



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

# LOGISTICS AND TRANSPORTATION INDUSTRY IN TÜRKİYE

March 2025

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



# AGENDA



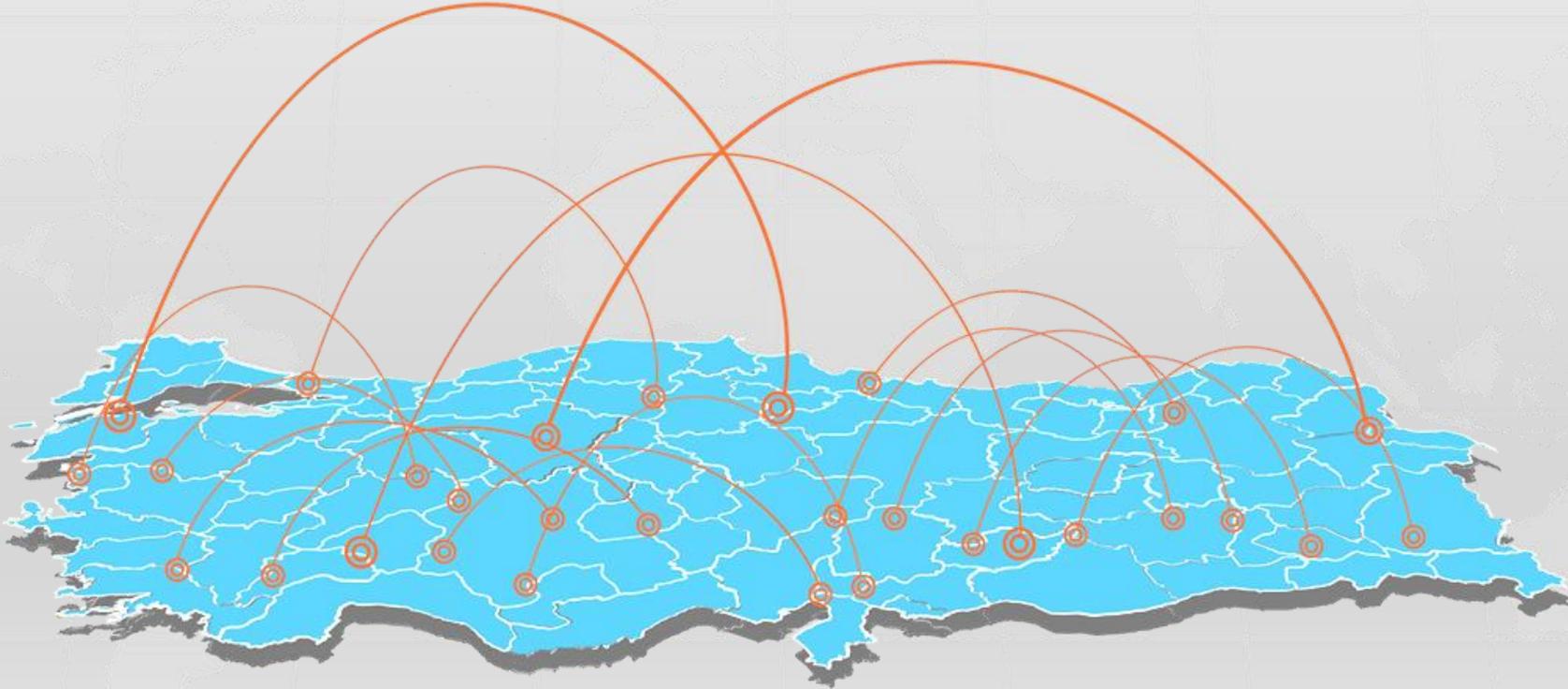
**WHY INVEST IN TÜRKİYE**



LOGISTICS INDUSTRY  
IN TÜRKİYE



TRANSPORTATION INDUSTRY  
IN TÜRKİYE





# 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



# 3 main reasons to invest in Logistics



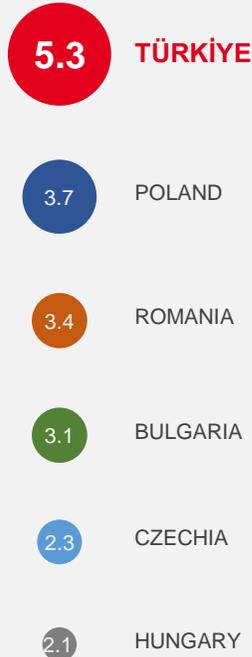


# 12<sup>th</sup> largest economy in the World

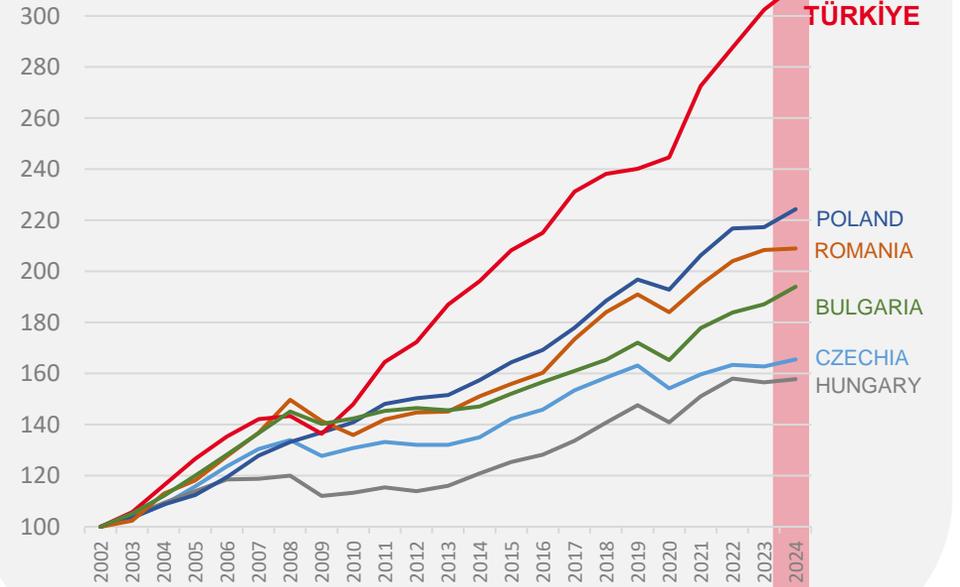
## RANKING OF ECONOMIES BY GDP AT PPP

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. <b>TÜRKİYE</b>
13. SPAIN	13. <b>TÜRKİYE</b>	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. <b>TÜRKİYE</b>	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**

**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

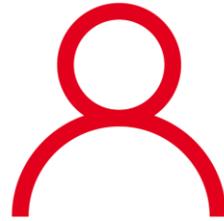


IMPRESSIVE ECONOMIC GROWTH LEADING TO A SIZEBLE MIDDLE CLASS WITH INCREASING PURCHASING POWER



\$ 10,998

2002



\$ 42,064

2023

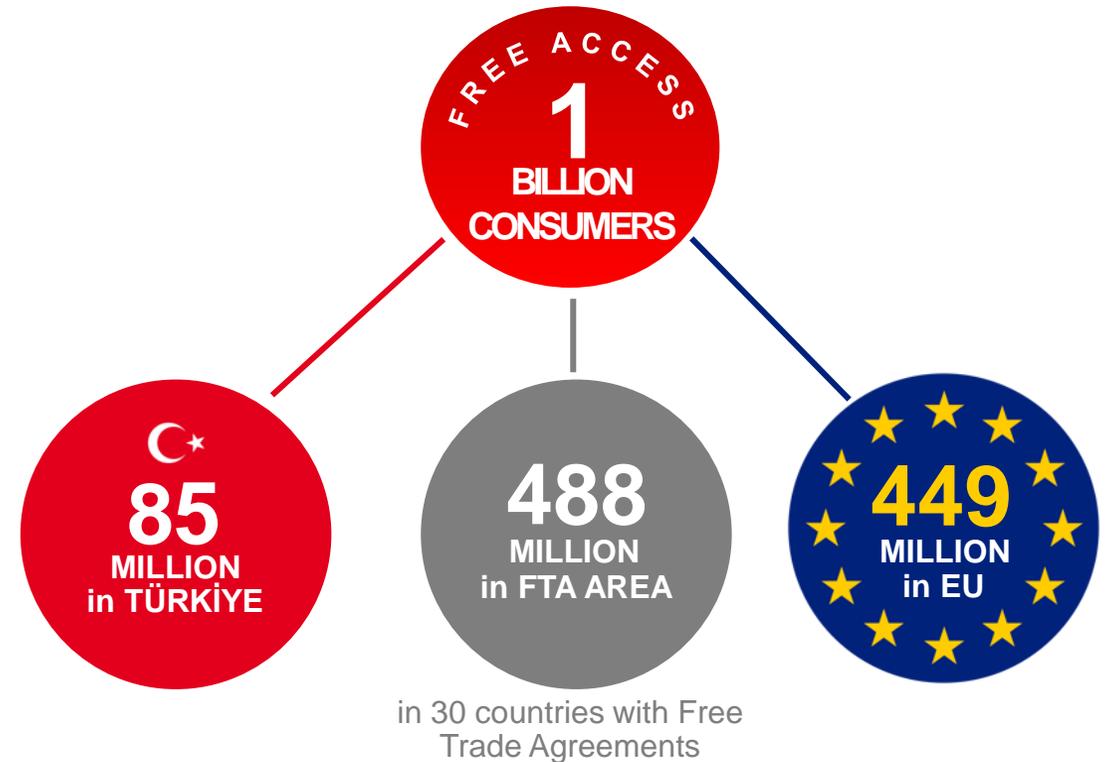
DOMESTIC MARKET FURTHER SUPPORTED BY EMERGING URBAN CENTERS



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



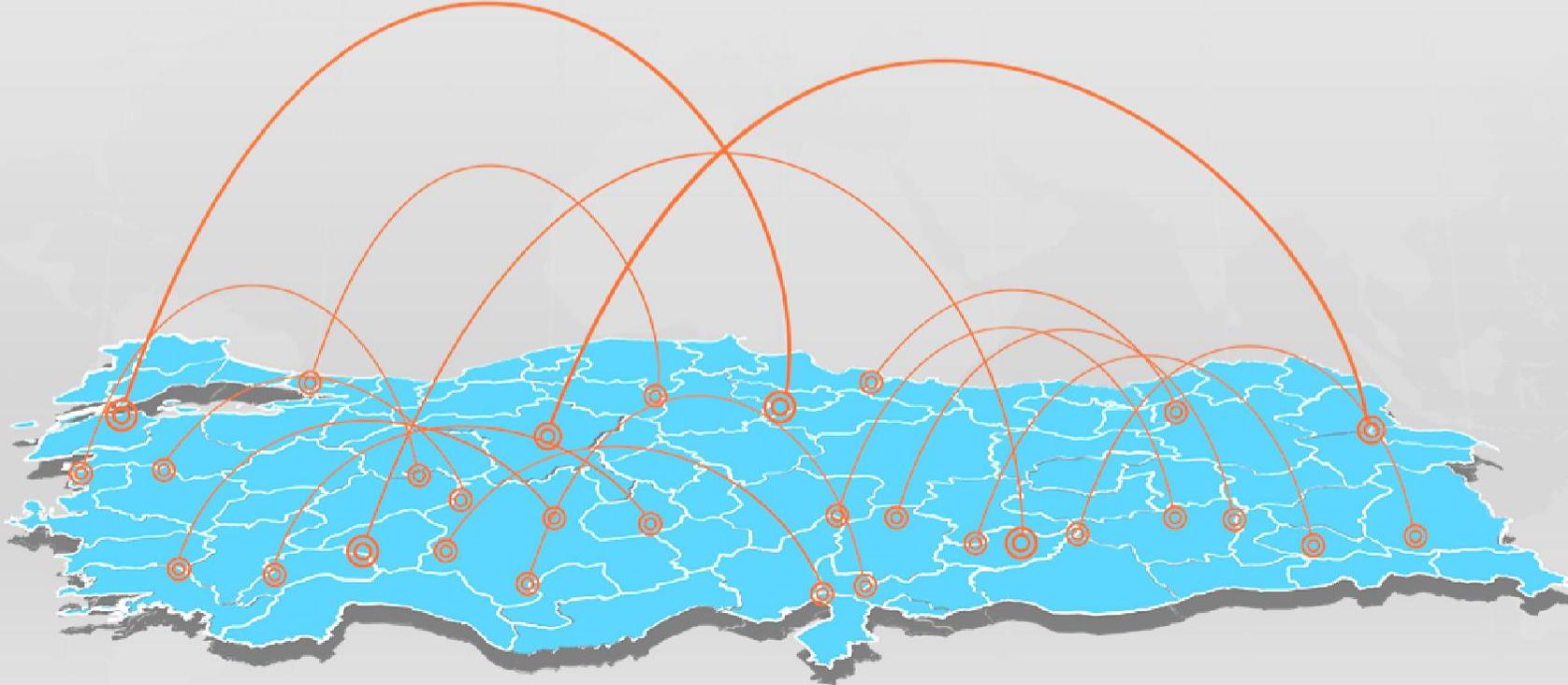
WHY INVEST IN TÜRKİYE



**LOGISTICS INDUSTRY  
IN TÜRKİYE**

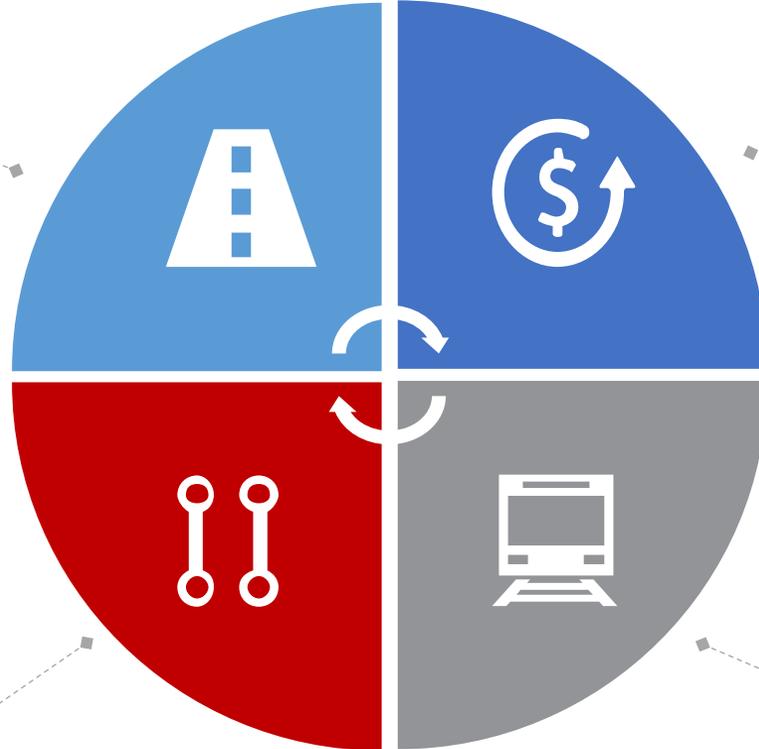


TRANSPORTATION INDUSTRY  
IN TÜRKİYE

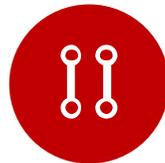




Making Türkiye regional logistics hub by attracting transit cargo to Türkiye



Decreasing logistics costs



Directing resources to productive investments and prioritizing

Increasing logistics maturity, improving technology and human capacity

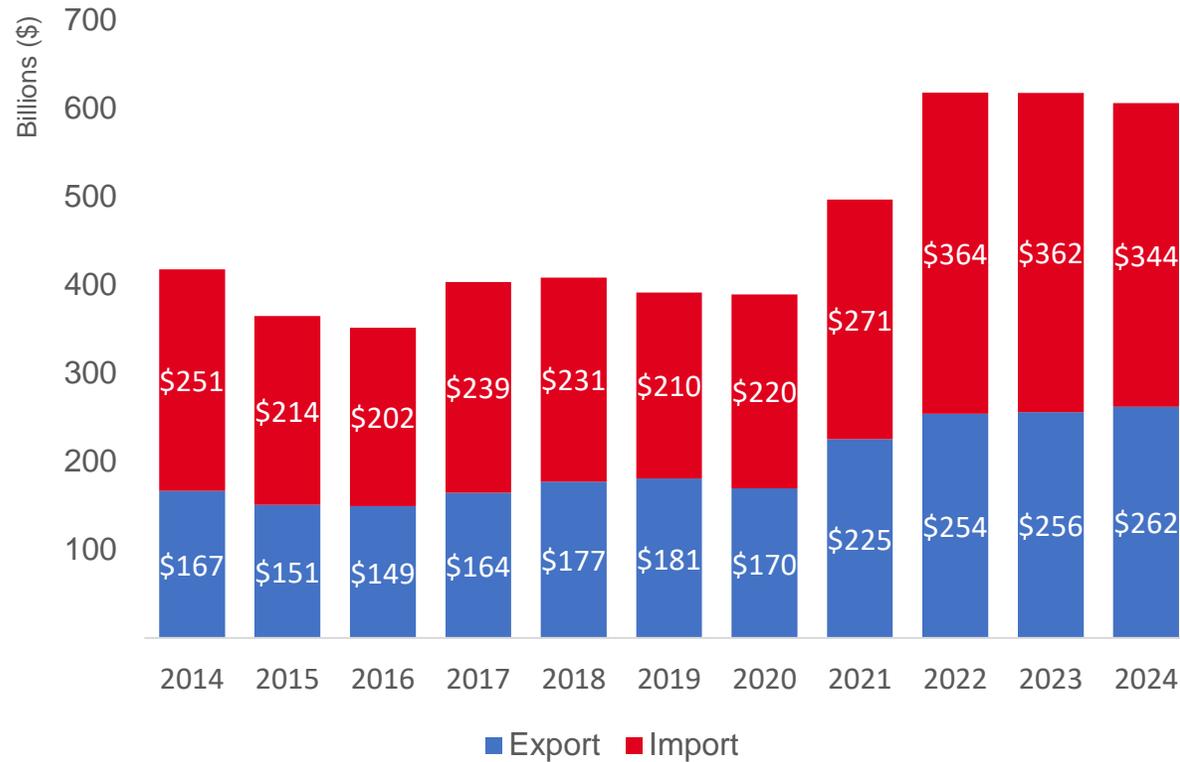


# LOGISTICS ACTIVITY IN TÜRKİYE

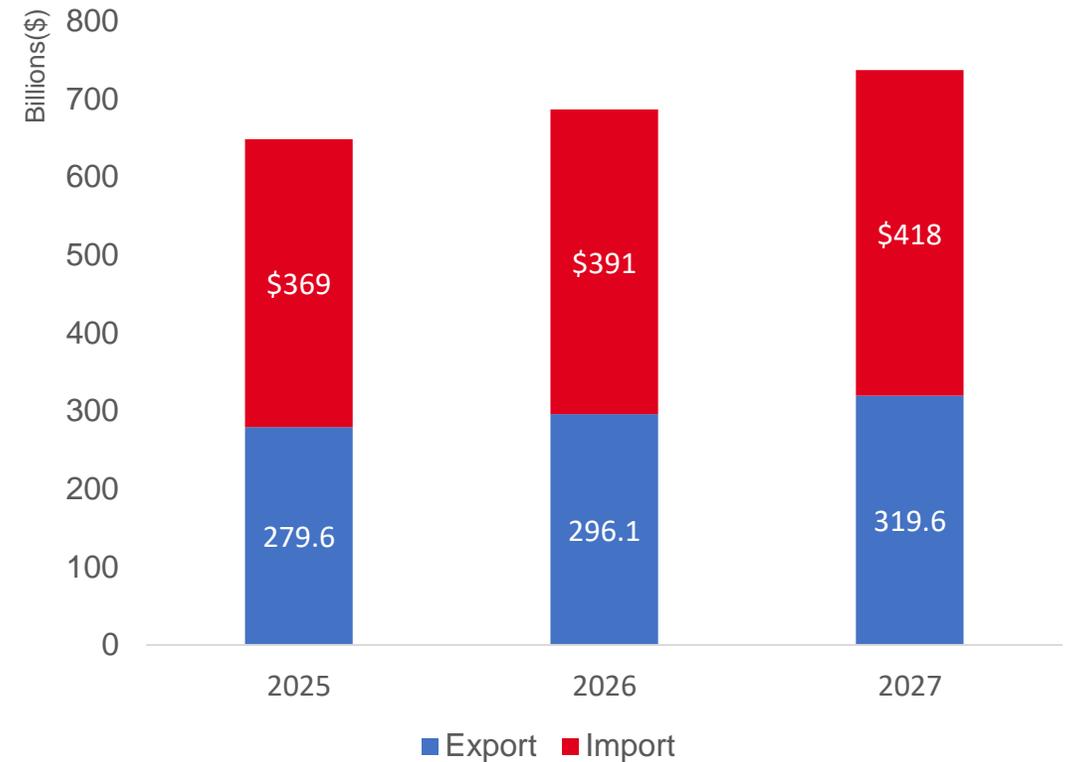
FOREIGN TRADE IS MAIN DRIVER OF LOGISTICS SECTOR



### Foreign Trade Statistics, 2013-2024



### Foreign Trade Growth Estimate, 2025-2027



# TRADE ACTIVITY WITH COUNTRY GROUPS

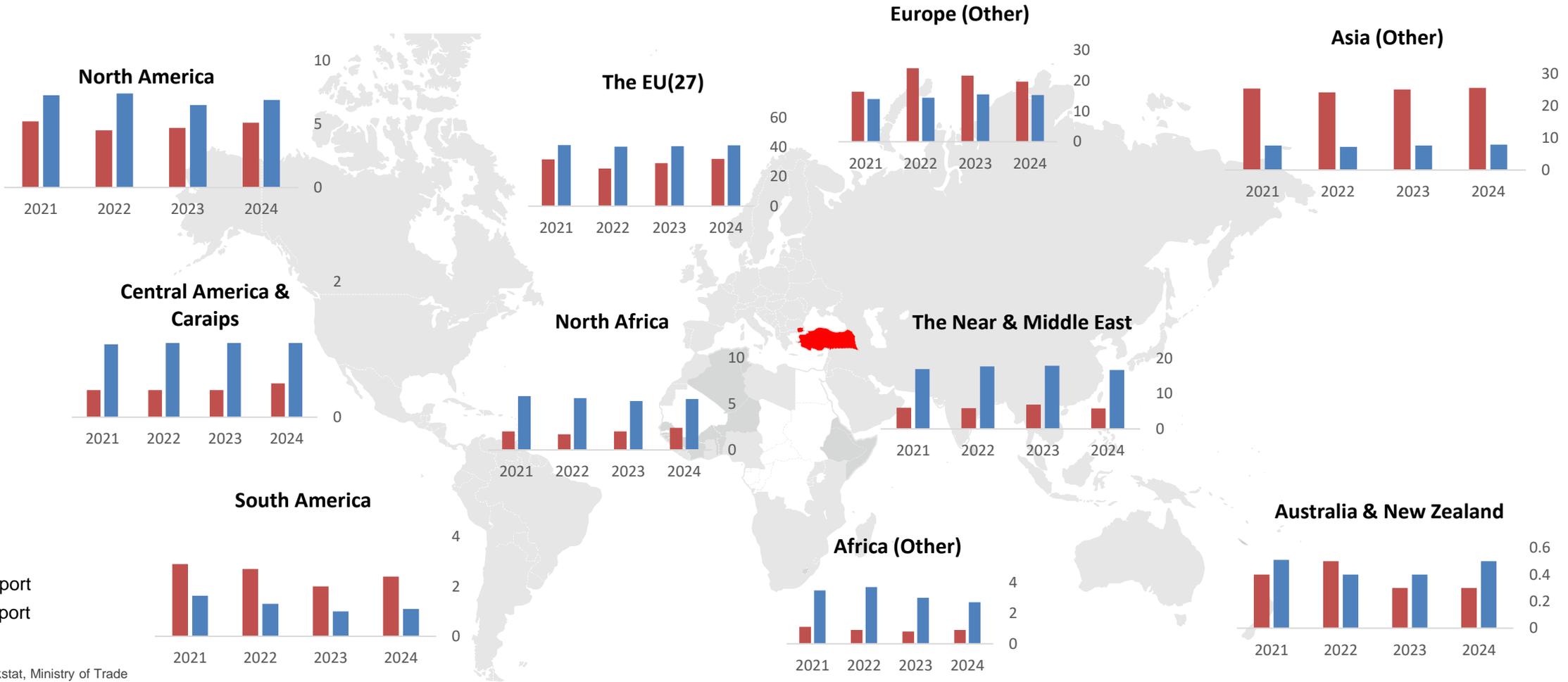
UPGRADED  
INCREASED  
ACROSS THE GLOBE

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.



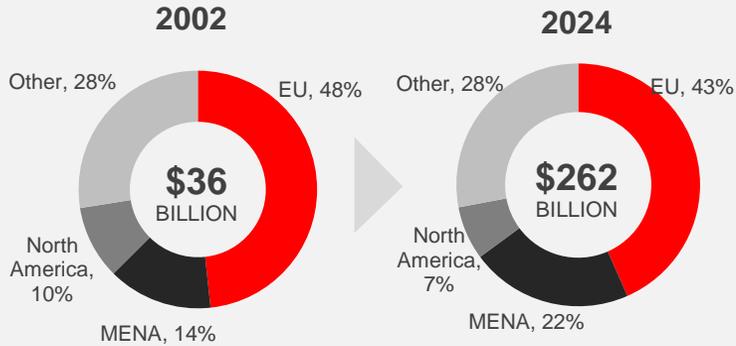
Source: Turkstat, Ministry of Trade  
\*Shares in Total

# TRADE ACTIVITY

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



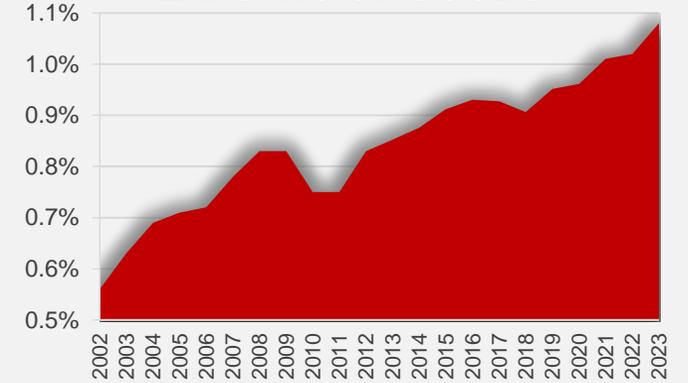
### MERCHANDISE EXPORTS BY GEOGRAPHY



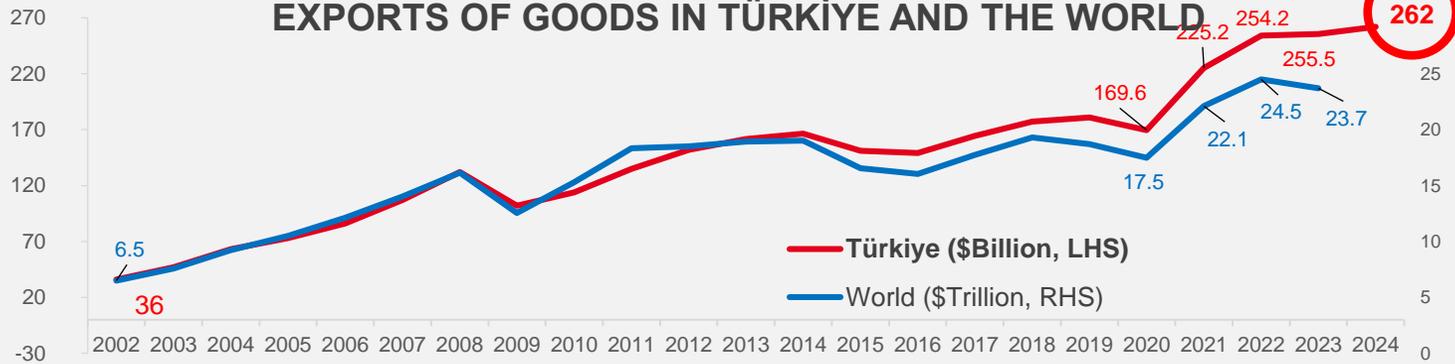
### NUMBER OF EXPORT PRODUCTS OVER USD 1 BILLION



### TÜRKİYE'S SHARE IN GLOBAL EXPORTS OF GOODS



### EXPORTS OF GOODS IN TÜRKİYE AND THE WORLD



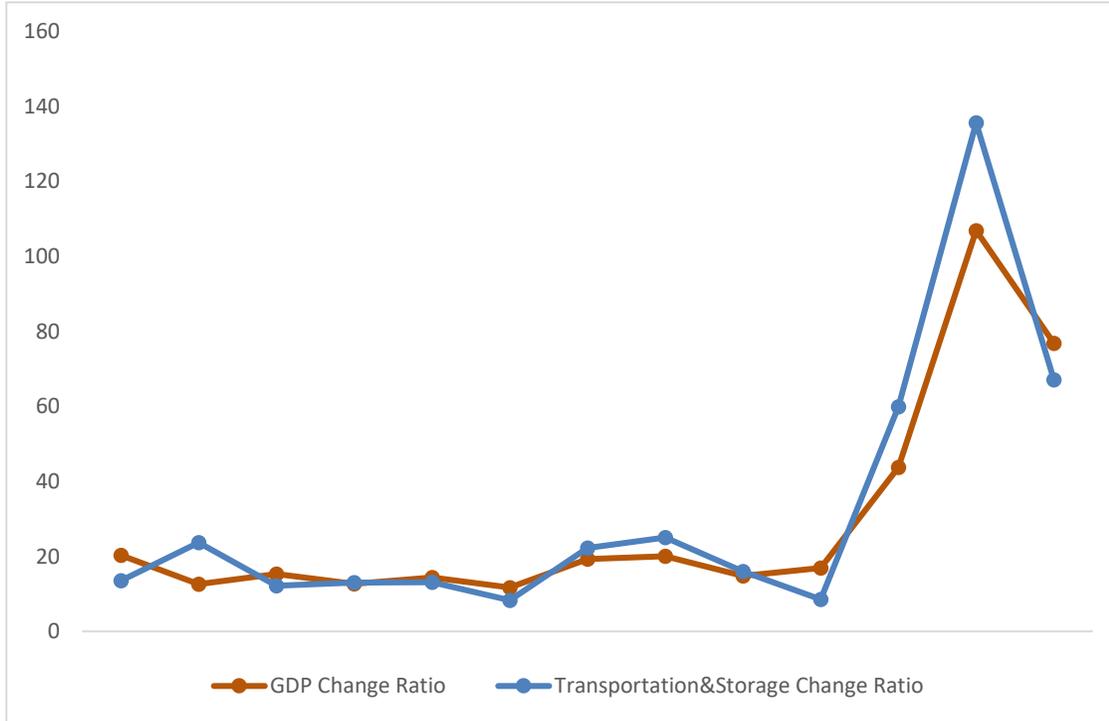
**Türkiye Records All-Time High Exports in 2024**

### ANNUAL AVERAGE GROWTH OF EXPORTS (2002-2023)

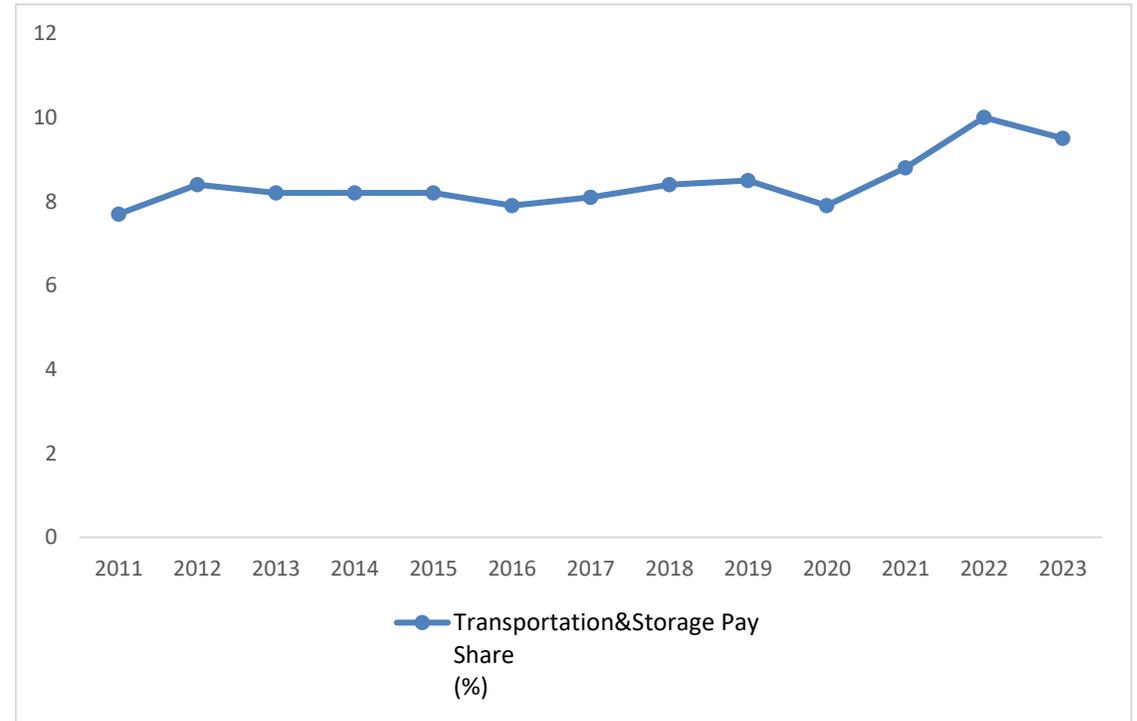




### Change Ratio of GDP and Transport and Storage (%)

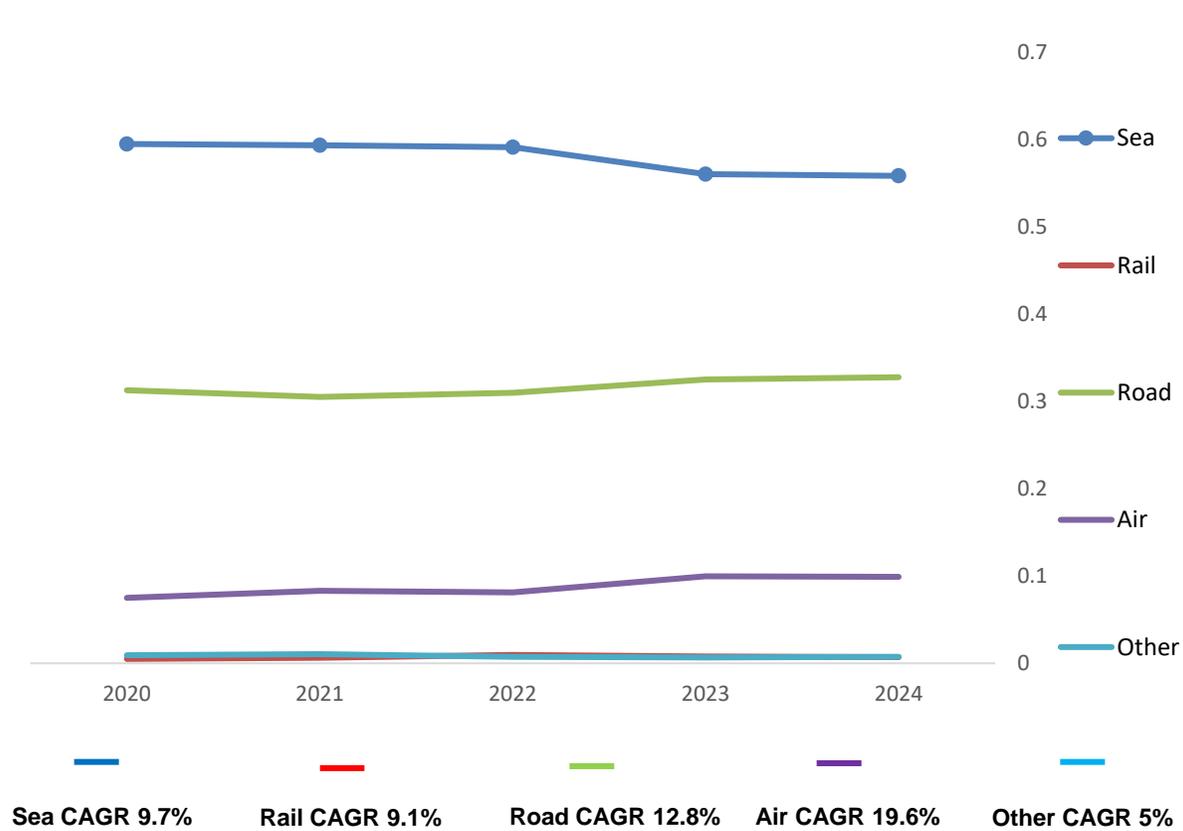


### Share of Transport and Storage in GDP (%)

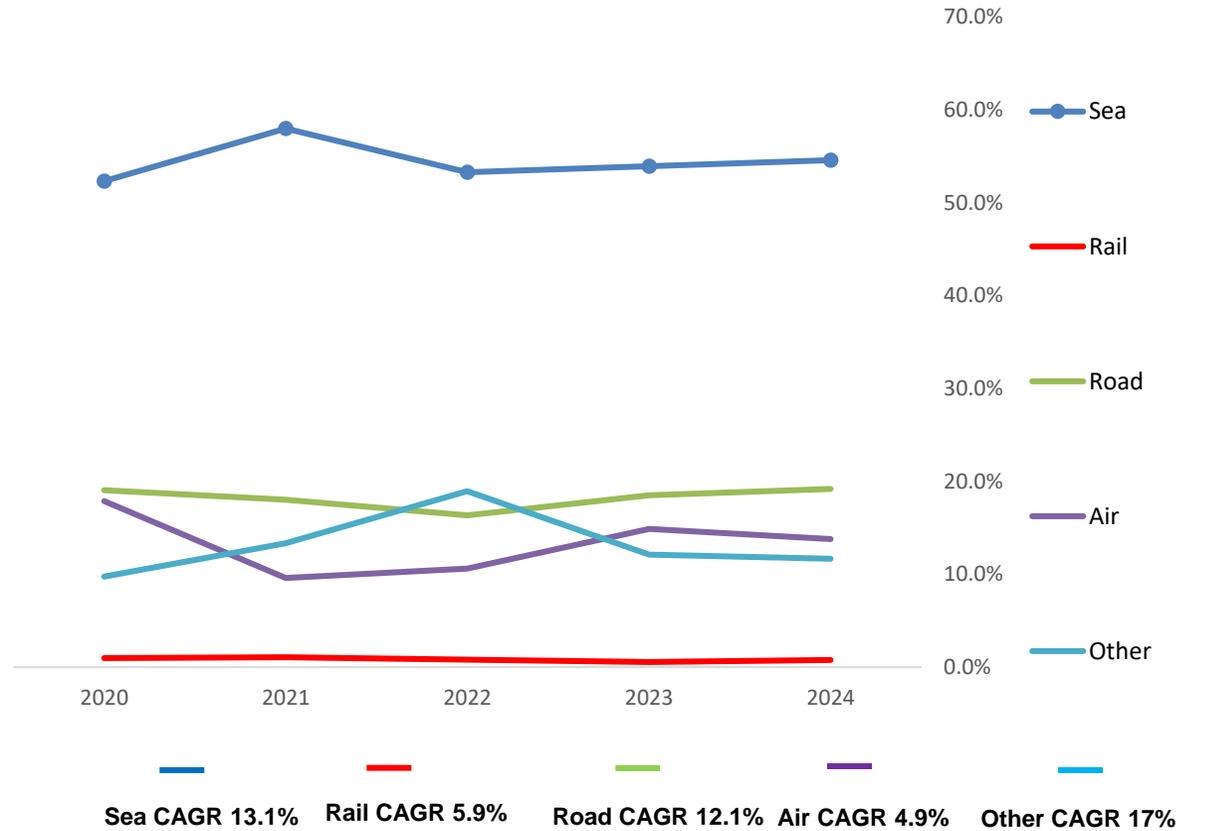




### EXPORTS BY MODE OF TRANSPORTATION, 2019-2023

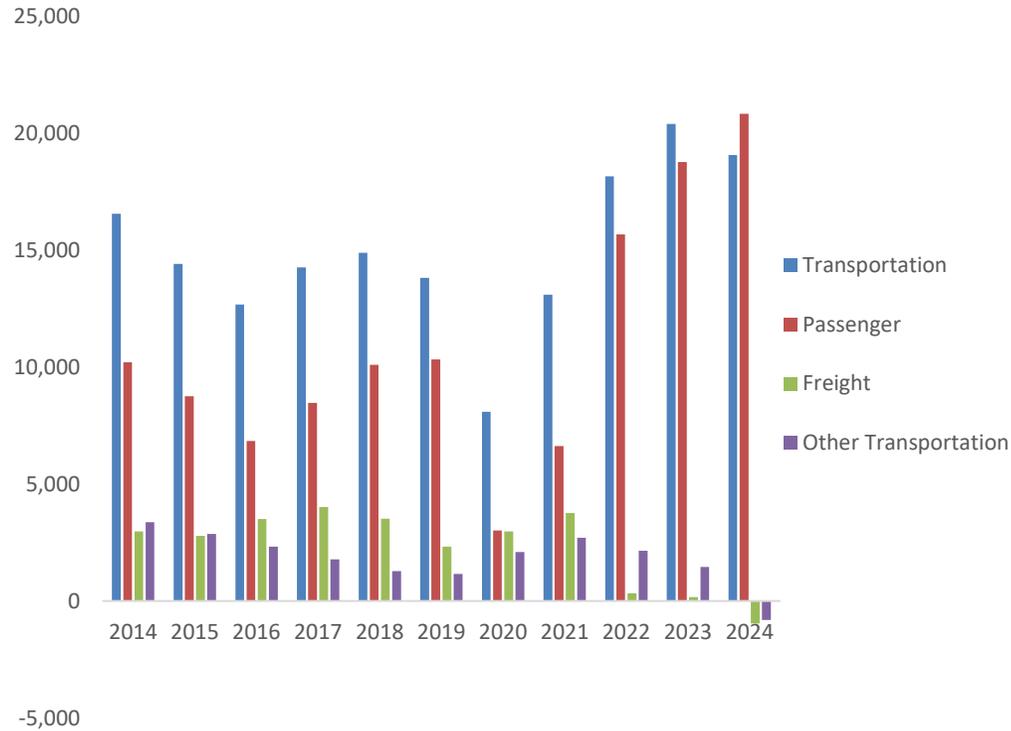


### IMPORTS BY MODE OF TRANSPORTATION, 2019-2023

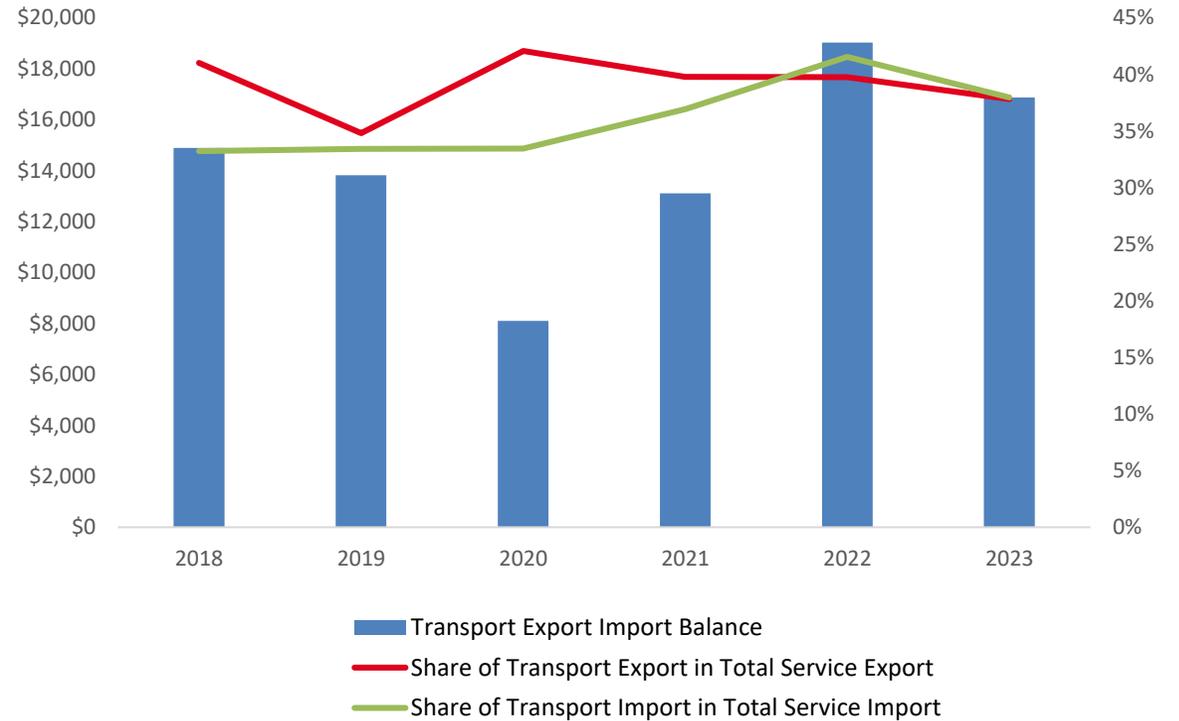




### Transport Activities in Balance of Payments (Million \$) (2013-2024)



### 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 **38<sup>th</sup>** best country in logistics out of 139 economies.

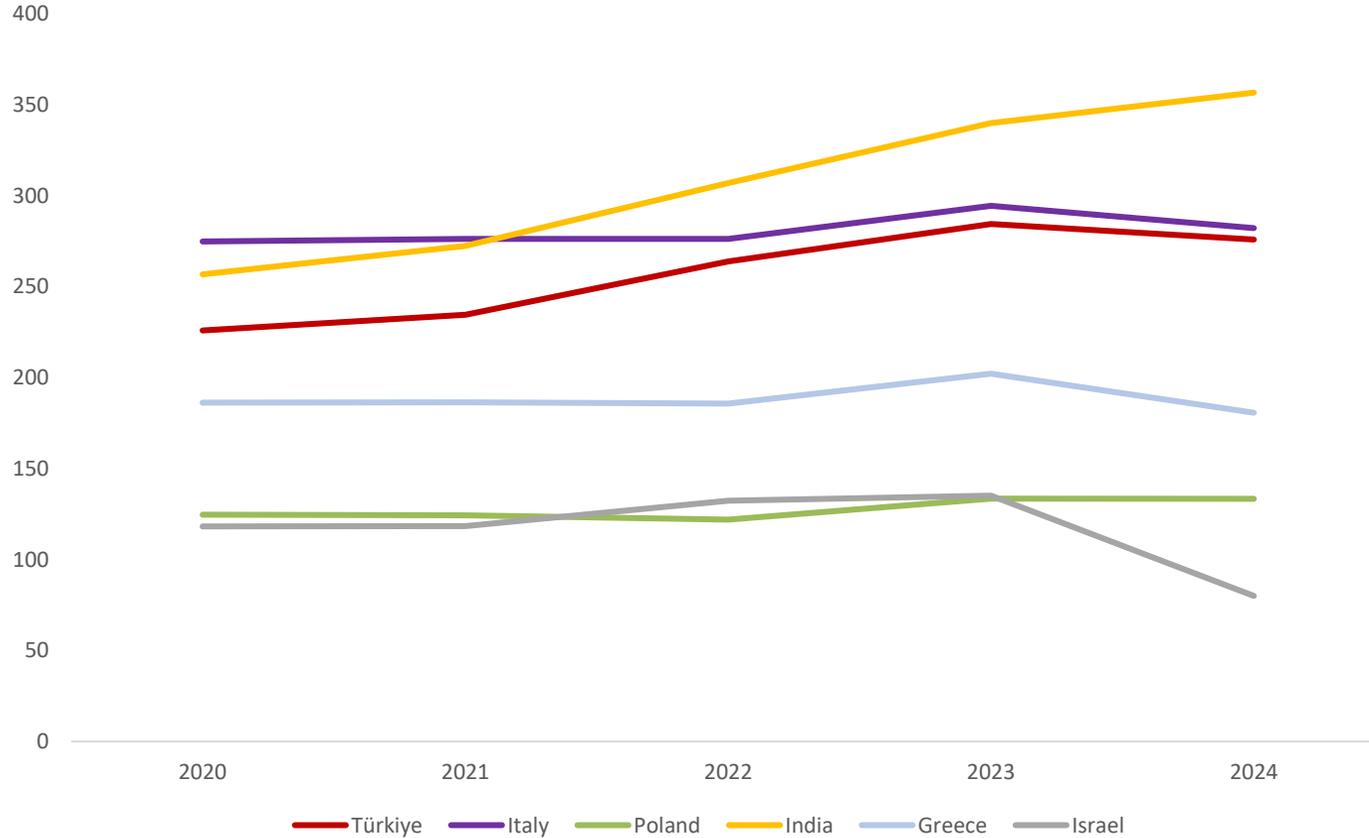
**Score**

**3.4**





### Liner Shipping Connectivity Index (LSCI)



### The Six Components of LSCI

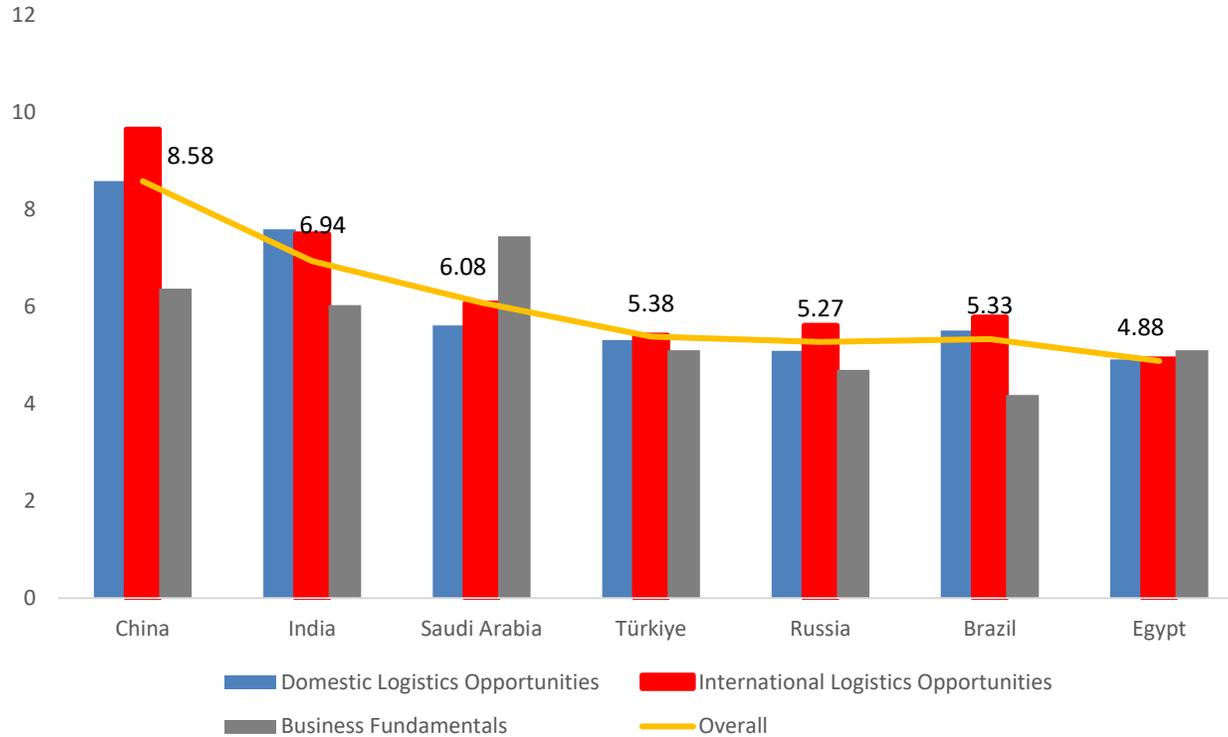
- 1 The number of scheduled ships
- 2 The total deployed annual capacity in TEU
- 3 The number of regular liner shipping services from and to the country
- 4 The number of liner shipping companies that provide services from and to the country
- 5 The number of other countries that are connected to the 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 **12<sup>th</sup>** best country in logistics out of 50 emerging markets.

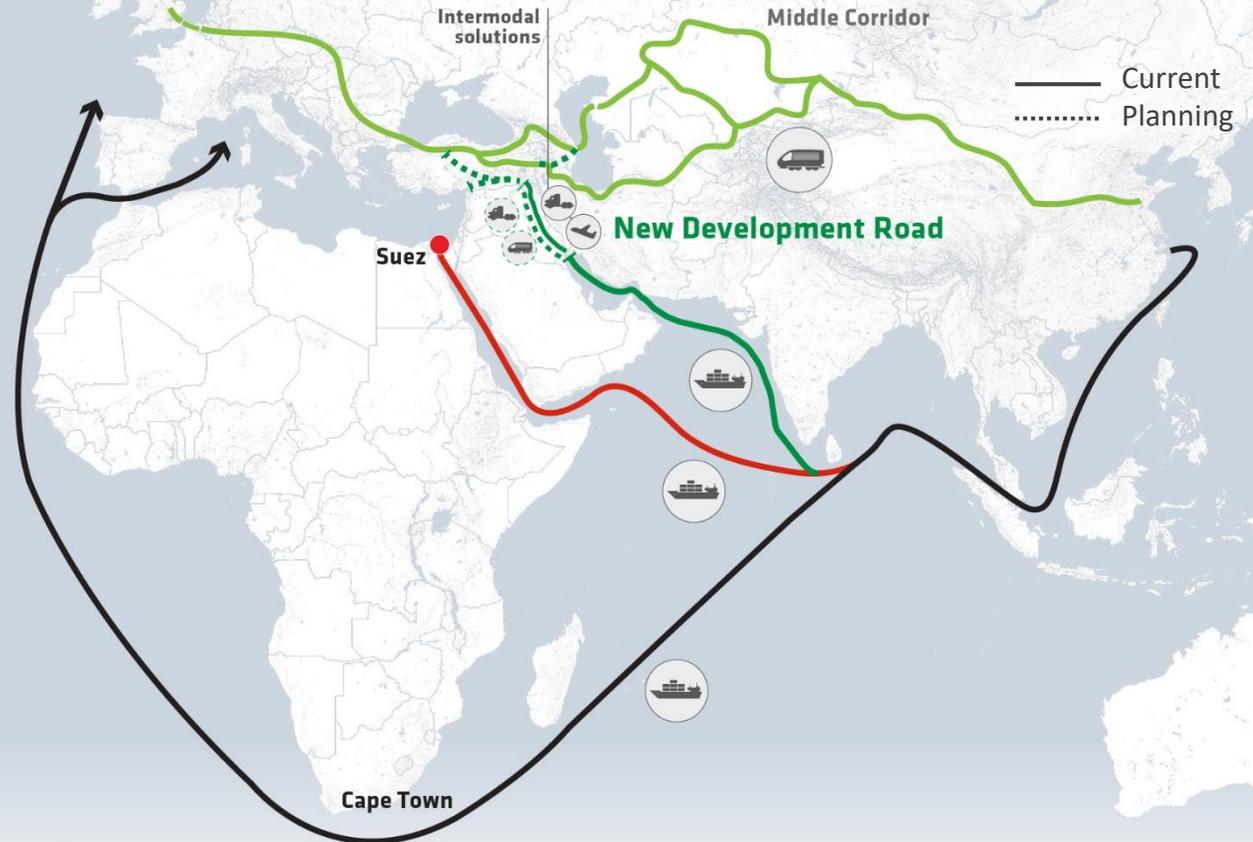
**Score**  
**5.38**



# 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

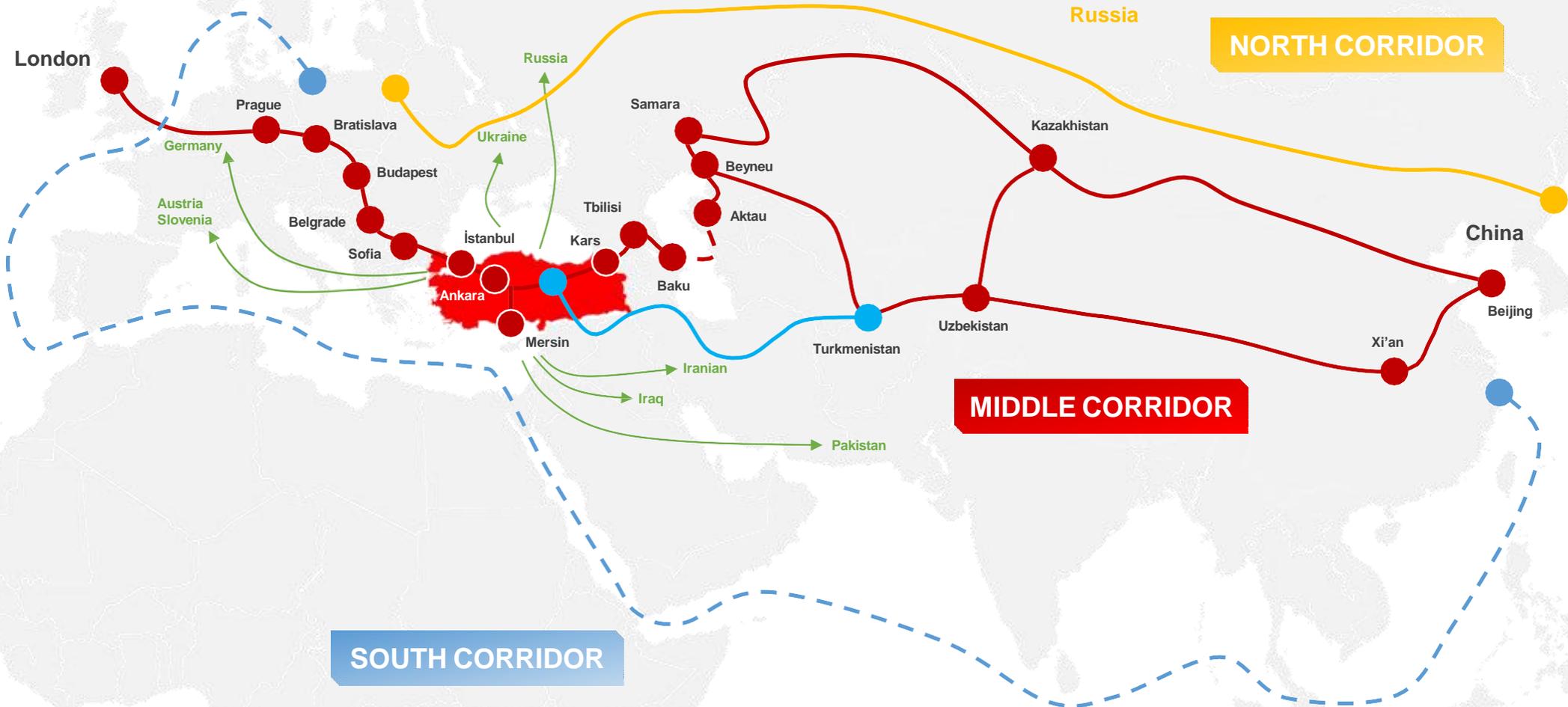
MIDDLE CORRIDOR

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 7<sup>TH</sup> 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.





# LOGISTICS CAPABILITIES OF TÜRKİYE

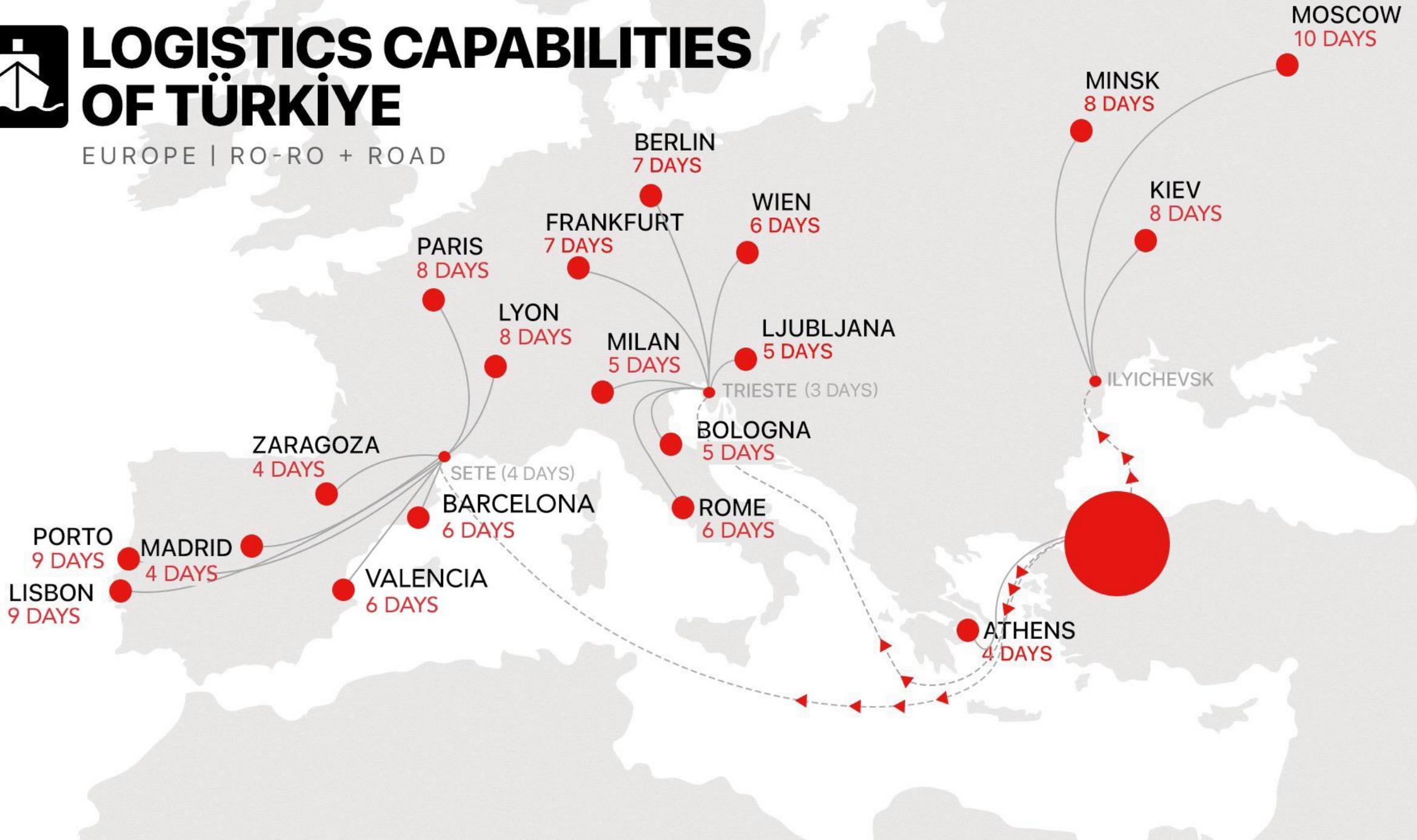
EUROPE | SEA / EXPORT





# LOGISTICS CAPABILITIES OF TÜRKİYE

EUROPE | RO-RO + ROAD





# LOGISTICS CAPABILITIES OF TÜRKİYE

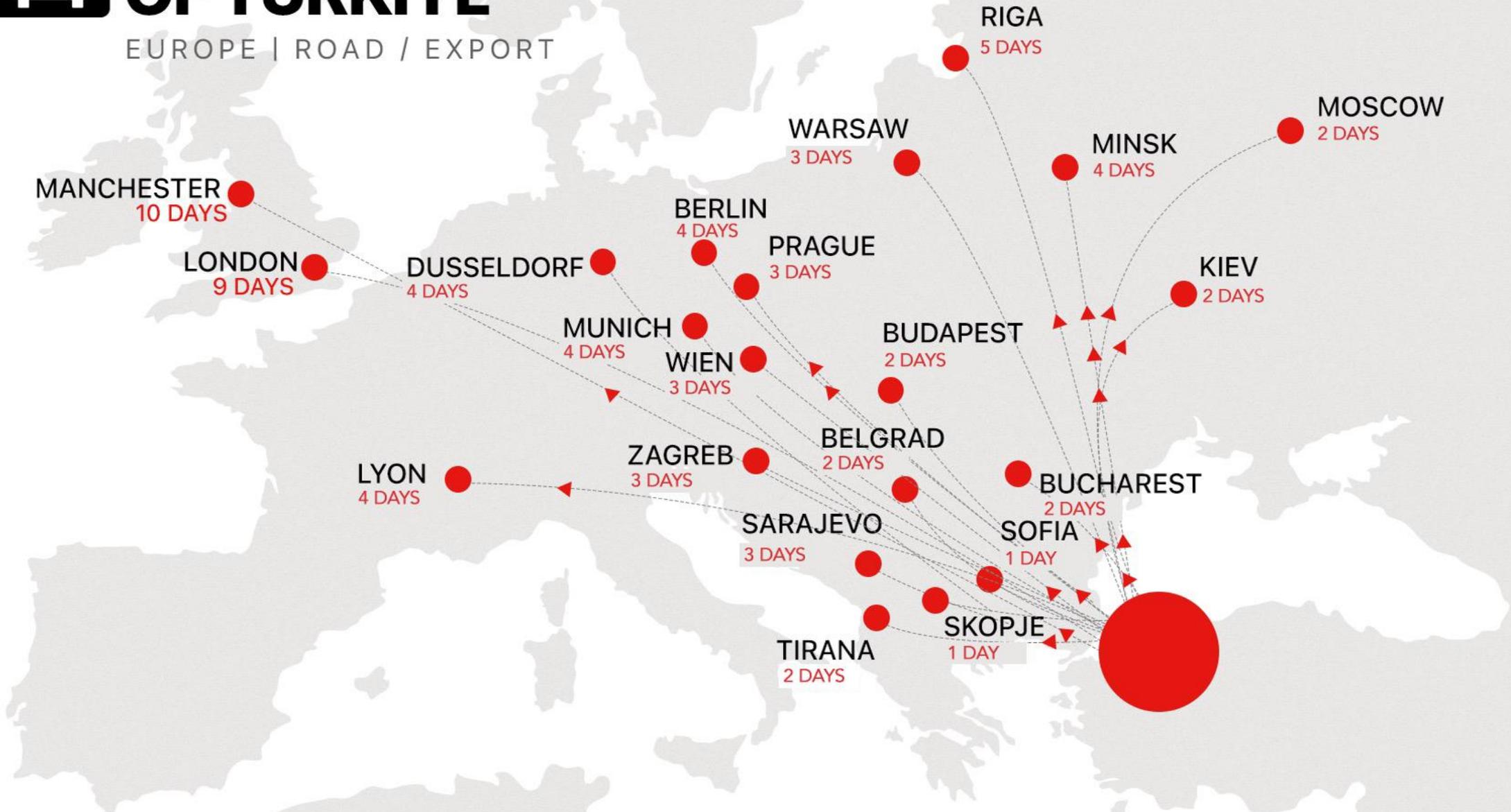
EUROPE | RO-RO + BLOCK TRAIN





# LOGISTICS CAPABILITIES OF TÜRKİYE

EUROPE | ROAD / EXPORT





# LOGISTICS CAPABILITIES OF TÜRKİYE

ASIA | SEA / IMPORT



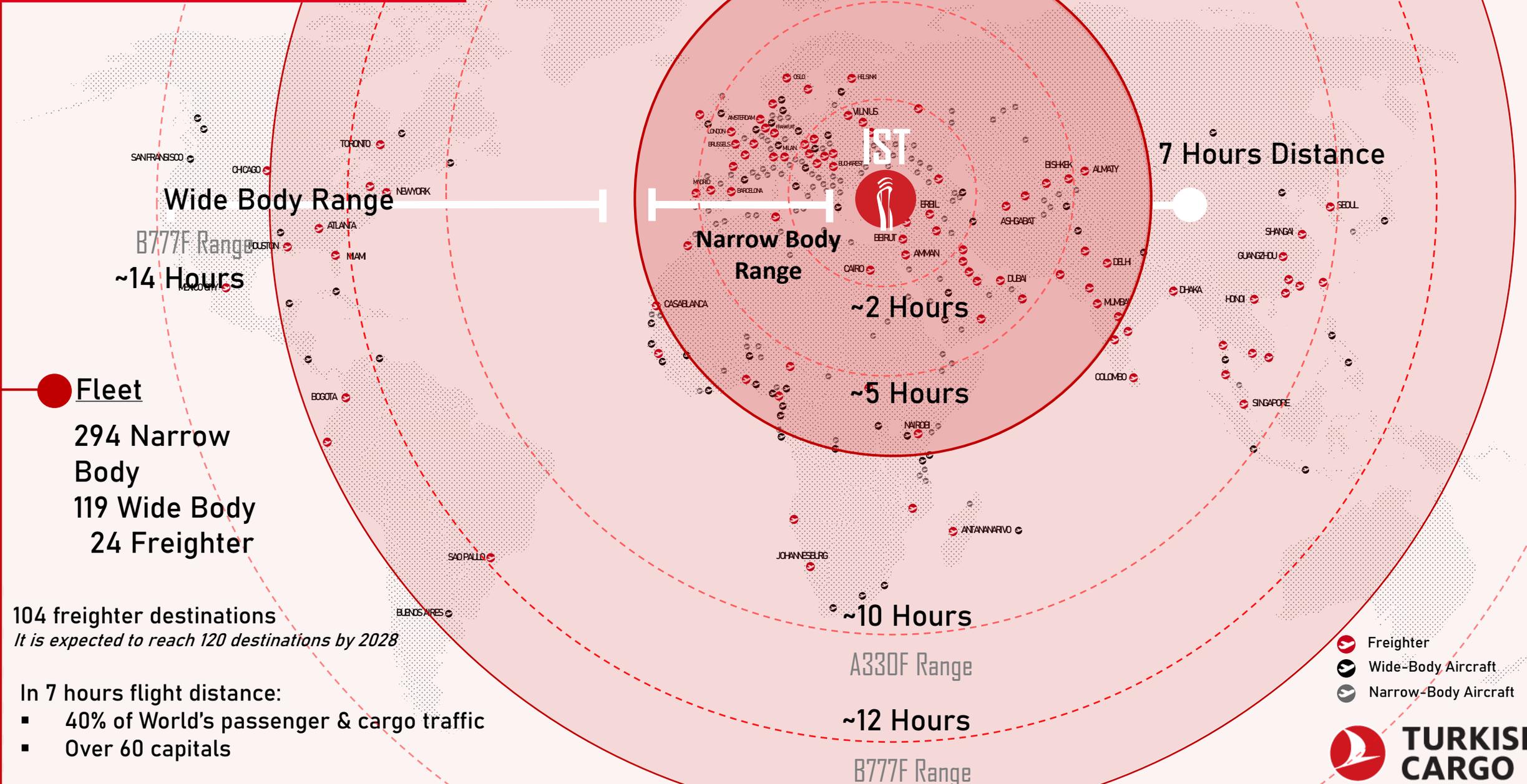


# LOGISTICS CAPABILITIES OF TÜRKİYE

EUROPE / N. AFRICA | SEA / IMPORT



# ISTANBUL AS A MEGA HUB



**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

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



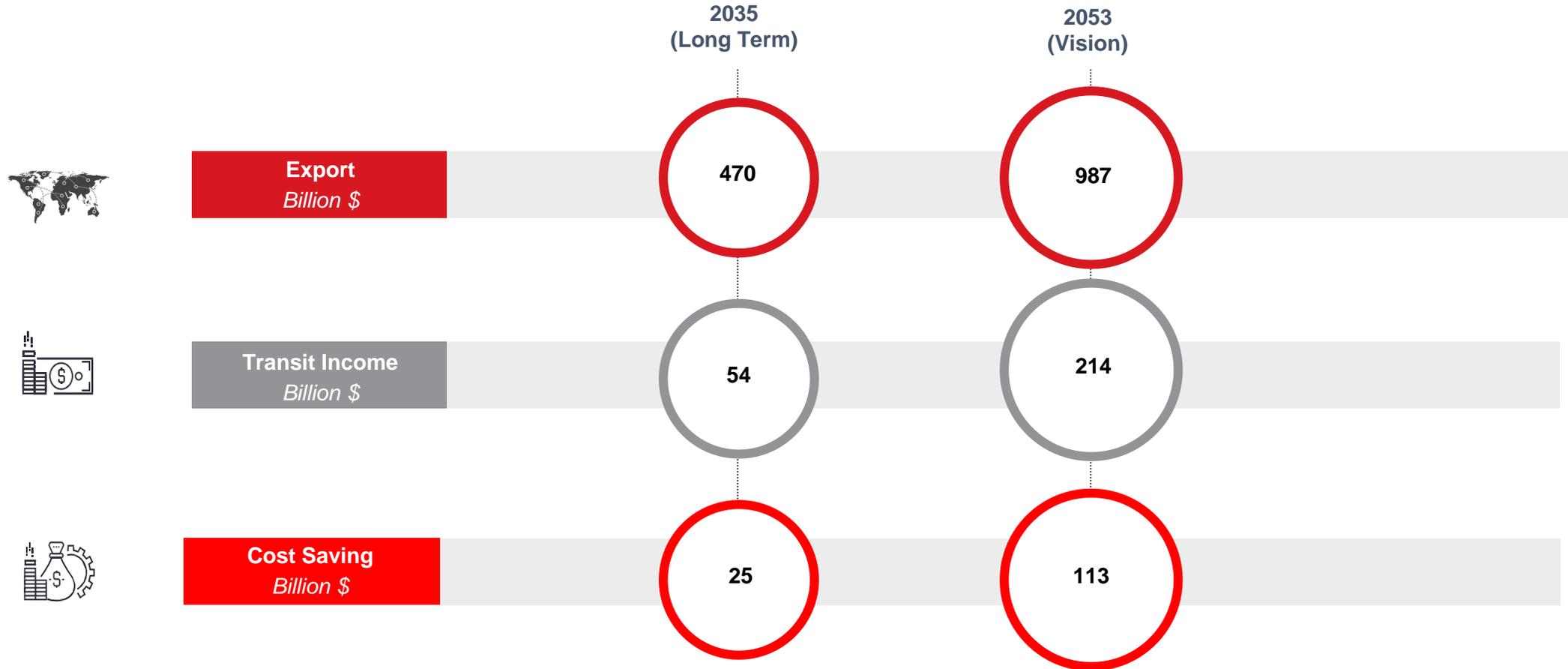


**Türkiye will be more lucrative location for three reasons**



# NEW LOGISTICS MASTER PLAN

SIGNIFICANT CONTRIBUTIONS IS EXPECTED FROM LOGISTICS MASTER PLAN



# AGENDA



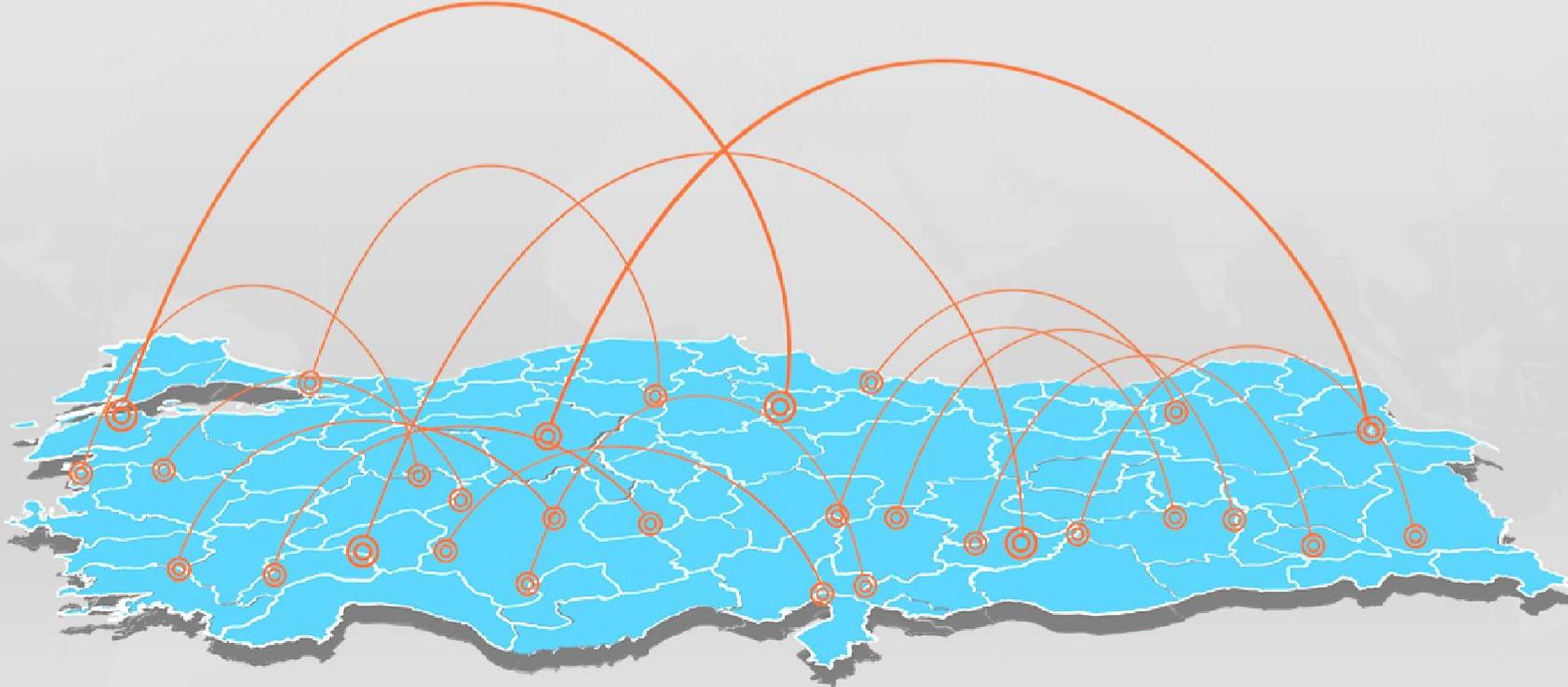
WHY INVEST IN TÜRKİYE



LOGISTICS INDUSTRY  
IN TÜRKİYE



**TRANSPORTATION INDUSTRY  
IN TÜRKİYE**

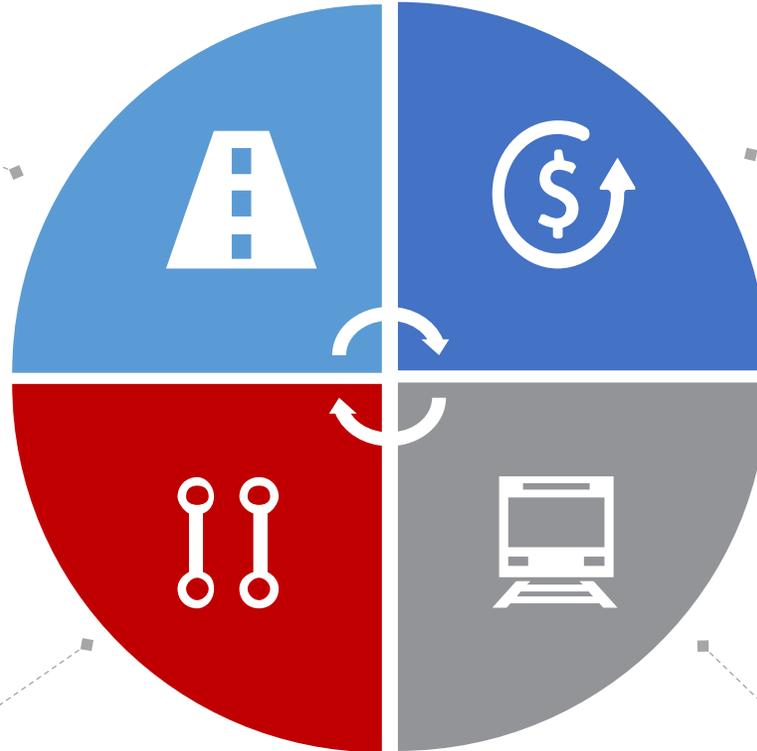


# TRANSPORTATION POLICIES

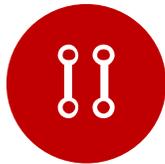
## PILLARS OF TRANSPORTATION POLICIES



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

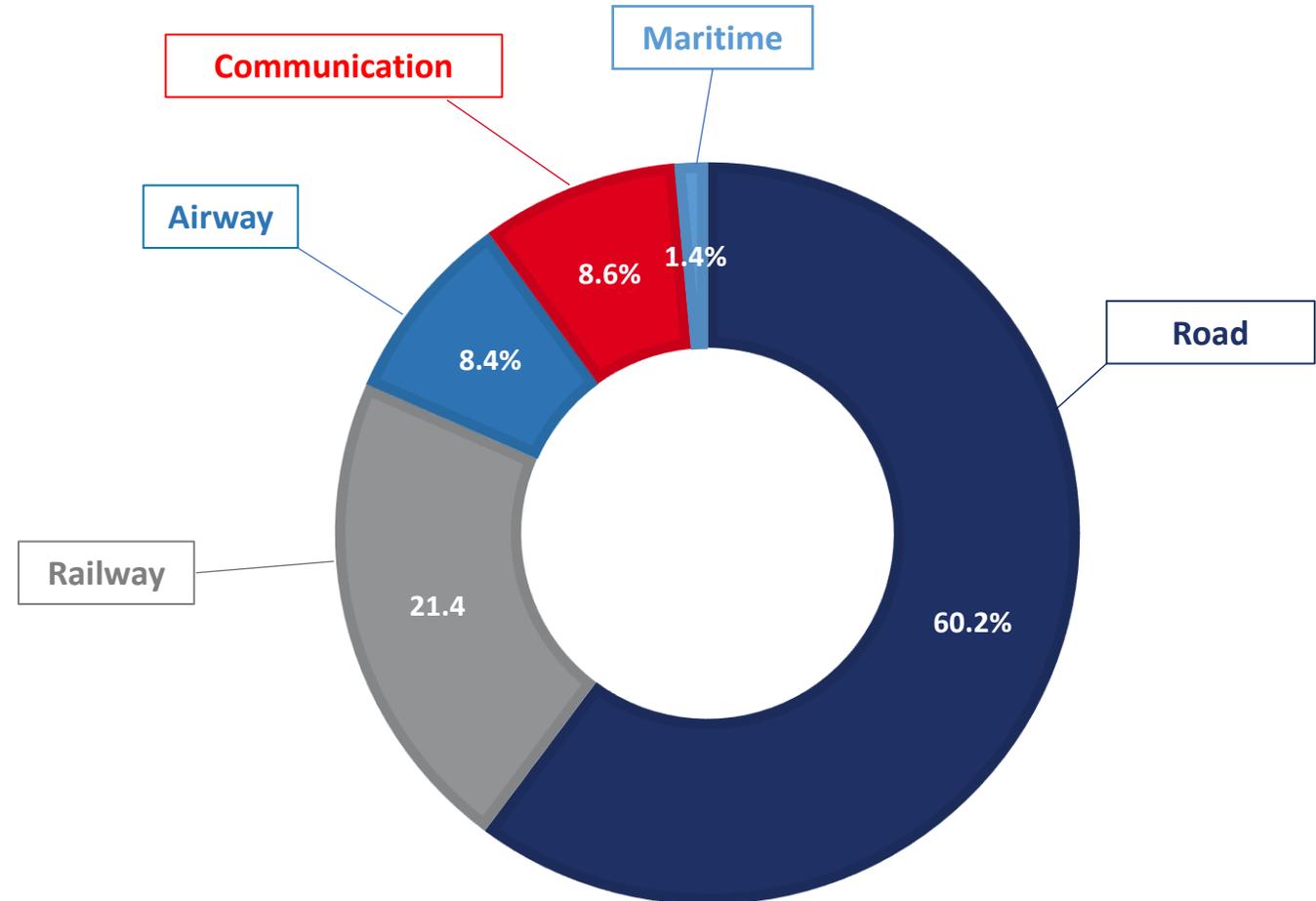


# INVESTMENTS IN TRANSPORT

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

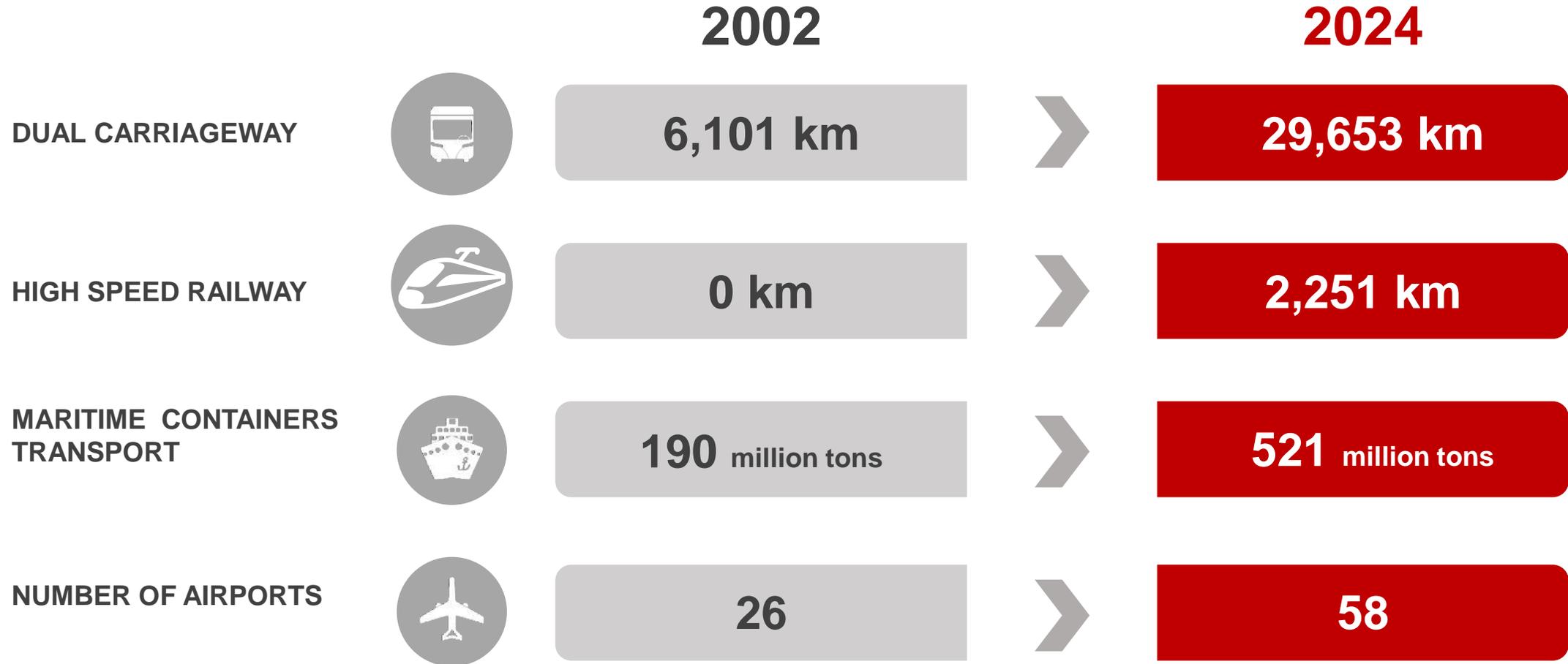


Sectors	Billion \$
Road 	168.8
Railway 	60.2
Airway 	23.5
Maritime 	3.9
Communication 	24.2
<b>Total</b>	<b>280.6</b>



# INFRASTRUCTURE INVESTMENTS IN TRANSPORT

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

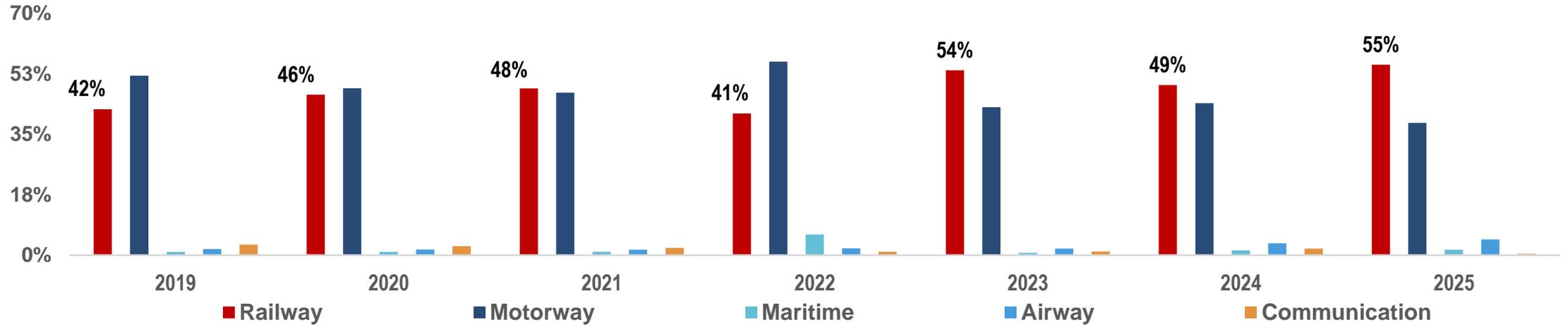


# INVESTMENT IN RAIL NETWORK

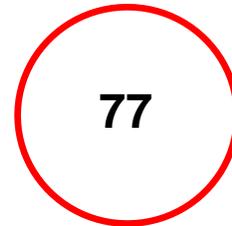
THE SHARE OF RAIL IN TRANSPORT INVESTMENTS CONTINUE TO RISE



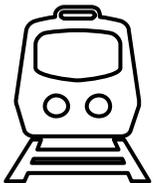
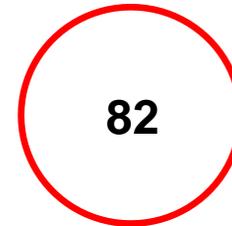
Investment Budget Percentages of Transport Subsectors



2035  
(Long Term)



2053  
(Vision)



Investment  
Billion \$

# INVESTMENTS IN TRANSPORTATION

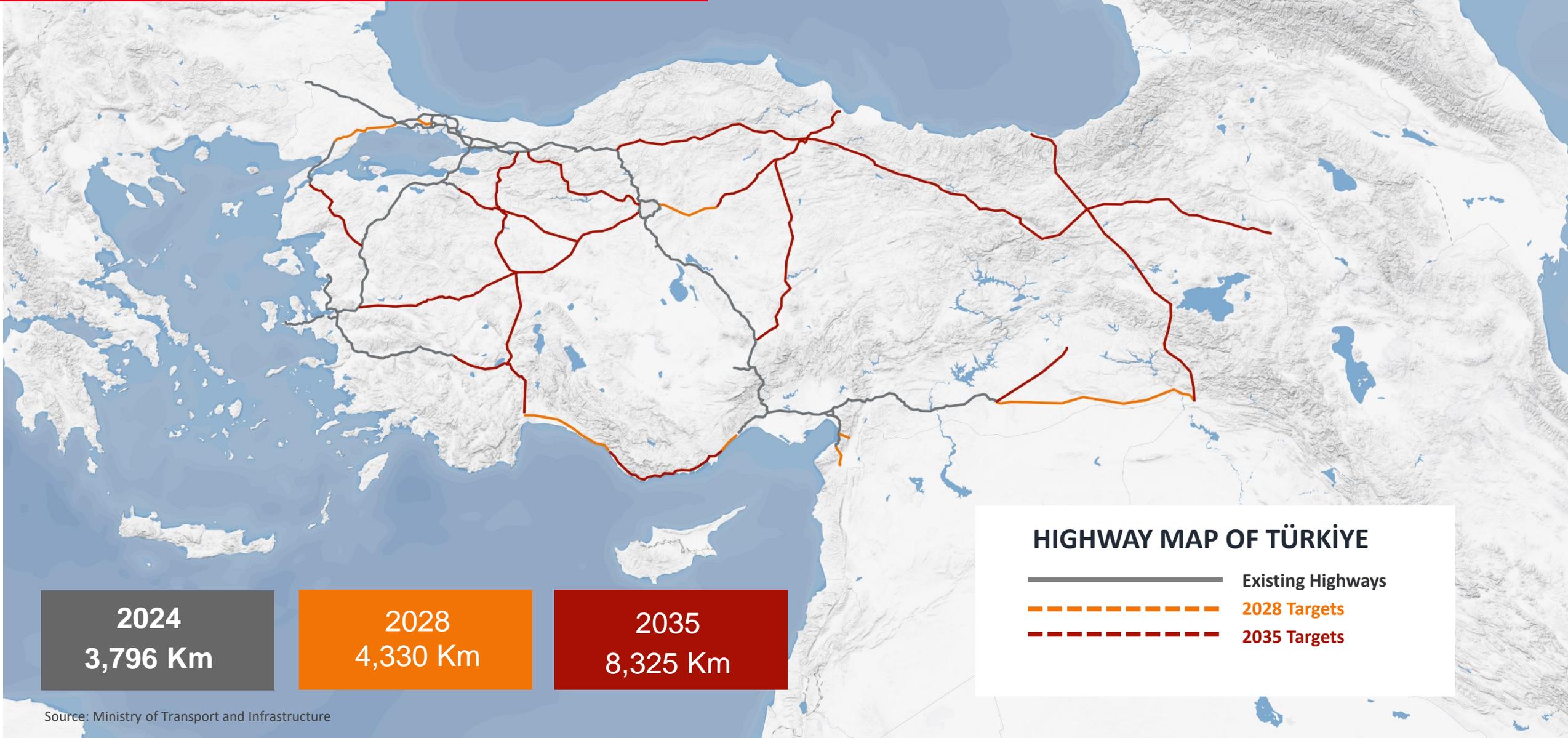
## ECONOMIC BENEFITS OF TRANSPORTATION INVESTMENTS (2003-2022)



SECTORS		 Investment (Billion \$)	 GDP Contribution (Billion \$)	 Production Effects (Billion \$)	 Employment Effects (Annual average, Thousand people)
<b>Road Transport</b> 	<ul style="list-style-type: none"> <li>➤ Highway</li> <li>➤ Divided road</li> <li>➤ Other motorway</li> </ul>	112.4	124.5	225.5	215
<b>Rail Transport</b> 	<ul style="list-style-type: none"> <li>➤ High speed lines</li> <li>➤ Speed lines</li> <li>➤ Conventional lines</li> </ul>	36.8	38.5	83.4	88.8
<b>Air Transport</b> 	<ul style="list-style-type: none"> <li>➤ Airport related investments</li> </ul>	16.2	201.5	439.5	386.4
<b>Maritime Transport</b> 	<ul style="list-style-type: none"> <li>➤ Marinas</li> <li>➤ Freight ports</li> <li>➤ Fishing shelters and yards</li> </ul>	2	22.1	41.8	27.6
<b>TOTAL</b>		<b>167.4</b>	<b>386.6</b>	<b>832.7</b>	<b>784.2</b>

# 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



**2024**  
**3,796 Km**

**2028**  
**4,330 Km**

**2035**  
**8,325 Km**

## HIGHWAY MAP OF TÜRKİYE

- Existing Highways
- 2028 Targets
- 2035 Targets

# 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

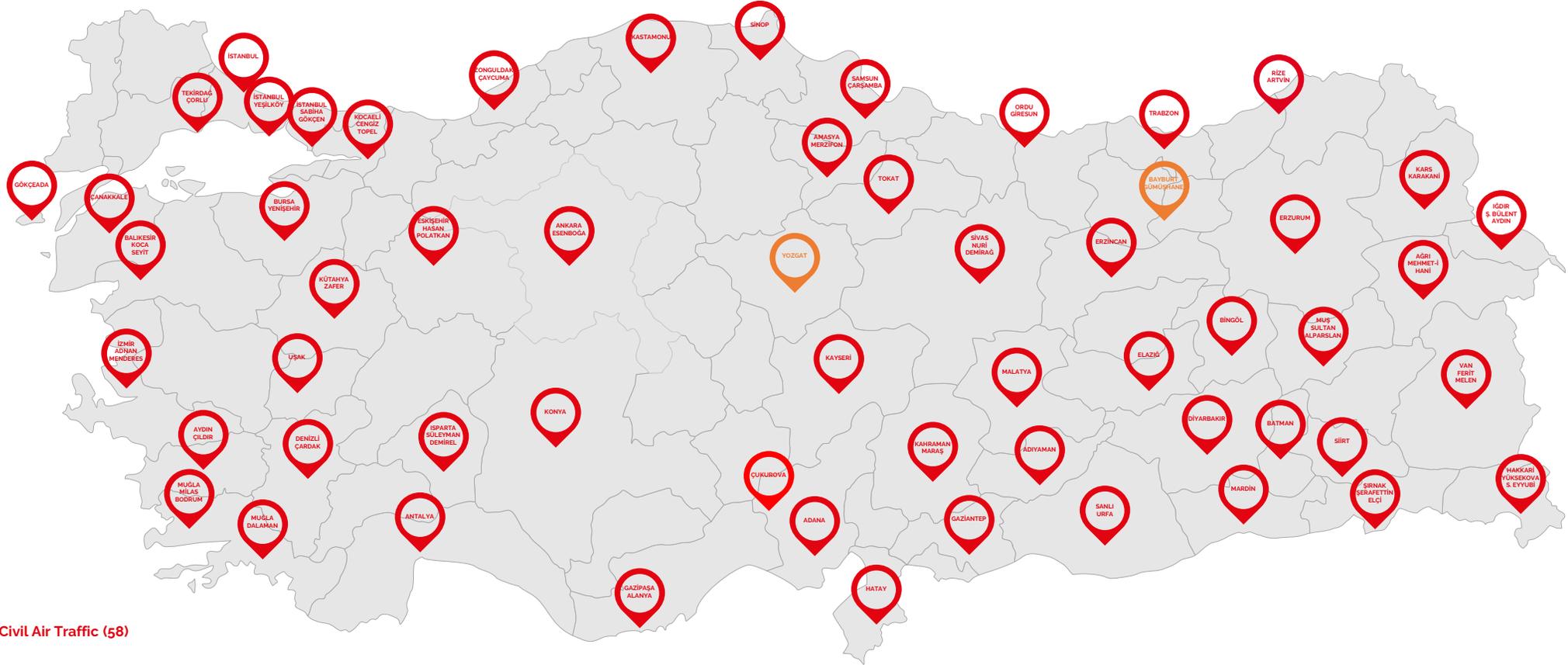
- Existing Railways
- 2028 Targets
- 2035 Targets
- 2053 Targets

# 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 m<sup>2</sup> container storage and handling area



In Service and Completed (14)



Planned (10)

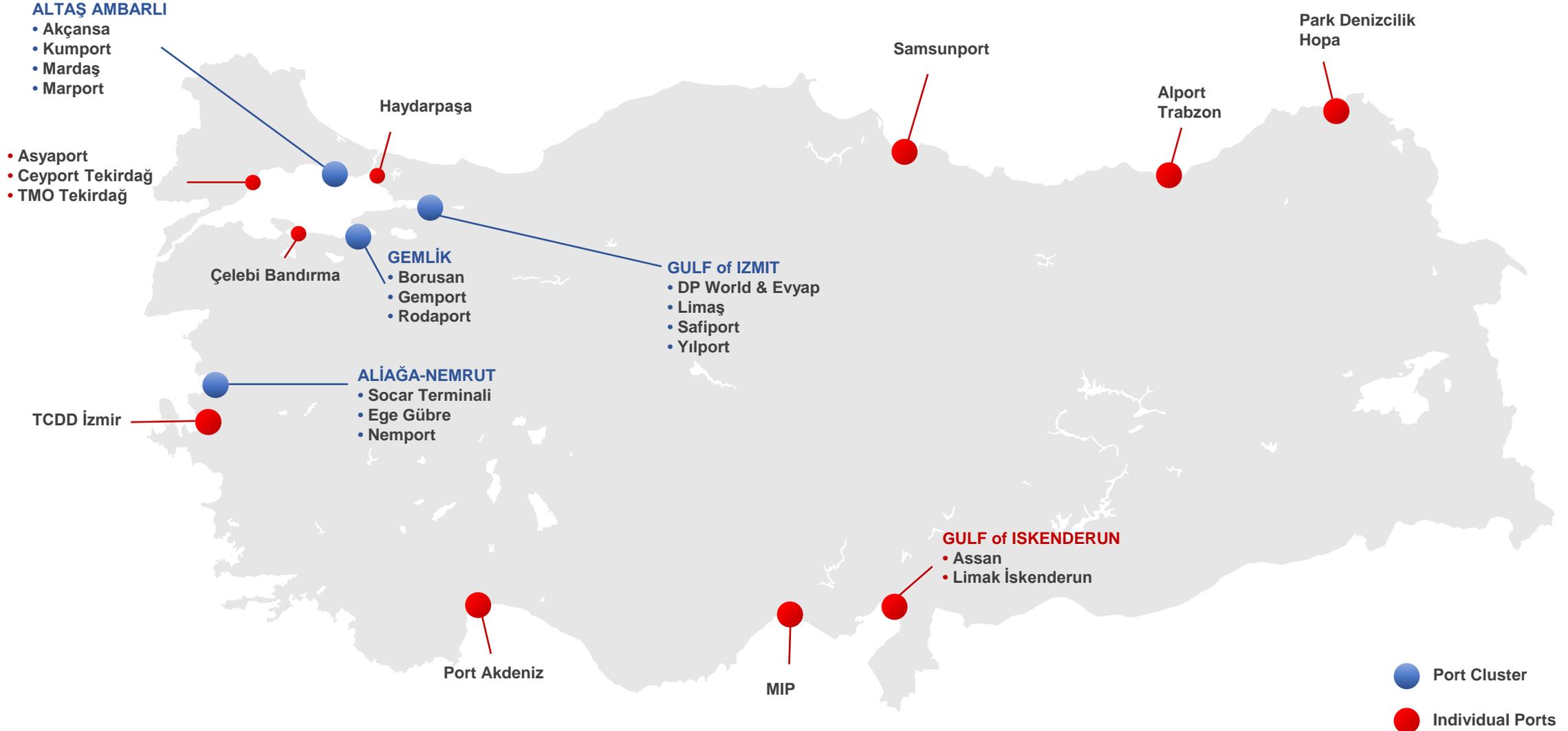


Under Construction (4)



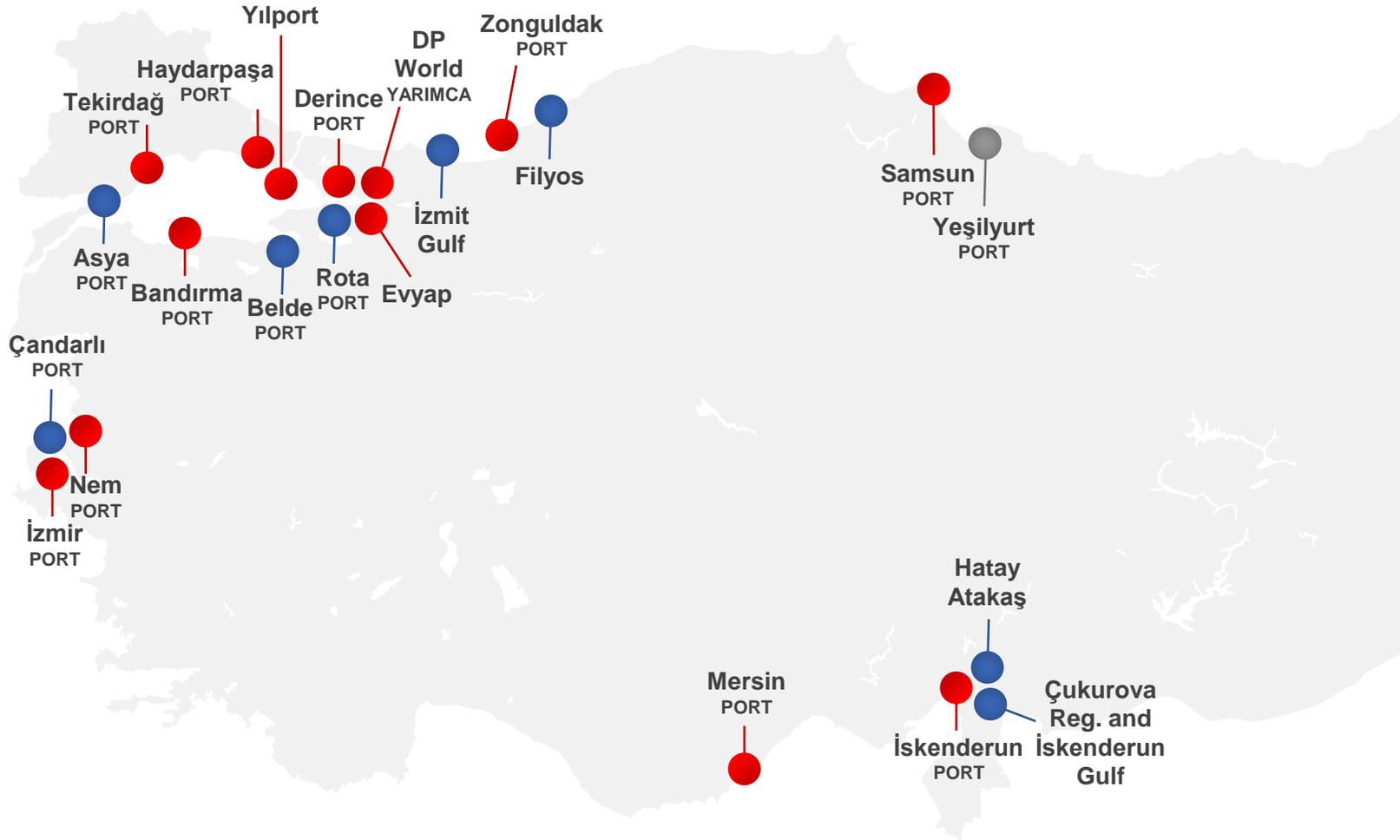
# CONTAINER PORTS IN TÜRKİYE

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.

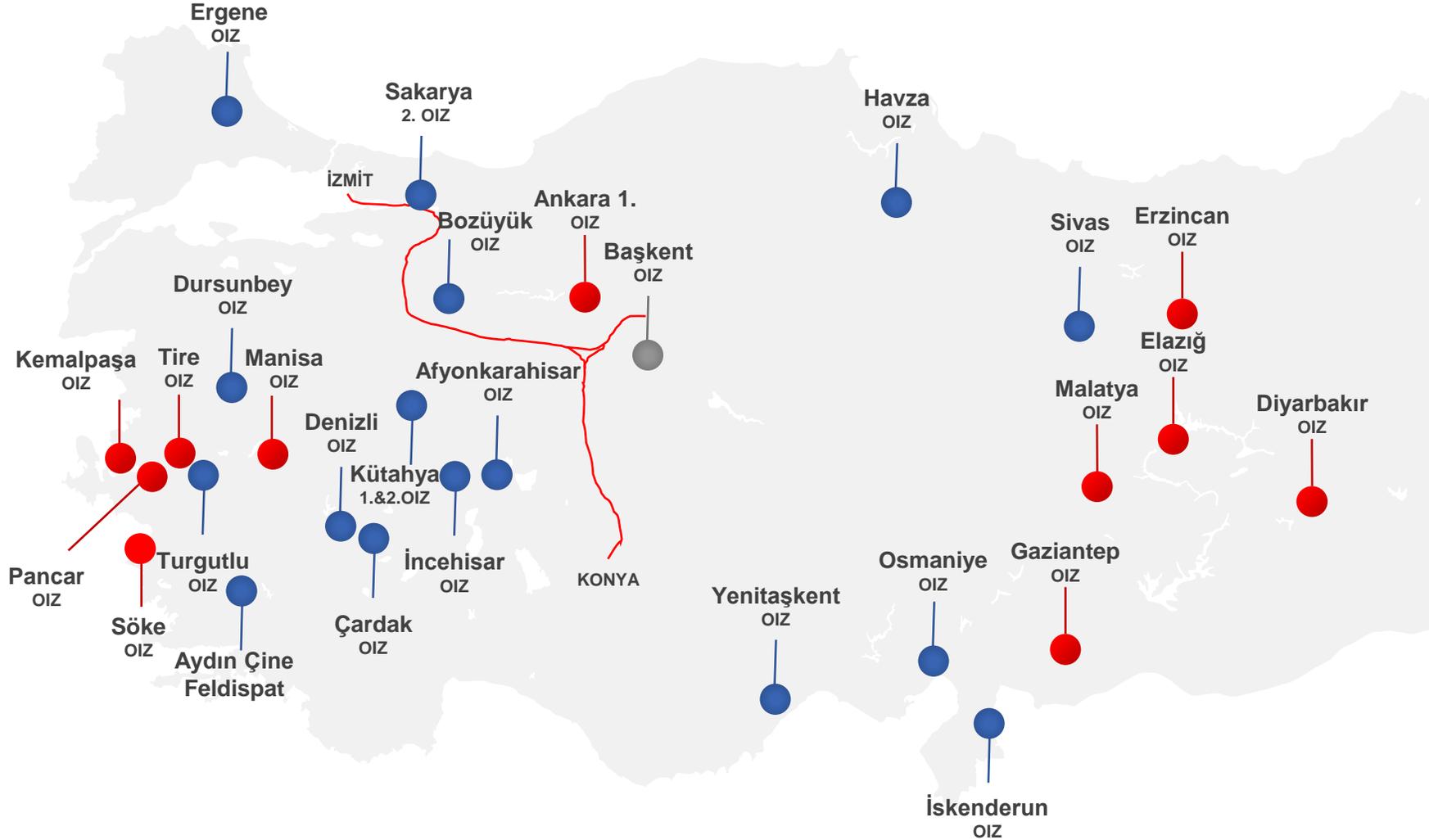


EXISTING LINES	Km	UNDER CONSTRUCTION	Km	PLANNED	Km
H. Paşa	2.5	Samsun Yeşilyurt Gelemen	6.76	Belde Port	1
İzmir	5.3			Rota Port	1.5
Nemport	3.4			Hatay Atakaş	3
Bandırma	5.1			Asyaport	4
Mersin	13.8			Çukurova Reg. and Iskenderun Gulf	36
Samsun	14.6			Filyos Port	12
İskenderun	19.0			İzmit Gulf Industrial 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			İşcehisar 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



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