

# Türkiye's Transition to Green Logistics

April 2026



PRESIDENCY OF  
THE REPUBLIC OF TÜRKİYE

**INVESTMENT &  
FINANCE OFFICE**

**nexus**  
OF THE WORLD

# AGENDA



**Global Trends in  
Green Logistics**



**Türkiye's Green  
Logistics**



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**Global Green  
Transformation**



**Türkiye's Green  
Transformation**

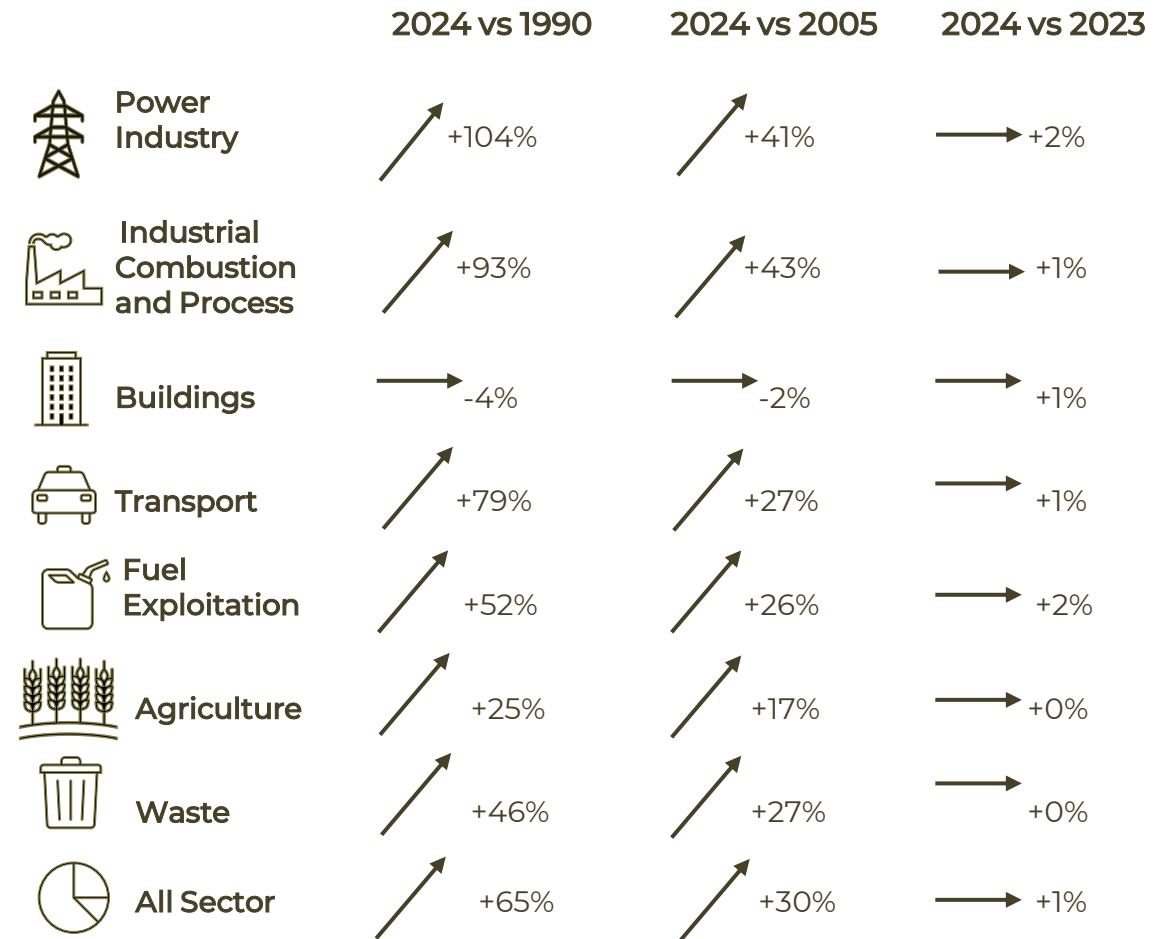
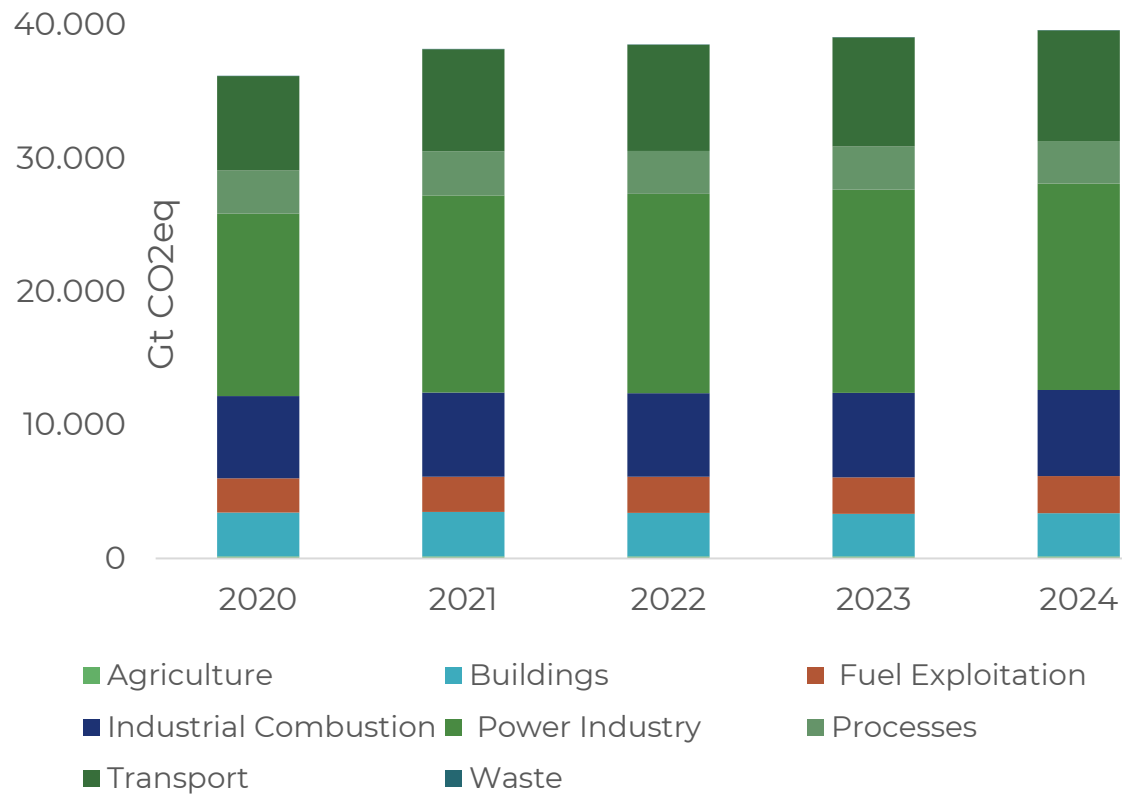


**Opportunities**

# GHG Emissions, World

The sectoral footprint of global carbon reveals the key sources of climate impact.

## Global Sectoral Distribution of Greenhouse Gas Emissions



# Global Drivers of Green Transformation

Global communities are in an unprecedented collaboration.



## Paris Agreement

Limiting the temperature increase to **1.5°C** above pre-industrial levels.



## 17 UN Sustainable Development Goals

The 2030 Agenda - 17 Main Sustainable Development Goals to reach.



## European Green Deal

Aims to be the first climate neutral continent by 2050.

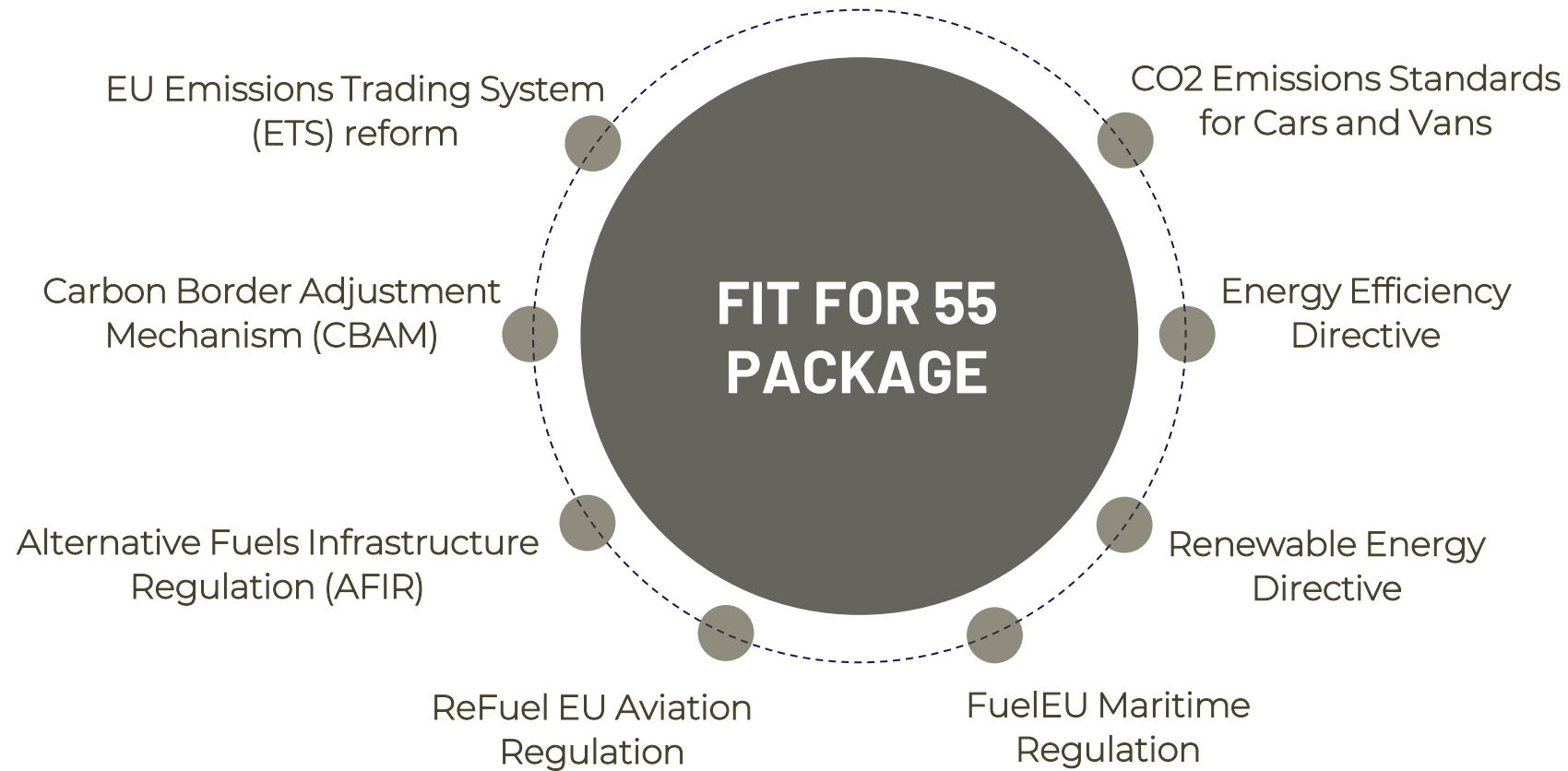


## IMO Targets

Net-zero goal for global shipping by 2050, with interim targets set for 2030 and 2040.

# THE EUROPEAN GREEN DEAL

To be the world's first climate-neutral continent by 2050.



# AGENDA



## Global Trends in Green Logistics



## Türkiye's Green Logistics



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**Global Green Transformation**

2



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**Türkiye's Green Transformation**

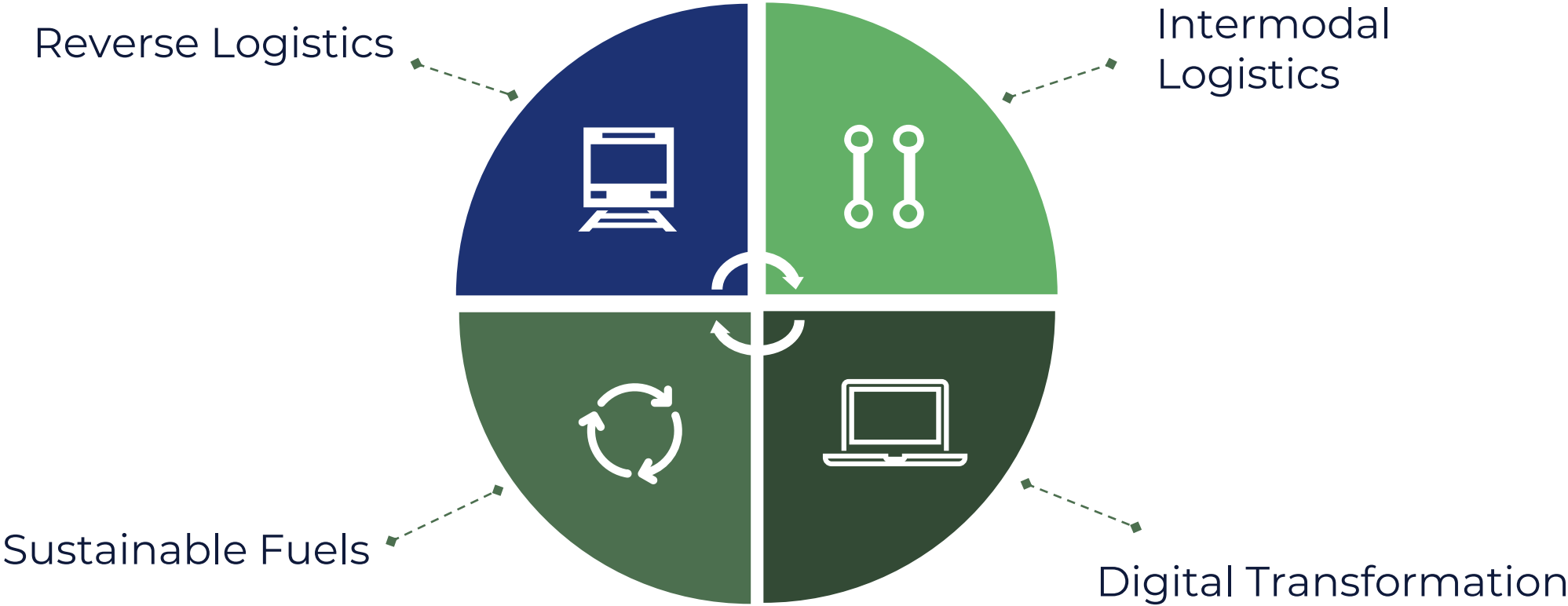
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**Opportunities**

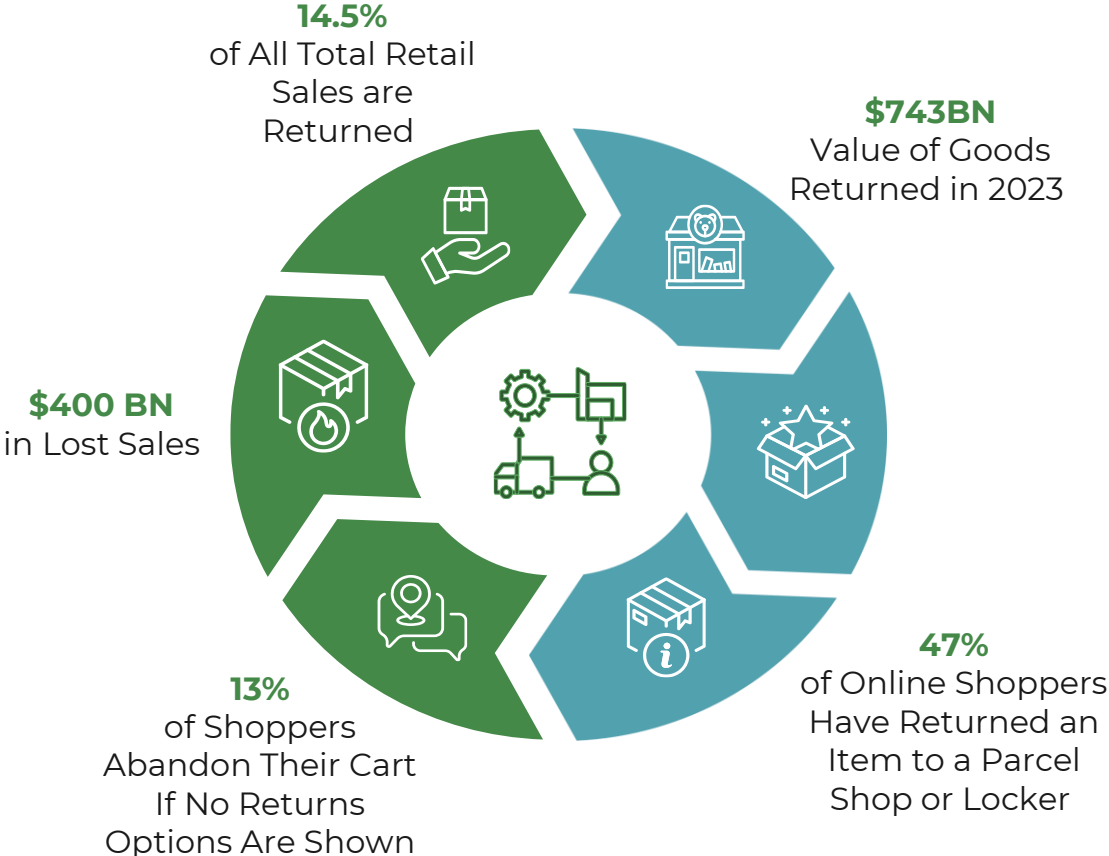
# Global Trends in Green Logistics



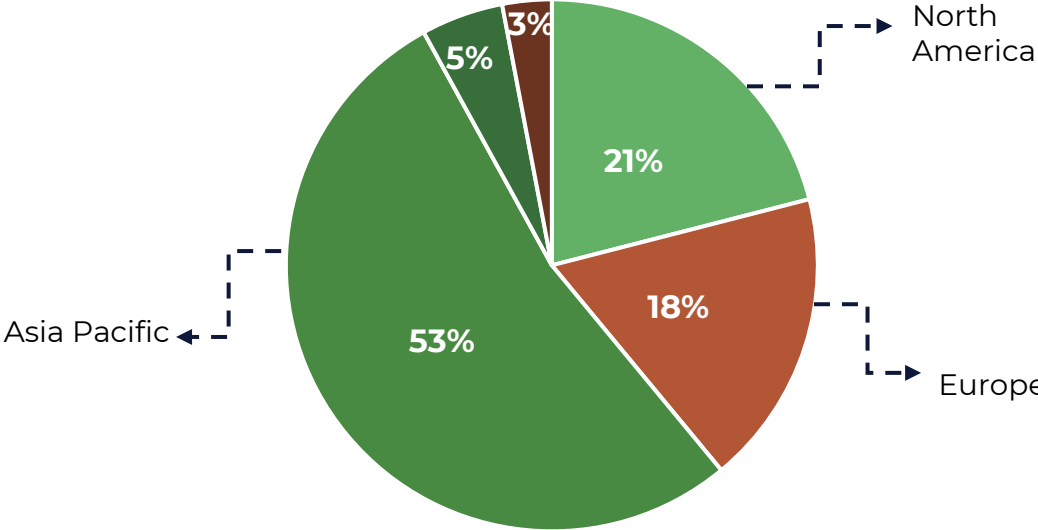


# Reverse Logistics

Reverse logistics turning challenges into profitable flows.



## Reverse Logistics Market Share by Region in 2024



■ North America ■ Europe ■ Asia Pacific ■ Latin America ■ MEA

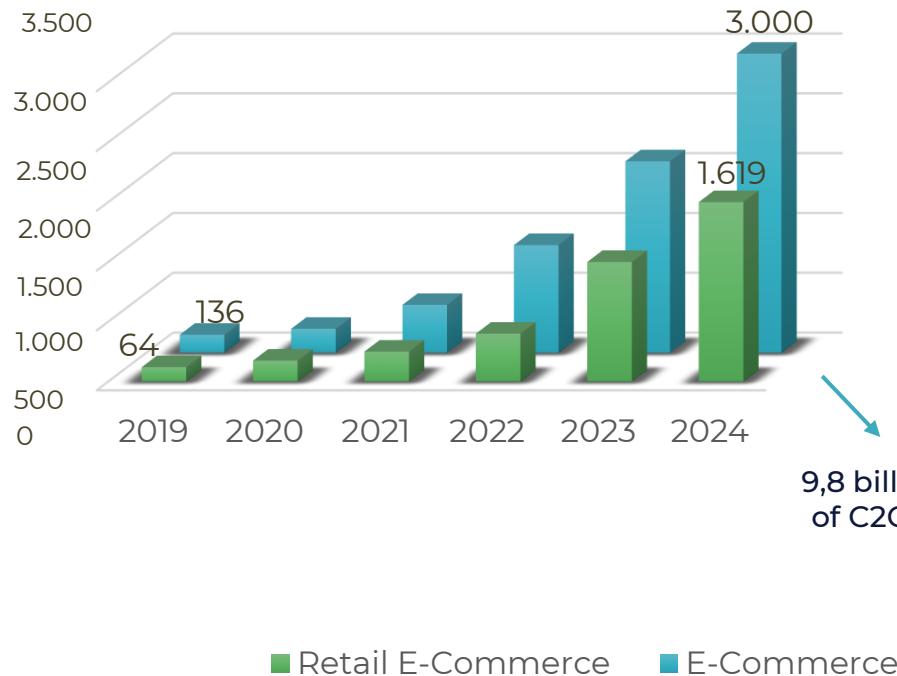
Source: Statista | E-commerce Returns in Europe Report  
DHL | eCommerce Trends Report 2024

Source: Precedence Research

# Reverse Logistics in Türkiye

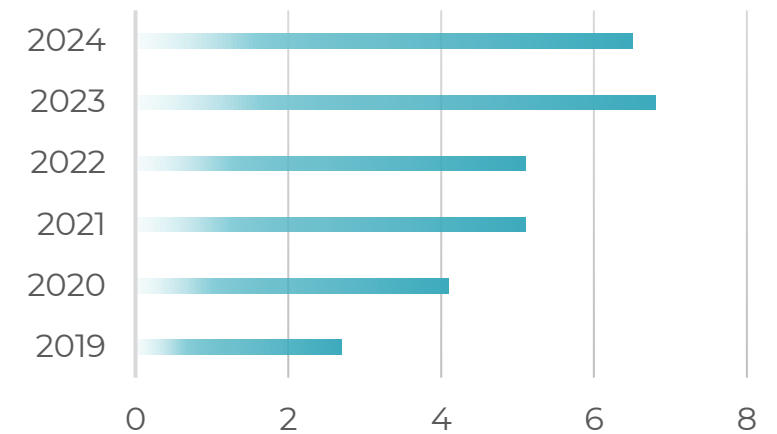
As e-commerce volume grows in Türkiye, significantly increases demand for reverse logistics.

Change in Retail & E-Commerce Volume by Year (billion TL)



Average return rate  
**15-20%**

SHARE OF E-COMMERCE IN GDP (%)



**55.7%**

Share of Online Shoppers in 2024

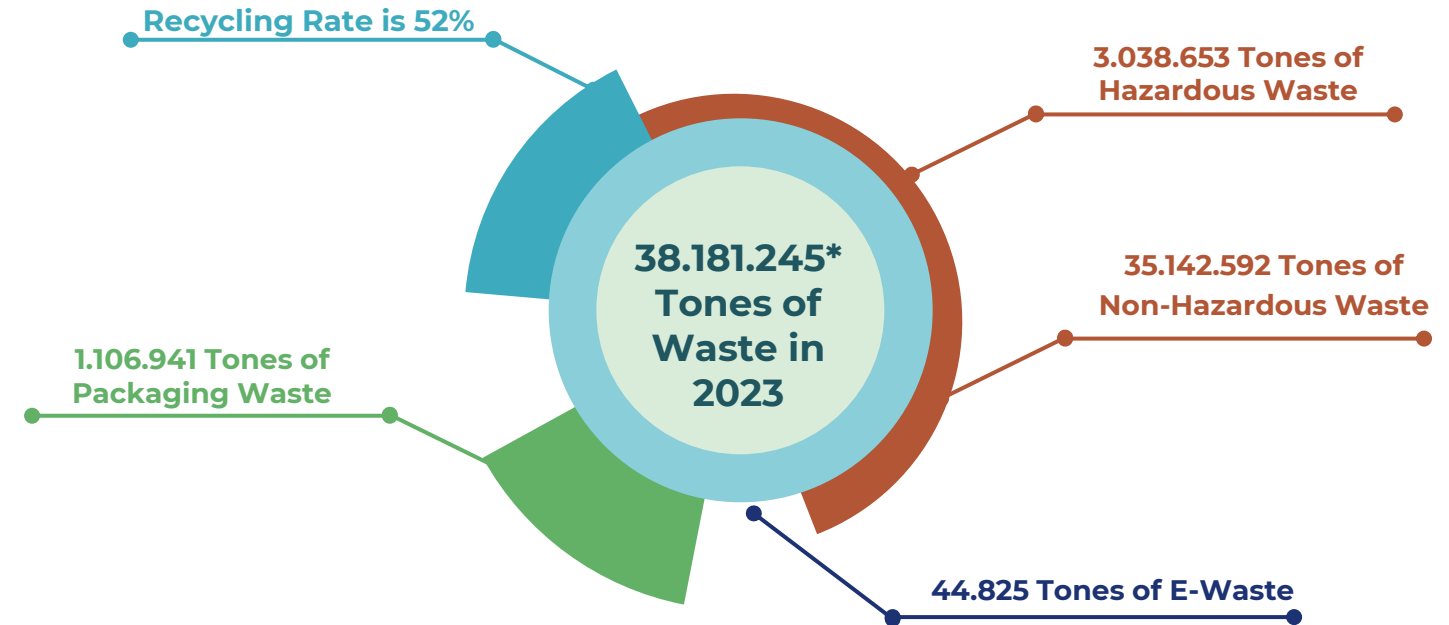
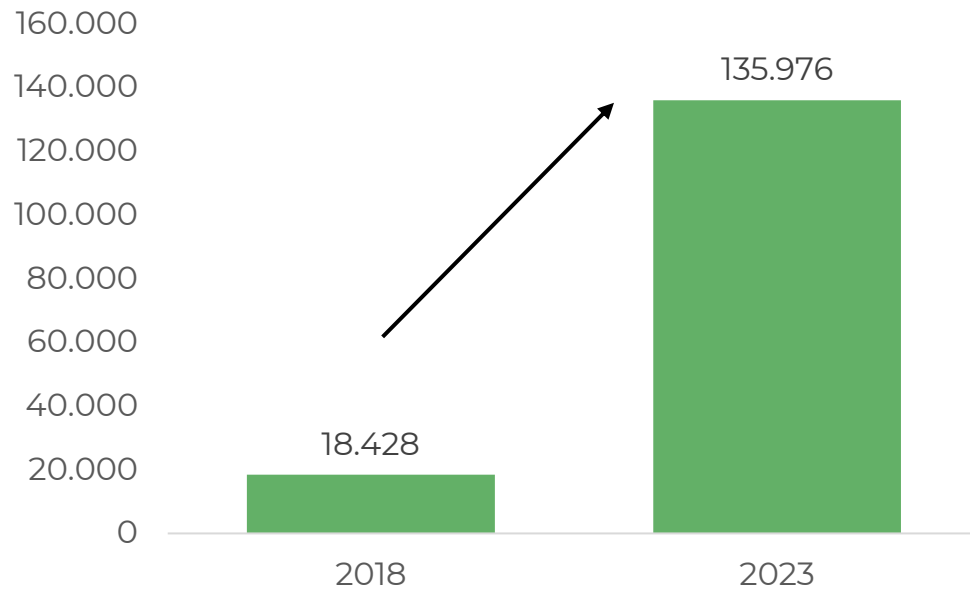
**63%**

Share of Online Shoppers in 2028

# Reverse Logistics in Türkiye

From waste to value: Türkiye's expanding reverse logistics ecosystem.

## Number of Facilities Making Waste Declarations

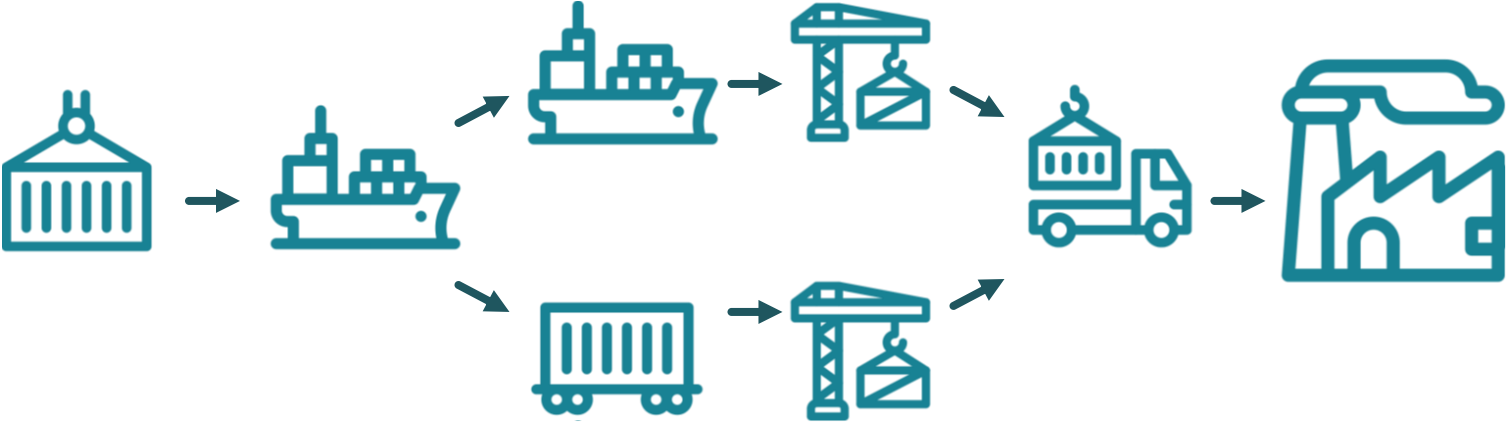
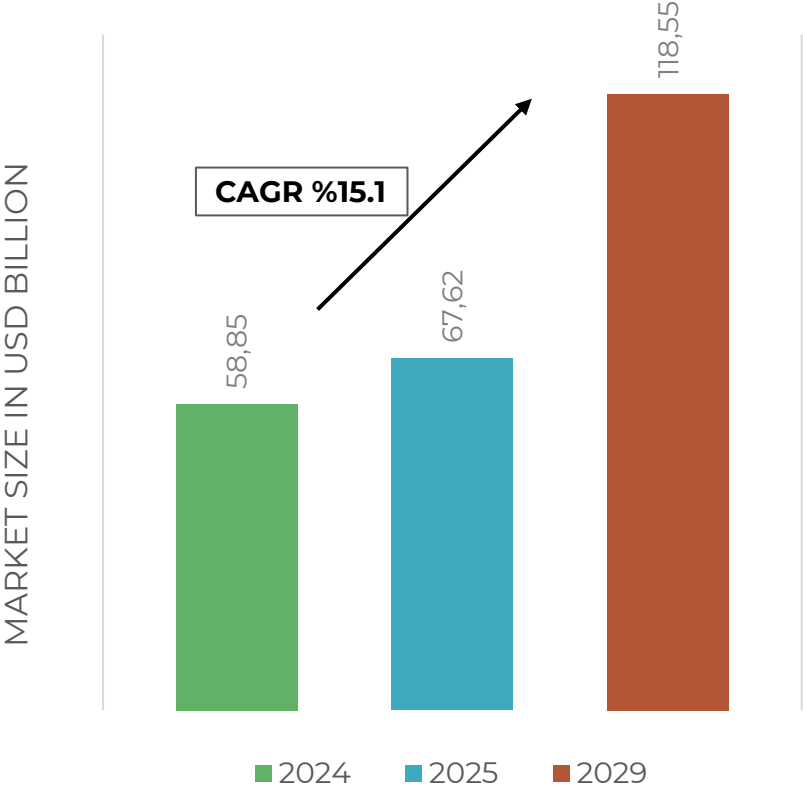


\* not included waste generated during the exploration, extraction, operation, physical and chemical processing of minerals (code 01) and mixed municipal waste (code 20 03).

# Intermodal Logistics

The Environmental Protection Agency (EPA) SmartWay program reports that intermodal shipping can reduce carbon emissions by up to 65%

## INTERMODAL FREIGHT TRANSPORTATION MARKET

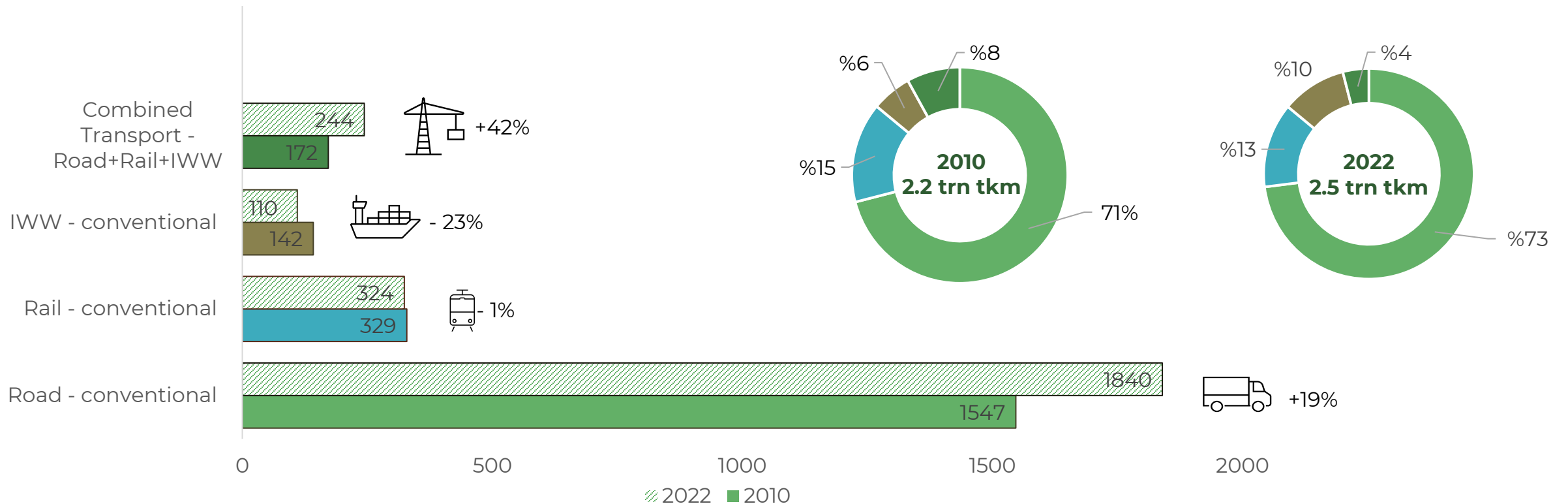


Source: The Business Research Company

# Intermodal Logistics

Europe's freight shift: Combined transport growing 42% in a decade.

Development of Modal Split of Combined Transport and Total European Freight Transport (billion tkm)



# Intermodal Logistics in Türkiye

Intermodal logistics: cutting costs, cutting carbon, creating value.



29 logistics centers



73.2 million tons additional transport capacity



19 million m<sup>2</sup> container storage and handling area



In Service and Completed (15)



Planned (10)

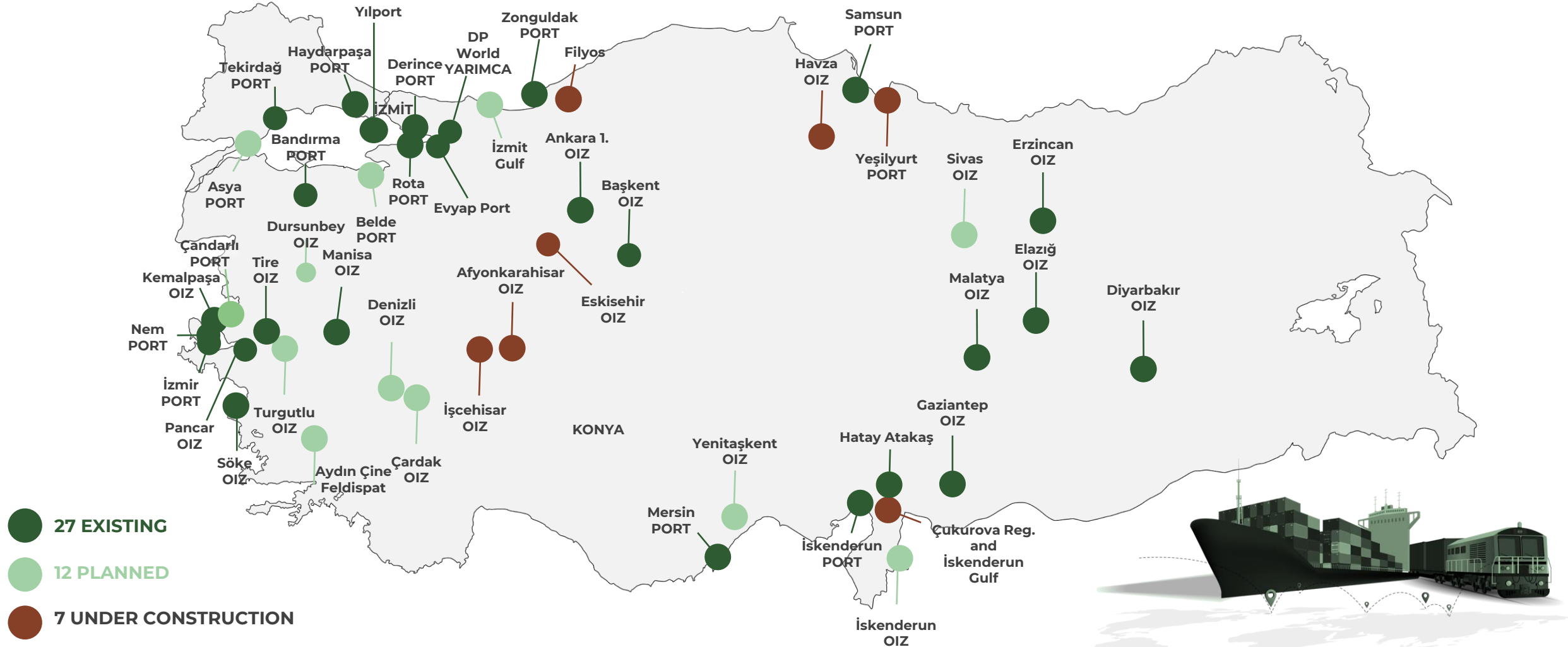


Under Construction (4)



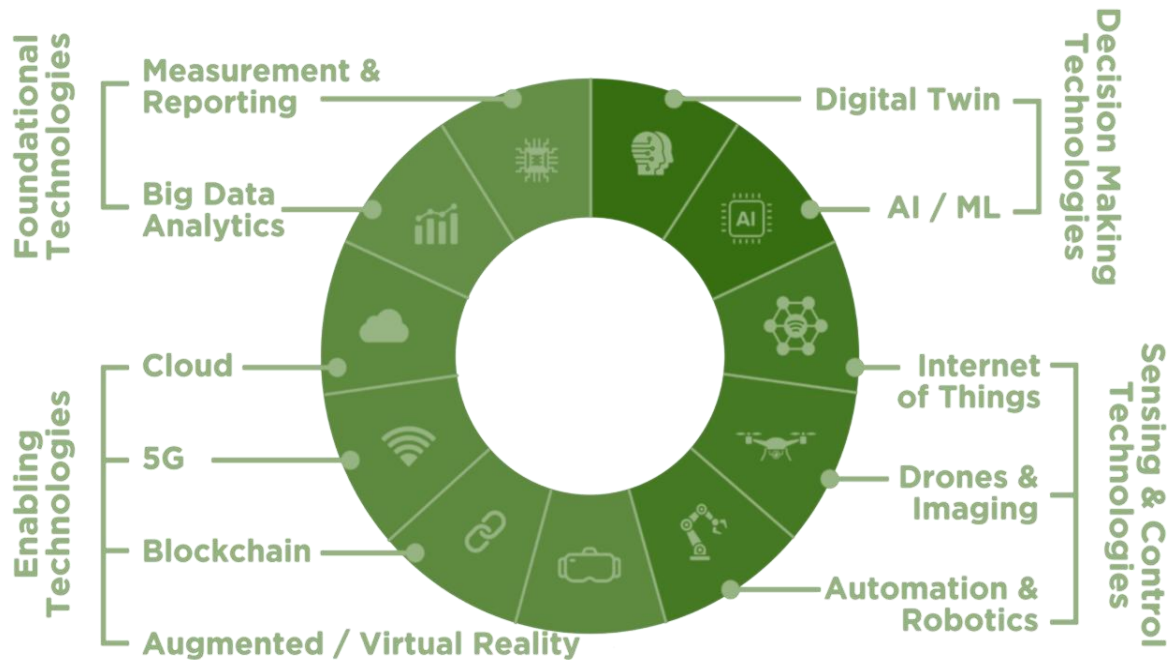
# Intermodal Logistics in Türkiye

Connecting Ports to Rails, Rails to Industry: Türkiye's Intermodal Transformation

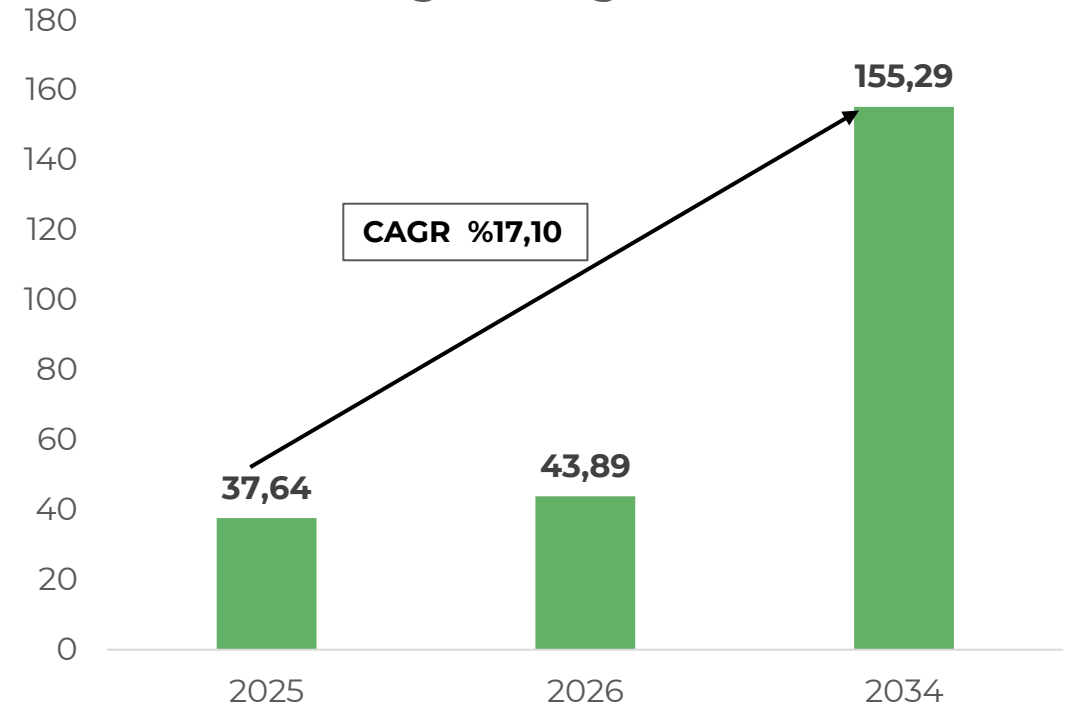


# Digital Transformation

The World Economic Forum projects 20% emission reduction via digital technologies by 2050.



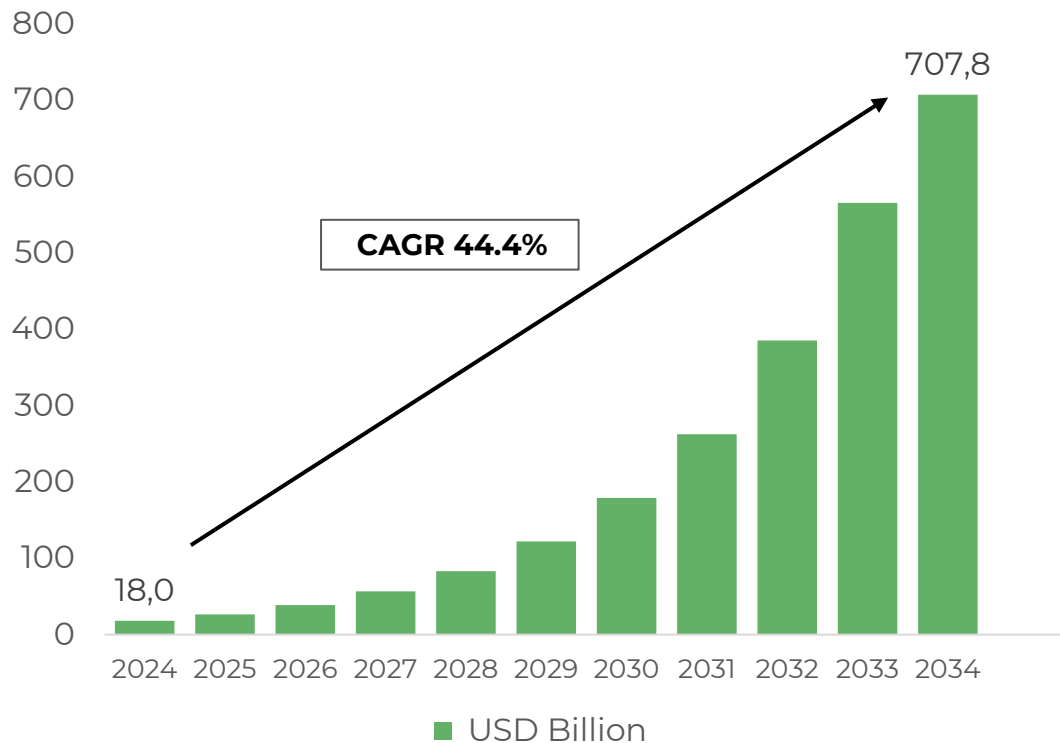
## Global Digital Logistics Market



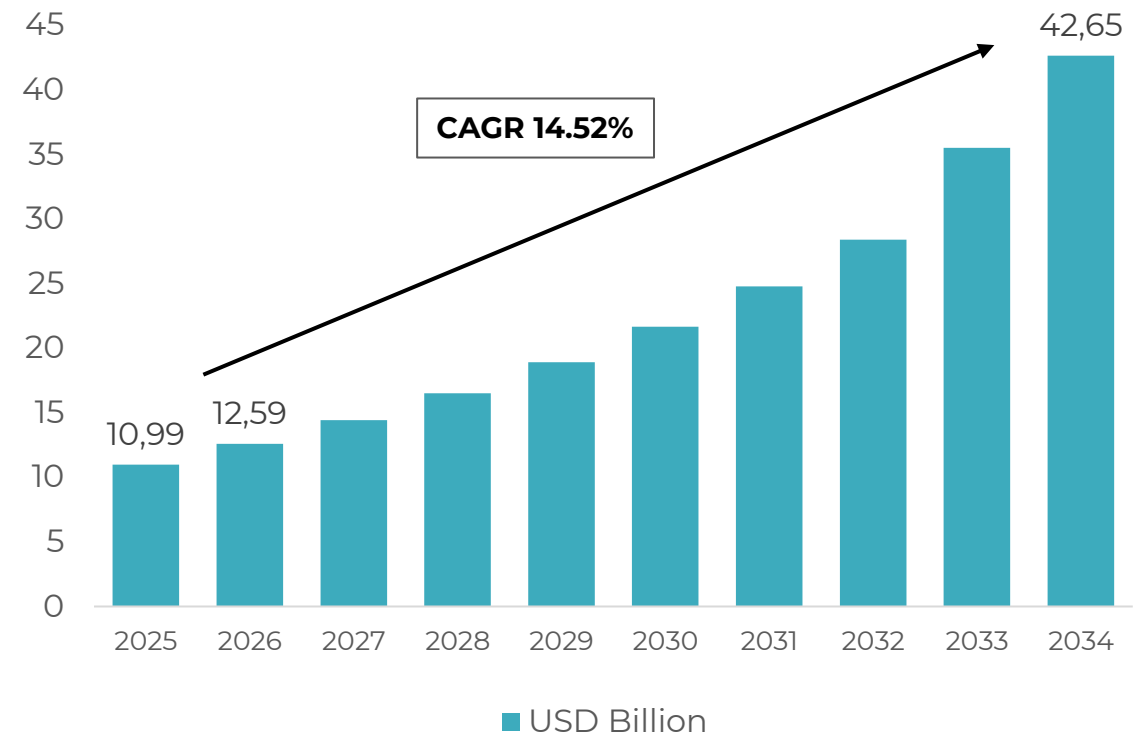
# Digital Transformation

Digital transformation enable greener and smarter logistics.

## Global Artificial Intelligence (AI) in Logistics Market



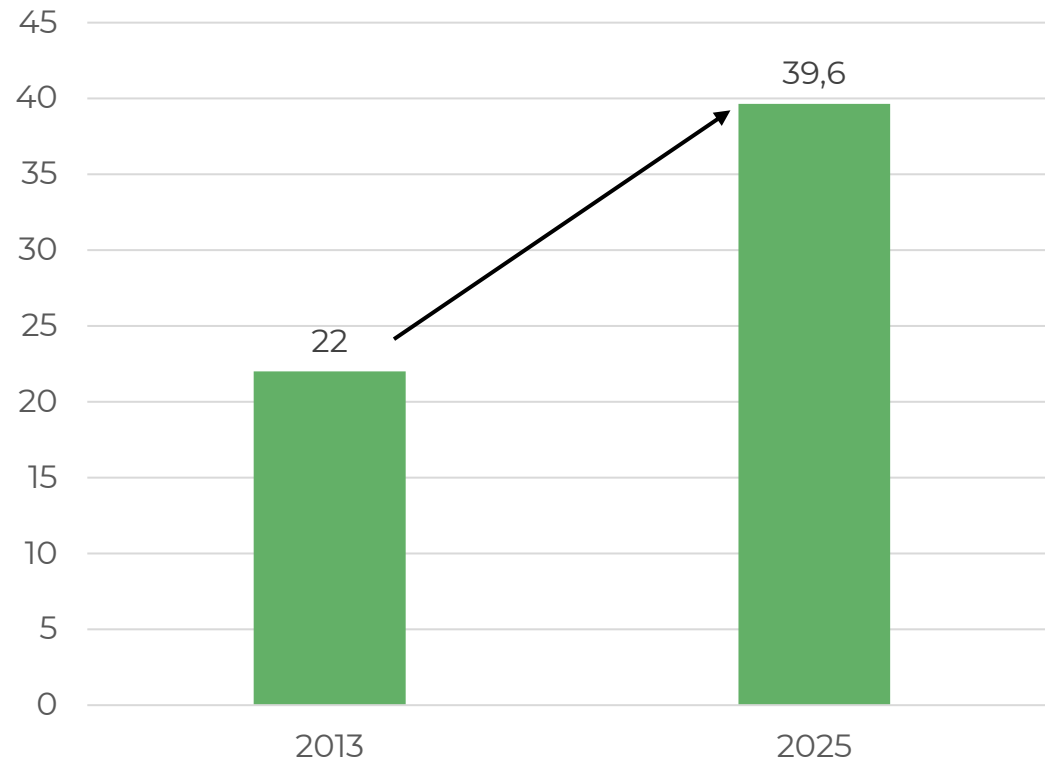
## Route Optimization Software Global Market



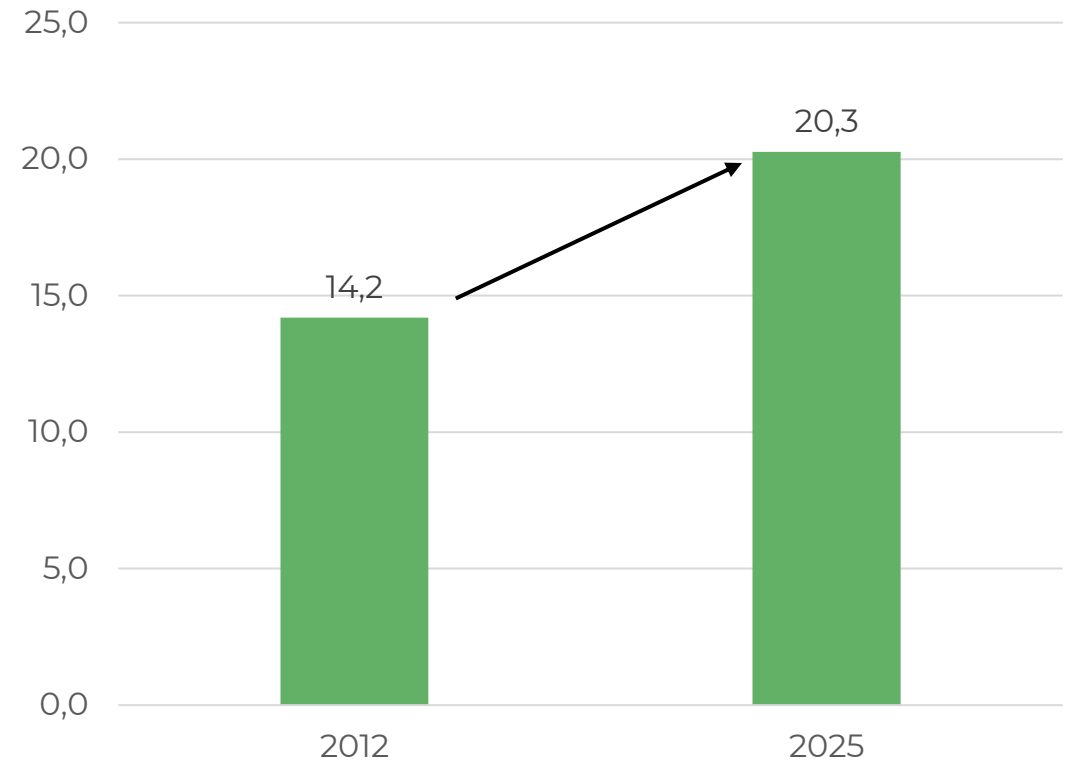
# Digital Transformation in Türkiye

The digital transformation reshapes business services.

Proportion of Transportation & Storage Enterprises Using Social Media (%)



Transportation & Storage Enterprises using Enterprise Resource Planning (ERP), (%)



# Digital Transformation in Türkiye

Türkiye's logistic sector actively investing digital transformation.

## 16 R&D centers



One of three R&D centers is located in İstanbul alongside Copenhagen and Grimsby.



14<sup>th</sup> leading R&D center for utility model production and 105<sup>th</sup> in R&D investment



The First Digital Transformation Office within a R&D center across Europe.



2 R&D centers, ranked 127<sup>th</sup> in R&D investment



R&D center of 570 square meters, employing 35 engineers.

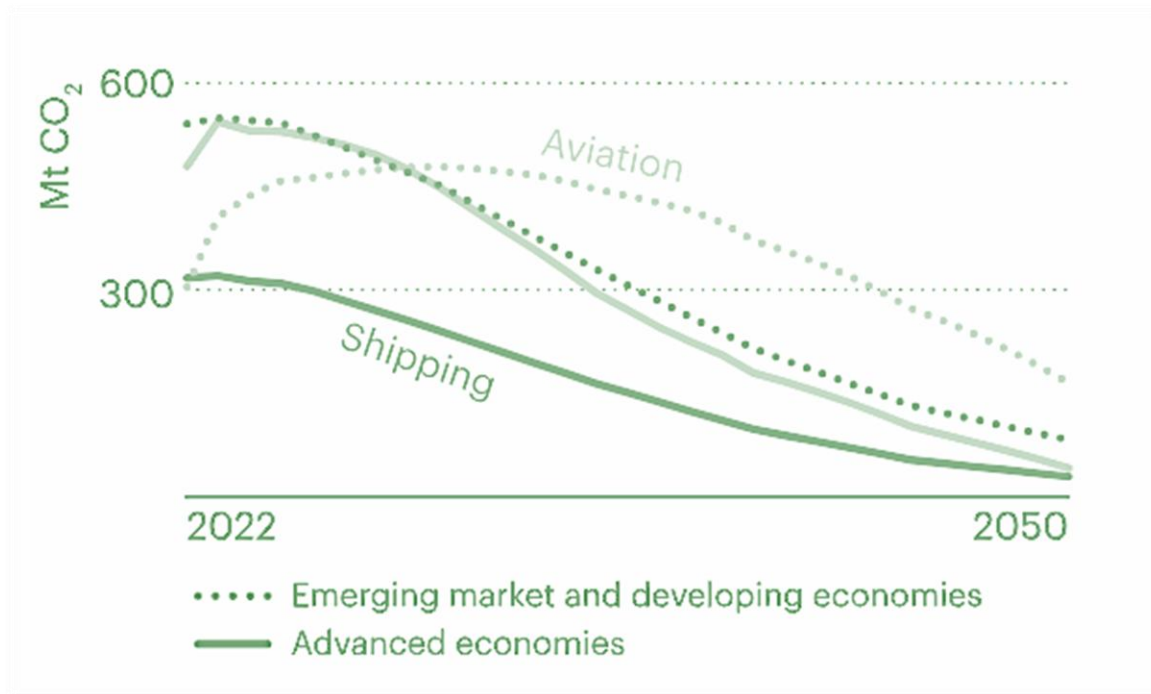


One of 60 companies contributing to Turkish economy through its R&D projects.

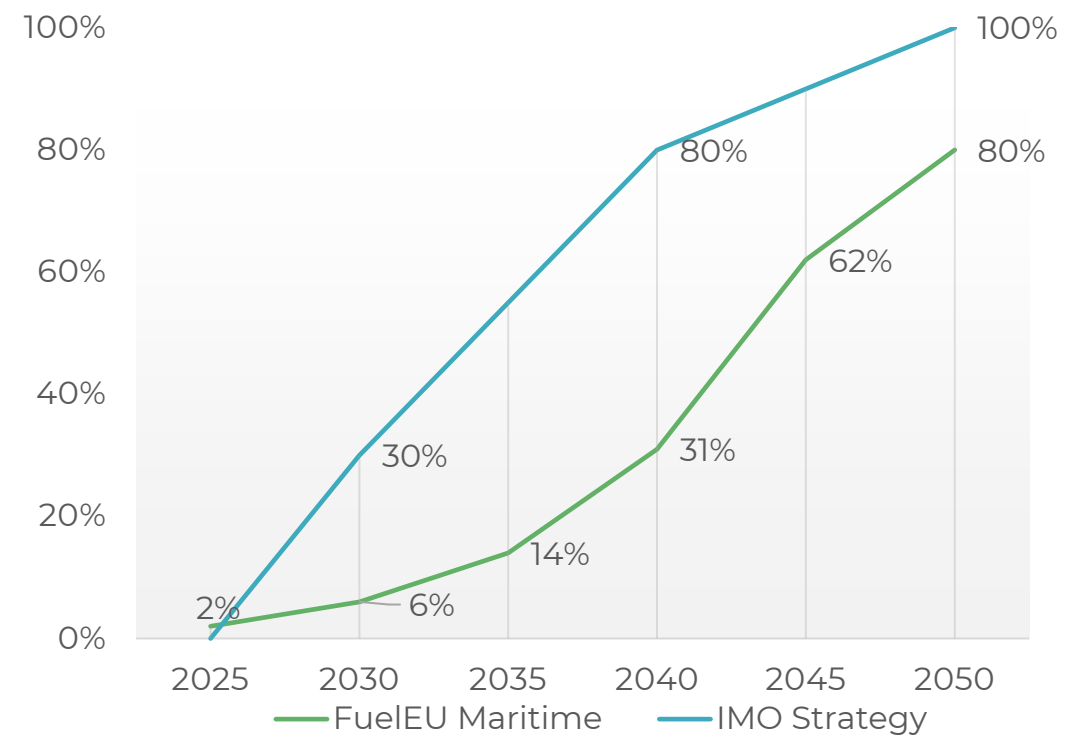
# Sustainable Fuels

International Energy Agency projects SAF & marine fuels to reach 15% by 2030, 80% by 2050.

### IEA Projections of CO<sub>2</sub> Emissions from Aviation and Shipping (2022–2050)



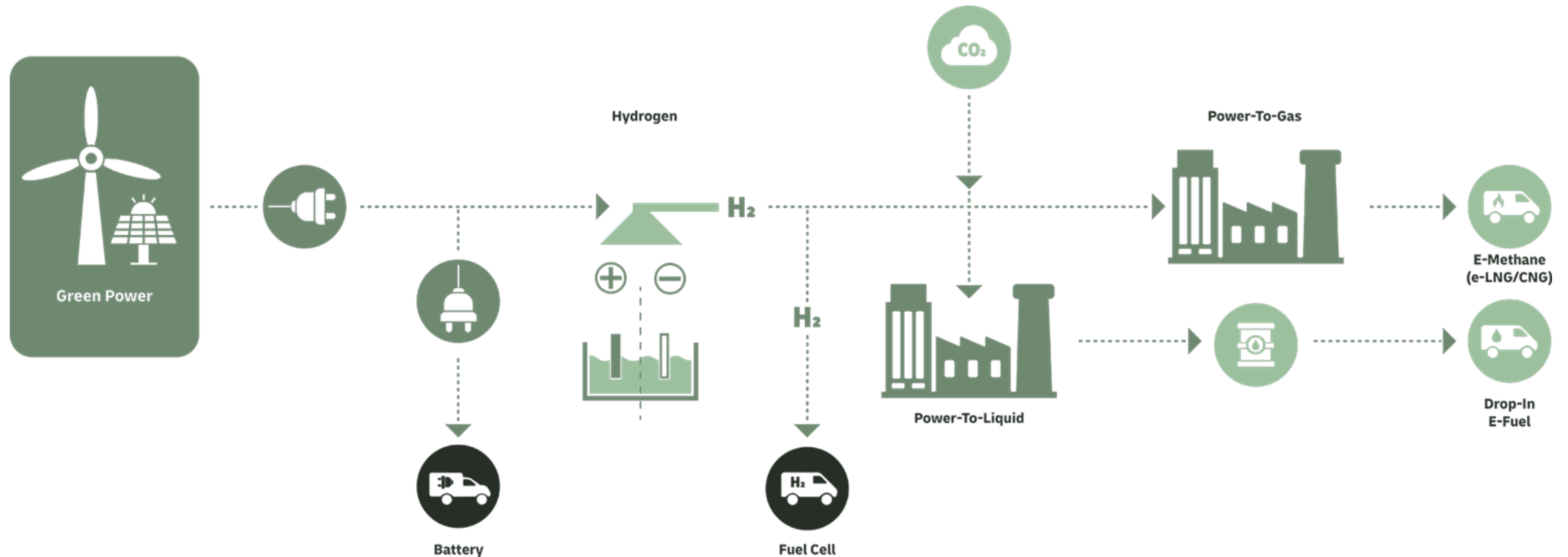
### Greenhouse Gas Intensity Reduction Pathway



# Sustainable Fuels

Sustainable fuels are currently the most effective solution for decarbonizing supply chains at scale.

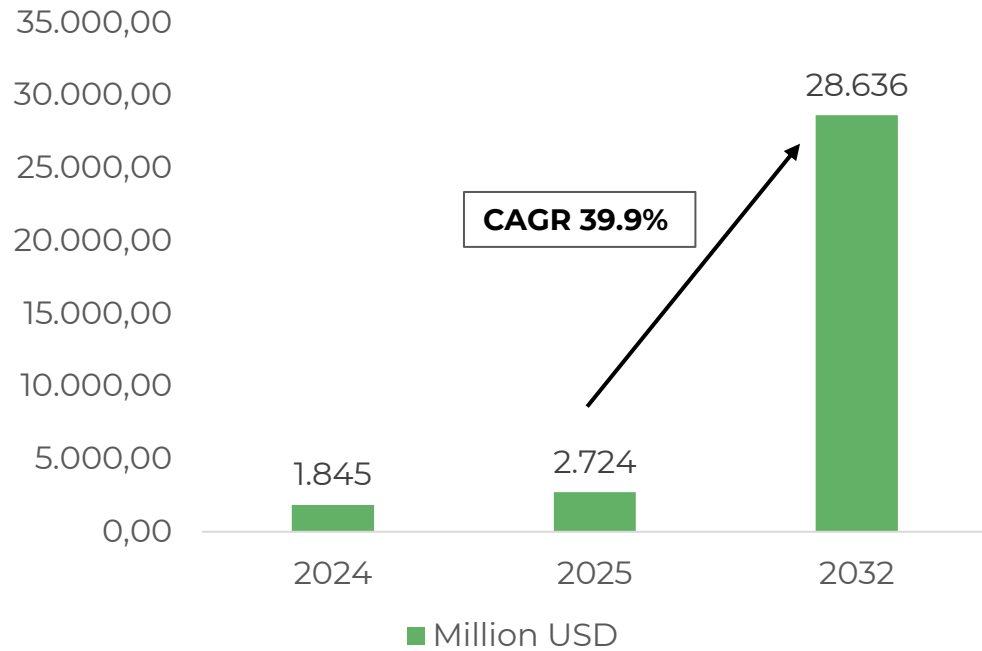
## E-Fuel Value Chain



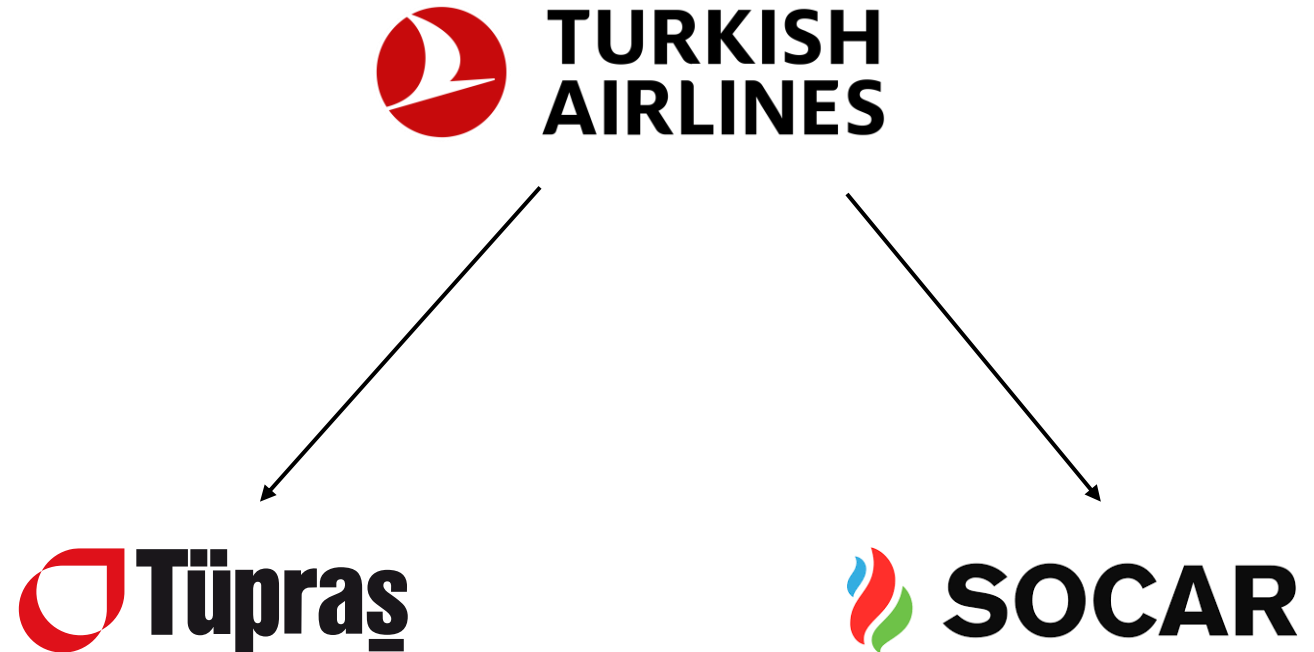
# Sustainable Fuels in Türkiye

Türkiye's Civil Aviation Authority is considering SAF mandates to cut aviation emissions by 5% by 2030.

### Global Sustainable Aviation Fuel (SAF) Market



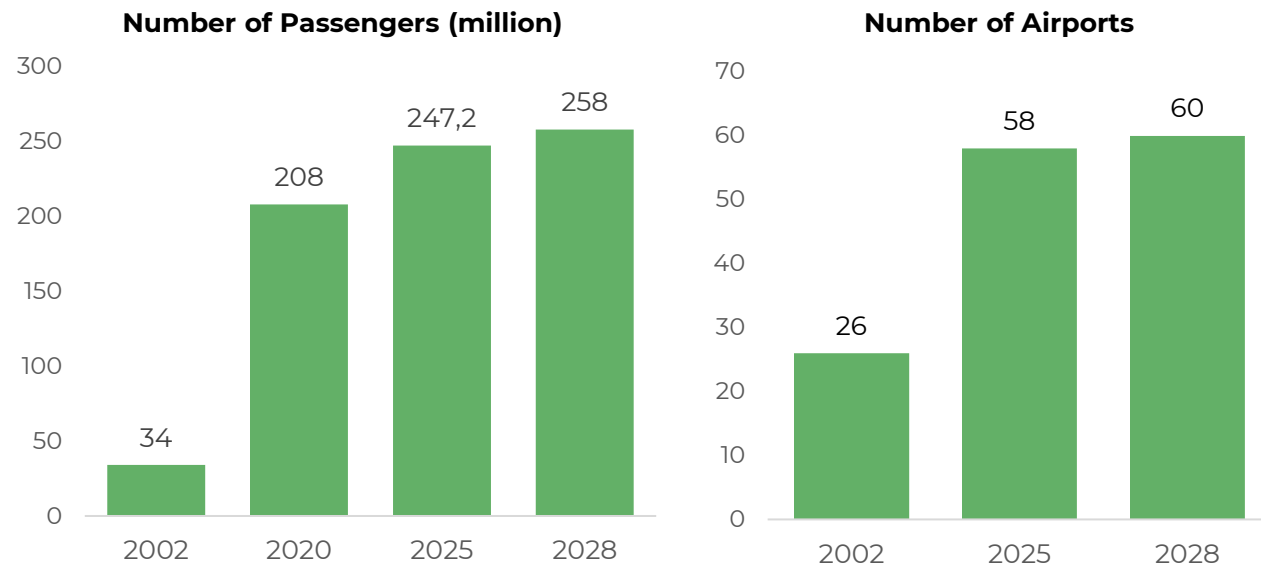
### SAF Production Agreements



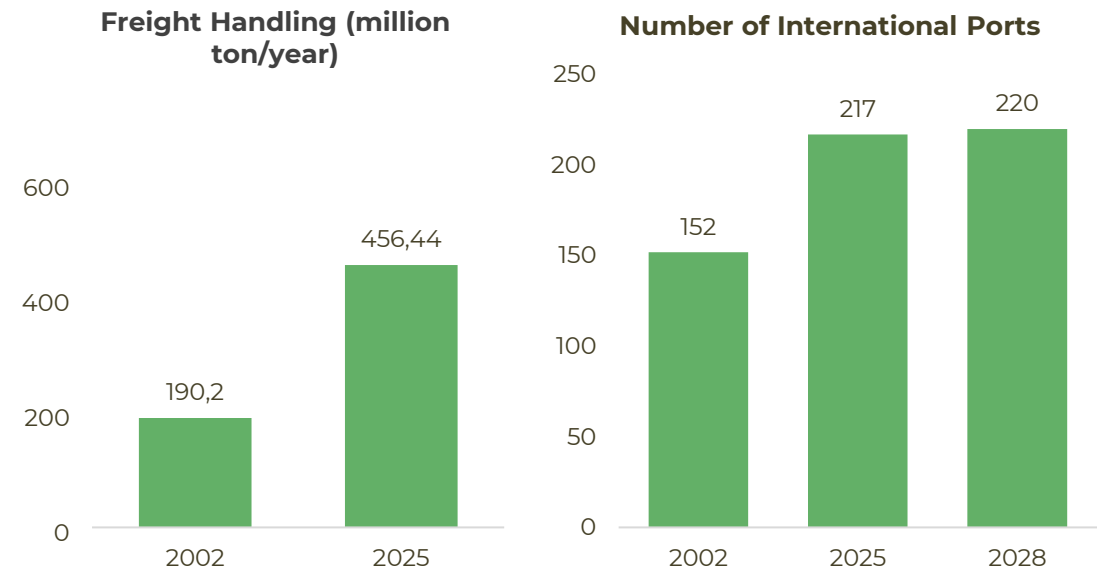
# Sustainable Fuels in Türkiye

Rapid growth in air and maritime sectors creates a strong market potential for sustainable aviation and marine fuels.

## AIRWAY SECTOR



## MARITIME SECTOR



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**Opportunities**

# GHG Emissions in Türkiye

From emissions to opportunities: guiding Türkiye's pathway to net zero.

## Sectoral Distribution of Greenhouse Gas Emissions in 2024 in Türkiye



# Türkiye's Green Leap

A rising hub in the global green economy.

## GREEN COMPLEXITY RANKINGS

1.  GERMANY
5.  CZECHIA
6.  USA
7.  JAPAN
9.  UK
10.  FRANCE
11.  POLAND
13.  SPAIN
15.  ROMANIA
17.  HUNGARY
22.  BULGARIA
- 26.  TÜRKİYE**
30.  NETHERLANDS
32.  S. KOREA
55.  S. AFRICA
93.  BRAZIL

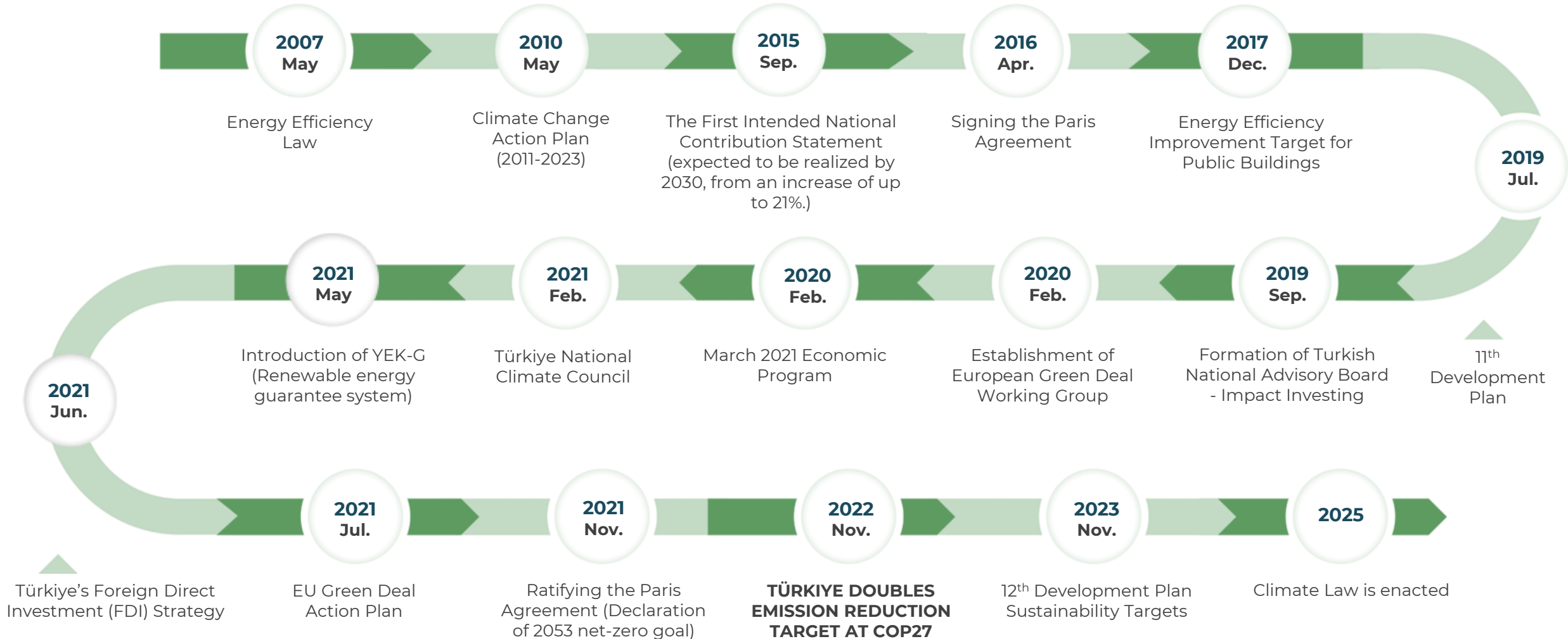
## GREEN COMPLEXITY POTENTIAL RANKINGS

1.  CHINA
3.  SPAIN
4.  FRANCE
5.  GERMANY
- 6.  TÜRKİYE**
7.  POLAND
12.  USA
14.  UK
15.  CZECHIA
18.  BULGARIA
20.  JAPAN
22.  ROMANIA
28.  HUNGARY
34.  S. KOREA
50.  S. AFRICA
74.  BRAZIL

Thanks to the manufacturing capabilities and ambitious targets in green economy, Türkiye is to become a leading green manufacturing hub.

# Türkiye's Sustainability Journey

Strategic steps towards a greener, resilient economy.



# Türkiye's Green Deal Action Plan: Key Objectives



## The 2053 Net Zero Target

32 targets and 81 actions were set for alignment with the EU Green Deal to achieve net zero target in 2053.



## Compliance with CBAM

Türkiye is developing its own carbon market mechanisms to minimize the impact of EU CBAM on its exporters.



## Clean Energy and Energy Efficiency

Clean energy transition is a key enabler of sustainable logistics in Türkiye.



## Sustainability in Transportation

Türkiye's rail and intermodal investments support the decarbonization of logistics.



## Green and Circular Economy Policies

Türkiye promotes circular economy practices, opening opportunities in reverse logistics and recycling investments.



## Green Finance and Incentives

Green finance and incentives are integral to Türkiye's sustainable logistics transformation.

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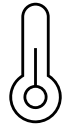
# Enabling the Green Transition

Building the foundation for sustainable growth in the logistics sector.



## Climate Law no. 7552

Introduces ETS, green taxonomy, and local climate action plans with 2027 deadline.



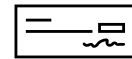
## Energy Efficiency Law no. 5627

Supports energy/carbon reduction projects; mandates energy managers and benchmarking



## Incentives

Funding and R&D support for sustainable and digital logistics projects.



## Eco-Friendly Certifications

Certification system promoting eco-friendly transport and port operations.

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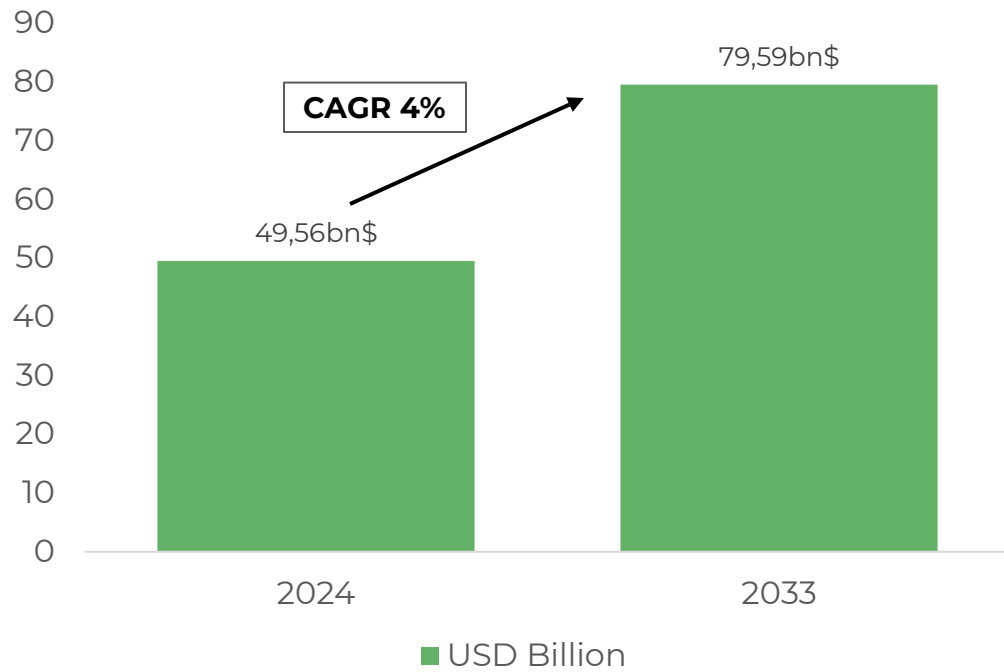
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**Opportunities**

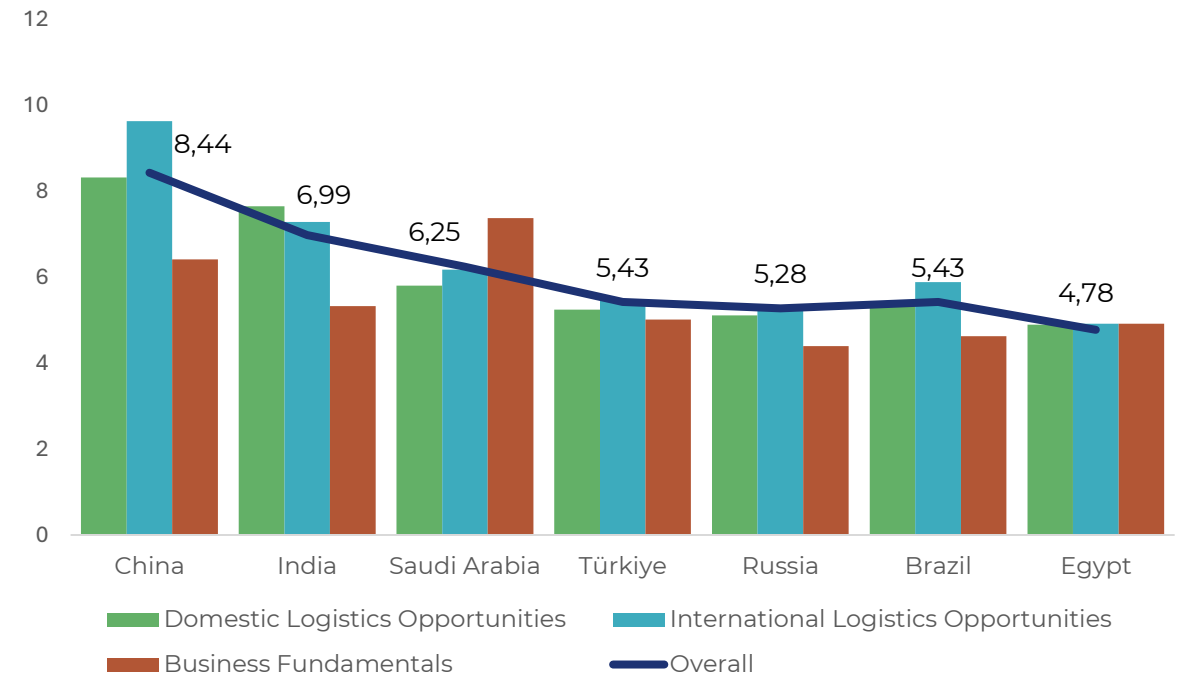
# Logistics Market in Türkiye

Türkiye's logistics market: resilient growth, strategic potential.

## Turkish Logistics Market Size

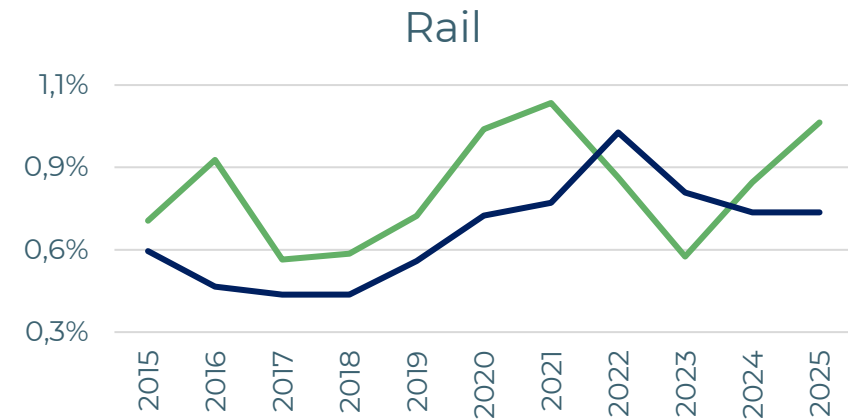
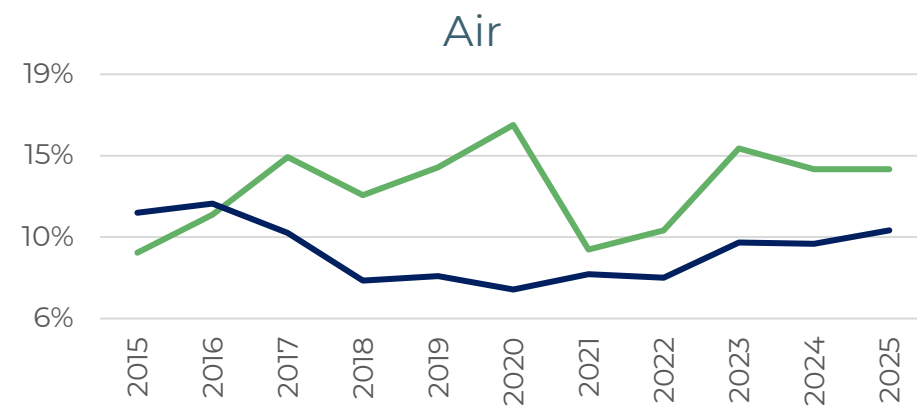
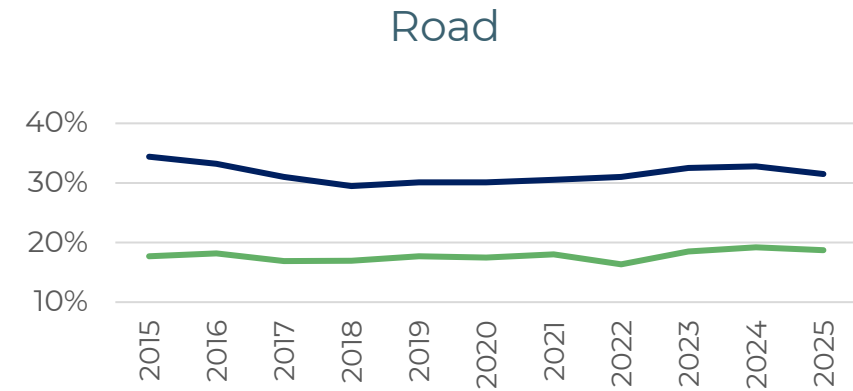
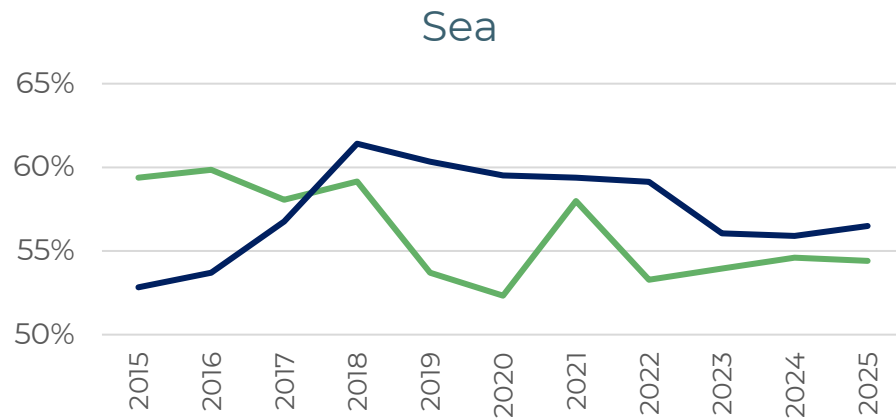


## Agility Emerging Markets Logistics Index 2026



# Logistics Activity in Türkiye

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

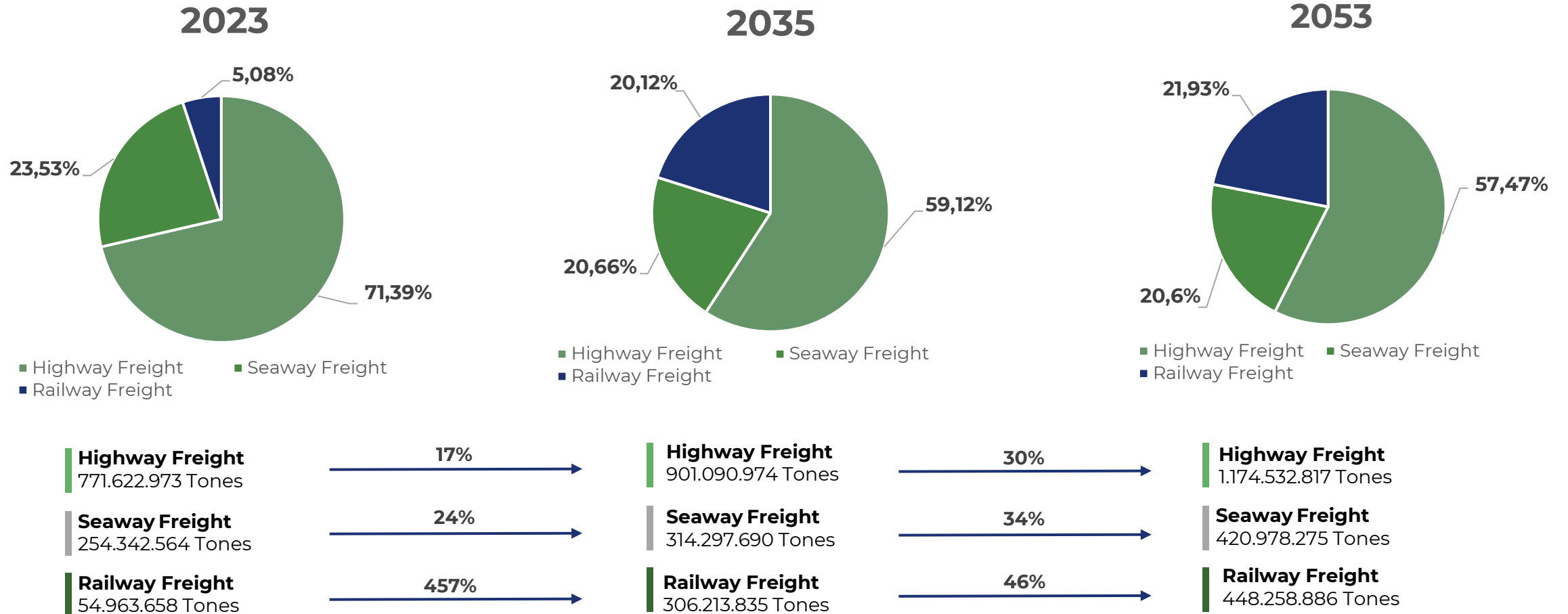


Import (by value of goods)

Export (by value of goods)

# Türkiye's Logistics Master Plan

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



# Green Certifications in Logistics and Ports

Strengthening competitiveness through green incentives and regulatory benefits.

## Green Port Certificate



Certificate durations extended by 2 years (Port Facility Operation Permit, Hazardous Cargo Compliance Certificate).



Passage priority through the Turkish Straits for 30 Green Port vessels annually.



Discounts/exemptions on renewal fees for licenses and certificates.



No survey service fees for the Operation Permit.



No fees for container weighing verification service.

## Green Logistics Certificate



50% reduction on initial and renewal fees for transport authorization and operational permits.



95% discount on vehicle registration fees for up to 100 additional vehicles.



Additional 5 bonus points in international transport permit (UBAK) applications.

# Showcase

## Freightweek Sustainability Awards

Sustainable Cargo Airline of the European Region for 2022, 2023 and 2024.



## SupplyTech Breakthrough Awards

Transport Management Innovation of the 2023.



## Stevie Awards

2023 Gold Award for Green and Integrated Logistics Services and Silver Award for Multimodal and Sustainable Logistics Solutions



## CDP SEA A-List



## European Business Awards

2019 Customer & Market Engagement Award for eTA (Electronic Transportation Network)



## The Supply Chain Excellence Awards MEA

The Sustainable Supply Chain Award of 2025

## EBRD Sustainability Awards

2024 Environmental & Social Innovation Bronze Award

# Showcase



4+/5

Level 4+



Ankara Esenboga International Airport - ESB  
TAV Airports Holding



4/5

Level 4



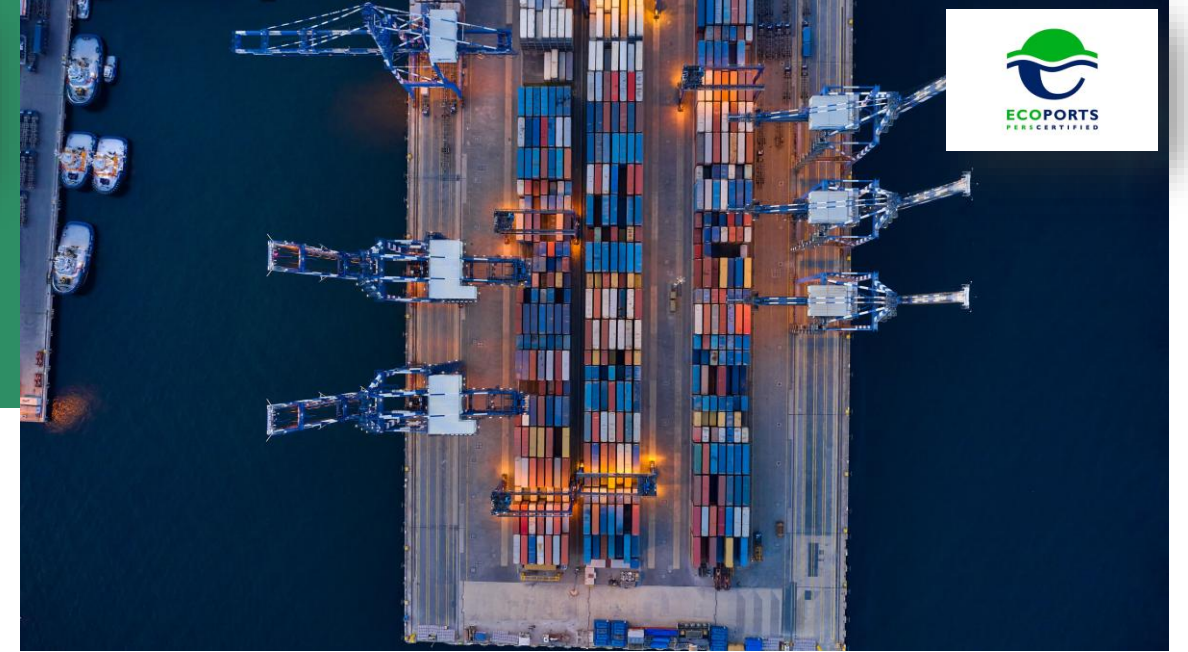
Istanbul Airport - IST  
IGA Istanbul Airport



# Showcase



**QTERMINALS**  
ANTALYA



**MARPORT**  
LİMAN İŞLETMELERİ  
SANAYİ VE TİCARET A.Ş.

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**Global Trends in  
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**Opportunities**

# Green Deal

Türkiye's competitive advantages in the Green Deal.



1

Growing  
renewables  
& recycling  
sector



2

Less shipping  
distance  
provides less  
carbon  
footprint



3

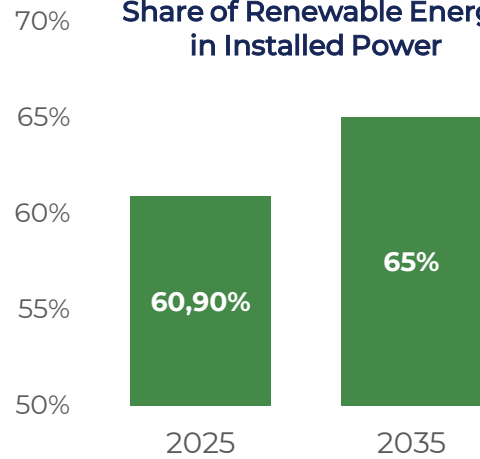
Growing  
infrastructure  
investments

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

# Renewable Energy Sector

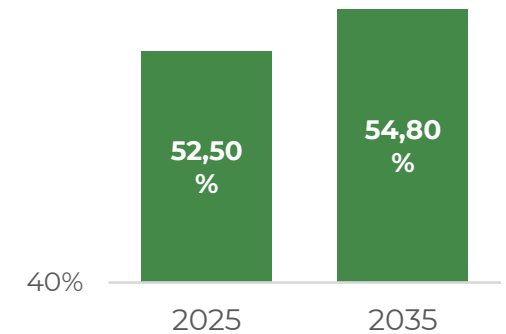
Investments in renewables driving long-term green transition.

Share of Renewable Energy in Installed Power



	2025	2035
<b>Installed Capacity</b>	119 GW	189.7 GW
<b>Share of Renewables</b>	60.9%	64.7%
<b>Solar</b>	22.9 GW	52.9 GW
<b>Wind</b>	13.4 GW	29.6 GW
<b>Nuclear</b>	-	7.2 GW
<b>Hydro</b>	32.2 GW	35.1 GW
<b>Geothermal</b>	1.7 GW	5.1 GW

Share of Renewable Energy in Electricity Generation



## Renewable Energy Installed Capacity in Türkiye



32.202 MW  
Hydro **2<sup>nd</sup>**  
in EUROPE



20.232 MW  
Solar **7<sup>th</sup>**  
in EUROPE



1.733 MW  
Geothermal **1<sup>ST</sup>**  
in EUROPE

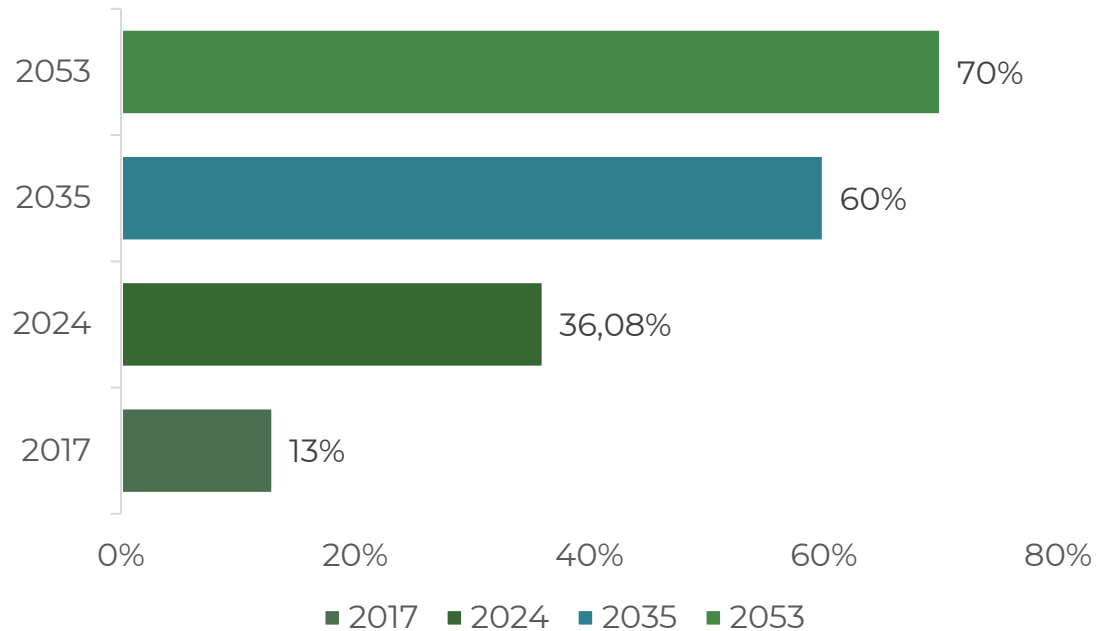


12.870 MW  
Wind **6<sup>TH</sup>**  
in EUROPE

# Recycling Industry and Zero Waste Targets

Large-scale recycling flows in Türkiye create opportunities for reverse logistics and sustainable supply chains.

### Recycling Rate according with Zero Waste Project



74.5 Million  
Tons of Waste  
Recycled



256 billion ₺  
saved



54.6 billion  
liters of  
Petrol saved

IN 2017- 2024



227.3 billion  
kWh  
Energy  
saved



150 million  
tons of CO<sup>2</sup>  
emissions  
prevented

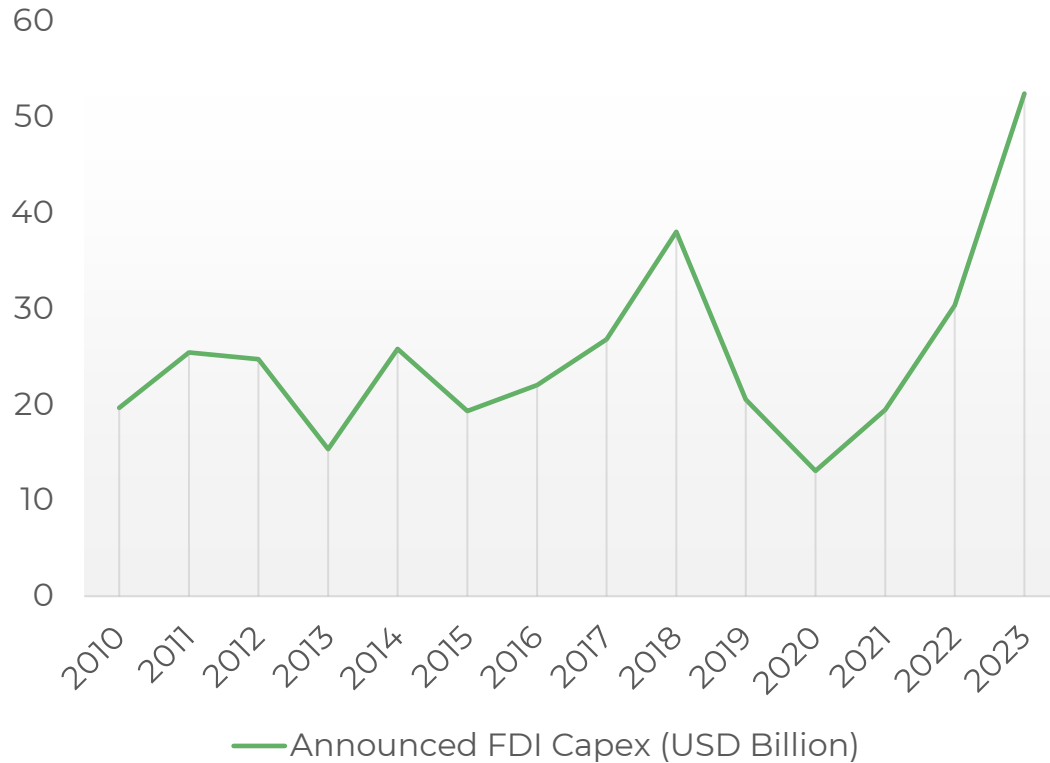


1.71 trillion  
liters of  
Water saved

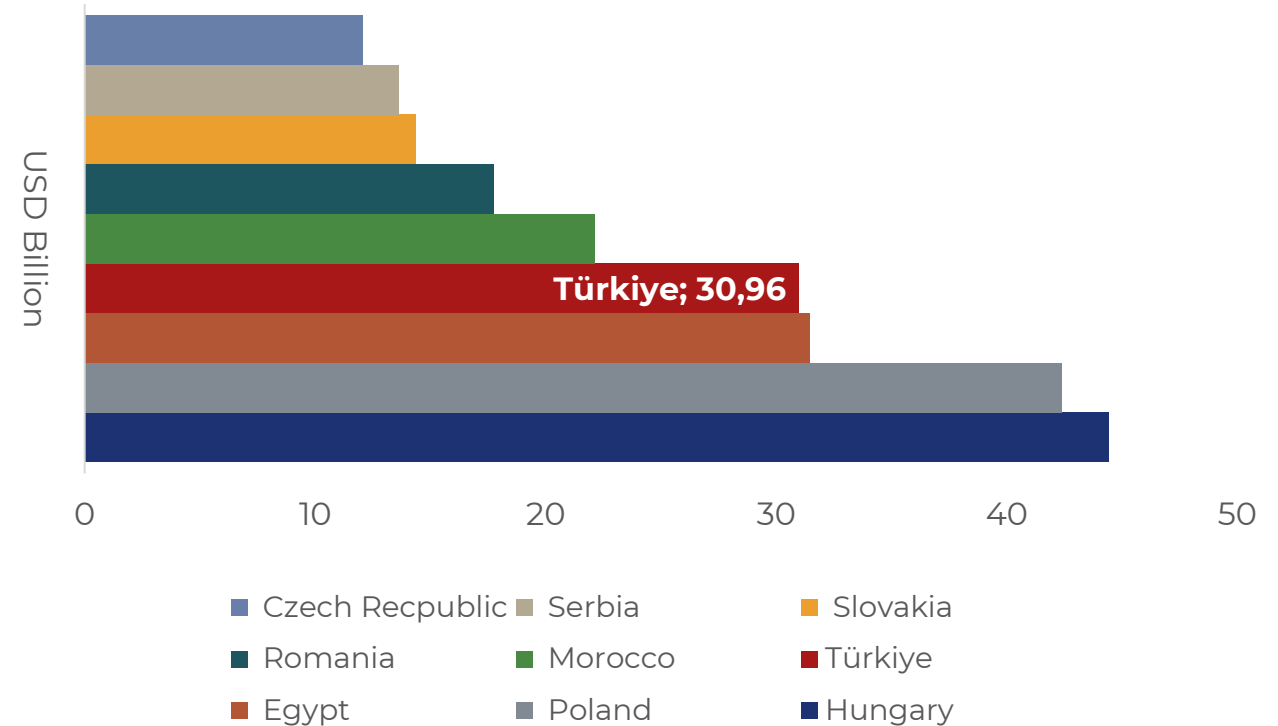
# Nearshoring

Türkiye: the bridge powering Europe's nearshoring shift.

### Capital Shift to Manufacturing Projects in European Nearshoring Destinations



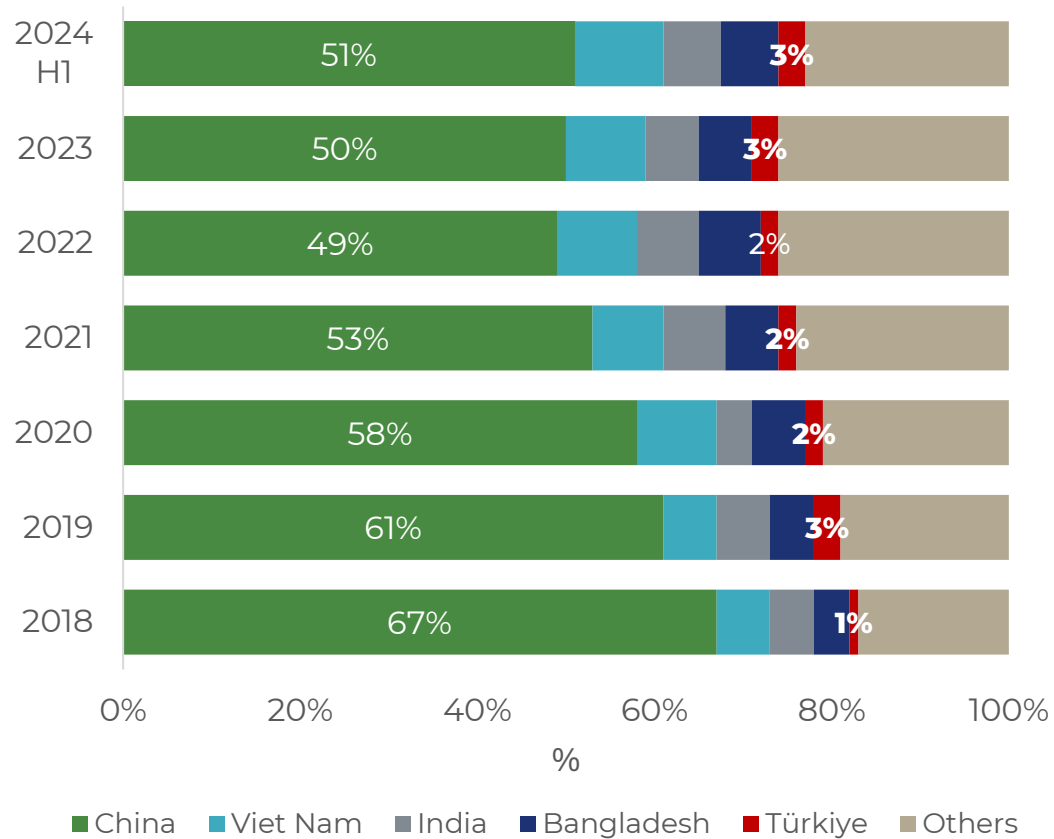
### Manufacturing FDI for 10 Nearshoring Destinations Between 2014-2023



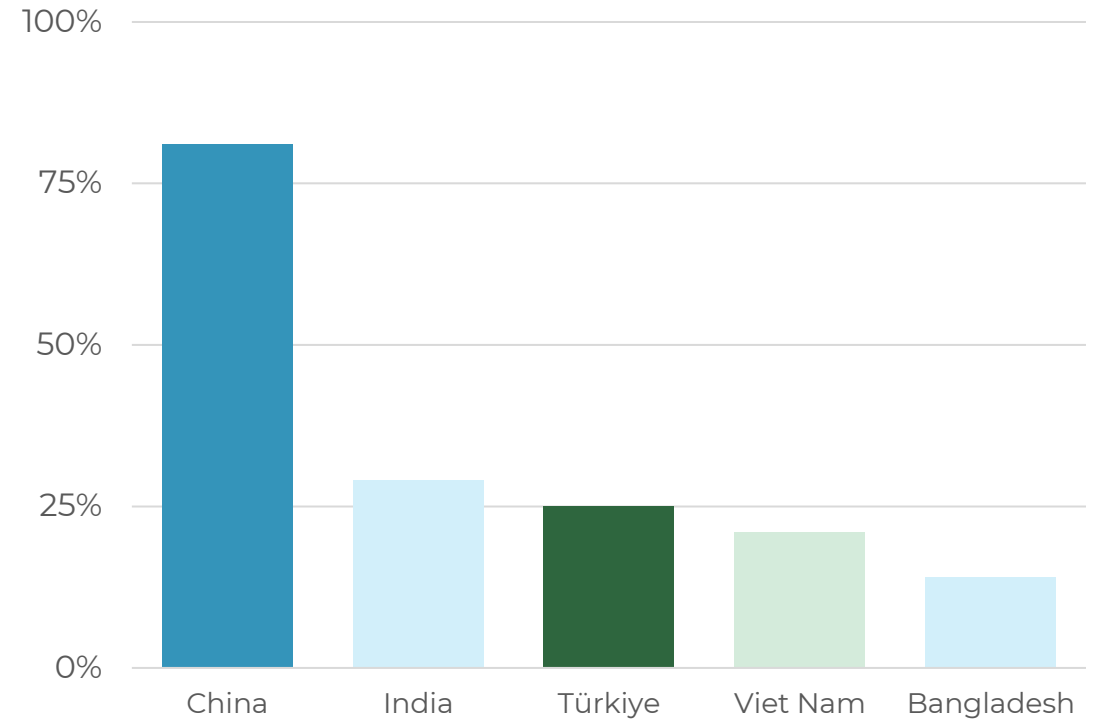
# Nearshoring

Türkiye offers a reliable nearshoring hub.

## US and EU Top Sourcing Markets



## Top 5 Sourcing Partners Of The EU-based Businesses



# Nearshoring

Türkiye offers a reliable nearshoring hub.



Signed an agreement with the Ministry of Industry and Technology 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.



Started installing a 23,000-square-meter facility in the Istanbul Airport Cargo Zone, which will be a hub that will integrate 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, boosting the country's potential in trade and logistics and allowing for more efficient service to local and global markets.



Announced a \$1.6 billion investment in Türkiye.

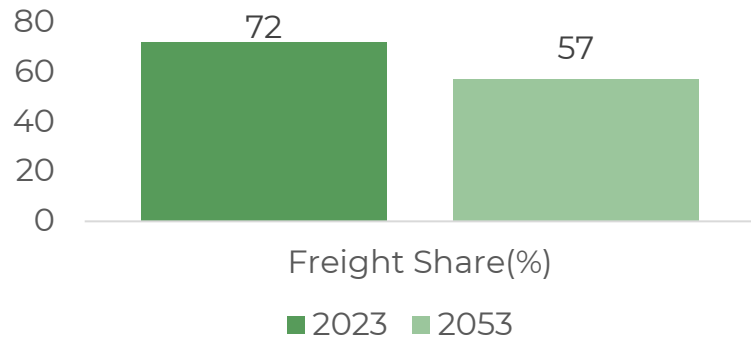


Has been producing buses at the Hoşdere plant in Istanbul since 1995, exporting 83% of them to over 70 countries across Europe and the Middle East.

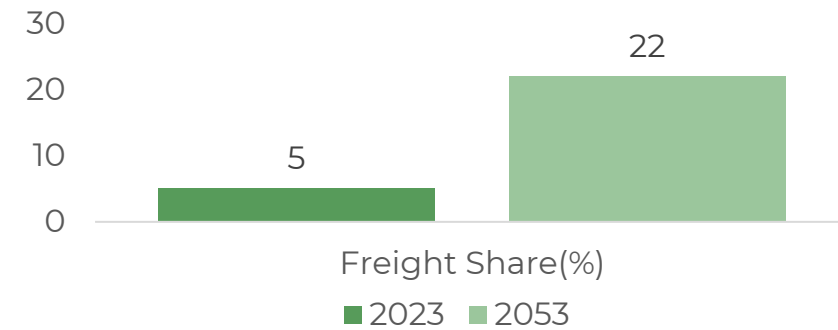
# Transforming Freight Transportation

Strategic infrastructure driving low-carbon logistics growth.

### Share of Road in Freight Transportation



### Share of Rail in Freight Transportation



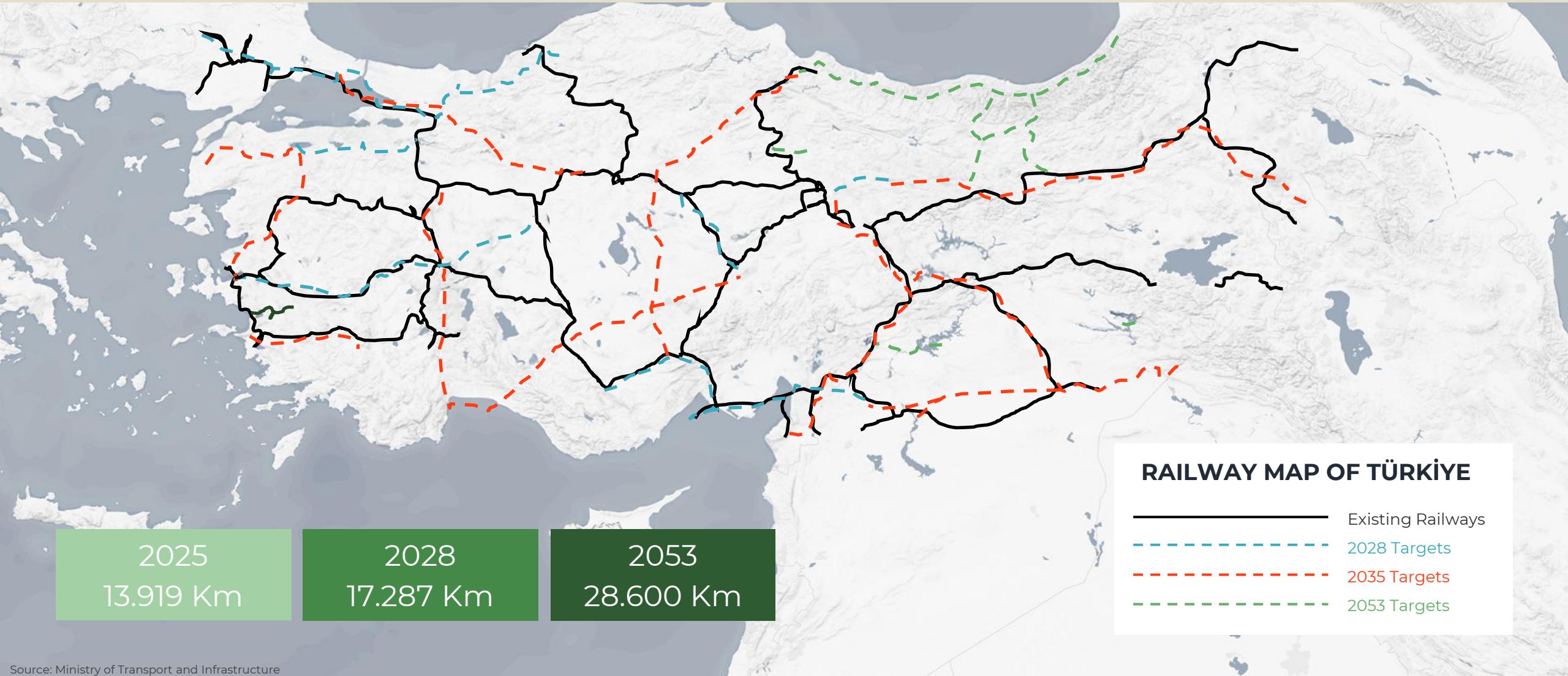
**MEGA PROJECTS  
LESSEN CARBON  
EMISSIONS**

**25  
Million  
Ton**



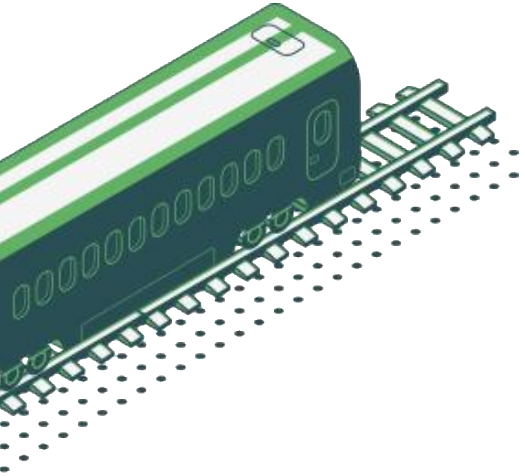
# Türkiye's Expanding Railway Network

Increasing railway capacity by 20% cuts emissions by 10.800 tons per year.

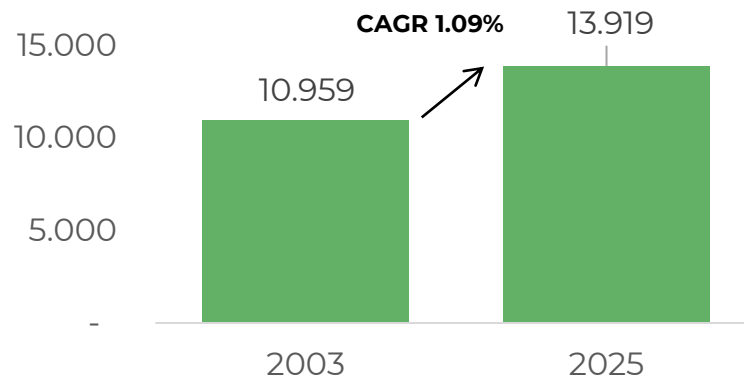


# Türkiye's Growing Railway Infrastructure

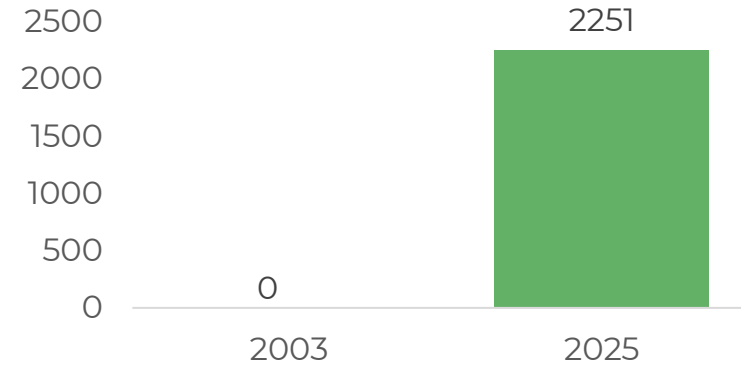
Expanding networks powering efficient, low-carbon freight.



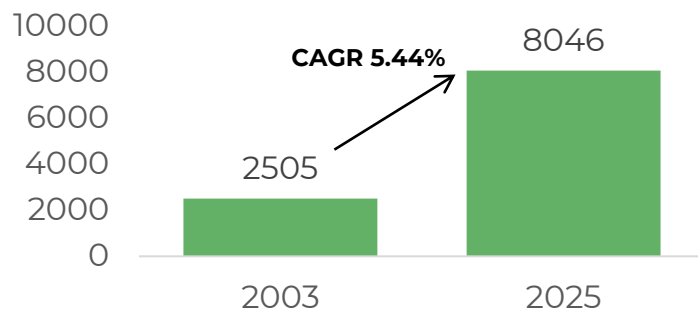
### Total Railway Network



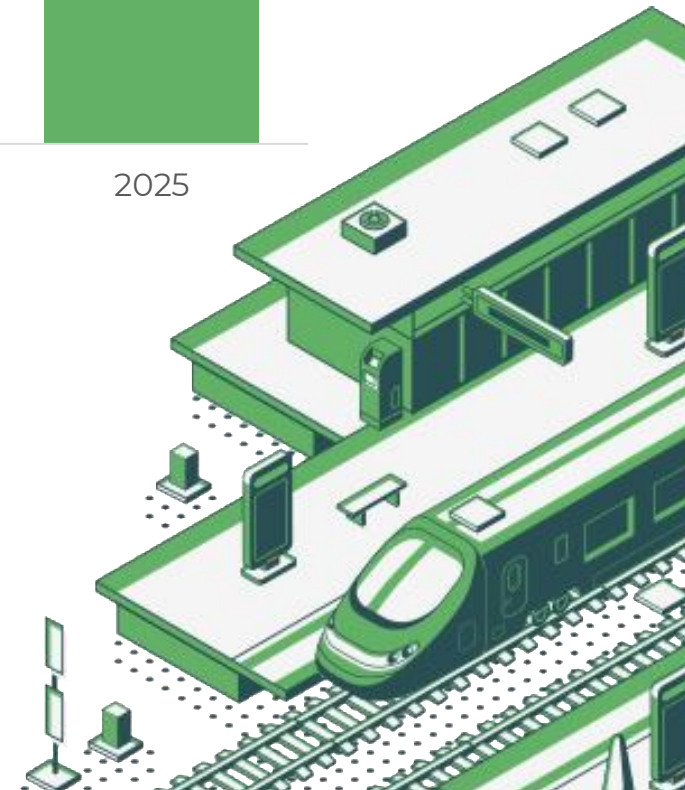
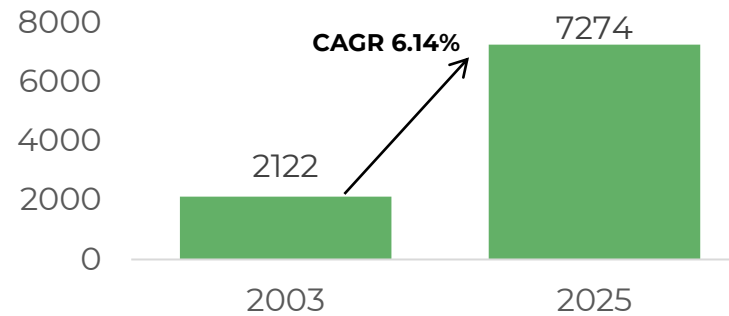
### High Speed Railway Network



### Signaled Railway Network



### Electrical Railway Network



nexus  
OF THE WORLD



PRESIDENCY OF  
THE REPUBLIC OF TÜRKIYE

**INVESTMENT &  
FINANCE OFFICE**

