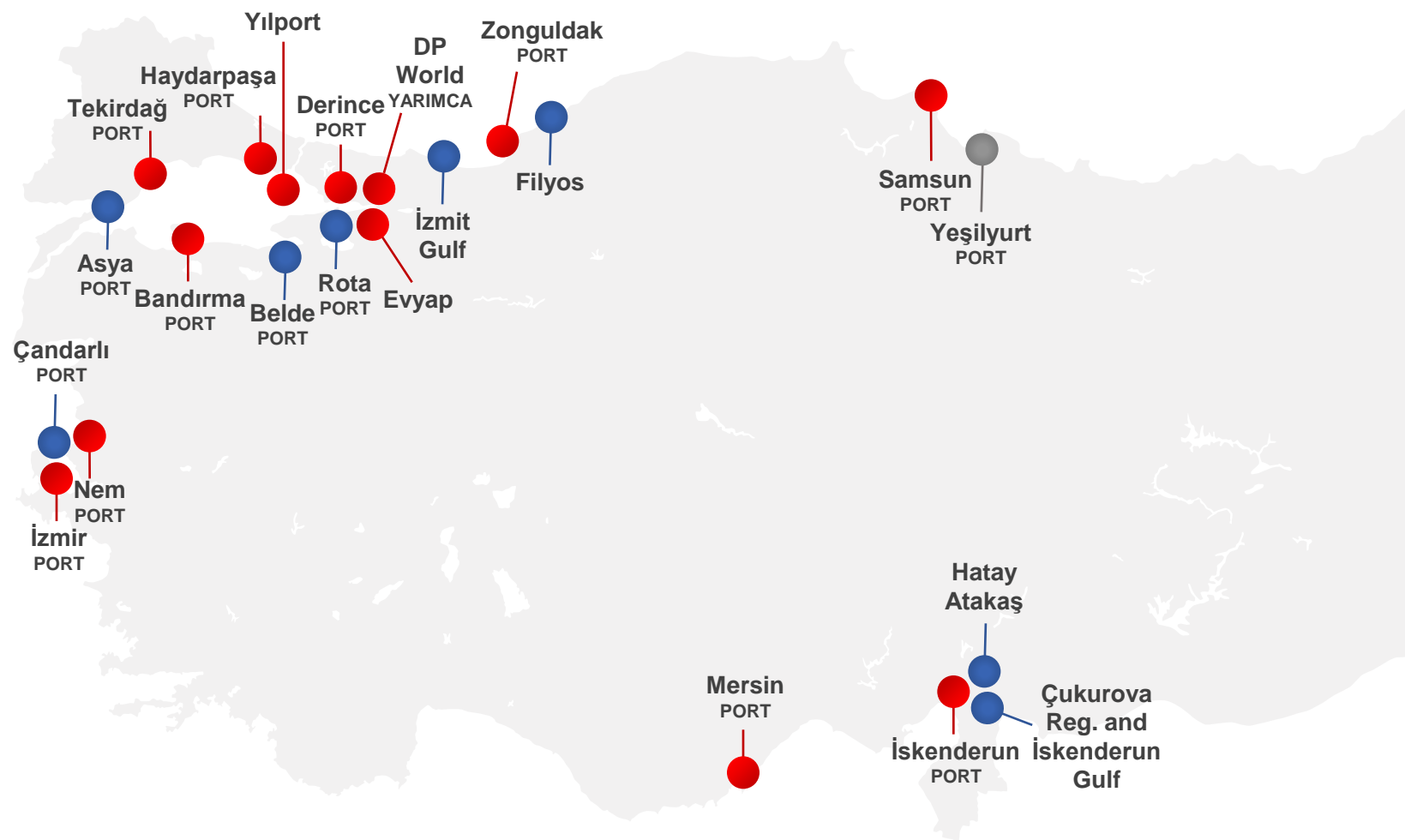
CONTAINER PORTS IN TÜRKİYE

PORT CLUSTERS PROVIDES SIGNIFICANT
TRADE OPPORTUNITIES



JUNCTION LINES CONNECTED TO PORTS

JUNCTION LINE INVESTMENTS CONTINUE FOR PORTS, WHICH ARE OF GREAT IMPORTANCE FOR INTERNATIONAL TRADE.

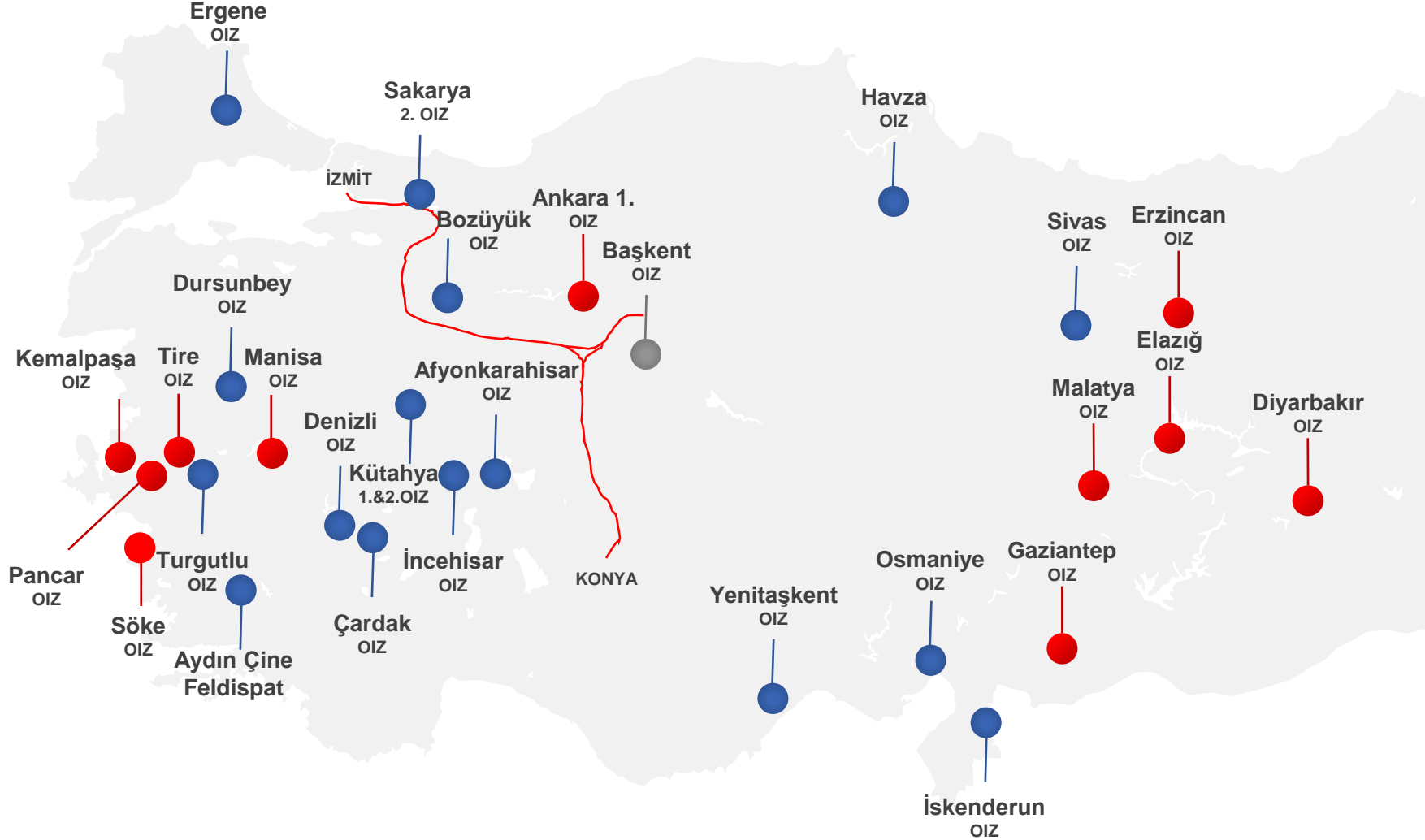


EXISTING LINES	Km	UNDER CONSTRUCTION	Km	PLANNED	Km
H. Paşa	2.5	Samsun Yeşilyurt Gelemen	6.76	Belde Port	1
İzmir	5.3			Rota Port	1.5
Nemport	3.4			Hatay Atakaş	3
Bandırma	5.1			Asyaport	4
Mersin	13.8			Çukurova Reg. and Iskenderun Gulf	36
Samsun	14.6			Filyos Port	12
İskenderun	19.0			İzmit Gulf Industrial Centers	10
Derince	7.5			İzmir Çandarlı	7
Tekirdağ	1.6				
Zonguldak	1.7				
Yılport	0.2				
Evyap	1.9				
DP World Yarımca	1.0				
Kozlu Pier	4.3				
Ekinciler Pier	3.3				
Gübretaş Pier	0.3				
İsdemir Pier	3.0				

- EXISTING 13
- PLANNED 8
- UNDER CONSTRUCTION 1

JUNCTION LINES CONNECTED TO OIZS

THE SHARE OF RAILWAYS IN COMBINED TRANSPORTATION APPLICATIONS IS INCREASED WITH THE JUNCTION LINES CONSTRUCTION IN ORGANIZED INDUSTRIAL ZONES, WHICH HAVE A HIGH SHARE IN FREIGHT TRANSPORTATION.



EXISTING LINES	KM	UNDER CONSTRUCTION LINES	KM	PLANNED LINES	KM
Ankara 1. OIZ	8.6	Başkent OIZ	3.75	Havza OIZ	3.45
Pancar OIZ	1.25			Sivas 2. OIZ	1
Tire	0.62			Yenitaşkent OIZ	16
Kemalpaşa	27.8			İskenderun OIZ	4.2
Manisa	7.6			Afyonkarahisar OIZ	12
Erzincan OIZ	9.11			İscehisar OIZ	12
Elazığ OIZ	1.41			Çardak OIZ	2.3
Diyarbakır OIZ	4			Denizli OIZ	4
Malatya OIZ	0.87			Aydın Çine Feldispat OIZ	7
Gaziantep (Başpınar) OIZ	9			Turgutlu OIZ	1.5
Söke (OIZ)	1.27			Dursunbey OIZ	4
				Osmaniye OIZ	19.8
				Çorlu Ergene 2. OIZ	9.6
				İzmir Asım Kibar OIZ	6
				İzmit Aslanbey OIZ	5
				Konya 2. OIZ	10
				Akhisar OIZ	3.5
				Bozüyük OIZ	4
				Kütahya 1.& 2. OIZ	3
				Sakarya 2. OIZ	26

- EXISTING 11
- PLANNED 21
- UNDER CONSTRUCTION 1



PRESIDENCY OF
THE REPUBLIC OF TÜRKİYE
**INVESTMENT
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