

**Global Change:
How International Trade is
Reshaping the Global Economy**

Türkiye's Logistics Sector

September 2026



nexus
OF THE WORLD

AGENDA

Outlook to Global
Trade & Logistics

1

Outlook to Trade
& Logistics in
Türkiye

2

Logistics
Capabilities
of Türkiye

3

Global Trends
in Türkiye

4

1- Outlook To Global Trade & Logistics

Global Challenges



Solutions & Strategies

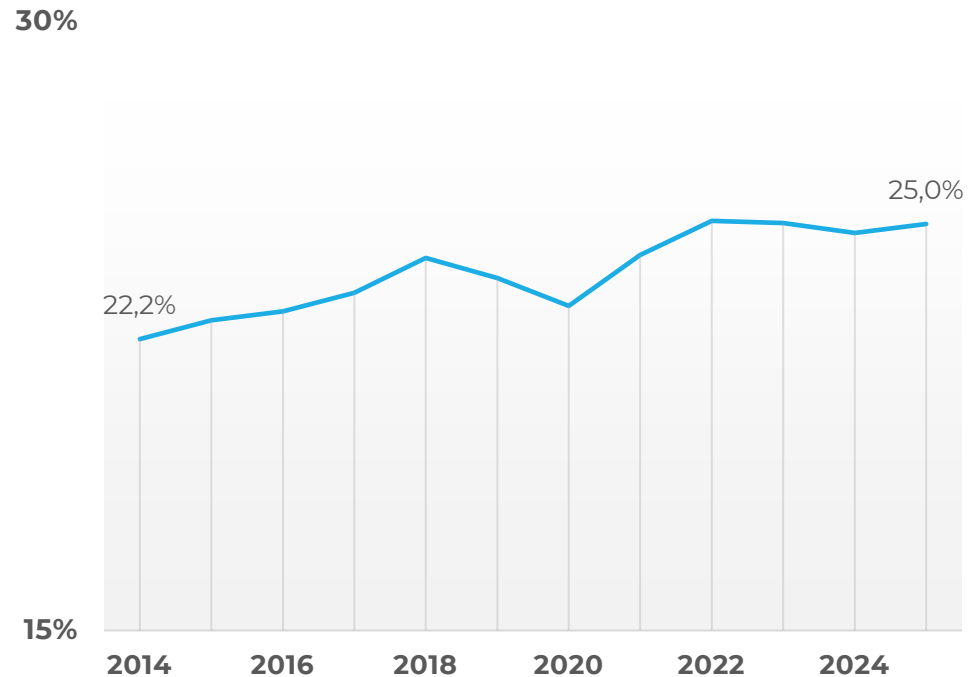


Global Outlook

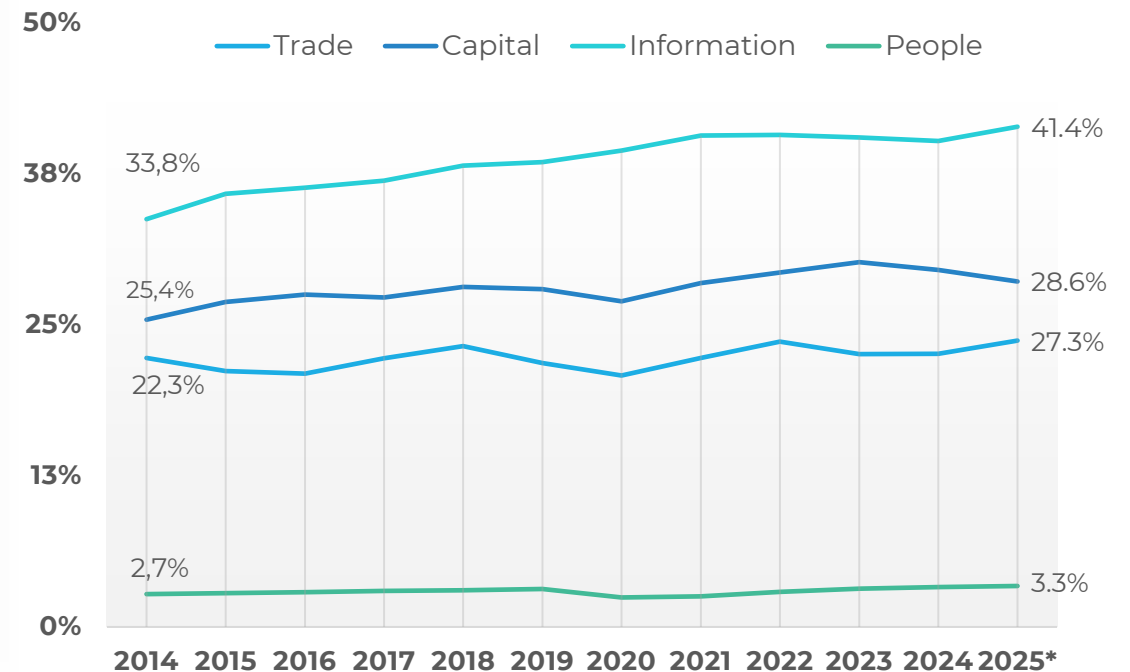
Globalization or Deglobalization

The growth of international flows is keeping pace.

Global Connectedness Index Depth Trend 2021–2025



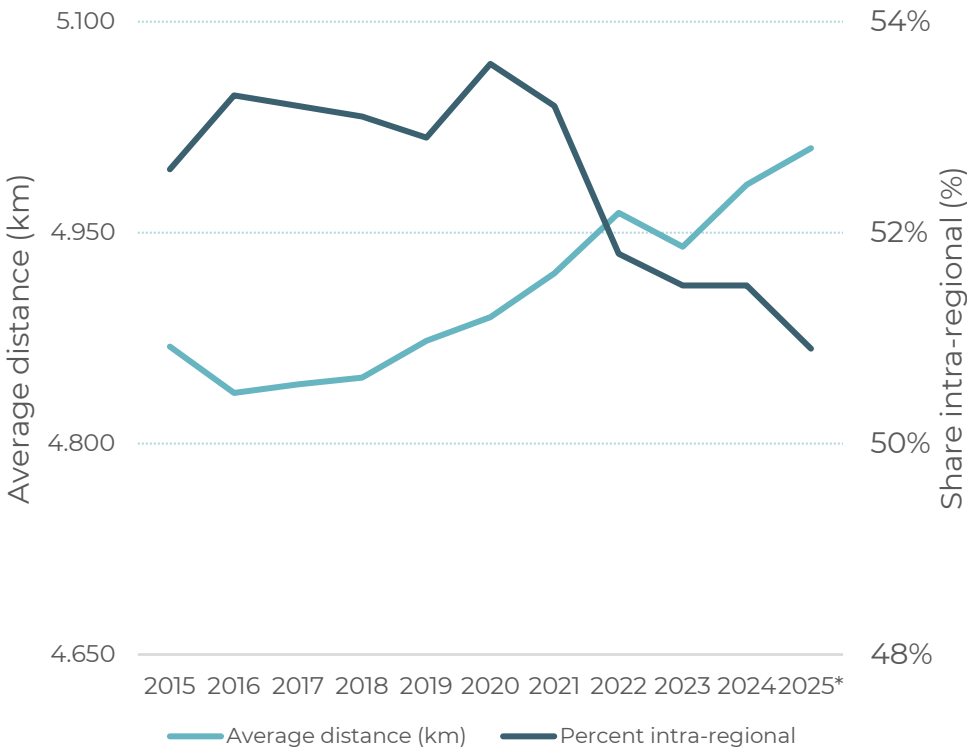
Four Pillars of Global Connectedness



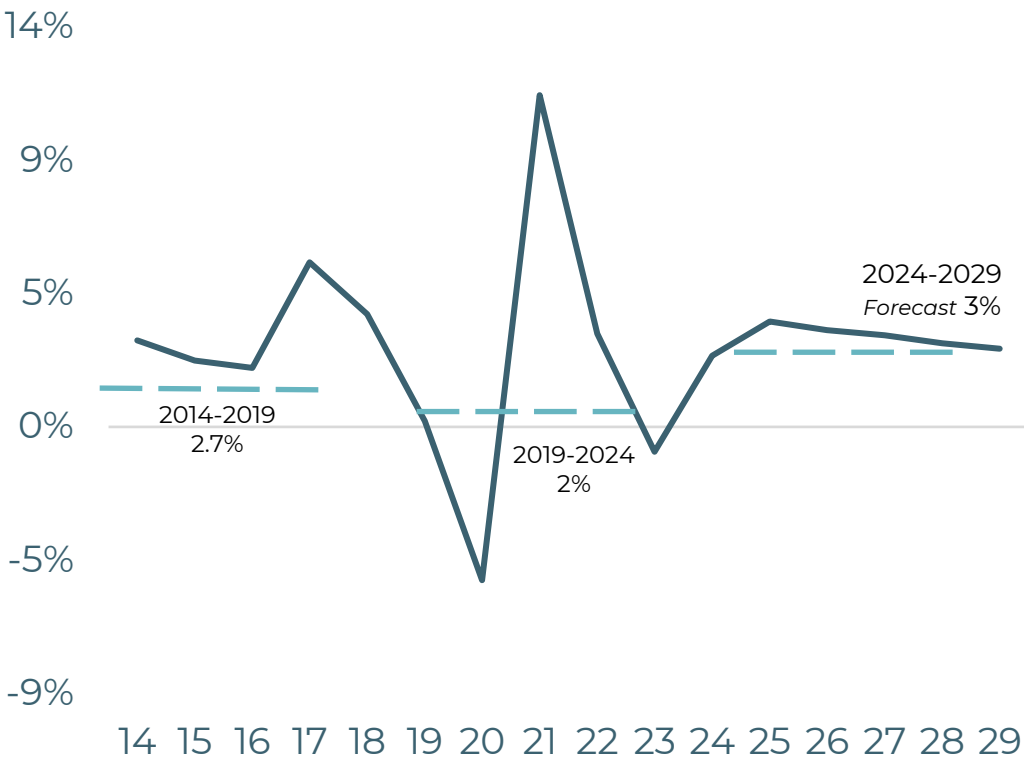
Global Outlook

The growth of international flows is keeping pace.

Goods Trade Average Distance and Regionalization



Growth Rate of World Goods Trade Volume (2014–2029)

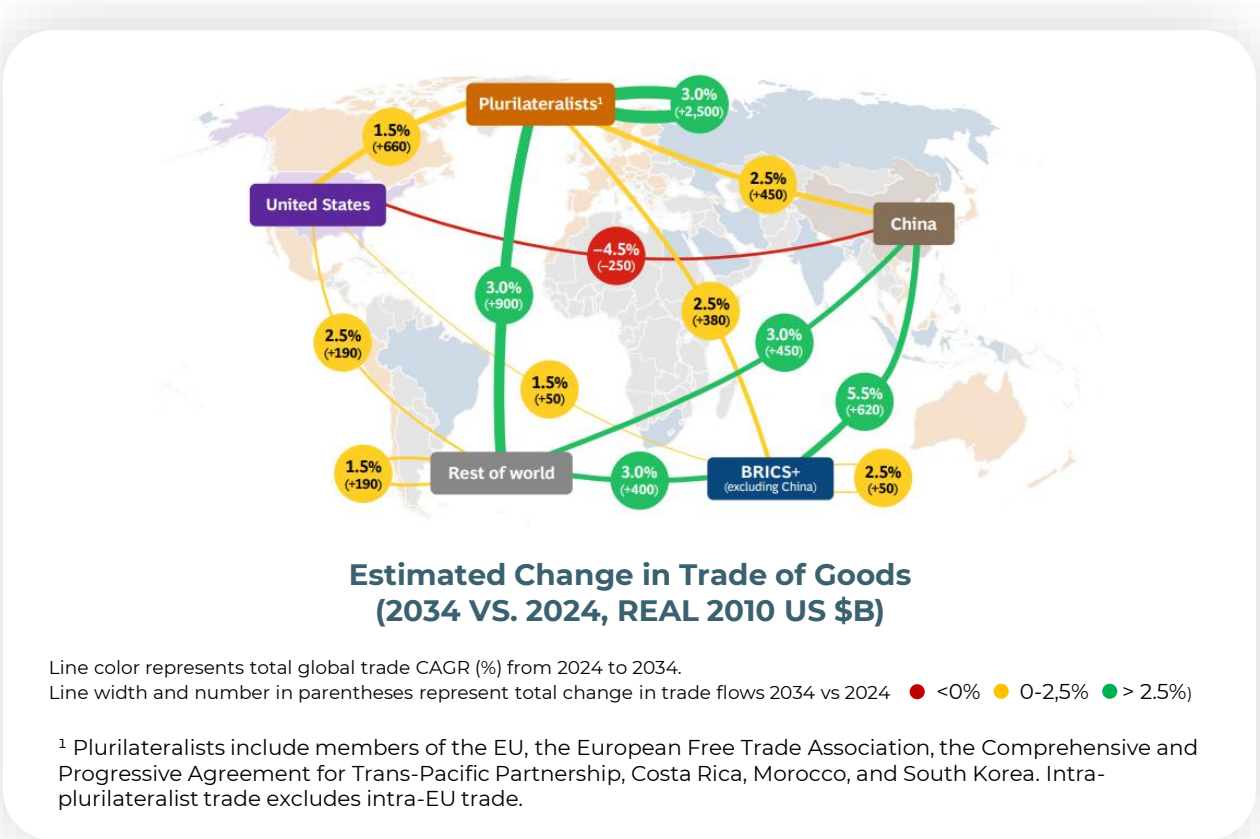


Source: DHL Trade Growth Atlas 2025 *2025 projected data

Global Outlook

Despite uncertainties, global trade volume continues to increase.

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



Global Outlook

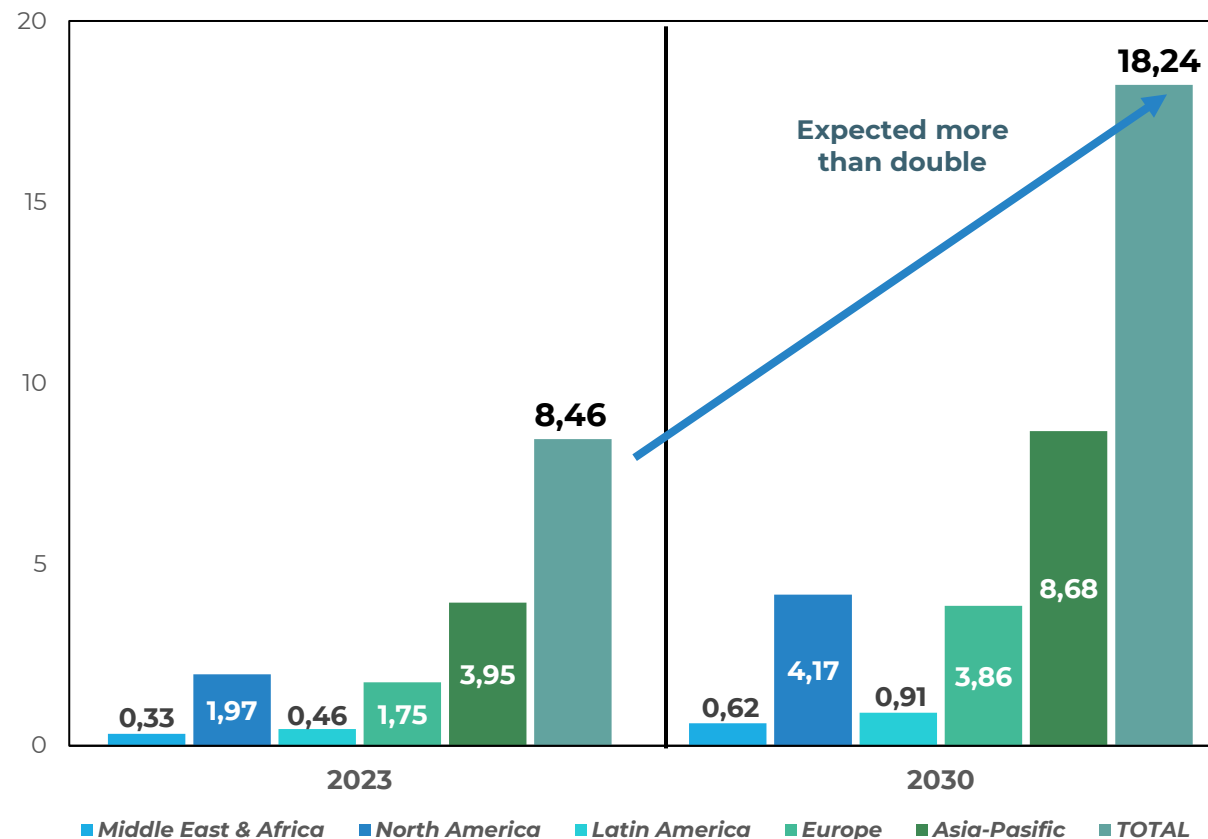
Global logistics is set to more than double in size by 2030.

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



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2- Outlook to
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in Türkiye

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, \$11.3T import
and \$35T GDP in Europe,
MENA and Central Asia
at 4-hour flight-distance

CONNECTIVITY

Turkish Airlines
connects you to 356
destinations in 132
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



86.1 Million
in Türkiye



450 Million
in EU

488 Million
in FTA Area

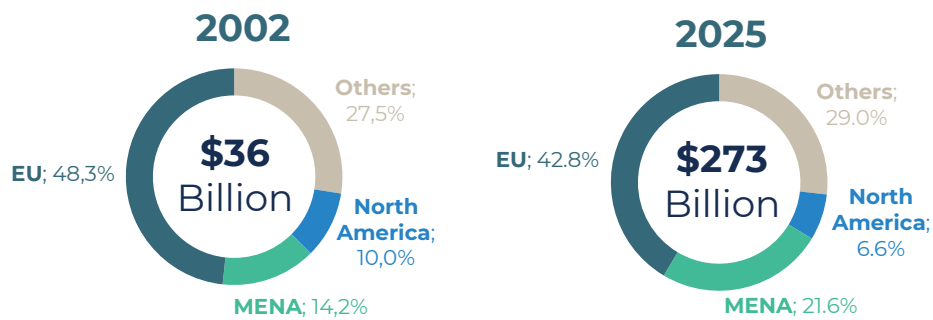
Free Trade
Agreements with
30 countries

Free Access to
1 Billion
Consumers

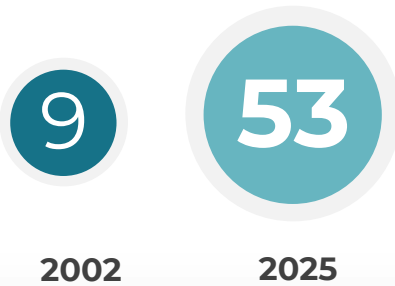
Trade Activity

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

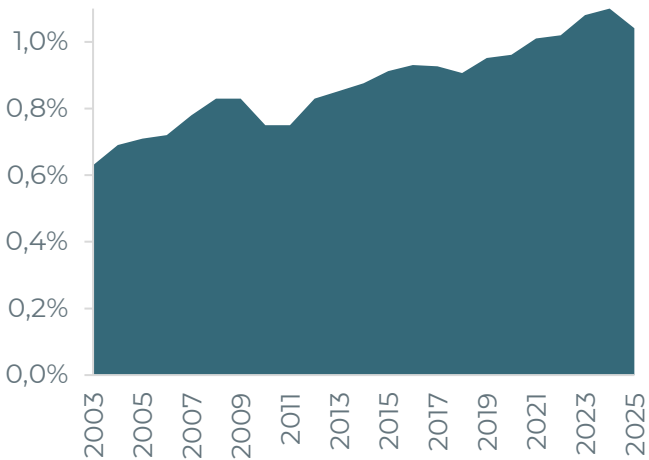
MERCHANDISE EXPORTS
BY GEOGRAPHY



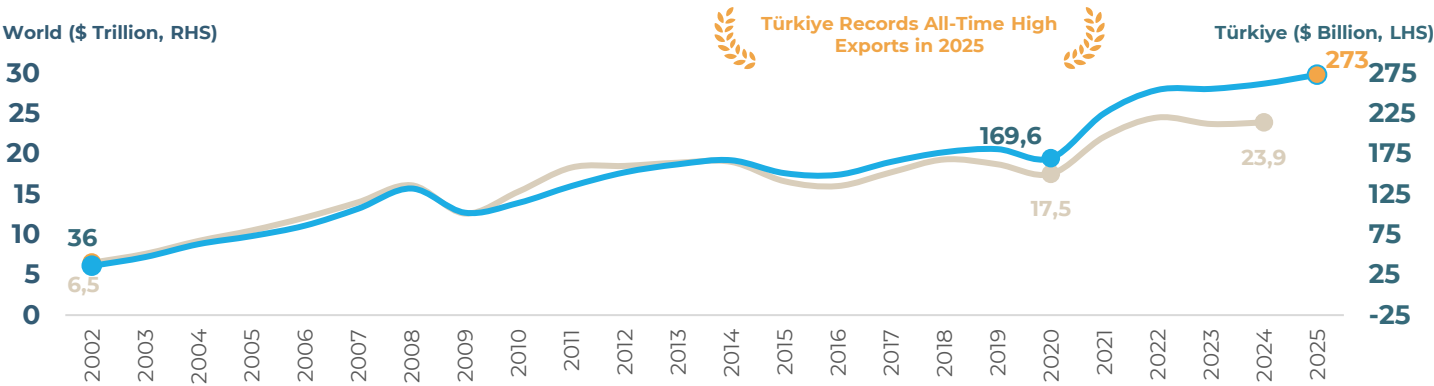
NUMBER OF EXPORT
PRODUCTS OVER USD 1 BILLION



TÜRKİYE'S SHARE IN GLOBAL
EXPORTS OF GOODS



Exports of Goods in Türkiye and the World



+9.2%

Türkiye

Average Annual Growth
Rate (2002-2025)

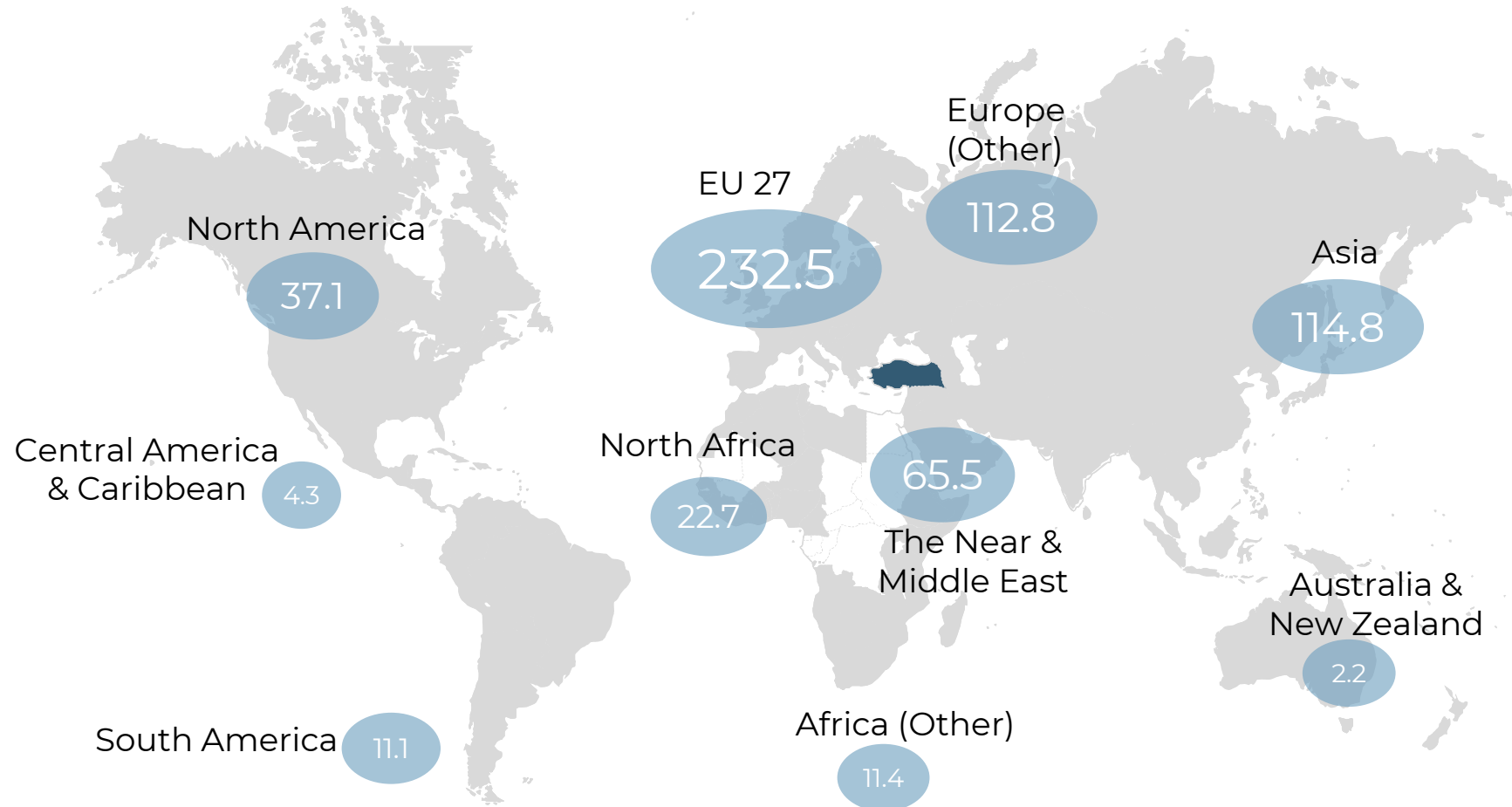
+6.3%

World

Average Annual Growth
Rate (2002-2025)

Trade Volume with Country Groups

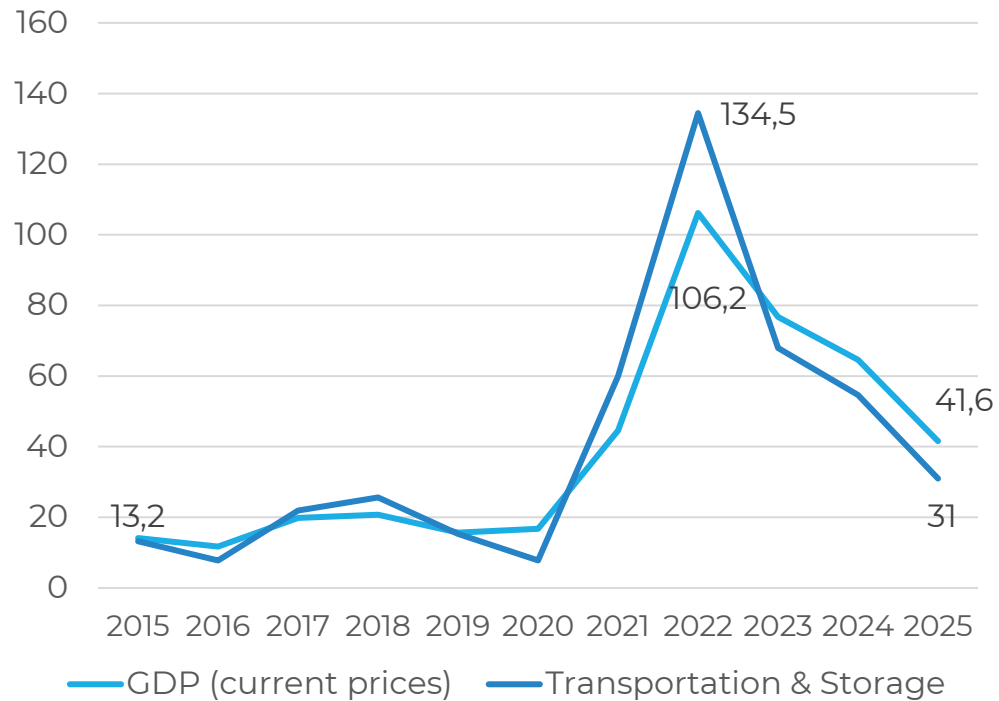
Enhanced logistics infrastructure contributes to the growth of international trade.



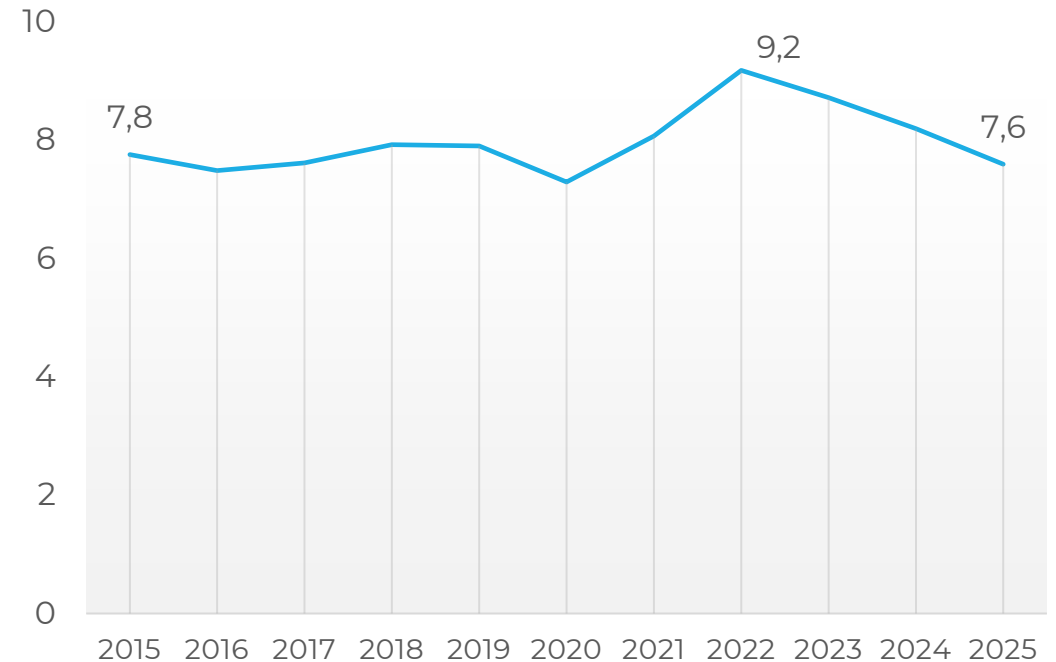
Logistics Activity in Türkiye

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 (%)

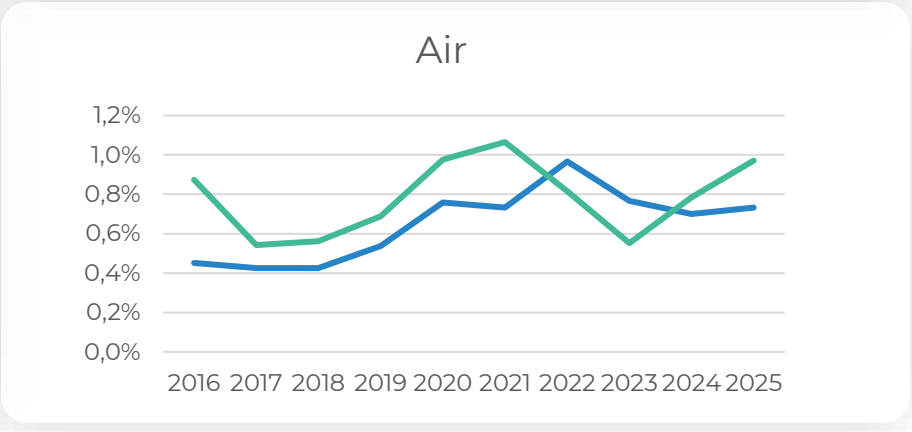
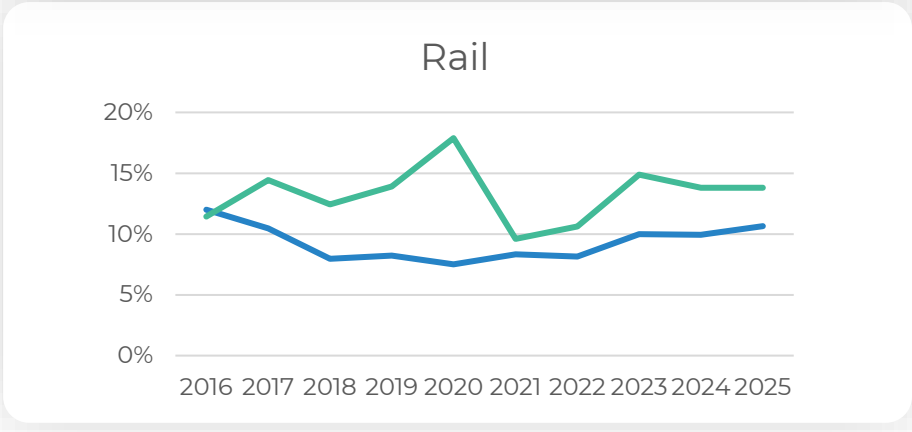
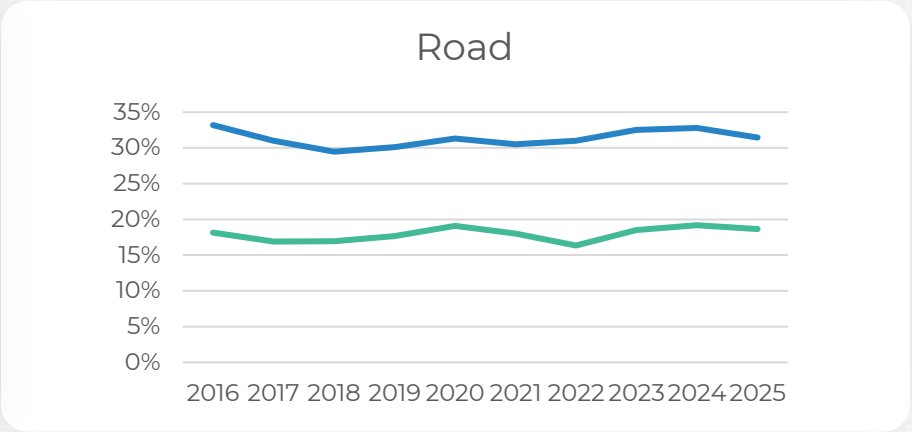
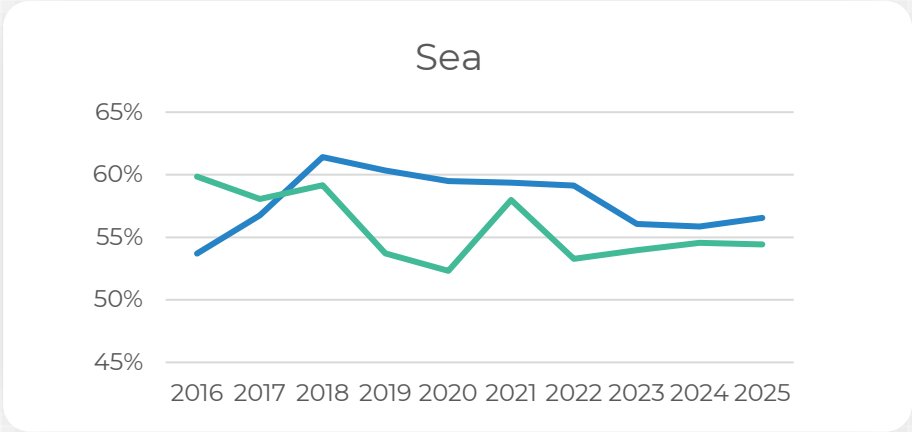


Share of Transport and Storage Sector in GDP (%)



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)

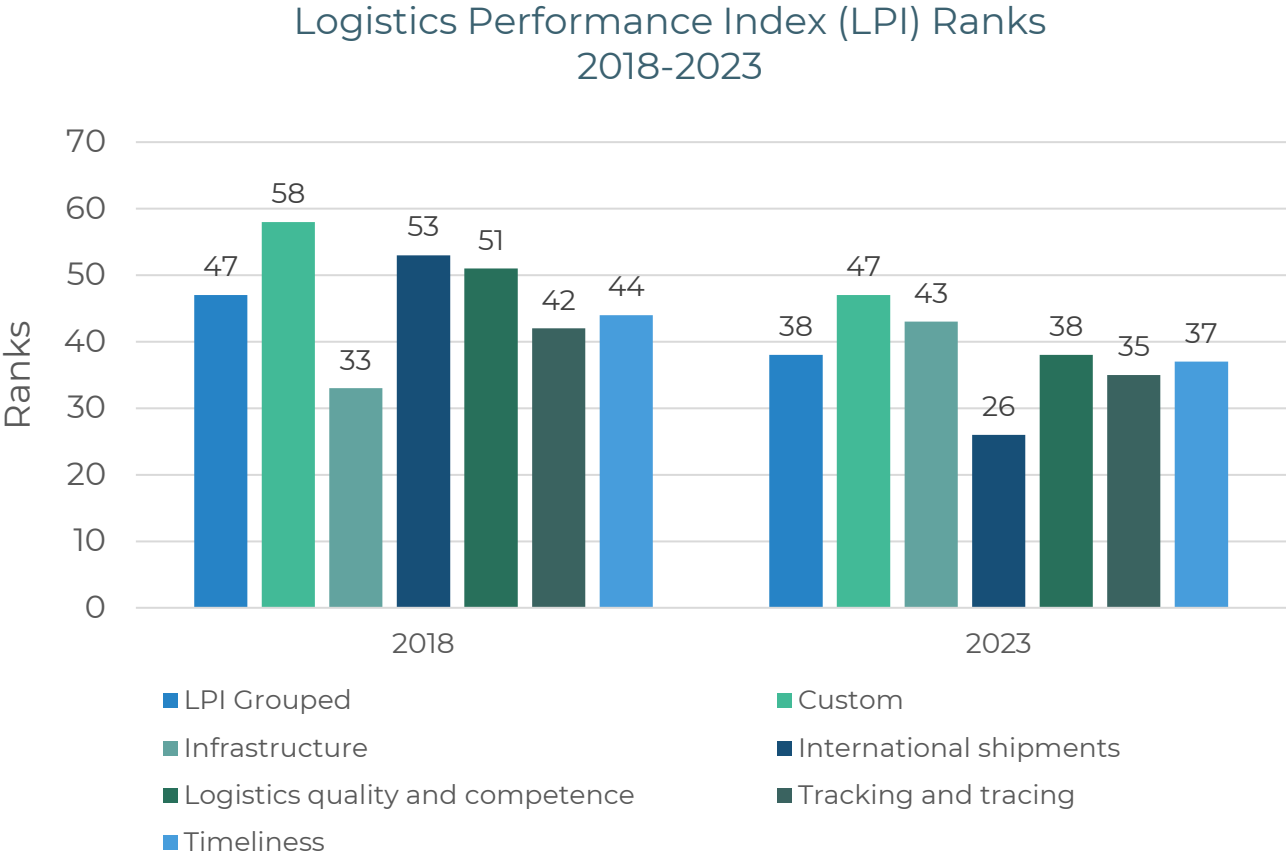


International Service Trade Statistics
(2018-2024) (Travel excluded)



Logistics Activity in Türkiye

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



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

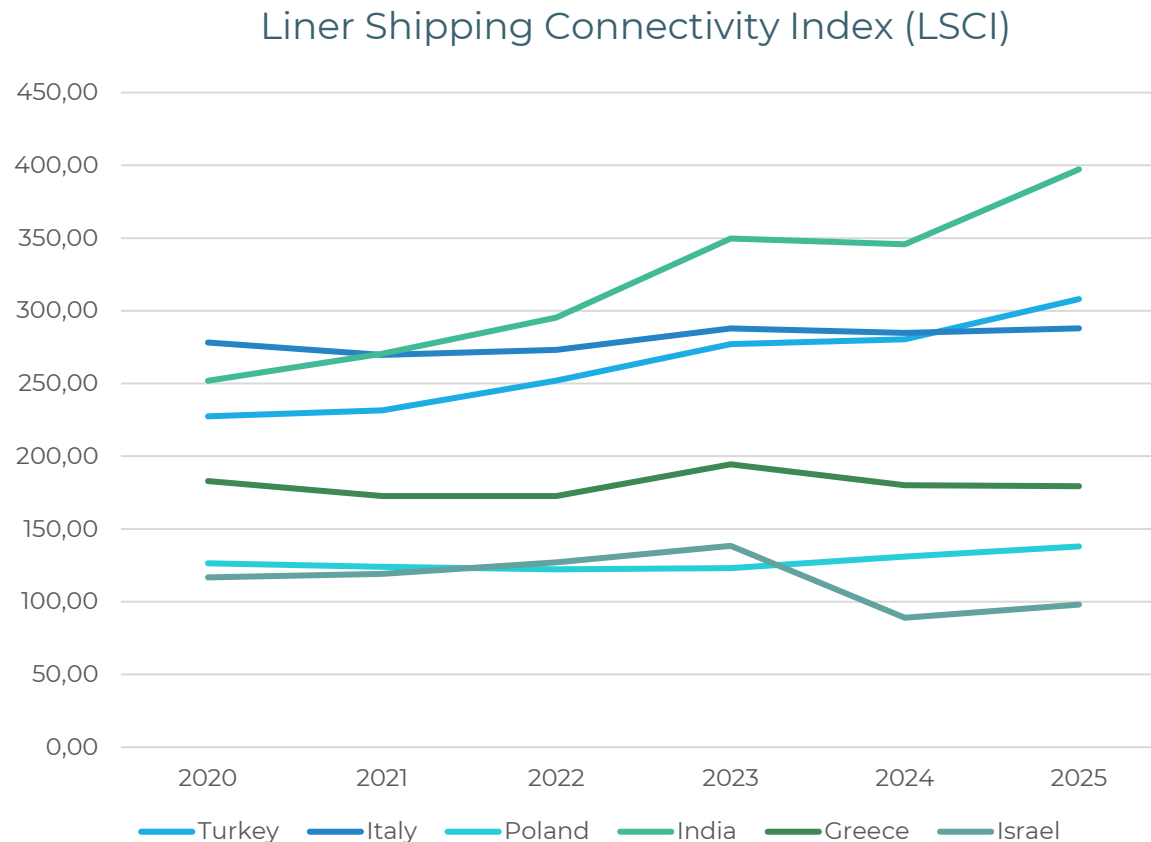
Score

3.4



Logistics Activity in Türkiye

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

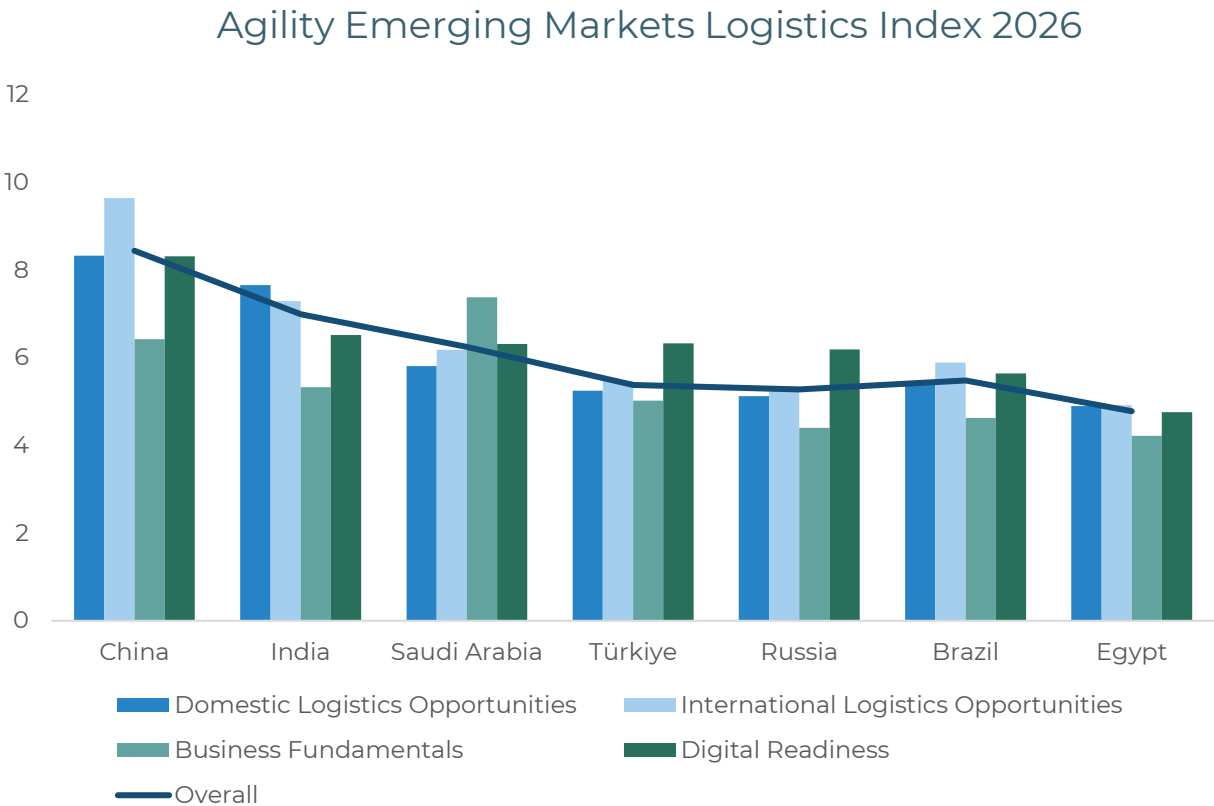


The Six Components of LSCI

- 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.



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

Score

5.43



Major Players in Logistics Industry



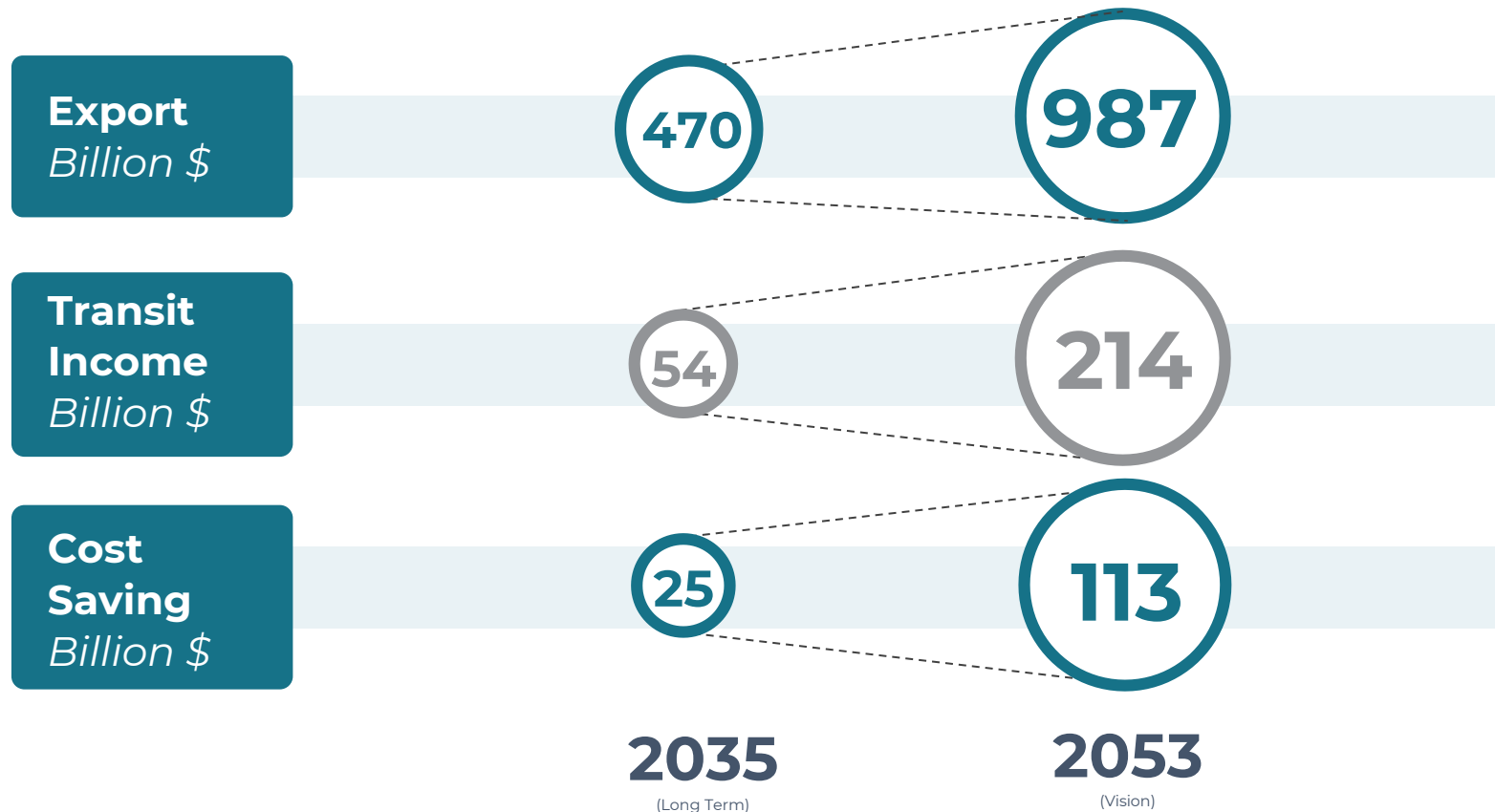
International Port Operators

Global players investing and operating in Türkiye



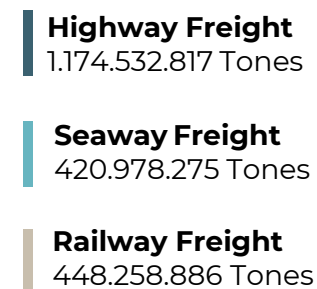
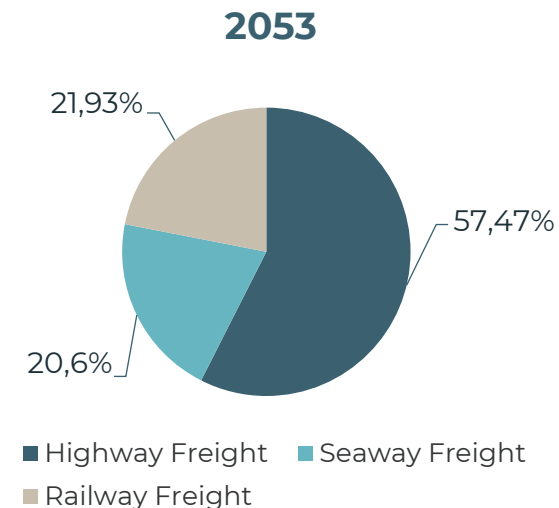
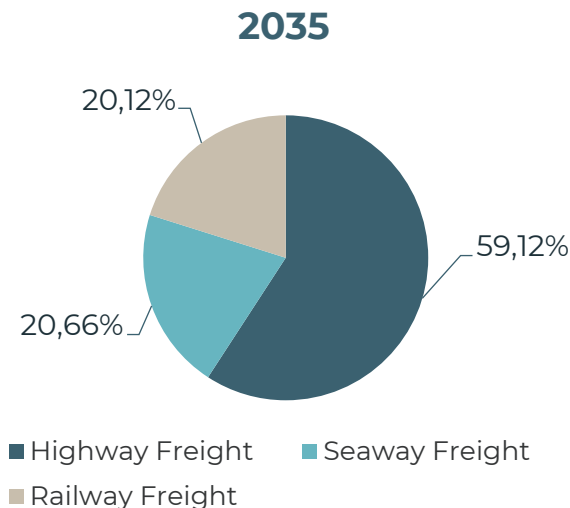
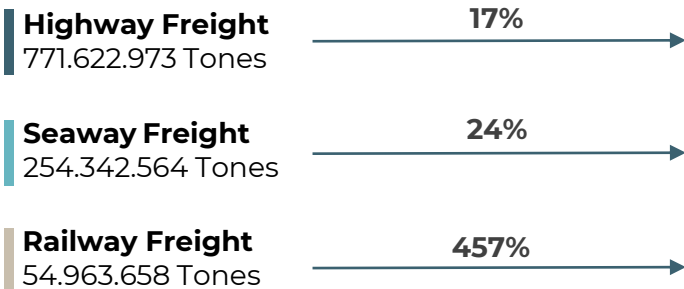
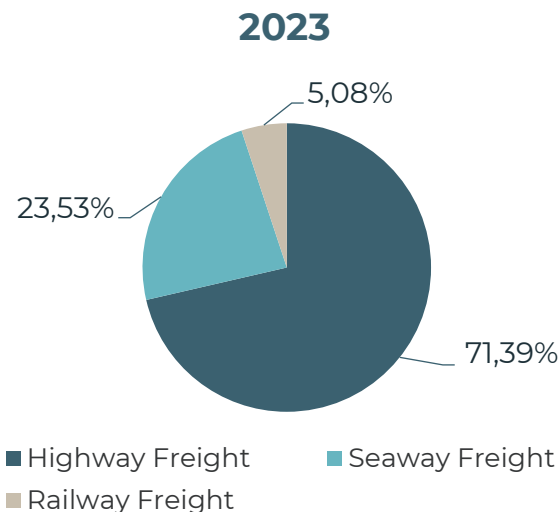
Türkiye's Logistics Master Plan

Logistics master plan outlines ambitious targets



Türkiye's Logistics Master Plan

Strategic investments aim to reduce road dependency and strengthen rail and sea freight for a sustainable future.



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3- Logistics Capabilities of Türkiye



Global Challenges

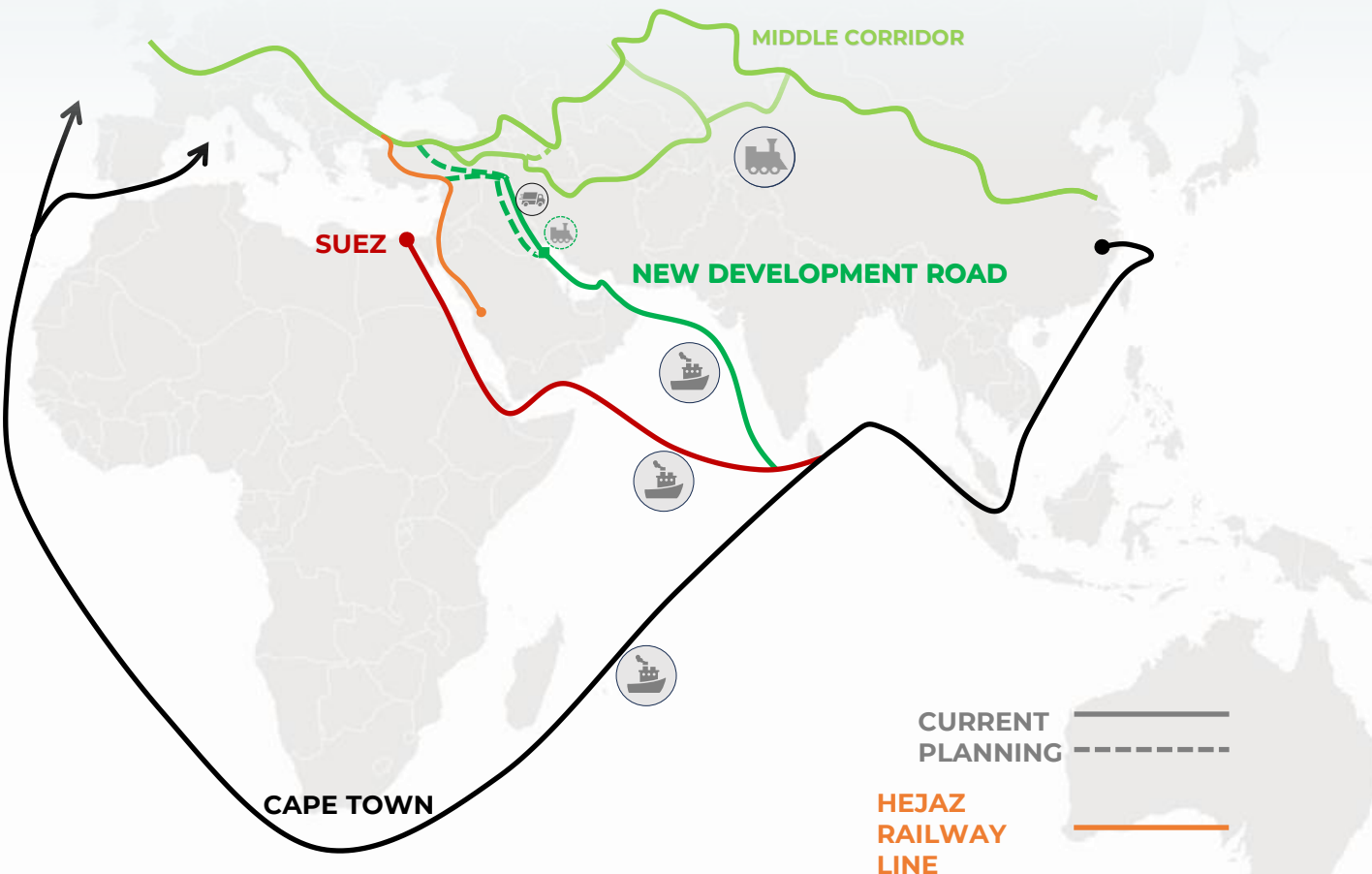




Türkiye's Logistics Advantages

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

Drewry WCI: Shanghai to Rotterdam



SUEZ CANAL ROUTE

18.250 KM

35 Days

THE CAPE ROUTE

23.317 KM

45 Days

MIDDLE CORRIDOR

12.500 KM

18 Days

DEVELOPMENT ROAD

16.416 KM

20 Days



The Rise Of The Middle Corridor

- Offers diversification to the traditional routes
- Europe-Asia in 18 days

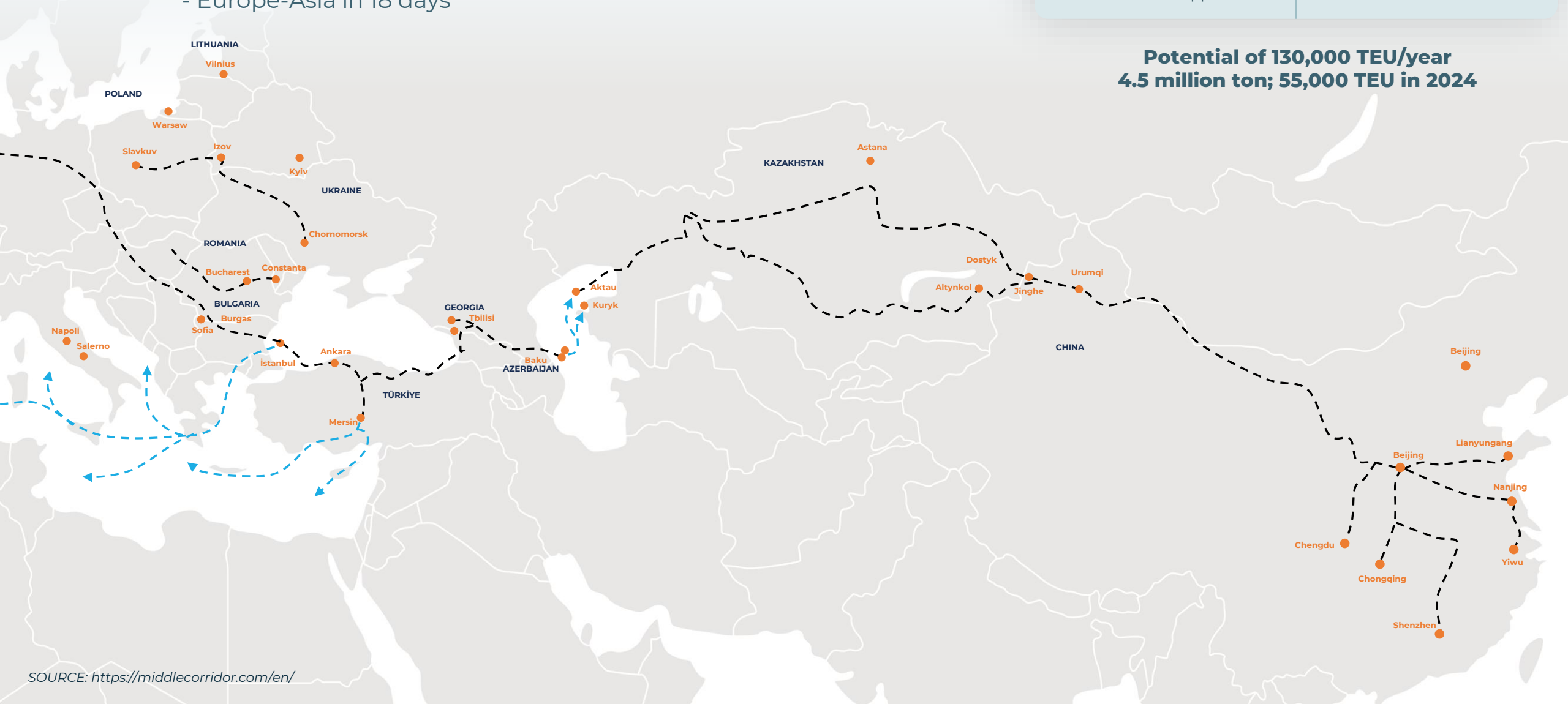
Strengths

Strategic Location
Diversification
Growing Market
Governmental Supports

Opportunities

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

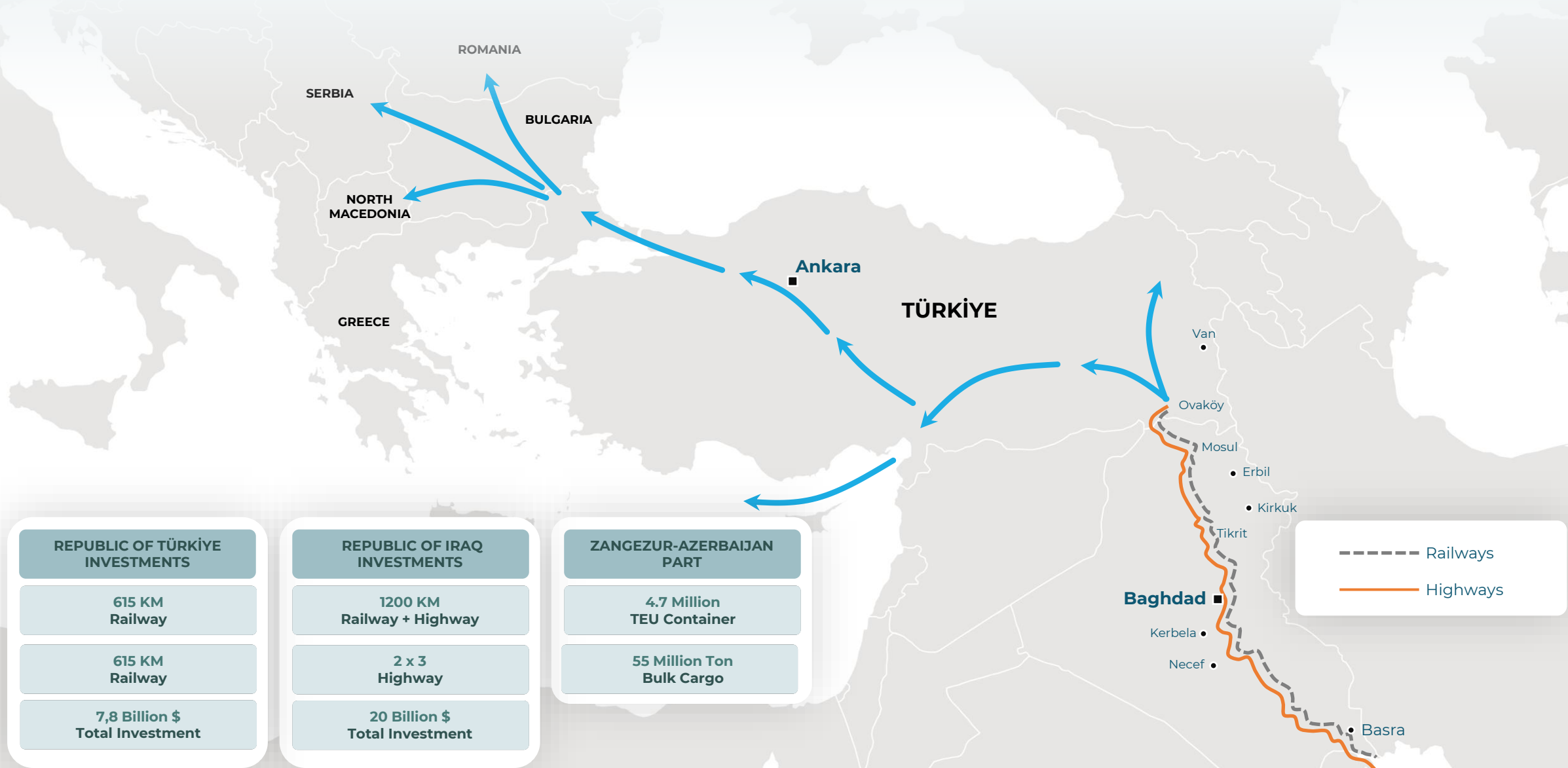
With the Zangezur Corridor, Baku Port will be directly connected to Türkiye





The Development Road

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





Türkiye's Logistics Capabilities

First concrete step taken for the revival of the Hejaz Railway





Türkiye's Logistics Capabilities

EUROPE SEA / EXPORT





Türkiye's Logistics Capabilities

ASIA SEA / EXPORT





Türkiye's Logistics Capabilities

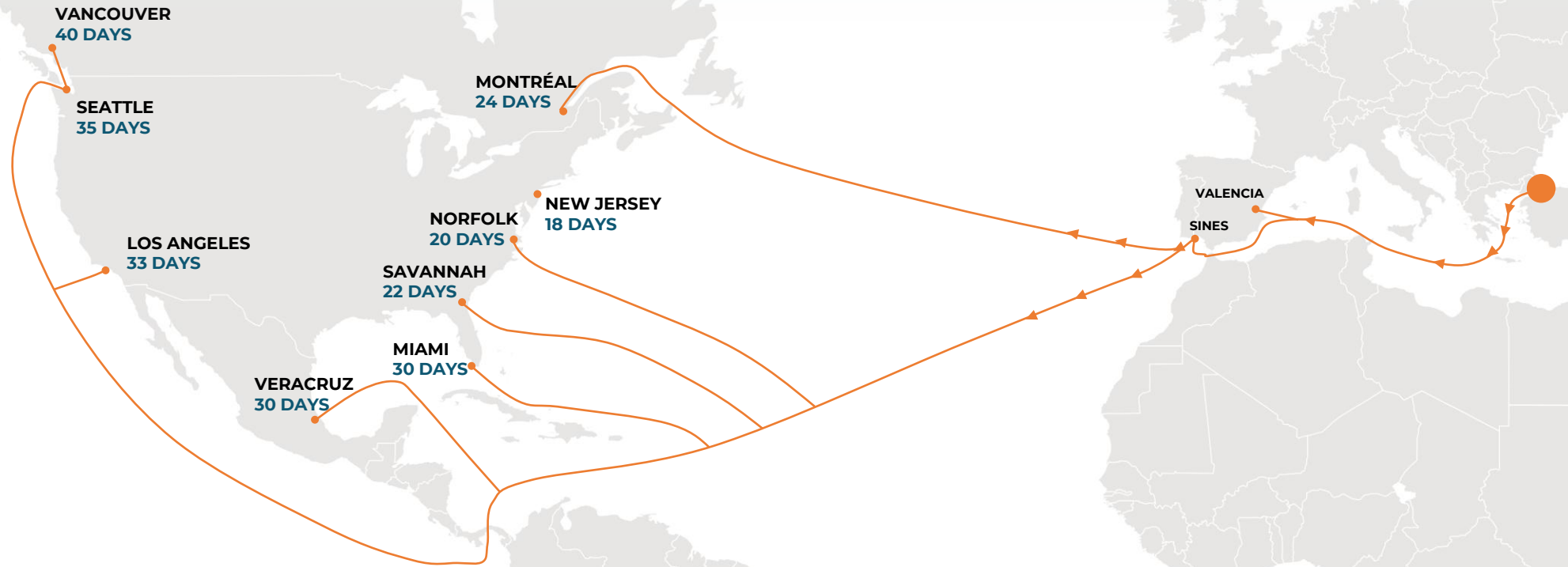
AFRICA SEA / EXPORT





Türkiye's Logistics Capabilities

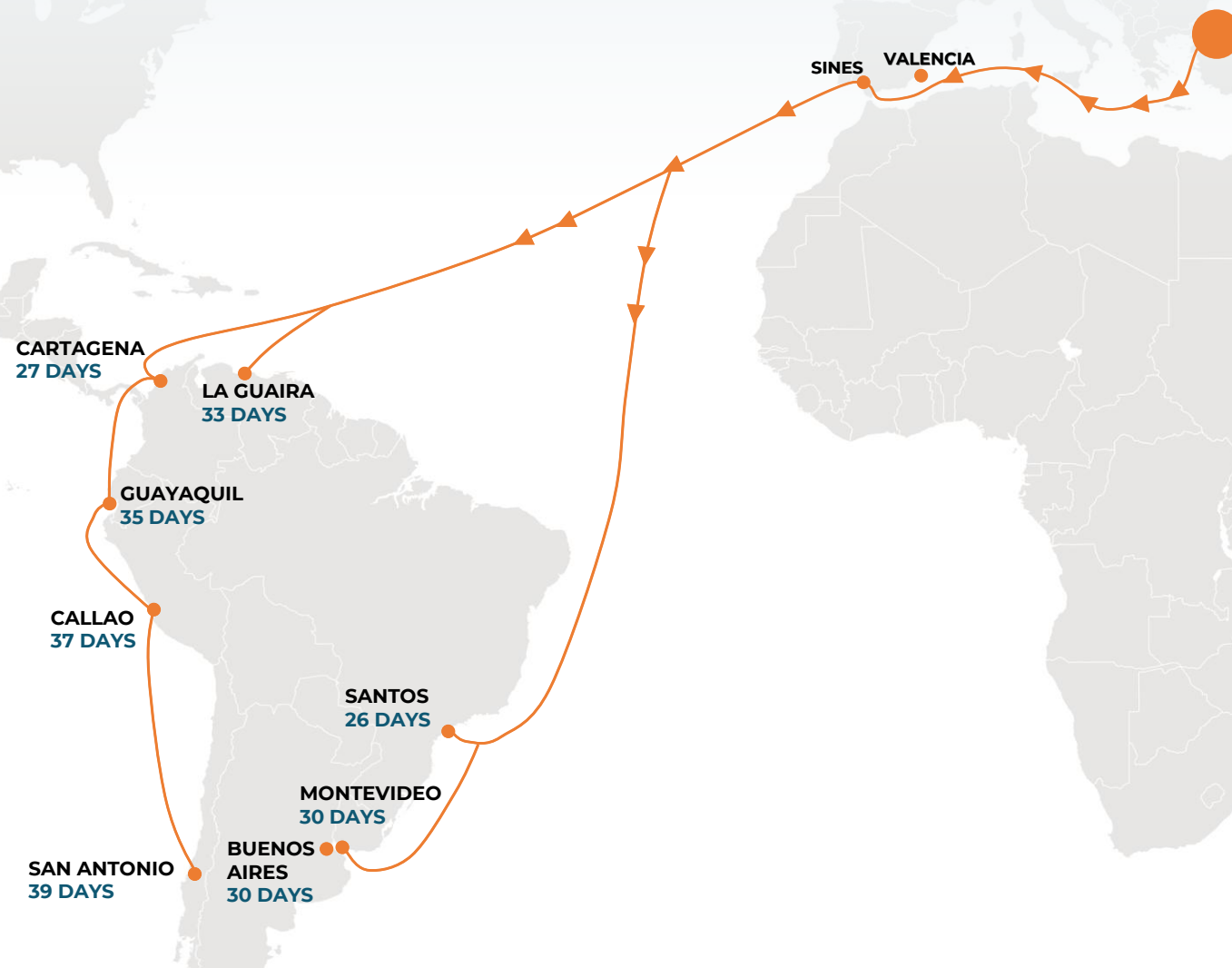
NORTH AMERICA SEA / EXPORT





Türkiye's Logistics Capabilities

SOUTH AMERICA SEA / EXPORT





Türkiye's Logistics Capabilities

AUSTRALIA SEA / EXPORT





Türkiye's Logistics Capabilities

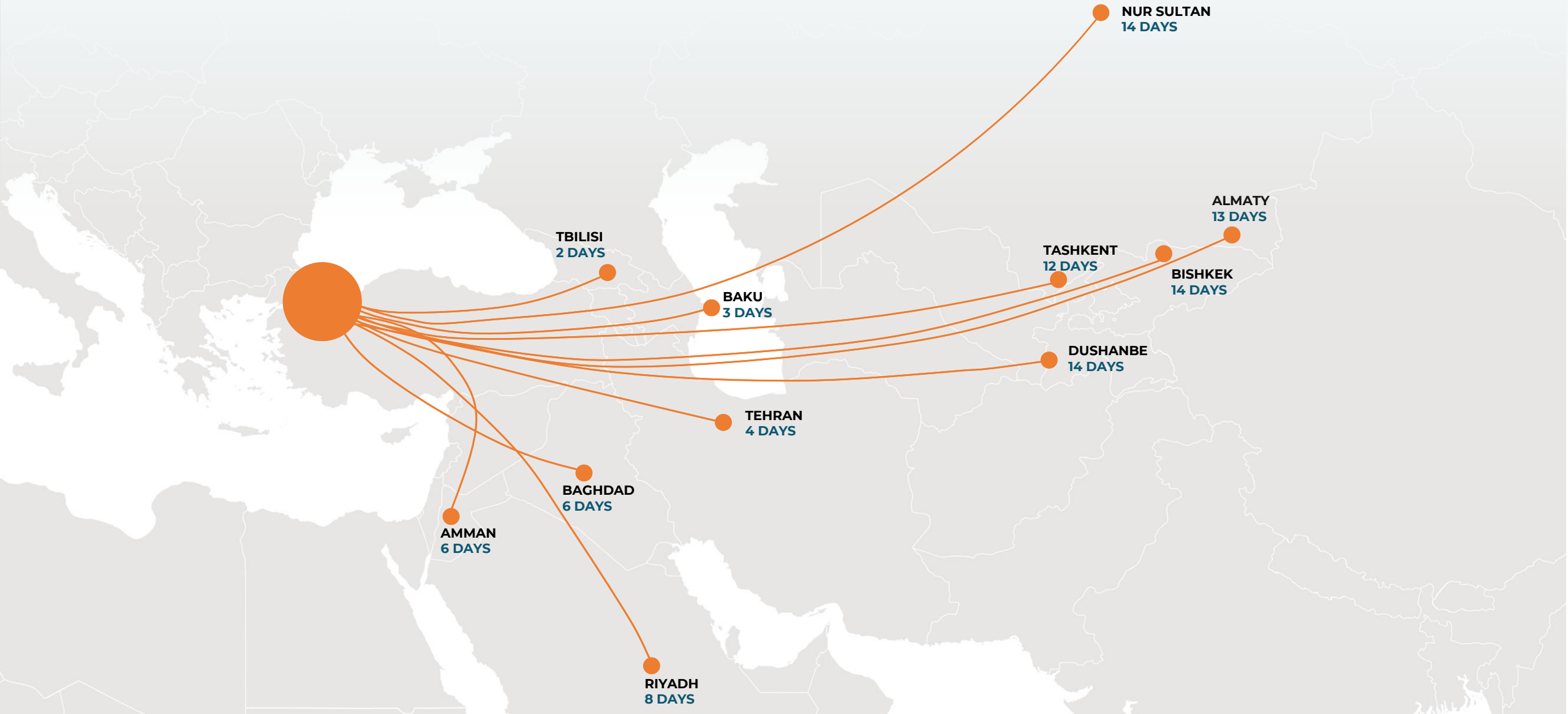
EUROPE ROAD / EXPORT





Türkiye's Logistics Capabilities

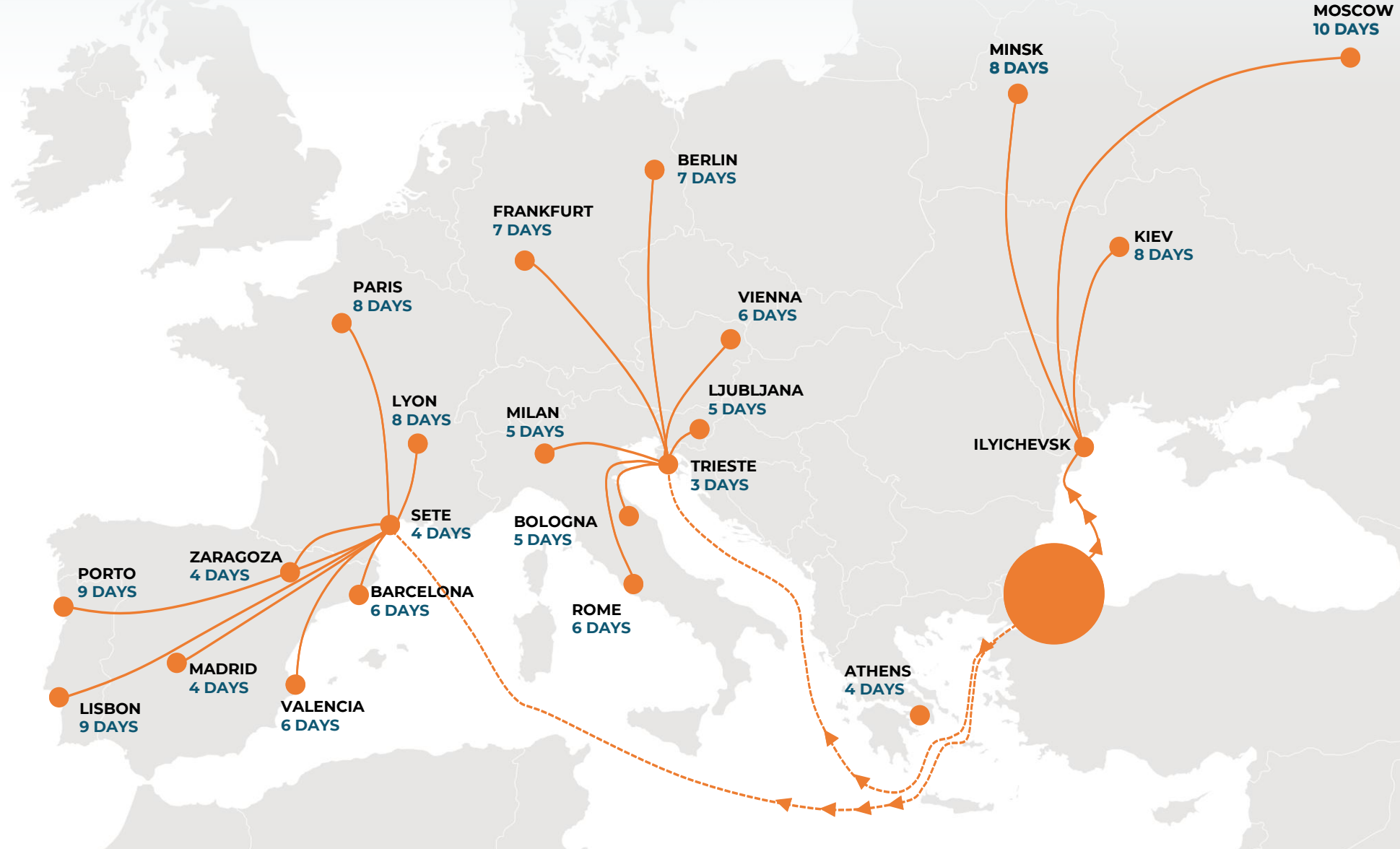
ASIA ROAD / EXPORT





Türkiye's Logistics Capabilities

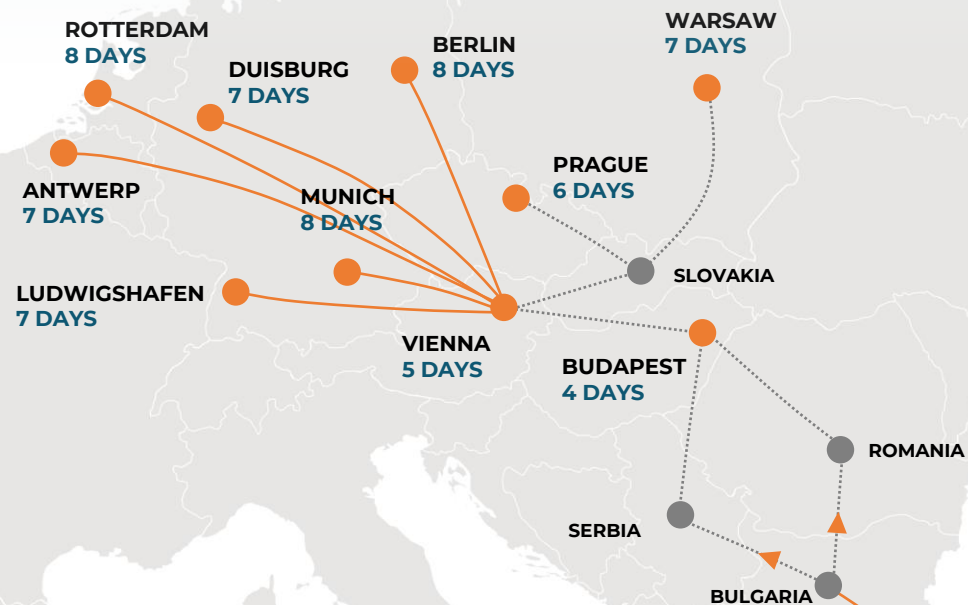
EUROPE RO – RO + ROAD





Türkiye's Logistics Capabilities

EUROPE TRAIN / EXPORT





Türkiye's Logistics Capabilities

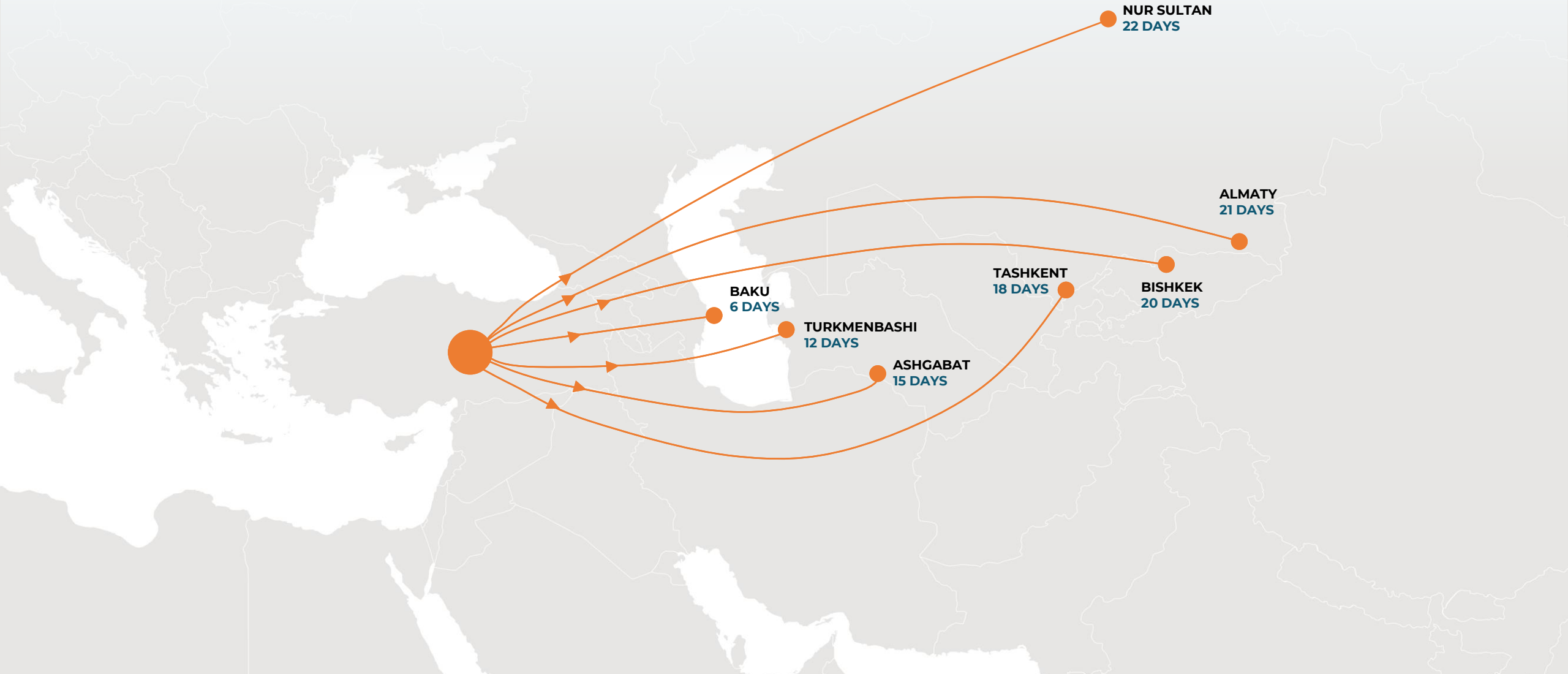
EUROPE RO – RO + BLOCK TRAIN





Türkiye's Logistics Capabilities

ASIA TRAIN / EXPORT





Türkiye's Logistics Capabilities

ASIA SEA / IMPORT





Türkiye's Logistics Capabilities

EUROPE - N. AFRICA SEA / IMPORT





Türkiye'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



7 Hours Distance



~2 Hours

~5 Hours

~10 Hours

A330F Range

~12 Hours

B777F Range

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



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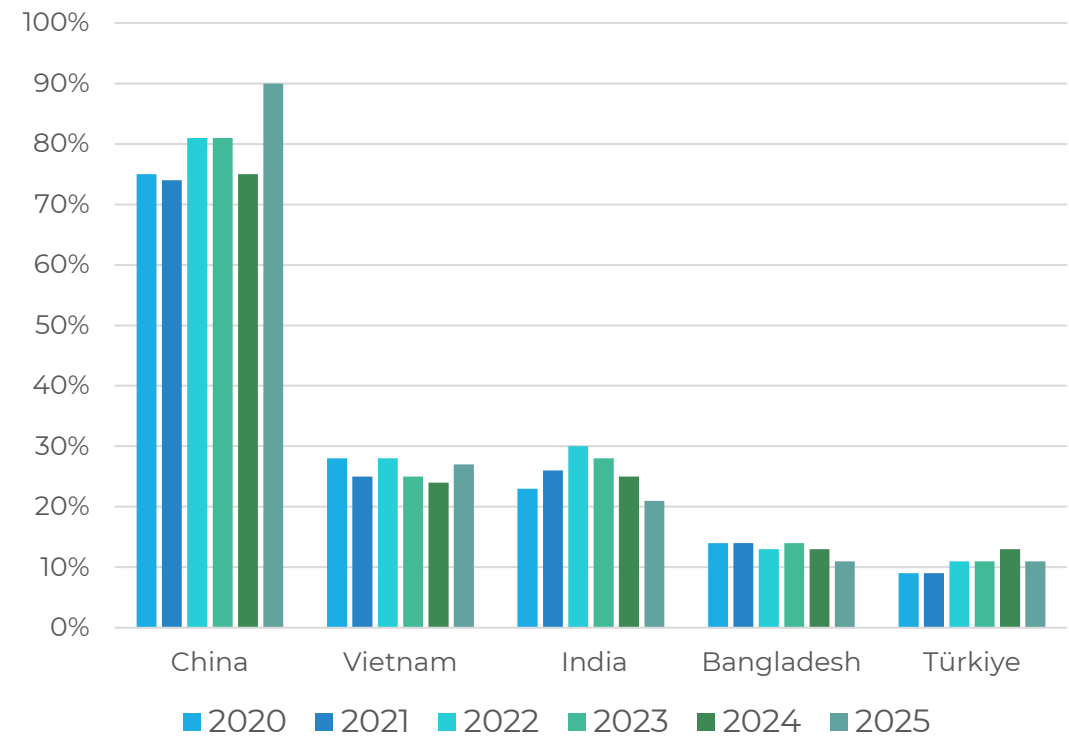
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4- Global
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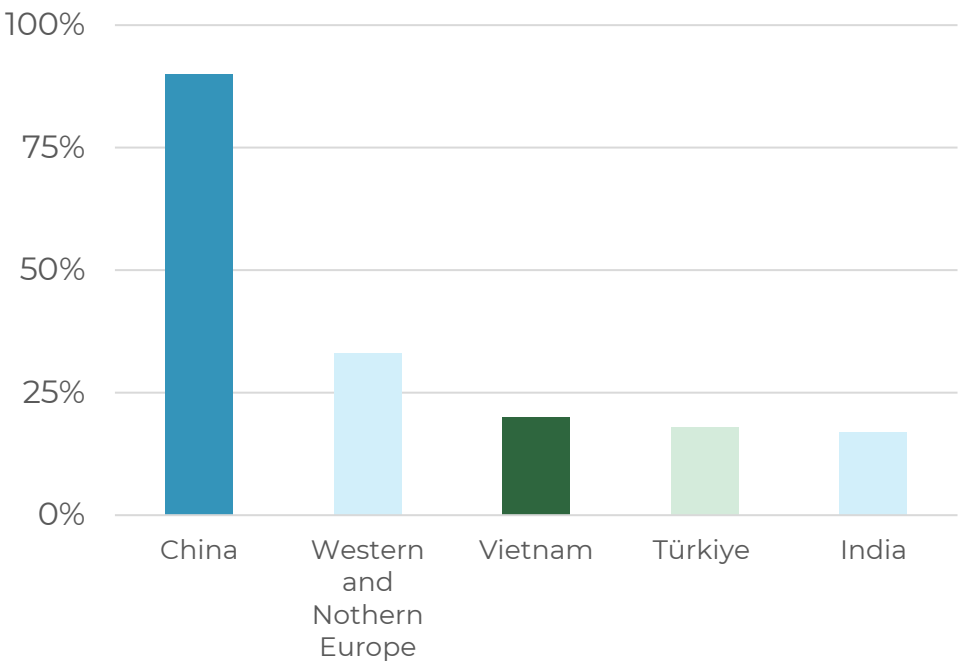
Nearshoring

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.



As Hyundai's first overseas production hub, the plant has transitioned to manufacturing electric vehicles and officially announced a new battery assembly facility.



Directly operates massive production facilities in Türkiye, serving as a vital regional nearshoring hub and exporting 60% of its VRV climate systems to Europe.



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.



A USD 683 million investment in Düzce to establish an integrated solar cell manufacturing facility, positioning Türkiye as a key green energy supply hub.



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.



Operating as a major export and R&D hub for Europe, Valeo Türkiye exports over 60% of its production to Europe.

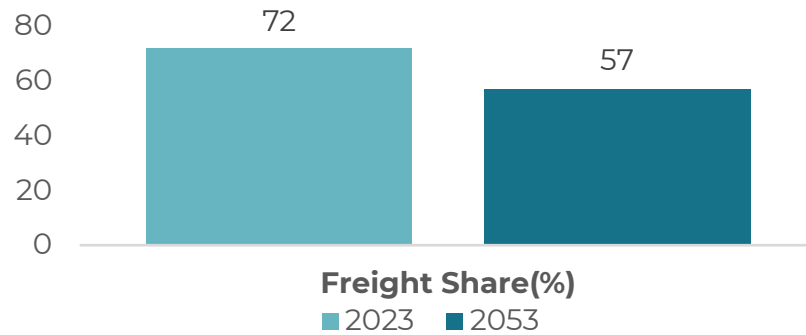


Has been producing buses at the Hoşdere plant in Istanbul since 1995, exporting 83% of them to over 70 countries across Europe and the Middle East.

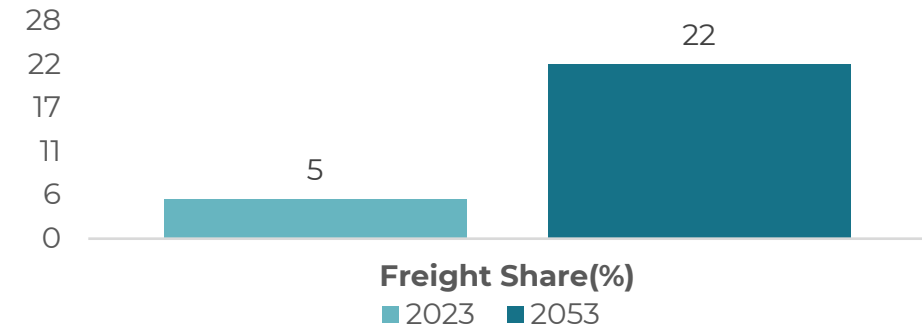
Green Deal

Türkiye 2053 Net Zero Emissions Target

Share of Road in Freight Transportation (%)



Share of Rail in Freight Transportation (%)



MEGA PROJECTS LESSEN CARBON EMISSIONS



Green Deal

Türkiye's Competitive Advantages in The Green Deal



1

Growing
renewables
sector



2

Less shipping
distance
provides less
carbon
footprint



3

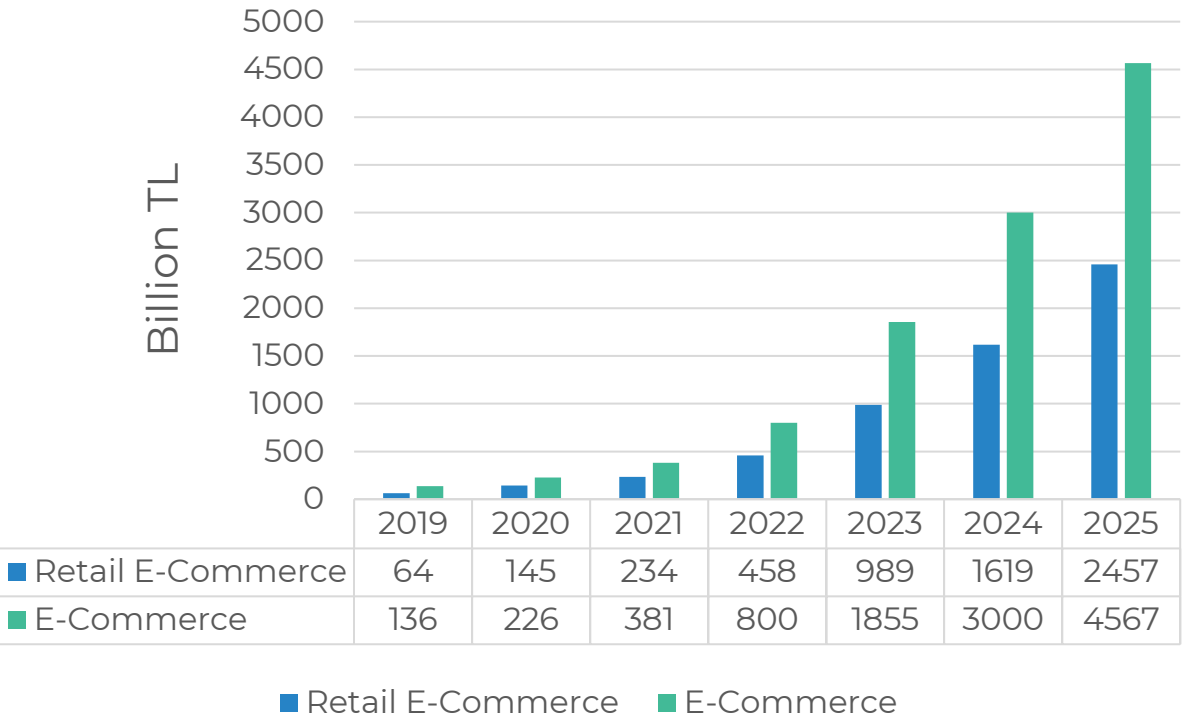
Growing
infrastructure
investments

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 in Türkiye

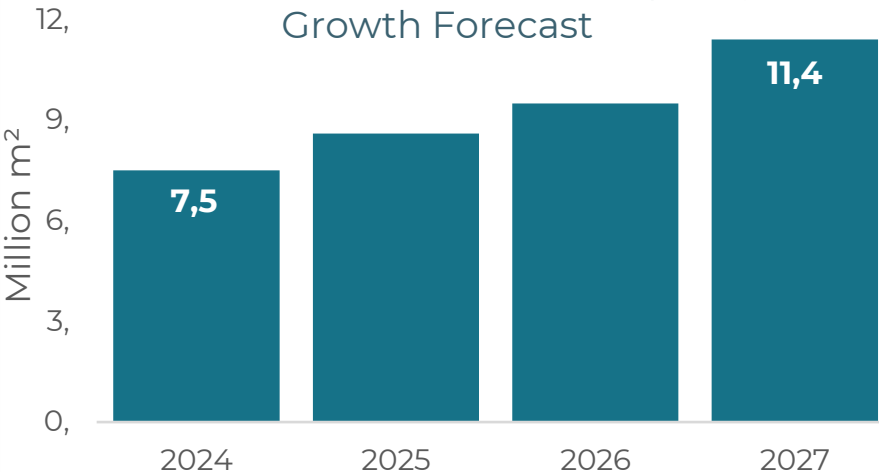


88,8%
Share of
Internet Users
2024

25
Million sq m
Logistics Supply

3/4
of Internet Users
Buy Online

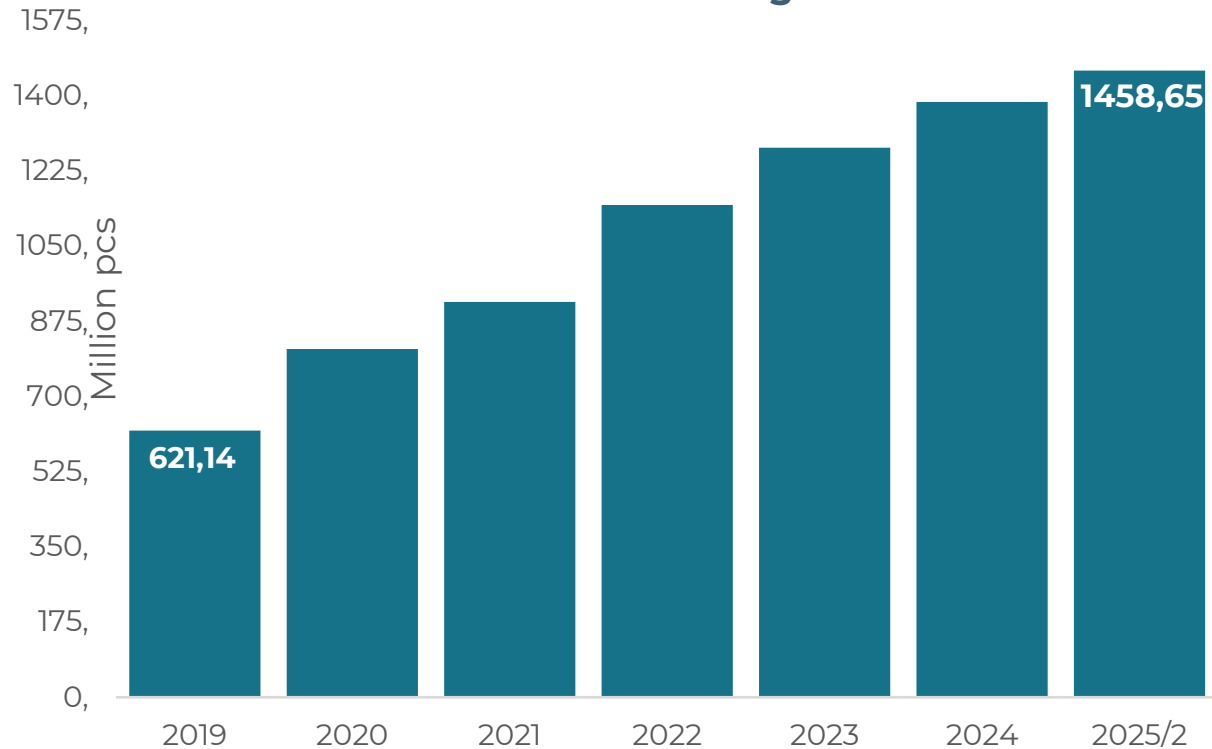
E-Commerce Warehouse Capacity
Growth Forecast



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



KUEHNE+NAGEL

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



Powerhouse for Investments in the Türkiye Century

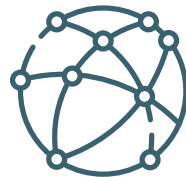
A program sets out a comprehensive economic positioning and investment attraction framework aimed at strengthening Türkiye's role in the global economy.

1



IFC* offers strong tax incentives, including a 100% corporate tax deduction, with planned extensions of key benefits until 2047.

2



Cross trade tax advantages are significantly expanded, offering up to 100% income deduction within the IFC and 95% outside.

3



Corporate tax for manufacturing and production is reduced from up to 25% to 12.5%, enhancing competitiveness.

4



Tax advantages for services exports are expanded, with deductions increased from 80% to 100%, effectively enabling a zero-tax outcome.



PRESIDENCY OF
THE REPUBLIC OF TÜRKİYE

**INVESTMENT &
FINANCE OFFICE**



/InvestTurkey



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