



MODERN LOGISTICS DEVELOPMENTS IN TURKEY

Cavit UGUR
General Manager





TURKEY



- **Parliamentary Republic**
- **8,333 km Coastline**
- **1/5 Black Sea Coastline**
- **2,750 km Land Boundary**
- **75 Million People**



■ GEO-ECONOMICAL



Gateway from/to

- Europe
- C.I.S.
- Black Sea
- East Mediterranean
- Gulf
- North Africa





■ GROWTH SECTORS

- Automotive
- Energy
- Telecommunications
- Transport & Logistics
- IT
- Textiles
- Iron & Steel
- Defense
- Tourism
- Environment



60% of the Population is below the Age of 30



■ FIRST 10 EXPORT COUNTRIES OF TURKEY

• GERMANY	USD	11,486
• UNITED KINGDOM	USD	7,238
• ITALY	USD	6,508
• FRANCE	USD	6,055
• IRAQ	USD	6,041
• RUSSIA	USD	4,632
• U.S.A.	USD	3,768
• SPAIN	USD	3,564
• U.A.E.	USD	3,337
• IRAN	USD	3,043





■ FIRST 10 IMPORT COUNTRIES OF TURKEY

• RUSSIA	USD	21,599
• GERMANY	USD	17,548
• CHINA	USD	17,180
• U.S.A.	USD	12,318
• ITALY	USD	10,203
• FRANCE	USD	8,176
• IRAN	USD	7,644
• SPAIN	USD	4,839
• SOUTH KOREA	USD	4,764
• UNITED KINGDOM	USD	4,680





■ FOREIGN TRADE

IMPORT: USD 185 Billion

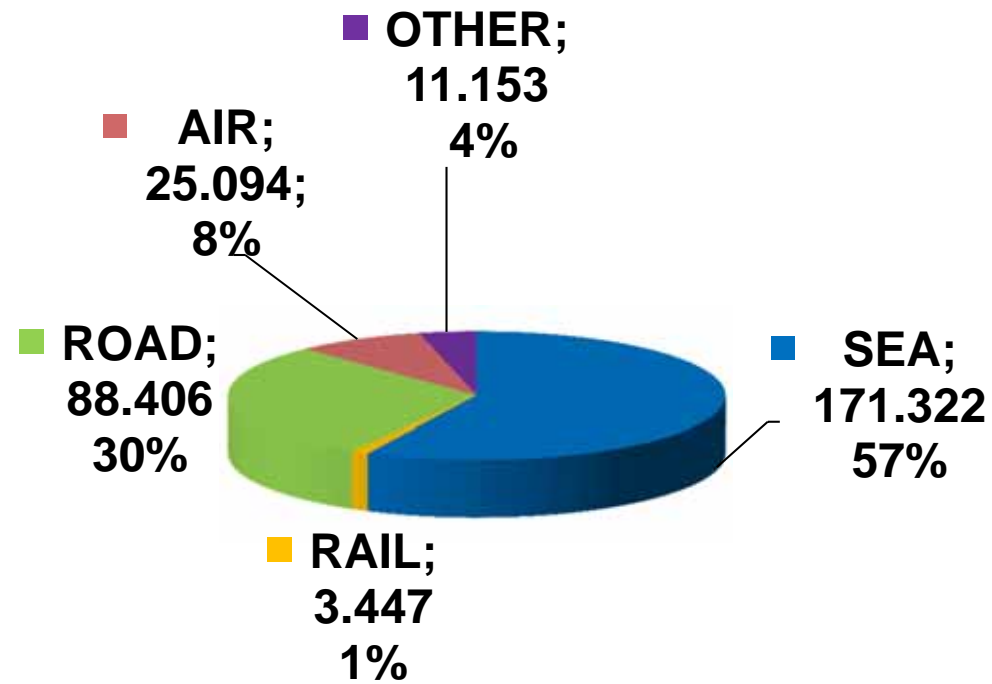
EXPORT: USD 115 Billion

TOTAL FOREIGN TRADE: USD 300 Billion





■ TRANSPORT MODES





SEA TRANSPORT





PORTS IN TURKEY





PORT PRIVATIZATIONS

-Black Sea Ports

- Hopa Port, Park Holding – 1997
- Riport, Rize Investment Holdings – 1997
- Trabzon Port, Albayrak Group – 2003
- Samsun Port, Ceynak Logistics – 2008

-Other Ports

- Derince, Turkerler Group – 2007
- Mersin Port, PSA – 2007
- Bandırma Port, Çelebi Group – 2008
- Antalya Port, Global Investment Holdings- 2010
- Nemport Port, Akdeniz Kimya Group – 2010
- İskenderun Port, Limak Group - 2011





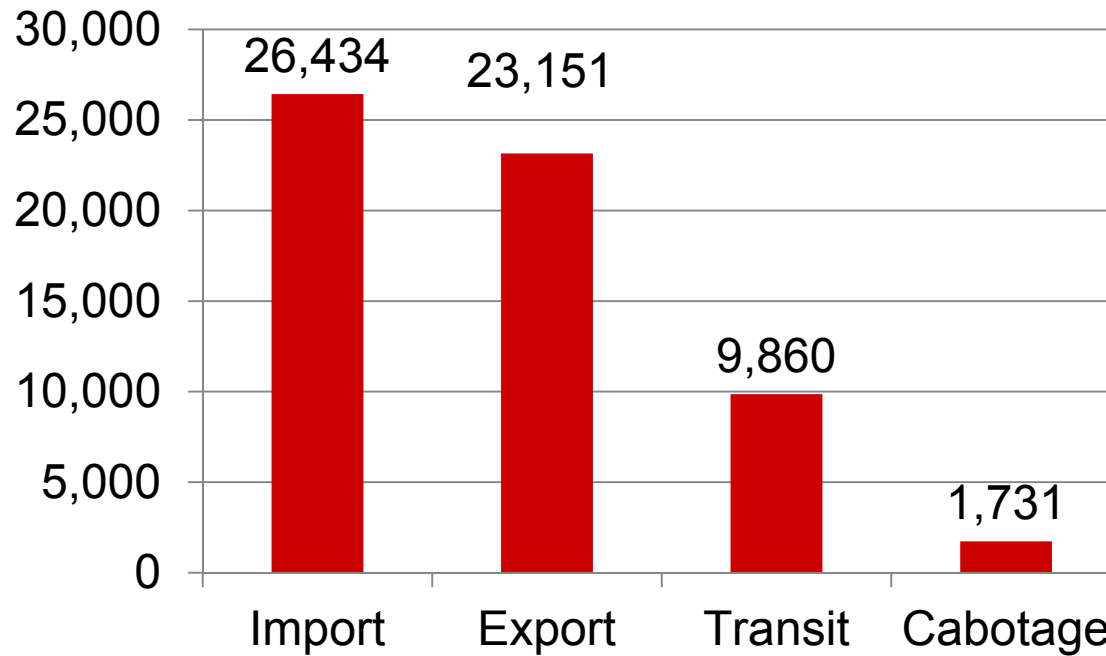
■ TRACECA & THE NEW PORTS IN TURKEY

Filyos – Candarli - Tekirdag





CONTAINER HANDLING IN 2010



Total 5,8 Million TEU

TARGET: 7,5 Million TEU

Total 61.175.130 Tons



ROAD TRANSPORT

Young Fleet with 45,000 Trucks

Turkey is member to:

- TIR system
- CMR Convention
- ADR will be in force as from 2012



To Russia and CIS Major Routes

- by various ro/ro services from **Black Sea Ports to Russian Ports**
- by road via Iran
- by road via Georgia



RO/RO OPERATIONS





■ RO/RO OPERATIONS (2003-2010)

- Samsun Port —————> Novorossiysk (Russia) 164.744 vehicles
- Zonguldak Port —————> Ukraine 143.448 vehicles
- Rize Port —————> Poti (Georgia) 14.794 vehicles
- Trabzon Port —————> Sochi (Russia) 44.572 vehicles





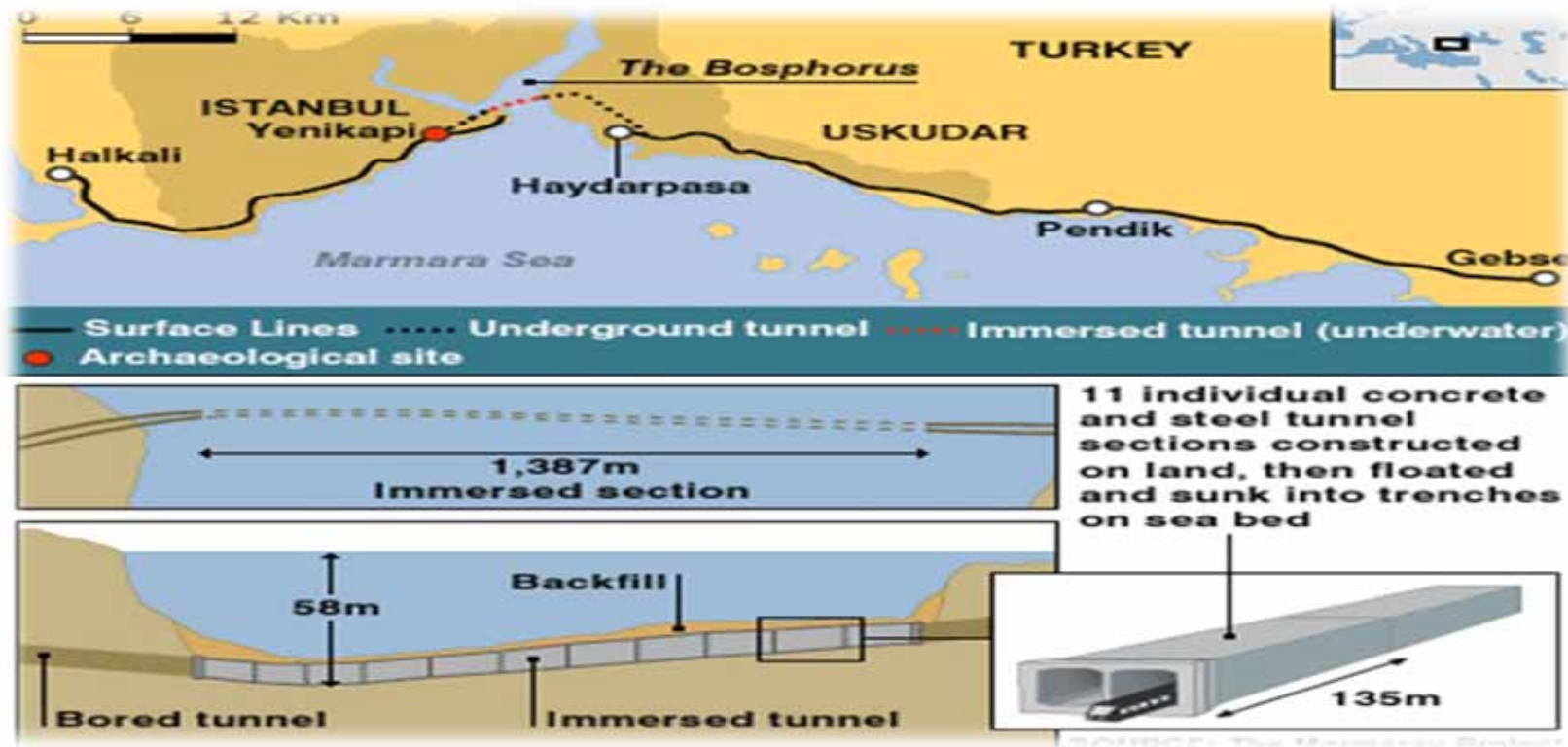
■ RAILWAY TRANSPORT

- Total length of the railways: 10.984 km
- 2,692.016 tons volume
- Monthly block train departures has reached to 3750
- 750 block trains for international operations
- 7 block train routes to Europe





MARMARAY PROJECT





KARS-TBLISI-BAKU





VIKING PROJECT





■ CREAM PROJECT



- **Connecting East and West:**
- West and Central Europe,
- Balkan States
- Turkey
- Greece
- **Total length of the project:**
3.150 km



AIR TRANSPORT

Flag Carrier – TURKISH AIRLINES
4th Biggest Airline in Europe

2010 150 Passenger / 5 Cargo

2011 Target : 162 Passenger /12 Cargo

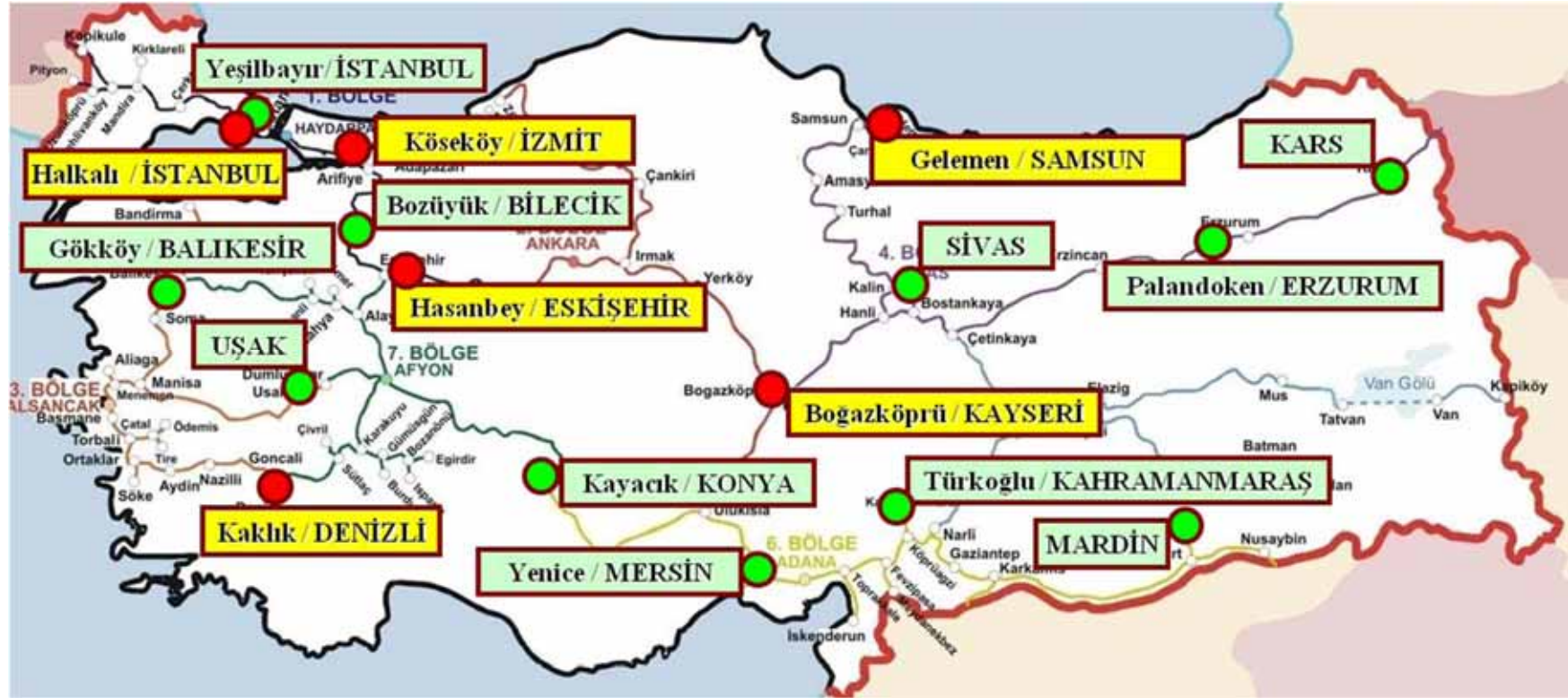
13 % increase in total fleet in 2011



“Best Airlines Europe”



LOGISTICS HUBS





THANK YOU!



Cavit Ugur