

Transport and Logistics Systems Magazine

INTERMODAL

Road • Rail • Sea • Air • Storage • Infrastructure • Supply Chain

2025 • Issue 40

Advantages in Trade
Corridors are Increasing

TÜRKİYE ENTERS A NEW AREA IN LOGISTICS

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LOGISTICS IS UNDERGOING A SERIOUS TRANSFORMATION WITH NEW INVESTMENTS

Globally leading players in the logistics continue to invest in Türkiye. Türkiye is rapidly becoming a regional center for these global players. Both the global conjuncture and Türkiye's geopolitical advantages bring Türkiye to a very important intersection point in trade routes. This global conjuncture also has an important role in the dynamism carried by the logistics sector. The difficulties experienced in the global arena are also causing structural changes in the sector, creating new capabilities while also strengthening the

sector's ability to adapt to changing trade routes.

Logistics undoubtedly consists of land, sea, air and railways as transportation modes. Ports, airports, border gates and warehouses are also the infrastructure of the sector in logistics. It seems inevitable that the positive progress made in manpower, technology and digitalization will accelerate investments in logistics infrastructure.

The logistics sector in Türkiye is also focused on increasing its competitiveness both domestically and internationally, despite increasing cost pressures and problems in accessing financing. In addition to the investments required by intermodal transportation, the quantitative and qualitative renewal of the road fleet stands out in this process. There is no way to remain strong in today's complex economic world without investing in technology, human resources and infrastructure. On the other hand, the climate is also suitable for acquisitions and mergers in the sector. In fact, it is expected that new acquisitions, which gained momentum in 2024, will be added to existing ones in the near future.

In structural change, in addition to fleet and technologic investments, policies that see logistics not only as a transportation but also as a complicated sector come to the fore. Although the transportation aspect of the business is an important branch of the services provided in logistics, warehouse management and contract logistics are becoming more prominent.

Warehouse services are at least as prominent as transportation. In fact, we see that warehouse and storage investments are increasing. Warehouse investments naturally create new opportunities in terms of longer-term contract logistics. This also offers significant convenience for global brands, in terms of proximity to target markets. Considering the momentum of e-commerce, it is clear that warehouse investments will become much more important in logistics. Global logistics companies have also accelerated their warehouse investments in the same direction.

While this whole picture makes the logistics sector one of the most dynamic sectors in the Turkish economy, it also creates a suitable ground for investments, especially digitalization. In a sense, Türkiye is rapidly progressing towards becoming one of the most important players in the global logistics market.

This issue of Intermodal Magazine also includes the views of professional intitutions and non-governmental organizations in logistics. It is also important that these views also outline a promising picture for the sector. ■

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Editor-in-Chief

Issue 40

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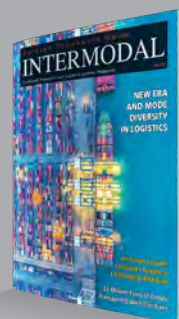
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TÜRKİYE ENTERS A NEW ERA IN LOGISTICS

Abdulkadir URALOĞLU



► For centuries, humanity has kept the flame of trade alive by crossing mountains and oceans. Caravans and sailboats have left their mark on historic routes such as the Silk Road and the Spice Road, and today, giant container ships, freight trains, trucks and airplanes carry this tradition into the future. This history has maximized the value of international corridors as global trade accelerates in the 21st century. Today, as industrial and raw material production rises in China and Southeast Asia, their trade volumes with Europe are growing, making the Asia-Europe trade corridor once again one of the world's most critical arteries. Today, there are three strong routes that continue the legacy of the historic Silk Road: The Northern Corridor crosses Russia from Far East Asia and reaches Europe; the Southern Corridor crosses the Suez Canal and opens the gates of the Mediterranean; and the Middle Corridor, rising in the heart of Türkiye, crosses the Caspian Sea and bridges Europe via Türkiye. Located at the heart of the North-South corridors stretching from the Caucasus to Africa, Türkiye is only a four-hour flight away from 67 countries with a population of 1.5 billion and an economic size of 51.2 trillion dollars. Thus, it rises as a unique geopolitical and economic powerhouse at the intersection of centuries-old trade routes. With this advantageous strategic position, Türkiye is not only the key point of the Middle Corridor, but also plays a decisive role in the Southern Corridor. However, this advantageous position has been tested by global turmoil in recent years. The transformation in supply chains that started with the Covid-19 pandemic gained momentum with the Russia-Ukraine War in 2022, while the inhumane war and massacres launched by Israel in Palestine in October 2023 disrupted the Suez Canal and directed some ships to the Cape of Good Hope. The travel time of ships that normally reach London from China in 35 days increases to 45 days with this long alternative route, which means a 30% increase

in costs and higher insurance costs. We believe that these crises also present a historic opportunity for Türkiye. In order to turn these disruptions in global trade into an advantage, we are strengthening national connections that unite different modes of transportation and we are working hard for uninterrupted, high-quality transportation infrastructures across continents. To this end, we have commissioned the Baku-Tbilisi-Kars Railway Line to increase the impact of the Middle Corridor, and our efforts to realize the Zengezur Corridor are progressing rapidly. We are resolutely developing the Development Road Project, which will carry cargo from China, East Asia and India to Europe via the Persian Gulf. As you know, on April 22, 2024, under the leadership of our President, we took a historic step in this visionary project by signing the "Development Road Project Memorandum of Understanding" with the transport ministers of Iraq, Qatar and the United Arab Emirates. Following this strong start, we held the 1st and 2nd Ministerial Council meetings on August 29th and October 31st in 2024; in particular, we reinforced our commitment by approving the Ministerial Declaration at the 2nd Council. Preliminary designs for new rail and road infrastructure investments have been completed, but we are rapidly advancing critical steps such as ground analysis and precise measurements for final designs. The Development Road, which will connect Iraq's Faw Port to Türkiye and then to Europe via 1200 kilometers of railway and highway, will usher in a new era in regional trade. This line, which will add strength to global trade by combining east-west corridors on a north-south axis, will start from the Persian Gulf and extend to Türkiye via Baghdad and Mosul, and will be integrated into Europe with 2092 kilometers of railway and 1923 kilometers of highway. We have planned 727 kilometers of new railway and 331 kilometers of highway investment for this project. This giant project, known as

the "New Silk Road", will reinforce Türkiye's geopolitical and economic weight. In Faw Port, which is currently the heart of the project, the first phase work has gained momentum: 5 main berths have been successfully completed, while construction of the tunnel and roads connecting the main berth to the Khor Al-Zubair waterway and Um-Kasr Port is underway. We aim to complete this first phase by the end of this year, so that the cornerstones of the project are firmly in place. In Türkiye, the transformation of the railway corridor is underway: in some sections we are commissioning high-speed rail lines, while in others we are continuing uninterrupted electrification and signaling works. At the same time, the design phase for the new railway line under the project is largely complete, and we are now meticulously shaping plans for the construction process. In the coming period, we will come together with our project stakeholders to clarify the management and financing structure. In addition, we will soon sign the final agreement on the Development Road Project with Iraq, marking another important milestone in the realization of this strategic initiative. These steps will be a milestone that will further strengthen Türkiye's leading position in regional and global trade and bring all Development Road stakeholder countries to the top. I would like to emphasize that the supply chains of the future will be built on resilience, adaptability and environmental awareness. Türkiye is determined to take the lead in this great change, joining hands with international partners through pioneering projects such as the Development Road. With cooperation, we can rebuild the future of global trade and create a more prosperous, sustainable and inclusive world. As Türkiye, we will always prioritize a transportation network that strengthens connections not only within our borders but also in the global arena. ■



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LOGISTICS: THE KEY TO EXPORT SUCCESS

Mustafa GÜLTEPE
Chairman



► Logistics stands as an indispensable pillar of export. We do not merely regard logistics as a supportive element of our export journey, but as the very key to its success. We are fully aware that it is impossible to achieve ambitious export targets without the backing of a robust logistics network. With this awareness, we remain steadfast in supporting our exporters not only in the realms of production, marketing, innovation, branding, and design, but also in logistics processes-adding speed to their pace. The impact of logistics on exports is evident in concrete data. According to research, even a single day's delay in delivery can lead to an approximate 7% decline in a country's time-sensitive product exports. This striking fact clearly underscores the role of the logistics sector in competitive strength. For this reason, as part of the export community, we consider the advancement of our logistics sector among our strategic priorities. As a testament to this importance, we are organizing the TİM Customs and Logistics Workshop with the participation of relevant stakeholder institutions and representatives. Additionally, under the auspices of the Coordination Council for the Improvement of the Investment Environment (YOİKK), we are supporting efforts to improve Türkiye's ranking in the Global

Logistics Index. In 2023, we rose to the 38th position in this index. Our goal is to elevate Türkiye into the top 10 countries in this field. A strong logistics performance generates positive impacts in many areas- from cost reduction and enhanced operational efficiency to increased customer satisfaction.

Over the past decade, Türkiye's foreign trade volume has witnessed a remarkable increase. In 2015, our trade volume stood at \$364.6 billion, and by 2024, it reached \$606 billion. During this period, our exports grew by 73.4% and imports by 61.5%. In 2024, our average export distance reached 3,000 kilometers. Within the framework of the Far Countries Strategy, we aim to raise this figure to the global average of around 4,700 kilometers. Naturally, throughout this process, logistics will continue to be one of our most critical partners. During this period of expanding foreign trade volume, our customs and logistics sector has proven itself with distinction. In the past ten years, our export cargo volume has nearly increased by 1.5 times. According to the Special Trade System, we exported a total of 154.715 million tons of goods in 2024, marking a 3.6% increase. Of our \$262 billion worth of exports in 2024, 56% was transported by sea, 33% by road, 10% by air, and approximately 1% by rail.

These positive developments are also reflected in our export of transportation services. In 2024, our country's total transportation services exports reached \$39.9 billion. During the same period, freight services exports amounted to \$13.8 billion. Both areas recorded increases compared to the previous year. Türkiye's capabilities in this domain have also affected the activity at our ports. In 2024, 4.988 million export containers were handled at our ports. In the first two months of 2025 alone, this figure stood at 794,000 containers. These figures clearly demonstrate the growing momentum and potential in our logistics sector. In the coming years, we expect this potential to strengthen further. We have embarked on the second century of our Republic with the goal of positioning Türkiye among the top 10 exporting countries. We are targeting \$375 billion in goods exports by 2028. Accordingly, it is of great importance that we expand our logistics capacity in alignment with these goals and accelerate our compliance with the Green Deal criteria. In the forthcoming period, as we work towards our export targets with collective wisdom, we will continue to stand shoulder to shoulder with the logistics sector to establish a more efficient, faster, and more sustainable trade ecosystem. ■

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Chairman



► Every crisis brings along new opportunities. All you have to do is to be prepared and take correct steps. 2025 has started with major uncertainties in terms of global trade. The additional customs taxes imposed and the protective policies implemented by the US President Donald Trump in his second tenure have exposed the global economy to cold winds. The geopolitical tensions in the Middle East also adversely affects the course of global trade. In addition to protective policies and trade wars, the governments reshape their trade policies by focusing on economic security and climate goals. USA, European Union and other countries increase their industrial policies and subsidies and direct their trade flows. China, on the other hand, continues its incentive policies to maintain its power in exports. However, these steps may further increase the uncertainties in global trade. As of 2024, the trade deficit of USA is increasing while the foreign trade surplus of China has expanded and the EU recorded trade surplus because of the changes in energy prices. For Türkiye, 2025 offers significant

opportunities in terms of logistics and trade. The "Development Road Project" carried out by the Republic of Türkiye Ministry of Infrastructure and Trade for some time was completed and launched as integrated to TIR system. The first transportation which originated from Türkiye to the United Arab Emirates via Umm Qasr Port in Iraq took only 8 days. I believe this to be a great opportunity for our sector.

This project has significantly facilitated the transit transportation via Iraq. Having become fully operational as of April 1, 2025, the TIR system will accelerate the trade flow from Türkiye to Gulf countries and Asia. This development will further increase the strategic importance of Türkiye in terms of logistics and will provide her with a more powerful location in regional trade. The geopolitical position of Türkiye makes her an important logistics hub for global trade. Acting as a bridge between Europe, Asia and the Middle East, Türkiye has the potential to increase her trade volume with modern infrastructure projects and logistics corridors. The investments made especially in

transportation render Türkiye more attractive in terms of transit trade.

Even though 2025 started with serious difficulties for the global trade, it yields great opportunities for Türkiye. While the global trade wars and geopolitical risks create uncertainties, Türkiye's increasing its effectiveness in regional trade thanks to new logistics projects serves as an important strategy that can contribute to the economic growth. Goods worth of 107 billion US dollars were transported with 2 million and 95 thousand export shipments made from Türkiye last year. The direct access to more than 70 countries by road shows how critical the road transportation is for our country. To conclude, it is clear that the trade activities need the logistics sector and the economic sustainability needs the trade activities to exist. The strengthening of the road transportation and creation of alternative routes will further increase the role of Türkiye in global supply chain and transform her into a logistic hub in the new world order. ■



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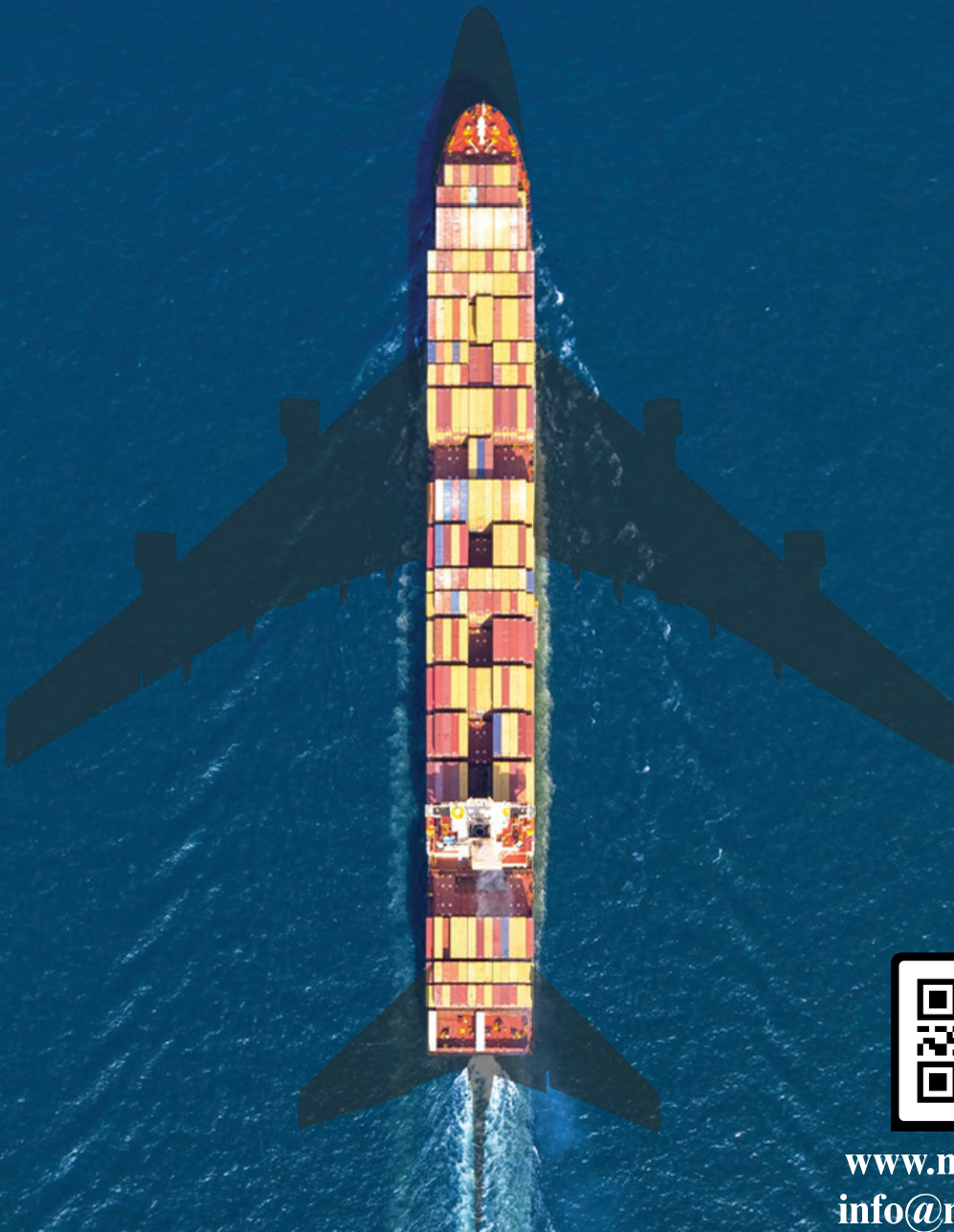
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PORTS OF TÜRKİYE: RESILIENCE, GROWTH, AND A SUSTAINABLE VISION FOR THE FUTURE

Hamdi ERÇELİK
Chairman



► The maritime transport sector faced unprecedented challenges in 2023 and 2024. Attacks on the Red Sea trade route originating from Yemen, drought in the Panama Canal caused by climate change, and regional crises driven by geopolitical instability and conflicts in Eastern Mediterranean countries have created serious disruptions in global maritime routes. These developments, emerging even before the logistics chain fully recovered from the COVID-19 pandemic, have made it essential for ports to rapidly adapt to external shocks. Despite all these global disruptions, Turkish ports have demonstrated strong performance. Although there was a 3.97% decline in total cargo in 2023, the sector showed a swift recovery in 2024. In the first half of the year, container throughput increased by 11.2% compared to the same period of the previous year. This trend reflects growing international confidence in Turkish ports and the maritime sector. According to data from the Ministry of Transport and Infrastructure, Türkiye's ports handled 531.7 million tons of cargo and 13.5 million TEUs in 2024. These figures indicate not only robust infrastructure capacity but also the sector's resilience and crisis management capability. A 5.04% rise in import cargo and a 35.7% increase in transit cargo clearly show Türkiye's expanding

role in international supply chains. Due to the security risks in the Red Sea, rerouted vessels have positioned Türkiye as a safe and efficient logistics hub between Asia and Europe. As the Turkish port sector navigates this exceptional period, the Turkish Port Operators Association (TÜRKLİM) has remained at the forefront of transformation-guiding the sector through policy development, strategic visioning, research, and public-private partnerships to support sustainable growth. Looking ahead, Türkiye's port vision for 2050 forecasts container volumes reaching 41.5 million TEUs and total cargo volumes surpassing 1.3 billion tons. The key to sustainability in the Turkish port sector lies in ensuring that port capacities can meet the rising demand in import, export, and transit handling. According to TÜRKLİM's strategic reports, some major container ports are expected to reach their capacity limits by 2028–2030 if current growth trends continue. Therefore, new capacity investments are critical to ensure long-term sustainability. In this context, enhancing multimodal connectivity-especially through railway links and hinterland integration-is also essential to support capacity expansion. At the same time, Turkish ports are making notable progress in green transition and digitalization.

Currently, only 20 out of 194 international ports in Türkiye hold Green Port Certification. However, with TÜRKLİM's leadership, efforts are underway to significantly increase this number. Investment projects focusing on cold ironing, emission reduction, waste management, and renewable energy use are being developed to meet the certification criteria. Another important objective is ensuring that Türkiye's ports, as key interfaces in global supply chains, are fully integrated with EU-compliant digital and security infrastructure. To achieve these goals, infrastructure investment, regulatory reforms, and digital solutions must progress in parallel. For this reason, TÜRKLİM advocates reforms such as extending port lease durations, streamlining investment approval processes, and incentivizing strategic projects. These reforms are vital to attract long-term private investment. The Transport Logistic Fair in Munich, June 2025, presents a unique opportunity to showcase Türkiye's transformation at the global level. Türkiye aims to establish new partnerships, deepen existing ties, and highlight its strategic role in logistics on this international platform. With its strategic location, resilient port operations, and forward-looking vision, Türkiye is set to remain not only a transit point in the global logistics chain but also a permanent and indispensable player beyond 2025. ■

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SUSTAINABLE TRANSPORTATION AND THE STRATEGIC ROLE OF RAILWAYS

Onur KÜÇÜKAKDERE
Chairman of the Board



► In today's world, where global trade is increasingly becoming digitalized and sustainability standards are emerging as defining elements, the logistics and transportation sector is undergoing a significant transformation. Positioned as a key connection point between Europe, Asia, and the Middle East, Türkiye is working to modernize its transportation policies to be environmentally friendly and aligned with international standards in order to fully leverage this strategic advantage. In this context, railway transportation lies at the heart of sustainable logistics, offering low carbon emissions, cost advantages, and efficiency in long-distance freight movements. The European Union's Green Deal policies prioritize eco-friendly transport models by aiming to reduce carbon emissions, thereby accelerating the green logistics adaptation process for regional countries. Strengthening the integration of Türkiye's railway network with international logistics corridors will enhance its export potential, particularly in light of its commercial relations with Europe. In recent years, various global projects have further emphasized

Türkiye's strategic logistics role. China's Belt and Road Initiative (BRI), the Middle Corridor, the Baku-Tbilisi-Kars (BTK) Railway Line, the Trans-Caspian International Transport Corridor, and the Europe-connected Trans-European Transport Network (TEN-T), along with the Zangezur and Development Road projects, all support Türkiye's vision of becoming a regional logistics hub. Under the European Green Deal's goal of becoming carbon-neutral by 2050, carbon border adjustment mechanisms (CBAM) and sustainable logistics policies are being implemented. While promoting railway transport, the EU imposes additional costs on transport modes with high carbon emissions. In this regard, transporting export goods to Europe via rail will not only reduce Türkiye's logistics costs but also help avoid additional financial burdens such as carbon taxes. Intermodal transportation projects targeting Germany, France, Italy, and Central European countries will provide exporters with a competitive edge by minimizing the carbon footprint. At this point, enhancing the integration of railways with logistics centers and ports becomes a critical factor.

Türkiye has recently made significant investments in strengthening its railway infrastructure. To become more competitive in international rail transport, integrated logistics solutions must be developed, and private sector investments in this area should be encouraged. Key strategic priorities can be outlined as follows:

- Increasing the share of rail transport in Türkiye's transit traffic between Asia and Europe,
- Focusing on carbon-neutral transport projects in line with green logistics strategies,
- Strengthening the integration of the railway network with port connections and logistics centers,
- Establishing incentive mechanisms to support private sector investments in railways.

With these steps, Türkiye can fully capitalize on its logistical advantages in international trade, creating a sustainable and eco-friendly transport model, and positioning itself as a key global player. Railway transport is not merely a logistical alternative; it is a strategic investment in the future. By implementing this investment timely and effectively, Türkiye can enhance its competitive edge in global trade. ■



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TÜRKİYE BECOMES A SAFE TRANSIT POINT IN THE GLOBAL SUPPLY CHAIN

Barış DİLLİOĞLU
Logistics Business Council President



► As of 2025, the logistics sector has entered a new era marked by the reshaping of global trade, accelerated digitalization, and the prominence of sustainability-focused policies. In this transformation process, Türkiye stands at the center of regional and global logistics networks, leveraging both its geographical advantages and its evolving infrastructure.

According to the press release issued by the Ministry of Trade on February 19, 2025, Türkiye's total service exports reached USD 115.2 billion in 2024. From this total, USD 38.9 billion was generated by the logistics and transportation sector, accounting for approximately 34% of total service exports. The Ministry aims to increase this value to USD 48 billion by the end of 2025. These targets are part of Türkiye's strategy to expand its share in the global logistics market and enhance the sector's competitiveness. Positioned at the crossroads of Europe, Africa, Central Asia, and Russia, Türkiye is at the heart of a trade volume worth nearly USD 10 trillion. Additionally, within a four-hour flight radius, Türkiye can access 67 countries with a combined GDP of USD 30 trillion and a population of 1.3 billion consumers. These figures, along with the country's strategic location, firmly establish Türkiye as a critical logistics hub along both east-west and north-south axes.

In recent years, Türkiye has significantly strengthened its logistics infrastructure through substantial investments. The

number of logistics centers supporting intermodal transportation has increased, port capacities have been expanded, and railway networks have been modernized. These advancements enable Türkiye to play a more active role in transit transportation. For instance, under the Türkiye - Rail Logistics Improvement Project, the Ministry of Transport and Infrastructure continues its efforts to construct strategic railway connection lines, enhance the efficiency of rail freight transport, and improve the operational performance of logistics centers. Moreover, 11 out of the 25 planned logistics centers nationwide have been commissioned. Once all centers are operational, they will provide an additional transport capacity of 35.6 million tons and 12.8 million square meters of container storage and handling areas. According to the Ministry's Transport and Logistics Master Plan 2053, Türkiye aims to extend its railway network to 28,590 kilometers and increase the number of airports to 61 by 2053. This plan is designed to reinforce Türkiye's logistics infrastructure and transform the country into a regional logistics hub.

Disruptions in supply chains caused by global geopolitical crises have increased the need for secure and flexible logistics solutions. Türkiye, thanks to its geostrategic location, is at the forefront of alternative trade routes with projects such as the Central Corridor and the Development Road, while DEİK Logistics

Business Council supports this process by focusing on areas such as digitalization and sustainability.

Established in 2013, DEİK Logistics Business Council carries out projects in areas such as digitalization, sustainability and infrastructure development in order to increase the effectiveness of Türkiye's logistics sector in the international arena. The Council aims to strengthen the sector's global integration and increase the presence of Turkish companies in international value chains. As the DEİK Logistics Business Council, we had the privilege of representing the Turkish logistics sector on an international stage for the first time at the Transport Logistic Fair in 2019. In 2025, we are proud to once again participate in this prestigious event with the Turkish Logistics Pavilion. From June 2-5, 2025, at the Transport Logistic Fair in Munich, we will showcase the strength and potential of the Turkish logistics sector at Hall A4, Stand 123/222. Our pavilion will serve as a vital platform for Turkish logistics companies to establish global partnerships while promoting Türkiye's strategic location and logistics capabilities to the world. Moving forward, the DEİK Logistics Business Council remains committed to leading sectoral transformations, developing projects centered on digitalization and sustainability, and further strengthening the Turkish logistics sector's position within the global value chain. ■



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POSITIONING TÜRKİYE AS A LOGISTICS POWERHOUSE

Berna AKYILDIZ
Chairman of the Board



► As someone who has been actively involved in the logistics and transport industry for over two decades, I have witnessed Türkiye's transformation from a transit country into a rising logistics hub. Today, we are at a unique turning point-driven by evolving global trade routes, digital innovation, and sustainability imperatives.

In my view, Türkiye's logistics potential lies not only in its strategic geography, but in its ability to anticipate trends, invest wisely, and most importantly, act with a unified national vision.

Türkiye's strategic edge: From geography to geopolitical responsibility

Türkiye's location -connecting Europe, Asia, the Middle East, and North Africa- is an undeniable advantage. But this geography is only meaningful when supported by strong logistics infrastructure and harmonized policy frameworks. The Middle Corridor, the expansion of the rail freight network, and intercontinental links like the Marmaray and BTK Railway are not just infrastructure projects—they are strategic tools that position Türkiye as a logistics bridge between continents.

Sustainability: A strategic priority, not just a trend

As Vice President of WiLAT Global and a strong supporter of ESG integration in logistics, I am proud to see Türkiye

take steps such as the Green Logistics Certificate and investments in clean transport modes. But we must go further. We need to design future-ready logistics parks powered by renewables, expand our electrified rail corridors, and support emission reduction across the entire supply chain.

Green logistics is not only a climate imperative—it is a strategic differentiator in an increasingly responsible global trade environment.

Digital transformation: Not a choice, but a necessity

Digitalization is reshaping supply chains. Turkey's logistics industry has embraced this, but we are still in the early stages. Artificial intelligence, blockchain and autonomous technologies should be widely used, not just piloted. At Transtas, we have seen digital tools shorten delivery times, reduce costs and improve customer experience. The government's digitalization efforts are promising, but alignment with global standards can be achieved through public-private collaboration.

Empowering talent: The engine of logistics excellence

As advanced as the infrastructure and digital tools are, our sector is people-based. Turkey has a young population, but we need more expertise, cross-sector skills and diversity in leadership. By launching the "5 Years, 5,000 Women Drivers" campaign with WiLAT Turkey,

we aim to increase the participation of women in logistics. Cultivation, inclusion and leadership development are critical for Turkey's logistics future.

Looking ahead: Türkiye's 2030 vision and our responsibility

My vision is to see Türkiye ranked among the world's top 20 logistics nations by 2030 -not just on the Logistics Performance Index, but in terms of innovation, sustainability, and workforce development. I also believe Türkiye is uniquely positioned to serve the growing logistics demand of Central Asia, the Gulf, and Africa- regions where I have had the privilege of working extensively. To achieve this, we must:

- Strengthen regional and international cooperation,
- Expand smart logistics zones and bonded trade centers,
- Invest in green and digital corridors,
- And unite academia, government, and industry around a shared logistics master plan.

Conclusion: Türkiye is not just a crossroad—it is a catalyst

In this critical decade, Türkiye is no longer a passive route—it is becoming a strategic catalyst in global supply chains. Through visionary leadership, collective effort, and responsible innovation, we can shape the logistics future not only for Türkiye, but for a more connected and sustainable world. ■



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ADVANTAGES OF TÜRKİYE IN TRADE CORRIDORS ARE INCREASING

İlker ALTUN

Managing Director - Aysberg Group



► Although the WTO adopts general and binding principles to ensure that global trade takes place freely, protectionism continues to be the most important trend in world trade. Visible or invisible protectionism and subsidies also pave the way for trade wars in the current meaning. Today, the US on one side, the EU on the other, and China in the Far East axis are the main players in trade wars. The new period initiated by the Trump administration in the customs regime and tariffs as of 2025 has changed the direction and size of trade wars. While the US protects its own economy with high customs duties, the EU is trying to protect the union economies with a restrictive framework, mainly in line with the transition to a green economy. These three major blocs, which direct the world economy with their production power, technological superiority and contribution to global GDP, also determine the competitiveness and power of individual economies. One of the most fundamental problems of the global economy today is the tensions created by trade wars. The difficulties experienced in trade routes and supply chains due to regional conflicts, embargoes and sanctions constitute another leg of the general economic problems. The Red Sea route, which serves the passage of 12-13 percent of world trade, cannot provide a healthy and meaningful service to the world supply chain since

the crises started. Today's trade routes are guided by customs walls, border crossing problems, quotas, fluctuations in freight markets and embargoes, which are the most important elements in the formation of competition, cost management and free trade. Ships use a nostalgic route like the Cape of Good Hope. This leads to both delays in the supply chain and increases in costs. The supply-demand imbalance in container markets and excessive concentration in ports are another negative aspect of the matter. The Trump administration offers important indicators in terms of understanding the world of 2025. High customs walls and protectionism certainly do not paint a picture that is in line with the spirit of globalization. The EU, on the other hand, is strongly committed to its own reason for existence and has a natural protectiveness, and has the power to impose its own rules on other countries in foreign trade. China, on the other hand, has gained an advantage in trade wars by developing its effectiveness in the world supply chain, in addition to its large economic structure, competitive workforce and ability to produce in every field. In short, free trade remains a very theoretical concept today. Another consequence of globalization is that it creates interdependence. Today, the US buys as much as it sells. EU countries are also dependent on foreign countries in many areas, including energy and food. Dependence

on foreign countries in energy is the most important problem of many economies... When viewed from this perspective, interdependence will be the most powerful lever for the healthy functioning of the global economy and for free trade to guide economies. Either we will set off towards another world order or the Trump administration and the EU will soften the obstacles they have erected in front of free trade over time. Whether we look at it from a global or regional perspective, trade routes and corridors will always be necessary. From this perspective, Turkey really has a very important place on the global economic map. It is a fact that supply chain problems are always on the agenda. It should be emphasized that Turkey is an important balancing element in the east-west axis in the world supply chain security. Turkey is right in the middle of the trade corridors targeted by the EU and China, two important blocs in the trade wars. This intersection is an important advantage for the Turkish economy. The logistics sector, which is the most important stakeholder of the supply chain, will continue to draw strength from this dynamism. The search for sustainable logistics corridors in terms of world trade will undoubtedly continue from now on. However, Turkey, which can produce alternatives to all corridors around it and most of which are based on more rational justifications, must also be an active player in projects outside of itself. ■

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TÜRKİYE PROVIDES ROAD TRANSPORT SERVICES TO 70 COUNTRIES

► The Minister of Transport and Infrastructure Abdulkadir Uraloğlu shared his comments on the road transport. Focusing on the sector, Minister Uraloğlu commented: "Today we transport to around 70 countries over 3 continents by road transportation. Today 33 percent of our exports are carried out with road transportation. Our exports by road reached 71.5 billion US dollars in the first 10 months of 2024. This year 140.9 million passengers were transported by road in 13.8 million trips in paid travels or touristic tours. Around 900 thousand drivers are employed in the road transport sector." The Minister of Transport and Infrastructure Abdulkadir Uraloğlu evaluated the data on the road transport sector. Minister Uraloğlu told that "Around 900 thousand drivers work in the road transport sector of Türkiye. These drivers serving in every field for long distance driving to intercity transportation are the backbone of all processes from production to marketing and to exports." Telling that as Ministry, they place importance on digitalization in order to

improve the quality in the sector, Uraloğlu reminded that they launched the Electronic Transport Tracking and Inspection System (U-ETDS) in 2018. Uraloğlu further noted that "U-ETDS was a turning point for the digitalization and registration of the transport sector. It became more effective to use as the companies started to enter the trip and passenger information to the system. According to U-ETDS, a total of 13.8 million trips were organized on roads for ticketed travels or touristic tours in 2024 and 140.9 million passengers were transported on these journeys. U-ETDS has not only increased efficiency but also aligns the transportation market with international standards." Pointing out that carriers can perform many transactions on e-Government in order to facilitate their operations thanks to digitalization, Uraloğlu added that: "Many transactions such as issuance of certificates of authorization and addition of vehicles to the certificate of vehicles issued as attached to the certificate of authorization can be performed on e-Government Portal. 67.9 percent of the certificate of authorization

issuance transactions and 83.36 percent of the vehicle addition transactions were performed on e-Government Portal as of 2024."

Noting that they as the Ministry continue to improve the road transportation, Uraloğlu further commented: "We provide road transport services to around 70 countries on 3 continents. We have road transport agreements with 60 countries. In addition to the Road Transport Agreement signed with China, we signed another agreement with Qatar on November 14, 2024. We continue to take necessary steps to improve transports."

Sharing also the data on the exports in the road transport sector, Uraloğlu further made the following remarks: "Today 33 percent of the total exports are made by road. Our exports by road reached 71.5 billion US dollars in the first 10 months of 2024. The number of annual export journeys increased over 1.6 million. We owe this success to the devotion and efforts of around 900 thousand drivers in the transport sector." ■





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DEVELOPMENT ROAD PROJECT TO CONNECT TO EUROPE WITH TRACECA

The Development Road Project will accelerate regional trade by transporting cargo from the Persian Gulf to Europe via the TRACECA network. Turkey is preparing to play a critical role in global trade by strengthening its logistics infrastructure.

► Türkiye is getting ready to integrate the Development Road Project which will improve the logistics connection between the Middle East and Europe to the Transport Corridor Europe-Caucasus-Asia (TRACECA). The Minister of Transportation and Infrastructure Abdulkadir Uraloğlu shared important information about the project at the 17th Annual Meeting of the TRACECA Intergovernmental Commission. Underlining that the Development Road Project carried out under the cooperation of Türkiye and Iraq provides a great trade and logistics opportunity for not only two countries but also for the entire region, Minister Uraloğlu further commented as follows: "Ensuring the uninterrupted transfer of the goods originating from the Persian Gulf to Europe, the Development Road will be integrated to TRACECA network and will contribute to the boom in the regional trade. This project will become one of the most important logistics route of global trade".

The Development Road Project will start from the Port of Basra and reach Europe via Türkiye thanks to railway and highway connections. Developed in alignment with the current logistics infrastructure of Türkiye, the project will both facilitate the access of the Middle East to European markets and also further strengthen the role of Türkiye in global trade. The integration

of the Development Road to TRACECA will ensure that this line will transform into an important trade corridor between Europe and Asia. Attracting attention to the investments that Türkiye has made to her transportation infrastructure, Uraloğlu further made the following comments: "We take important steps especially for strengthening the railway connections. A Memorandum of Understanding was signed with Bulgaria for the opening of a second railway border gate. This initiative will further strengthen our direct railway connections to Europe". Commenting also on the steps taken by Türkiye for digitalization within the scope of TRACECA project, Uraloğlu told that actions are still ongoing to develop the e-permit system in order to accelerate transportation and to decrease costs. Noting that meetings are ongoing for extending the e-permit system successfully implemented for Uzbekistan to other TRACECA countries, Uraloğlu noted that digitalization plays a key role in international logistics.

Stating that the participation of Turkmenistan in TRACECA is a strategic development for the regional transportation, Minister Uraloğlu told that the Development Road Project is of great importance not only for Türkiye and Iraq, but also for the logistics flow between Central Asia and

TRACECA MEMBER COUNTRIES

	ARMENIA
	AZERBAIJAN
	BULGARIA
	GEORGIA
	IRAN
	KAZAKHSTAN
	KYRGYZSTAN
	MOLDOVA
	ROMANIA
	TAJIKISTAN
	TÜRKİYE
	TURKMENISTAN
	UKRAINE
	UZBEKISTAN

Caucasus and Europe. The strategic actions taken by Türkiye in the field of transportation and logistics both contribute to the national economy and smooth the path for the regional trade. The integration of the Development Road Project to TRACECA will improve Türkiye's position to become a key country in the global trade corridors. ■

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26 MILLION TONS OF GOODS TRANSPORTED IN 2024



► The General Directorate of the Turkish State Railways held its 2024 Coordination and Cooperation Workshop in Ankara. The Workshop participants included the Deputy Minister of Transport and Infrastructure, Turkish State Railways General Manager Ufuk Yalçın, Executive Vice Presidents Çetin Altun and Şinasi Kazancıoğlu, regional office managers and department heads. General Manager Ufuk Yalçın made an evaluation on 2024 and shared the developments and projects in the transport sector in his opening speech. Yalçın remarked that a total of 266.8 million passengers were transported with high speed trains, conventional main line trains, regional trains and intracity suburb trains and a total of 25.7 million tons of goods in domestic and international transport journeys as of 2024. Evaluating on the goods transportation and local and national vehicle procurement projects, Yalçın further commented: "A total of 31.8 million tons of goods are expected to be transported by the train operators, including 5.8

million tons of goods to be transported by other private railway train operators. In order to expand the electric vehicle fleet and to replace the old vehicles with new generation, efficient, local and national vehicles, we planned procuring a total of 56 national EMUs, including 22 EMUs with a service speed of 160 km/h and 34 EMUs with a service speed of 225 km/h, manufactured by TÜRASAŞ with local and national efforts. As part of this plan, a total of 3 Yeni Sakarya National Train Sets, including 2 sets procured in 2023 and 1 set procured at the end of February 2024 were starting serving on Adapazarı-Gebze line. We are currently awaiting the delivery of the fourth set. Moreover, we will sign a protocol with TÜRASAŞ for the train sets with a service speed of 225 km/h. We also plan procuring 95 Eskişehir 5000 National Electric Main Line Locomotives as per the protocol signed with TÜRASAŞ by 2027. Our efforts to procure 40 diesel main line locomotives are also ongoing to strengthen our diesel electric vehicle fleet." Telling that efforts are ongoing to procure high speed train (HST) train sets for use on additional trips

on the HST rail lines and HST lines whose construction is ongoing, Yalçın underlined that Navigation Security Platform Application was launched in order to ensure safe and secure railway operation and prevent unwanted incidents and accidents and further commented as follows: "This application allows for watching the rolling stocks, environment and locomotives on a real time basis thanks to the cameras installed on the locomotives and sending artificial intelligence supported information and warnings regarding whether the train operators are sleepy or tired and are present on the vehicle or not, which are then evaluated by the operators working at the Train Monitoring and Coordination Operation Department established in Ankara and necessary warnings and notifications are made to them. Reminding that they place importance on the studies required by the information and technology era, Yalçın stated that the Resource Planning and Big Data Analytics Project is aimed at increasing the vehicle lifetime and motor efficiency. ■

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A NEW CHAPTER IN CUSTOMS SYSTEM FOR EXPORTERS TO EU

Aiming for enhancing the security and safety of the goods entering the EU, the Import Control System 2 (ICS2) will be applicable for all logistics modes including rail and road transports.

► The Import Control System 2 (ICS2) of the European Union aims for increasing the security of the goods entering the EU. In addition to the requirements for air, maritime and inland waterway sectors, the system will also cover the road and railway sectors as of April 1, 2025. Goods might be stopped at the EU borders and might not be cleared by the customs authorities if traders do not meet the ICS2 requirements on time. ICS2 will enhance the safety and security of trade by introducing a standardized pre-arrival customs process. By mandating the submission of accurate and complete Entry Summary Declaration (ENS) data prior to arrival, the system facilitates the risk assessment of the customs authorities, thereby improving the EU's ability to prevent and combat customs offenses, and ultimately ensuring a safer and more secure trade environment.

From April 1, 2025, road and rail carriers will be obliged to provide data on goods sent to or through the EU prior to their arrival, through a complete ENS. This obligation also concerns postal and express carriers as well as other parties, such as logistics providers. Moreover, in certain circumstances, final consignees established in the EU will also have to submit ENS data to ICS2.

Economic operators who are not ready by this date need to contact the National Service Desk of the EU Member State (National Customs Authority) where they have registered, to request a deployment window by March 1, 2025 at the latest. Deployment windows are granted only upon request.

To comply with the ICS2 requirements, affected businesses will be required to make sure they collect accurate and complete data from their clients, update their IT systems and operational

processes, and provide adequate training to their staff. Economic operators will also need to successfully complete a self-conformance test before connecting to ICS2, to verify their ability to access to customs authorities.

ICS2 in detail

ICS2 has been prepared in close collaboration between the European Commission, Member States' customs authorities and businesses. Starting from September 1, 2025, ICS1 will phase out. ICS2 will fully replace ICS1 with an entirely new business process in accordance with the European Union Customs Code.

The European Commission organizes monthly webinars (in English) where economic operators can ask questions about the operational and technical aspects of ICS2. ■

DFDS

Jeppe Skivild
Head of Logistics,
DFDS Türkiye



DFDS STRENGTHENS TURKISH OPERATIONS

► DFDS's acquisition of Ekol International Transport in November 2024 has marked a pivotal milestone in the company's growth strategy for the Turkish market. The integration combines Ekol's deep local expertise with DFDS's extensive ferry and logistics network, creating a stronger foundation for Türkiye's growing production and export needs. According to Jeppe Skivild, DFDS VP, Head of Türkiye Logistics, the priority after the acquisition was to ensure smooth operational continuity:

A streamlined approach to logistics between Türkiye and Europe.

"We aligned local expertise in Türkiye with DFDS's operational standards, ensuring our teams could merge seamlessly and continue delivering reliable transport solutions to customers on both sides of the border."

By merging these competencies, DFDS now provides a comprehensive logistics service that covers land, sea, and rail. This multimodal approach mitigates common bottlenecks, such as border congestion, driver visa issues, and roadway restrictions. DFDS's ferry lines, combined with an extensive network of ports and warehouses, are specifically designed to expedite cargo movement while keeping costs in check. Thanks to strategic scheduling and transfers between various transport modes,

shipments can reach destinations across Europe more reliably, with less exposure to border delays or congested routes.

Integrated logistics for comprehensive solutions

DFDS's enhanced presence in Türkiye significantly reduces logistical complexities for companies aiming to trade with European markets. Temperature-controlled transport, intermodal connections, and expedited "Speedy" services allow time-sensitive freight to reach destinations in as little as 36 to 48 hours. This level of speed and flexibility is especially valuable in sectors where just-in-time deliveries and shorter lead times have become the norm.

The expansion of intermodal transportation goes hand in hand with a push to decrease carbon emissions and roadway congestion. In fact, DFDS has begun deploying electric trucks within its fleet and exploring other alternative fuels, reflecting an industry-wide shift toward more sustainable logistics practices. Skivild emphasizes that these efforts are part of a larger vision for reducing the overall carbon footprint:

"We are committed to investing in cleaner technologies and intermodal solutions. By doing so, we lower fuel consumption, minimize



environmental impact, and help customers stay ahead of evolving regulations."

Additionally, DFDS Türkiye Logistics offers bonded warehousing for inventory management under customs-approved conditions, simplifying cross-border formalities and driving down operational costs. Meanwhile, digital solutions for cargo tracking and customs clearance ensure transparency across the supply chain, empowering customers to track their freight in real time and adapt quickly to changing requirements.

Sustainability and future outlook

With the European Green Deal and Emissions Trading System (ETS) already influencing road and maritime transport, logistics providers face new cost and

regulatory pressures. However, DFDS views these changes as opportunities rather than obstacles.

"We see the Green Deal not as a regulatory obligation but as an investment in the future," Skivild affirms. "Reducing emissions through electric trucks, rail expansion, and alternative fuels not only meets regulatory requirements—it keeps us competitive and forward-thinking." Looking ahead to 2025, DFDS intends to accelerate organic growth and further solidify its market position by expanding the breadth and depth of its services. The company's network already spans more than 20 countries, employs over 17,000 personnel, and transports around 100,000 trailers annually between Türkiye and Europe. Building on this scale, DFDS aims to refine existing operations, tap into emerging markets, and strengthen end-to-end solutions that integrate seamlessly with its maritime routes. Ultimately, DFDS's integration of Ekol International Transport underscores a commitment to Türkiye's dynamic manufacturing and export potential. By combining proven operational standards with on-the-ground expertise, DFDS stands ready to meet increasing demand on the Türkiye-Europe route, building a more robust, efficient, and sustainable bridge for international trade in the years to come. ■



DISCORDIA EXPANDS IN GERMANY WITH A DEDICATED ROAD FORWARDING SALES TEAM



► DISCORDIA, the largest transport solutions provider in Bulgaria, continues its ambitious European expansion with the launch of a dedicated Road Forwarding Sales Force in Germany. With over 30 years of experience, DISCORDIA is a market leader in the Balkans and a trusted partner for the European customers, providing reliable, flexible, and effective transport across the UK, Germany, South-West Europe, Greece,

DISCORDIA

and Türkiye.

As the carrier of choice for both spot and contract markets, DISCORDIA is committed to ensure capacity availability and service reliability for its customers. The new team setup marks a strategic move to further strengthen relationships with the German producers, offering them

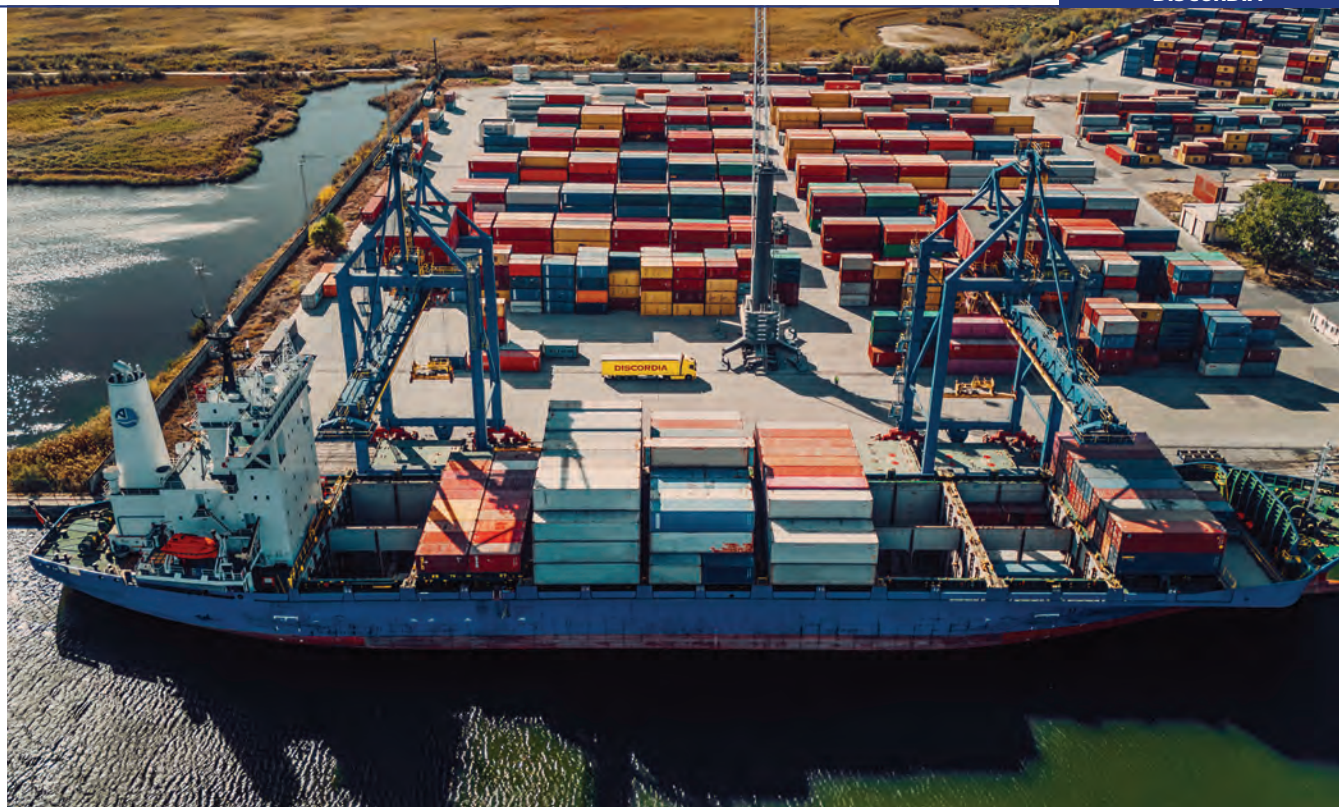
tailored transport solutions, superior communication, and seamless service execution.

At the core of DISCORDIA's evolution is its digital transformation and customer-centric approach. The company is upgrading its Transport Management System (TMS) with Oracle and integrating its financial operations with SAP, enabling real-time fleet visibility, streamlined operations, and automated invoicing through a dedicated customer portal. This investment underscores DISCORDIA's commitment to efficiency, transparency, and operational excellence.

DISCORDIA's service portfolio is executed across several business lines, ensuring a comprehensive logistics offering:

- International Road Transport – powered by a proprietary fleet of 1,500+ trucks.
- International Road Forwarding – managed by expert teams in Bulgaria,





Romania, Ukraine, and mobile teams in Germany.

- Ocean & Air Freight Forwarding – providing global transport connectivity through teams in Bulgaria and Romania.
- Rail Forwarding - offering sustainable and multimodal solutions. To meet the growing demand and enhance the customers' experience, DISCORDIA has elevated the expertise of its sales experts and managers, embedding a culture of customer-centricity, proactive communication, and problem-solving. By maintaining an agile presence in both spot and contract markets, the company offers unparalleled flexibility to customers seeking capacity, quality, and long-term partnerships.

DISCORDIA is not only a logistics leader but also an employer of choice for over 2,400 professionals, including 2,000 drivers. The company's Driver Academy plays a pivotal role in developing skilled professionals,

ensuring a steady pipeline of qualified drivers who contribute to DISCORDIA's operational excellence. Since 2009, the company's strict Economic Driving Policy has led to a 20% reduction in fuel consumption, significantly lowering CO2 emissions and reinforcing DISCORDIA's commitment to sustainability. "Our advanced commercial expertise, extensive truck capacity, and best-in-class management systems allow us

to deliver seamless and hassle-free logistics solutions. We are proud to extend this commitment to our German customers," said Ivan Bassan, Commercial Director of DISCORDIA. With its ongoing investments in technology, sustainability, and customer engagement, DISCORDIA is setting new industry benchmarks and solidifying its position as a leading European transport and logistics partner. ■



L.A. MAKZUME OF COMPANIES GLOBAL HQ

Ronald L. Makzume
President



RONALD L. MAKZUME, HONORARY CHAIRMAN OF LAM GROUP:

“LEADING THE INDUSTRY FOR 80 YEARS”

In an exclusive interview with our magazine, Ronald L. Makzume, Honorary President of LAM Group, talked about the company’s 80-year adventure, his family’s deep-rooted history in the shipping and logistics industry and LAM’s strategic goals for the future. Makzume made important statements about his strong leadership approach from the past to the present and his ambitious goals for the future.

► **Congratulations on the 80th anniversary of LAM Group! What are the most important milestones in the company's history?**

No milestone is more significant than my father, our founder Lyonel's, decision to stay in İskenderun and establish a three-person agency to serve the interests of his two brothers, who were already ship agents and short-lived shipowners in Syria and Lebanon. From there, we built strategic partnerships, expanded to a nationwide service in Türkiye, and integrated the second generation at an early stage. I began interning periodically during school holidays as early as 1956 and fully joined the company in late 1965 after my military service. My late sister Muriel and my brother Raymond joined later, bringing their unique skills to the team. The third generation came onboard in 1994 with my elder son, Timur, and in 2006 with my younger son, Selim. Their arrival brought a renewed energy and vision we could not have achieved otherwise.

What about the current organizational structure of the group?

The third generation leads the way now. My brother and I are fortunate to still have an active consulting role within the group, with daily involvement. For me, sales has always been my lifetime hobby, and for my brother, it's finance—a passion since his days as a mathematics and Sup Elec Paris graduate.

How many people make up the "LAM family," and where are they based?

We are about a thousand strong across four continents and 20 countries. The largest presence is still in Türkiye, but we also have a strong foothold in Egypt, Georgia, and the Far East, which has grown faster than anticipated.

LAM Group started as a small local shipping agency in 1944. What are the core competencies of the company today?

Today, we pride ourselves on a nearly 360-degree service scope in shipping, logistics, and marine services.

What do you see as the biggest challenges for LAM Group's business?

The lack of regulations in our industry in many countries allows fierce competition from various players with no financial securities, posing significant challenges.

What is the secret to the company's success? Can you share an example from its rich history?

Our success is rooted in humility, tolerance, courtesy, and respect towards competition. Honesty, stability, transparency, and natural long-term planning are our cornerstones.

Our track record speaks for itself: 60 years with GAC, 50 years with Jugolinija Rijeka, 50 years with NEASA Madrid, 30 years with CMA CGM, 20 years with Blasco Odessa & Estonian Shipping Co., 15 years with Prodromos, and 10 years with Sarens and Sinotrans, to name a few.

Where does LAM Group plan to expand its business? Are there any major investments planned for the ongoing year?

There are countless countries we have yet to explore. With the world reshaping, we're eyeing opportunities in Indonesia, Brazil, Saudi Arabia, Ethiopia, Kenya, and West Africa. It's not a race, and there's no ego involved; but with God's will and healthy financial growth, we will continue to pursue opportunities.

What is the company doing to promote sustainable development?

Although we may not be large enough to make a huge impact, we've implemented several eco-friendly policies, such as transitioning to hybrid vehicles and advocating for "dry iron" in ports we work with. Recently, we invested in the Swiss EPFL-based startup Aeler, which pioneers next-generation containers aimed at reducing carbon emissions.



Who will survive in the future: large multinational companies or family-driven providers like LAM Group? Where do you envision the company in its 100th year, in 2044?

Both will survive, and both may also vanish. We've been in the business long enough to witness family businesses disappear, new families emerge, multinationals merge, and once-global names fade away. LAM is 80 years old, but other branches of our family have been active in shipping and trading for over 150 years. I have high hopes that LAM will be even more prominent in 2044. God willing, the third generation will maintain today's energy, and either a fourth generation will take the reins, or we'll see a mix of family and corporate leadership. Qui vivra verra! (Time will tell!) Will I live to see it at 104? Chi lo sa? (Who knows?)

What fascinates you about the logistics business personally?

It never stops, never sleeps, and nothing is set in stone. After over 60 years in this field, I'm still learning something new every day. ■

Mine Kaya
General Manager
SGS Transitnet

REVOLUTIONIZING CUSTOMS OPERATIONS WITH SGS TRANSITNET: **THE FUTURE OF LOGISTICS EFFICIENCY**

The phrase "SGS TransitNet is not just a service; it's a game-changer in customs operations," stands out as a key statement, emphasizing the transformative impact of SGS TransitNet on the industry.

► In the complex world of logistics and customs, speed, transparency, and precision are critical. SGS TransitNet, a leading provider of customs and transit declaration services, is redefining the industry with its advanced digital platform. With a network spanning 25 countries and coverage of the European Union's 40 member states under the NCTS Common Transit System, SGS TransitNet ensures that every shipment moves faster, more securely, and more efficiently than ever before.

Transforming the logistics landscape

"SGS TransitNet is not just a service; it's a game-changer in customs operations," said Mine Kaya, General Manager of SGS TransitNet. "Our system offers unparalleled speed, control, and transparency, empowering logistics operators to optimize their processes while ensuring compliance and confidentiality."

With its seamless digital interface, SGS TransitNet allows users to create T1/T2/TR/BY declarations for shipments originating from any of the 25 participating countries. Fully compliant with EU and Turkish NCTS regulations, the platform eliminates the traditional bottlenecks associated with customs operations, offering an efficient and reliable alternative.

Unmatched compliance and confidentiality

The corporate structure of SGS TransitNet is built on a foundation of ethics and integrity, ensuring absolute confidentiality of information. "We pride ourselves on being independent of transport companies, enabling us to deliver unbiased and secure services," Kaya explained. To support its clients, SGS TransitNet

maintains an experienced team that operates around the clock, 365 days a year. With strategic offices in cities such as Geneva, Warsaw, Istanbul, and Bucharest, SGS TransitNet minimizes customs damage and delivers rapid solutions on-site, bolstered by high insurance coverage of up to EUR 660 million.

Financial and fiscal benefits

SGS TransitNet brings a suite of financial advantages that set it apart in the industry. Transport companies benefit from fair pricing without the need for costly documents such as bank guarantees or promissory notes. Immediate electronic confirmation upon transport completion eliminates long wait times for payment confirmation, while guarantees cover sensitive goods like alcohol and cigarettes for approved clients. "Saving time and money is at the core of our mission," Kaya emphasized. "With SGS TransitNet, our clients avoid unnecessary costs and delays, paving the way for smoother operations."

Logistics excellence

SGS TransitNet's advanced logistics solutions redefine what's possible in transit and customs operations. By providing a unified platform for export, import, and transit declarations, users can track shipments in real time, manage subcontractor vehicles, and avoid costly ENS procedures. Partnerships with foreign logistics companies and 24/7 availability at key locations like Sete, Kapitan-Andreovo, and Zagreb ensure seamless support. The platform's expansive network also facilitates cost-effective shipping routes, such as the Croatia-Serbia corridor, and provides priority access at Ro-Ro port customs offices.

Ease of service: Redefining customer experience

SGS TransitNet offers an intuitive system that accommodates multiple users, simplifies data entry with Excel uploads, and provides a new interface for even faster operations. "Our goal is to make customs operations as simple and efficient as possible for our clients," Kaya stated.

Authorized consignor status: A game-changer for Türkiye

One of SGS TransitNet's standout features is its AEO and Authorized Consignor status, which streamlines export customs declarations. This eliminates the need for presenting goods at Turkish customs offices, saving up to a full day in transport time.



"Our authorized consignor status is a testament to our commitment to innovation," said Kaya. "By avoiding long delays and unnecessary costs, we enable our clients to focus on what truly matters: growing their businesses."

Trusted by the industry

From shipments requiring T1/T2 declarations across the EU to ENS and TIR documentation for Ro-Ro lines, SGS TransitNet is the trusted partner for logistics operators worldwide. With specialized services for sensitive goods, port shipments, and transit through non-EU countries, the platform caters to the diverse needs of global shippers.

"SGS TransitNet is more than a service provider; we are a strategic partner in success," Kaya concluded. ■

ALL EYES ON LOGITRANS 2025 ISTANBUL



Interest in the Turkish logistics market continues to be strong. The 2024 exhibitors have already rebooked their spaces for the logitrans 2025.

logitrans
TÜRKİYE

international transport
logistics exhibition

► The International logitrans Transportation Logistics Fair, which is considered the most important and largest meeting platform of the logistics sector in Turkey, will also be the most mentioned event in logistics this year. The fair will not only bring together the stakeholders of the sector, but will also bring a big

voice in logistics with panels, special sessions, award ceremonies. logitrans will reflect the pulse of the sector again this year.

logitrans 2025 will be held in Istanbul between November 19 Dec-21st, 2025 with the participation of many organizations and companies from Turkey and various countries of the

world. International participation is increasing by a significant number every year.

It is expected that around 200 exhibiting organizations and companies from almost 40 countries, including Turkey, will be represented at logitrans 2025.

The country pavilions of the Czech





Republic, Belarus, Germany, China and Spain will also open their doors to visitors at the fair and will be one of the important points of interest at the fair.

While the logitrans Fair at the Eurasia Show and Art Center located in Yenikapi keeps the pulse of the industry for three days, it is expected that a large number of visitors will attend the fair this year. It is estimated that the number of visitors will approach 20 thousand this time. The pavilions, stands and exhibition areas of the companies and organizations participating in the Fair, which are expanding slightly with additional areas in square meters every year, will make significant contributions to the formation of a multi-colored fair environment with their contemporary and functional designs and well-designed architectural elements this year, just like last year. logitrans, which is in great demand from the sector and international companies, will host its visitors at full capacity this year as well as the number of participants. Ekin Seren Ünac, Deputy General Manager of ECO Fairs, stated that they have raised the bar even higher this year at logitrans, whose international quality stands out a little more every year, and said; "The success of a fair depends on the table displayed by the participating organizations both numerically and qualitatively. We know and see that



*ECO Fair Deputy General Manager
Ekin Seren Ünac*

logitrans' representation ability in its sector is approaching 100 percent. We had connected a significant part of the 2024 fairgrounds to contracts during the 2023 fair and completed their sales. In the 2025 fair, this ratio has increased to much higher. We are really pleased that companies showed high demand for the 2025 fair in the enthusiastic participation environment created by the 2024 fair. And thanks to the high demand, we signed the contracts of a significant part of the 2025 fairgrounds during the 2024 fair. Unfortunately, due to the space problem this year, we could not respond positively to the participation requests of some sector companies to the fair. We know that Turkey has now become a real center

in the region in the field of logistics. The increasing interest and demand for logitrans from many countries, especially Europe, Asia and the nearby geographies, fully reflects the fact that Turkey is the most important logistics hub both in the region and globally."

Noting that Turkey's importance on the global logistics map has increased significantly during this period when logistics routes have undergone changes, Ekin Seren Ünac underlined his opinion that "Turkey is rapidly becoming a global and regional center in logistics with its land, air, sea and railway capacities and infrastructure."

Emphasizing that it is very important that logitrans will take place in the constantly changing global environment this year, Ekin Seren Ünac made the following assessment;

"Trade routes are changing, the importance of trade corridors is increasing. And most importantly, Turkey is located at the junction point of these corridors in logistics both with its geographical location and the strong infrastructure capabilities of the sector. In this context, logitrans will be a powerful platform for establishing business relations between Europe and Asia in the intercontinental supply chain and bringing together the stakeholders of the logistics sector. logitrans will host almost all the stakeholders

of the logistics sector. With a wide international participation, it will further strengthen Turkey's strategic position in the field of logistics in the Eurasian region. In the current situation, Turkey has become both a logistics hub and an international supply chain base, especially in the Eurasian region. The interest of both participants and visitors shown to logitrans confirms this fact. We believe that logitrans also has an important role and function in Turkey's goal of reaching a sector size exceeding \$100 billion in logistics."

logitrans, the showcase of the sector

Stating that logitrans is a powerful platform that creates a serious added value for the logistics sector in total at every new fair, and that the participating organizations create an opportunity to establish new customer relationships at the fair, as well as to thoroughly strengthen their existing relationships, Seren

Ünaç said, "logitrans is also the most important showcase that reflects the level of development and dynamism of the sector. In addition to international participation, our efforts to make logitrans the most important platform of Turkey in global logistics with the intensive support of the institutions of our country continue to increase every year. logitrans Fair, which is the most important logistics event of Eurasia, offers a very important opportunity for those who want to follow the developments in the sector by coming together with their customers and business partners. Exhibitors, on the one hand, conduct the traffic of meetings with their customers and stakeholders in the fair environment, and on the other hand, they take the opportunity as the pulse of the sector. Especially the increase in international participation makes the added value created by logitrans more important in this aspect." Within the scope of logitrans, there

are also panels of sector professional organizations such as IRU, UND, UTIKAD, CILT. In addition, the Atlas Logistics Awards will again make their mark on the fair.

Ekin Seren Ünaç pointed out that logitrans goes far beyond being a fair and is also a platform for generating ideas where innovations and problems in the sector are taken into account, "We know that especially non-governmental organizations are preparing special panels for the November fair. These meetings also make important contributions to the future vision of the sector. logitrans Fair will be an important event for those who want to follow the developments in the sector by coming together with their customers and business partners, in this respect logitrans will create new collaborations and new commercial relationships, as well as a platform where new perspectives from the point of view of industry stakeholders."she said. ■



LOGISTICS MARKET GROWTH PROMOTES START-UPS, START-UPS OFFER MORE DIGITAL SOLUTIONS

Having reached a size of 8.96 trillion US dollars in 2023, the global logistics market is expected to reach 21.91 trillion US dollars by 2033.

- Stating that the global logistics market reached 8.96 trillion US dollars in 2023 and is expected to reach 21.91 trillion US dollars by 2033, Decacorn Angels CEO Duygu Eren noted that the logistics start-ups will grow more in future thanks to digital solutions, sustainable energy resources and artificial intelligence managed systems.

Underlining that the logistics sector continues to grow day by day, Decacorn Angels CEO Duygu Eren further made the following comments: "Especially the increase in the e-commerce and digitalization have a significant role in this growth. According to the "Logistics Market Outlook Türkiye 2024" report prepared especially for the international investors in cooperation with the Presidency Investment Office, the global logistics market reached 8.96 trillion US dollars in 2023 and is expected to reach 21.01 trillion US dollars by 2033. This translates into a compound annual growth rate of 9.35 percent in average from 2024 to 2033.

Adding that the start-ups in this field have reached a significant size across the world thanks to the sector growth, Eren further commented as follows: "Significant increases were observed in the logistics sectors in the last 5 years because of innovations such as digitalization, green logistics and AI-based

solutions. The growth of e-commerce increased the investments in fields such as smart storage and city logistics. As of 2023, especially the "Courier, Express, and Parcel (CEP)" market size was realized as 457.38 billion US dollars and is expected to reach 977.40 billion US dollars by 2028. In future, the logistics start-ups are expected to grow more thanks to digital solutions, sustainable energy resources and AI managed systems. The carbon emissions of electric cars are anticipated to decrease by 350 million metric tons per year, especially by 2030.

Giving information on the market size in Türkiye, Eren further commented as follows: "Türkiye is ranked 11th in

the global logistics market thanks to its 100-billion-US-dollar market size and its share of 2.5 percent in the global logistics exports. As can be seen from these figures, Türkiye is a distinguished logistics hub in Europe, Asia and Africa

because of her strategic location and well-developed infrastructure. Factors such as fast growth in the e-commerce sector and near shore production indicate that Türkiye has a big potential in the logistics sector. The fast growth in the sector and its future potential bring along an increase in the number of start-ups in this field. We expect an increase in the number and size of start-ups in the field in future. The start-ups in the logistics sector attract great attention from the investors because of the increased e-commerce demand, sustainable logistics practices and digitalization trends. Especially the artificial intelligence and automation based solutions increase operational efficiency and decrease costs, creating in turn attractive opportunities for investors." ■



ROAD TRANSPORTATION REINFORCES THE LOGISTICS POWER OF TÜRKİYE

The International Transporters Association (UND) emphasized that the road transportation strengthens the logistics superiority of Türkiye. Chairman Şerafettin Aras remarked the global crises increased the interest in this field.

► UND Chairman Şerafettin Aras told that the impact of roads on the country economy and trade increase year by year and added that: "Road transport has transformed into a sector of great importance for economic growth as well as a sector reinforcing the logistic superiority of Türkiye in the region." UND shared its evaluation on the logistics sector for 2024 with the press meeting it held and shared its expectations regarding the future period. UND Chairman Şerafettin Aras and Board Members participated in the meeting held at UND

Headquarters on February 5. UND Chairman Şerafettin Aras told that the interest in the roads is at its peak due to the pandemic, wars, crises in the maritime sector and channels and other developments and the roads also come to the forefront thanks to the advantages they provide on the global supply chain.

Share of roads in foreign trade is on the rise

Telling that Türkiye has road connection with 70 countries, Chairman Aras attracted attention to that Türkiye serves as a bridge

between Europe and Central Asia. Emphasizing that 85 percent of the global trade are carried out by sea but 41 percent of the exports from Türkiye (107 billion US dollars) were made by road, Aras told that "This shows how important the roads are for our country and region."

Road transport generates foreign currency income

Chairman Aras told that the logistics sector requires a structure covering all transport modes but the roads play a strategic role both in terms of continuity of trades and the



foreign currency income. While the international road transport generated 6-billion-US-dollar service income in 2023, the total income generated by the transportation sector reached 40 billion US dollars.

71 percent of 2 million and 95 thousand export trips made from Türkiye in 2024 were made by vehicles with Turkish license plates and 29 percent by vehicles with foreign license plates. The highest number of export transportations were carried out to Iraq with 492 thousand trips, followed by Germany with 146 thousand trips, Romania with 123 thousand trips and Georgia with 95 thousand trips.

65-Billion worth of exports to europe by road

A total of 897 thousand export trips were organized to Europe in 2024. Germany got the biggest share from the exports to Europe with exports worth of 131 billion US dollars while the exports made by road reached 65 billion US dollars. While the share

of Turkish vehicles was 65 percent, the share of foreign vehicles was 35 percent.

57 percent of the total export transportations were made to the Middle East and Central Asia countries. 816 thousand trips made to the Middle East increased by 6 percent while 367 thousand trips made to Central Asia and Caucasus decreased by 4 percent. Exports worth of 20 billion US dollars made to Central Asia and of 22 billion US dollars to the Middle East and North Africa were made by road.

We can become a global power on logistics corridors

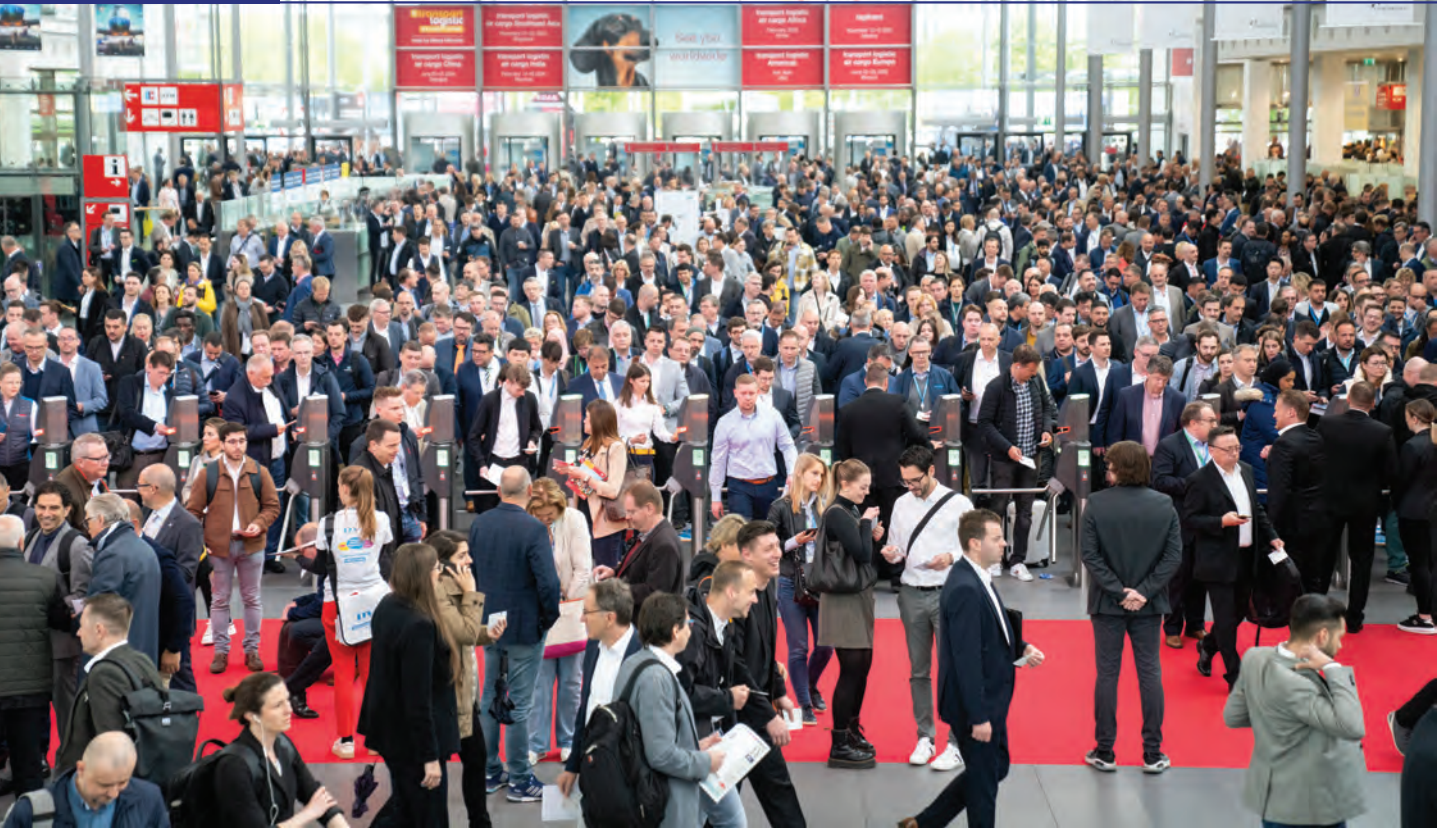
Chairman Aras told that Türkiye is located at the hearth of the logistics corridors and added that Türkiye will become more powerful in global trade with the activation of the Development Road and Zengezur Corridor. Aras further added that: "Türkiye has a key position on the transportation road from Türkiye to Europe and to China and to Central Asia. We should take

advantage of this and transform into a global logistics power."

UND continued its efforts to find solutions to the problems of sector in 2024. Steps were taken to improve the logistics processes thanks to "International Scientific Research Congress (UBAK) and Transportation Legislation Workshop" organized with the Ministry of Transport and Infrastructure and the visits paid to Kapıkule-Gürbulak border gate. Important developments such as opening of the Female Drivers Academy, initiatives taken to resolve the visa problems of drivers and establishment of Union of Road Transport Associations of the Organization of Turkic States (OTS-URTA). Diplomatic attempts were made to ensure easy visa issuance to Turkish drivers in the negotiations held with European Union. Chairman Aras underlined that the effectiveness of road transport should be increased to ensure sector growth and transforming Türkiye into a global logistics center. ■



UND Chairman
Serafettin Aras



TURKISH LOGISTICS SECTOR SHOWS ITS STRENGTH IN MUNICH

The Turkish logistics industry is preparing to make its mark with record participation in transport logistic Munich 2025. The exhibition will be an important platform to strengthen Turkey's claim in the global market.

► Transport Logistic Munich 2025, one of the world's largest logistics and supply chain management exhibitions, will be held in Munich, Germany between 2-5 June 2025. The fair, which becomes the meeting point of the global logistics industry every year, will witness a record level of participation from Turkey this year. The exhibition, which will be held on a total area of 150 thousand square metres, using 12 separate halls and

open areas, will bring together all stakeholders of the logistics industry. Turkish companies operating in a wide range of services such as logistics, transport, warehousing and digital solutions will take part in the fair and will have the opportunity to follow the current developments in their sectors and strengthen their global cooperation. Transport Logistic Munich, which is an important showcase in terms of exhibiting

Turkey's rising potential in the field of logistics on the international platform, will also contribute to the goals of Turkish companies to have more words in global markets. The fair will not only be limited to the promotion of products and services; it will also offer great opportunities for industry professionals to exchange information, explore new market opportunities and develop strategic business partnerships. Turkish



transport
logistic

the leading exhibition

exhibitors will come together with sector representatives from all over the world, especially from Europe, and will convey Turkey's power and dynamism in the logistics sector to a wider audience.

The strong Turkish presence at Transport Logistic Munich 2025 will both support sectoral development and once again demonstrate Türkiye's claim to be a global player in logistics. ■

TRANSPORT LOGISTIC MUNICH FAIR TURKISH EXHIBITORS

ABC Lojistik A.S.	Marport
Airon Transport and Logistics	Maxion Wheels
AKAR IC Ve Dis Tic. Ltd. Sti.	Medkon Group
Alisan Lojistik A.S.	Mersin International Port
All Cargo Turkey	MGT Lojistik a.s.
Alp Özler Lojistik A.S.	Middle Corridor Lojistik A.S.
Arclog	Mir Global Lojistik A.S.
Arkas Lojistik A.S.	Miss Project
Aysberg Press and Publishing	MNG AIRLINES
Azure Grup	Mutlular Transport LTD. STI
Barlas Lojistik	Neoflex Endüstriyel Ambalaj Sanayi
BOLTAS	Lojistik Hiz. Ve Dis Tic A.S.
Borusan Lojistik	NETWORK GLOBAL LOGISTICS
CNTR BILISIM	NGL Lojistik Limited Sirketi
DEIK, Foreign Economic Relations Board	ONE Uluslararası Tas. Ve Dis Tic AS.
Delta Ankara Otomotiv Limited Sirketi	Oregon
Destan Heavy Transport & Logistics	Railport Terminal İşletmeleri A.S.
Dincer Lojistik A.S.	Rems Lojistik Limited Sirketi
DTS Lojistik Hizmetleri Tic. Ltd. Sirketi	S Sistem Lojistik Hizmetler AS
Element Ulus. Nak Loj Tur. İth İhr Tic. AS.	Services Exporters' Association
Erdoganlar Logistics	SEYIR Mobil Yazılım Elektr. Otom. Sis.
Erkport Liman Hizmetleri	Seyit Usta Treyler San ve Tic Ltd Sti
Esna Ulus. Tas. Brok. Hizmetleri	SGS e-Customs/TransitNet
Europe Intermodal Nak. Hiz. Ara. Ltd. Sti	Sigma Denizcilik ve Kont. Loj. Ltd.Sti.
Evolog Nak. ve Loj. Hiz. Tic. Ltd. Sti.	Soft Business Solutions Inc.
FMC Hidrolik Otom. Mak. San. Tic. A.S.	Solmaz Gümrük Müsavirliği A.S.
Galata Tasimacilik ve Tic A.S.	T.G.L Tetglobal Lojistik Nak. San.
Genel Transport Nak. Ve Tic. Ltd. Sti.	Vetica. A.S
Global Trade Dis Tic. Ve Loj. Ltd. Sti.	Talay Logistics
GLS İnsan Kay. Özel İstih. Hiz. Ltd. Sti.	TAM Lojistik Dis Ticaret Ltd. Sti
Hareket	TCT Lojistik AS
Hicri Ercili Deniz Nak. Kim. Mad. San.	TLS Lojistik A.S.
Imsan Group	TOBBUND
Intermax Logistics	TTS Uluslararası Nakliyat Ve Tic.A.S.
ITT Uluslararası Tasimacilik	Turkish Airlines Inc
John Good Denizcilik Tas. Ve Lojistik	TUVAS Project Türkiye
Karahan Loj. İth. İhr. San. Tic. Ltd. Sti.	U Lojistik A.S.
Karinca Lojistik A.S.	ULS Airlines Cargo
KINAY Transport and Logistic A.S.	Ulustrans Logistics
KITA LOGISTICS	VIOLET LOGISTICS LLC
Lima Lojistik Hiz. San. ve Tic. A.S.	Winton Otomotiv Endüstri AS
Limitrans Lojistik Ve Tas. Ltd. Sti.	WORKLOG Lojistik
Logista Global Lojistik Ltd. Sti.	Yeniay Lojistik As
Logistics Tur Transit Ulus Nak Tic A.S.	
Logitrans Lojistik	
Lyonel A. Makzume Group of Comp.	

WIDENING AGE CHASM COMPOUNDS TRUCK DRIVER SHORTAGE CRISIS: NEW IRU REPORT

- Global truck driver shortage flat at 3.6 million (in 36 countries)
- Age gap widens further: young drivers down 5.8%, older drivers up 1.6%
- 3.4 million drivers will retire by 2029
- Salaries and job satisfaction remain high

IRU's latest global truck driver shortage report is published. While unfilled positions in 2024 were similar to 2023 due to easing transport demand, alarming figures show a widening age chasm between young and older driver employment rates. But salaries and job satisfaction remain high.

IRU's 2024 global truck driver shortage report has found that 3.6 million positions remain unfilled in 36 countries studied representing 70% of global GDP. This is a similar level to 2023, primarily due to easing transport demand over that period.

The report however reaffirms that the shortage of truck drivers is a long-term structural issue that persists in all regions. Of 5,100 trucking firms surveyed in 2024, up to 70% in some countries face severe or very severe difficulties in recruiting drivers.

-Widening age chasm

Underlying structural demographic trends are increasingly alarming, notably a widening chasm between younger and older drivers.

Young drivers under 25 make up 6.5% of the total driver workforce.¹ Some countries have critically low rates, including Italy and Germany at 2.2% and 2.6% respectively. Poland and Spain are not much better at 3% each.

Unfortunately, the trend is downward. The percentage of young truck drivers compared to all drivers fell by 5.8% from 2023 to 2024.² This

is despite the reverse trend being witnessed in the overall workforces of the countries studied, with young workers up by 1.4%.³

Without concentrated action

demographic timebomb is ticking

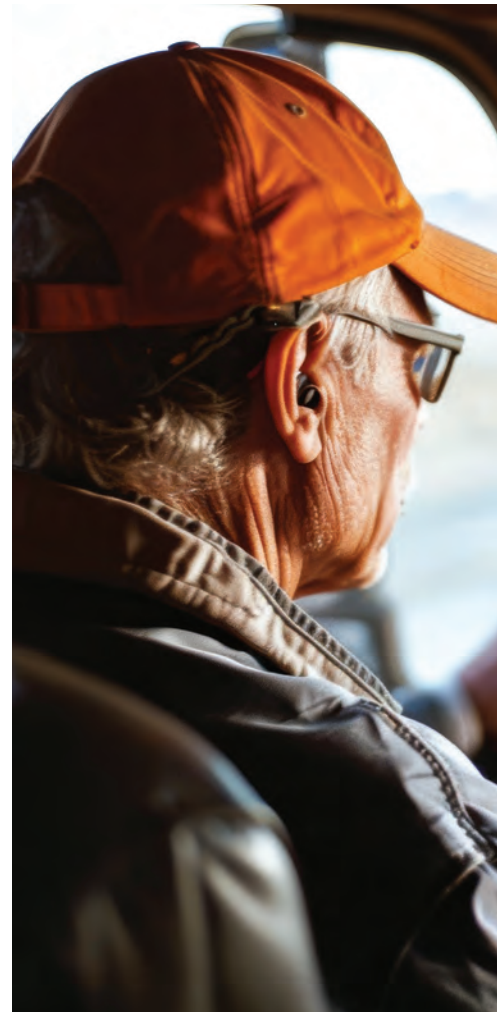
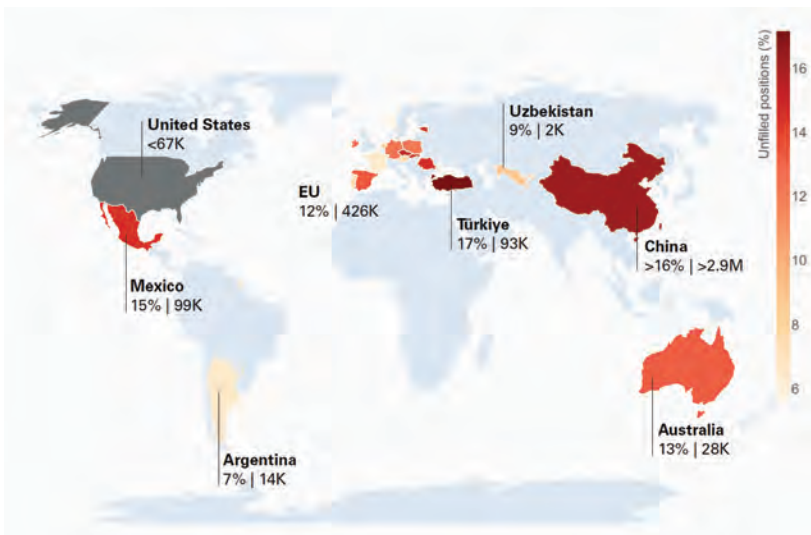
In stark contrast, the share of truck drivers who are over 55 is 31.6%.

Countries with very high percentages of older drivers include Spain at 50%, Australia at 47%, and Italy at 45%.

The trend here is also alarming.

In line with overall labour force participation rates for this age group, the percentage of truck drivers who are over 55 has increased by 1.6% in the past year. The average truck

UNFILLED TRUCK DRIVER POSITIONS IN 2024



driver age globally has now crept up to 44.5.4

Over the next five years, the report forecasts that 3.4 million truck drivers will retire in the countries studied. In Australia, 21% of current drivers will have retired by 2029. In China it is 18%; in Europe 17%.

For Australia and several European countries, notably Germany, Italy, Slovakia and Spain, the widening structural gap between younger and older drivers is particularly acute. IRU Secretary General Umberto de Pretto said, "The truck driver shortage crisis continues to deepen with, most alarmingly, an ever-widening chasm



PROVISIONAL EU DRIVING LICENCE DEAL SUPPORTS SKILLS AND TALENT ATTRACTION

IRU welcomes the provisional agreement reached following trilogue negotiations between EU institutions on the revision of the EU Driving Licence Directive. The outcome reflects long-standing priorities of the road transport sector and supports efforts to ensure road safety and alleviate the growing shortage of professional drivers.

The provisional agreement reached between the negotiating bodies marks progress on key issues, including minimum driver age requirements, accompanied driving for young drivers, facilitation for alternatively fuelled vehicles, an EU framework for recognising third-country driving licences, and the introduction of a harmonised digital driving licence.

IRU EU Director Raluca Marian said, "This pragmatic trilogue compromise shows real EU-level support for removing barriers to the driver profession - crucial as shortages worsen. It brings legal clarity, modernised rules, and progress on youth access, third-country drivers, and digital licences."

-Clarification of the professional drivers' minimum age

The agreement provides long-awaited clarity on the minimum age for professional drivers, confirming that drivers with full training can drive trucks internationally from the age of 18.

For passenger transport, while we appreciate that 21 years has been confirmed as the minimum age for driving buses and coaches, we regret the missed opportunity to remove the existing 50km limitation for drivers under 21 years old. This remains an obstacle to attracting young graduates to the sector.

IRU supports the inclusion of an accompanied driving scheme for 17-year-olds, which EU Member States may choose to implement for licence categories B, C1 and C1E. This important initiative allows young drivers to gain supervised experience and targeted training, contributing to road safety and the attractiveness of the profession.

-Progress on third-country driver access

The introduction of an EU-wide framework to recognise and exchange certain third-country driving licences - when aligned with EU standards - is a welcome step towards reducing administrative burdens for operators and drivers. This move supports efforts to expand the talent pool beyond EU borders.

IRU encourages policymakers to build on this progress by also addressing the recognition of third-country professional qualifications, which remains key to fully unlocking international driver recruitment.

Raluca Marian added: "While attracting EU talent must remain the priority, the reality of 500,000 unfilled driver positions across the EU makes tapping into the third-country driver pool a necessity."

"We welcome the initial step of simplifying the recognition of professional driving licences issued by third countries. However, this only addresses part of the challenge."

between young and older drivers.

"Without concerted and continuing action, this demographic timebomb will explode, seriously impacting economic growth and competitiveness across the globe."

-Salaries and satisfaction is high

Salaries are often cited as a key reason for driver shortages, yet the data disproves this. Average truck driver salaries are 30-135% higher than the base cost of living level in all regions. Driver salary levels do not correlate with driver shortage levels.

On job satisfaction, IRU partnered with Truckfly by Michelin to survey 1,100 truck drivers in seven major European markets. This barometer analysed satisfaction by country, age, gender, type and size of company, and route distance.

An impressive 81% of truck drivers are satisfied with their job, with 57% being very or extremely satisfied.

British, French and Italian drivers are the most satisfied. Young drivers under 25 were the age group with the highest levels of job satisfaction.

The biggest issues that drivers want fixed? 91% cited access to well-equipped rest areas and treatment at delivery sites. Gender and age did not

affect this ranking.

Umberto de Pretto added, "There isn't one magic bullet to solve the crisis, but this report points towards key solutions to start closing the widening age gap and treating drivers with more respect and dignity. "Young working drivers are very

satisfied: the issue is therefore not retention but improving access to the driver profession and its attractiveness, especially to young people.

"Governments therefore need to better integrate professional driver career pathways into educational systems, also removing unrealistic age thresholds for training and qualification, and to invest more in safe and well-equipped parking and rest areas."

The 150-page report has detailed breakdowns by driver age, gender, country, company size, route length and international vs domestic operations. It includes sections on the economic outlook for road transport operators; detailed driver job satisfaction, accessibility and attractiveness analysis; and attraction and retention solutions for transport operators. ■

"Without mutual recognition of Certificates of Professional Competence (CPCs), these drivers will still be unable to operate in the EU. Although this opportunity was missed for now, we remain hopeful as the upcoming revision of CPC rules could finally close this critical gap."

-Digital driving licences: towards paperless mobility

As part of the provisional agreement, a uniform digital driving licence is set to be introduced by the end of 2030, integrated into the European Digital Identity Wallet and recognised across all EU Member States.

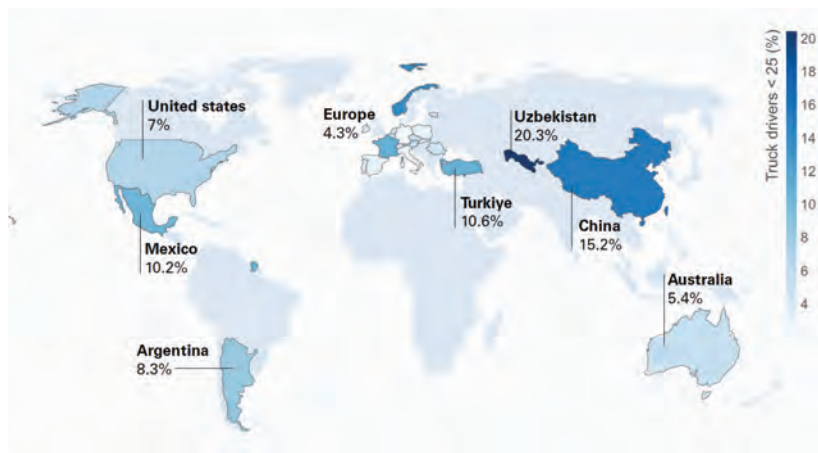
While digitalisation will streamline and modernise the issuance and use of licences, drivers will retain the right to request a physical version. This is an important step towards smarter, more inclusive and paperless mobility, reflecting the EU's commitment to adapting road transport rules to the needs of a digital society.

-Adapting to alternative fueled vehicles

Drivers holding a category B licence for at least two years will be permitted to drive alternatively fuelled vehicles of up to 4.25 tonnes - an increase from the standard 3.5-tonne limit. This measure is particularly relevant for taxi services and urban delivery operations.

Importantly, the final agreement clarifies that the exemption applies to both commercial transport of passengers and goods, expanding the scope beyond the European Commission's original proposal, which limited it to goods transport only.

SHARE OF TRUCK DRIVERS UNDER 25 IN 2024



GROWING CONCERNS FOR CLEAN ENERGY SOLUTIONS IN ROAD TRANSPORTATION

► The International Road Transport Union (IRU) voices serious concerns regarding the Industrial Action Plan announced by the European Commission for the automotive sector. IRU is deeply concerned that this plan of great importance for the commercial road transportation sector only promotes the battery-electric vehicles and disregards alternative clean energy solutions. Even though the Plan provides some incentives for the transformation in the sector, it also includes serious obstacles for the transportation operators. The IRU states that the Industrial Action Plan of the European Commission should cover more clean energy options, which are of great importance for the commercial road transportation. Even though the European Commission provides various incentives for the expansion of zero emission vehicles, the plan's focusing on only battery-electric vehicles and disregarding alternative clean energy solutions such as biofuels and hydrogen deeply concern the IRU. The IRU emphasizes that this will prevent the development of comprehensive solution options in the sector and might cause major problems especially in the fields with special needs such as long distance transportation. IRU EU Director Raluca Marian said that "Carbon-neutral fuels, renewable fuels, biofuels, and even hydrogen are missing from the EU's plan. However, these technologies have a great potential for the future of commercial transportation. The EU's promotion of battery-electric vehicles as the only solution for green road transportation will restrict the expansion in the sector and prevent innovation opportunities."



While the plan of European Commission aims for strengthening the infrastructure required for road transportation, the IRU believes that this plan will not be sufficient. As the plan only covers the main transportation lines of Europe (TEN-T), the regional and local transportation sectors do not fit in the plan. However, a significant portion of the transportation activities in Europe is comprised of local and regional transportation activities. The IRU claims that a more comprehensive infrastructure strategy and local transportation solutions should be provided. Raluca Marian added that "The restriction of the network infrastructure only to TEN-T promotes the long distance transportation but will be insufficient for the companies carrying out transportation activities over a short distance. A more extensive infrastructure solution is required for this field. However, the insufficiency of the charging stations poses a serious obstacle."

The Industrial Action Plan aims for promoting decarbonization in the commercial transportation sector. The IRU acknowledges the plan of the European Commission to green corporate fleets as a correct step but believes that this plan ignores the operational problems in the sector. The IRU points out the fact that financial supports are also needed in addition to strong incentives for the expansion of electric vehicles and other clean technologies. The IRU will maintain the cooperation with the European Commission and will continue its efforts to ensure that the needs of the commercial road transport sector will be better understood. Stating that the plans for the clean energy transformation of Europe should be shaped by taking into consideration the special needs of the clean transformation sector the IRU emphasizes the importance of creation of a regulatory framework to satisfy the needs of the sector. ■



IMO REDUCES GREENHOUSE GAS EMISSIONS FROM SHIPS

The International Maritime Organization (IMO) continues working on medium term measures to reduce greenhouse gas emissions from ships. Technical standards and economic mechanisms introduced by the “IMO Net-Zero Framework” are on the IMO agenda.

► The IMO’s Intersessional Working Group on Reduction of Greenhouse Gas (GHG) Emissions from Ships (ISWG-GHG 18) completed its last meeting on the efforts to reduce the greenhouse gas emissions from ships. This meeting and its outcomes are considered as an important step of the international efforts made to reduce GHG emissions in the global maritime sector.

The 2023 IMO GHG Strategy commits Member States to adopting new mid-term measures to reduce GHG emissions from ships in late 2025. These measures include two main elements: A technical element including standards aiming for decreasing the phased reduction of a marine fuel’s GHG intensity; and an economic element on the basis of a maritime GHG emissions pricing mechanism.

The ISWG-GHG 18 continued

discussions on these measures by using the draft text for an ‘IMO Net-Zero Framework’ developed at the last meeting of Marine Environment Protection Committee (MEPC) 82. This draft text integrates proposals from Member States and international organizations on possible amendments to be made to the International Convention for the Prevention of Pollution from Ships (MARPOL, Annex VI). If adopted, these amendments would be incorporated into this treaty, which has 108 parties representing 97% of world merchant shipping tonnage.

A range of topics, including global marine fuel intensity regulations, the economic mechanism’s structure, the organizational and operational aspects of the proposed ‘IMO Net-Zero Fund’, revenue disbursement, and potential food security impacts were discussed at this meeting. The Working

Group agreed to keep all proposals for the GHG pricing mechanism under consideration and acknowledged potential ‘bridging options’ suggested by some Member States.

The IMO Chair, in consultation with the Secretariat, prepared an updated version of the proposed MARPOL Annex VI amendments. This version introduces areas of agreement and the proposed possible consolidated text for further discussion. The draft text will be further considered at the 19th meeting of the Intersessional Working Group and an agreement will be tried to be reached at MEPC 83 meeting to be held on April 7-11, 2025.

Delegations reaffirmed their commitment to continue exploring possible ways to converge their positions and find common ground. The steps to be taken to ensure new-zero goals of IMO indicate major changes in the global maritime sector. ■

MARITIME TRANSPORTATION ROUTES CHANGE, DEMAND IN NEW PORTS INCREASE

As the trade wars and customs regulations challenge trade chains, the maritime transportation routes are reshaped, bringing sustainability and digitalization to the forefront.

► According to the report prepared by KPMG on “Emerging Trends in Infrastructure and Transport”, the increasing uncertainties in global trade, new customs regulations and the probability of trade wars create serious pressure on supply chains. These developments are expected to reshape maritime transportation and to increase the demand for new ports. The Report also states that sustainability and digitalization are among the priorities of the sector executives. It also underlines that the companies rewire their value chains to address new tariff risks and costs. This means that some will ensure near-shoring to their customer bases and some will look to alternative export markets. All this might cause that shipping lanes will be redrawn and demand for new

ports and operators will grow. The new regulations regarding supply chain sustainability and the growing demand for transparent carbon reporting from investors force the companies to create more flexible, efficient and resilient supply chains. These developments should shape the agenda of the decision makers and the infrastructure players to take on more active roles to lead the change towards standardization, according to the report.

KPMG Türkiye Transportation and Tourism Sector Leader Mert Öner stated in his evaluation on the report that the changing global dynamics have created radical transformations in the infrastructure and transportation sector and their report does not only state the current problems but also provide

strategic recommendations regarding how the sector players will be adapt themselves to these transformations. The Report also states that the maritime transportation companies will face fluctuations in demands, capacity increase, carbon decrease pressure and changing trade models. Therefore, the sector should invest in fields such as digitalization and sustainability and should focus on ensuring long term efficiency.

Stating that the impacts of trade wars will decrease but will never be eliminated in full, the Report underlines that the current period has once again reminded the maritime transportation companies to invest in strategic cooperations and transformation in order to fight against uncertainties. ■



TRANSFORMATION AND SUSTAINABLE FUTURE IN RAILWAY SECTOR

The railway sector provides an important opportunity in terms of environmental sustainability and economic growth. However, infrastructure improvements, legislation amendments and private sector investments are required to be promoted for the realization of this potential. The steps taken by Türkiye in this field will also increase competitiveness in international trade.

► The railway sector has entered into an important transformation process across the world in line with the sustainability goals. Because of the impact of the EU Green Deal, the railway transportation comes to the forefront with the efforts to decrease carbon emissions and increase energy efficiency. The role undertaken and the difficulties faced by Türkiye in this process are among the elements to shape the future of the sector. The EU Green Deal is a comprehensive strategy launched by the European Union in 2019 and aiming for creating a climate neutral economy. This strategy brings along radical changes in the transportation sector and the railway sector takes a central position in this transformation thanks to the low carbon emissions. The railway transportation generates lower emissions by 12 times per ton-kilometer as compared to road transport. The report prepared by the Railway Transport Association (DTD) and examining in detail how the railways were transformed in line with the EU Green Deal, their impacts on foreign trade and sustainable transportation methods also covers the difficulties, opportunities and future developments in the sector.

Being a country carrying out most of the commercial relations with European Union, Türkiye directly feels the impacts of Green Deal. Having launched the "Green Deal Action Plan" in 2021, Türkiye set goals of ensuring alignment with EU regarding energy efficiency, circular economy and carbon emissions. However, the necessary legislation process required for Türkiye and EU integration has not been completed yet. Alignment has to be ensured with the fourth railway package of EU, which entered into force in 2016. This is an important sector affecting the development of Türkiye in the railway sector. Railway transportation attracts attention thanks to its environmentally friendly structure and high energy efficiency. Low carbon emission is one

of the most important advantages provided by railway transportation. Generating lower carbon emissions by ton-kilometer as compared to road transport, the railways can release zero emissions if fed by renewable energy resources thanks to electrified systems. According to the report, the strategic steps for improvement in railway sector can be listed as follows:

Strategic prioritization of railway sector for investment incentives:

The railway sector should be included in the scope of strategic investments in line with the national economic development and sustainable transportation goals and should be ensured to benefit from YATAK (Advance Loans against Investment Commitment) loans or similar loans. Taking into consideration the length of the return of the investments in this sector, the need for long term loans in Turkish liras with a low interest rate should be satisfied with similar methods.

Provision of operational financial support:

In order to support the operational sustainability of the sector, operational financial support should be provided





to all railway train operators without differentiating between the public-private sector and these supports should be continued until the infrastructure geometry becomes suitable for ensuring efficient transportation.

Ensuring a fair competition environment:

Equal support should be provided all private/public enterprises in order to

ensure that the free market rules are fully implemented and a competition environment is established. Ensuring this competition environment will be a driving force for increasing the private sector investments to be made to the railways. Not giving any operational support to private train operators in an environment where the losses of public train operators are covered by the government is one of the main reasons that the private sector abstains from

making investments in the railways. Provision of investment incentives for railway vessels and supporting of local production and new technologies. These steps will support the growth of railway sector, promote the private sector investments and increase competitiveness in the sector. With the completion of infrastructure investments, the logistics potential of Türkiye will be evaluated more effectively. ■

LEGISLATION AMENDMENTS AND ENACTMENTS ARE REQUIRED FOR EU HARMONIZATION PROCESS IN TÜRKİYE RAILWAY SECTOR

According to the report, the railway sector of Türkiye should revise its legislation, implement financial independence principle and make infrastructure preparations in order to ensure integration with EU. Türkiye has yet to align its legislation with the fourth railway package of EU which entered into force in 2016. The current legislation regarding railway safety and interoperability does not ensure full harmonization with the EU acquis. Especially the subsidies provided by the public train operator (TCDD) and the financial independence of train operator from the infrastructure

operator (TCDD) have not been resolved yet. Neither the technical and legal standards required by the EU for international interoperability nor the necessary infrastructure preparations have been completed. Therefore, the interoperability agreement should be signed as soon as possible. If a preparation process is required to be initiated before signing this agreement, it is of great importance that its articles should be started to be implemented in Türkiye. In order to ensure the integration of the railway sector of Türkiye with EU, the legislation should be revised, the financial

independence principle should be implemented and necessary infrastructure preparations aligned with international standards should be initiated. These steps will increase the competitiveness of Türkiye and will contribute to a sustainable development in the railway sector. In the transition process, legislative facilities should be ensured for the companies carrying out internal track transportation in order to satisfy the locomotive need of Türkiye will increase the interest of the private sector in the railway sector and realization of the sustainability and national goals.

THE LOGISTICS SECTOR FOCUSES ON SUSTAINABLE SOLUTIONS IN 2025

Making an evaluation on 2024, UTİKAD shared its goals and sectoral expectations for 2025. President Bilgehan Engin emphasized the strategic power of Türkiye in transit transportation and the importance of Development Road Project.



► The Turkish Forwarding and Logistics Association (UTİKAD) shared 2024 evaluations on the logistics sector, association activities, transportation statistics and 2025 expectations at its press meeting held in Radisson Blu Hotel Şişli on Tuesday, January 7, 2025. UTİKAD Board President Bilgehan Engin, Vice Presidents Ayşem Ulusoy and Barış Dillioğlu, Board Members Arkin Obdan, Serkan Eren, Serdar Ayırtman, Murat Gümüşlüoğlu, Yüksel Kahraman, İbrahim Halil Delgezenli, Ayfer Vurgun and Özgecan Er Çevlik, UTİKAD General Manager Alperen Güler, UTİKAD Executive Board Members and the press were present at the meeting.

President Bilgehan Engin underlined the potential of Türkiye to become a hub in transit transportation and shared the advantages provided by her strategic location. Noting that the ongoing Development Road Project will make a great contribution to Türkiye, President Engin told that: "The Development Road Project is an exciting project. It is planned to be launched at the end of 2019. We want to connect the Grand Faw Port to Europe by road and railway under cooperation with Iraq. The Development Road Project is of significant importance for increasing the share of railway transportation in the foreign trade of Türkiye and increasing the transportation income of Türkiye."

Noting that the regime change in Syria happened at the end of 2024 once again revealed the strategic importance of Türkiye in the region, President Engin emphasized that the trade volume will increase. Remarking that the political developments are positive for the logistics sector, President Engin indicated that the logistics need for construction materials will increase and the transportation will accelerate.



UTİKAD Board President Bilgehan Engin

The global climate crisis affects the logistics sector

Telling that the drought having affected the Panama Channel and considered as the biggest drought of the history due to the impacts on around 170 countries caused a domino effect on maritime transportation, President Engin noted that the number of vessels passing through per day decreased, restrictions were imposed on the goods transported by ships and the spot freight prices increased. Stating that the logistics and transport sector have an important share in service exports, President Engin shared the latest data. Telling that according to TurkStat data, 59.52 of the exports in terms of value were made by sea, 27.18 percent by road and 12.48 percent by air during January to October 2024, President Engin said that 87.07 of these exports in terms of weight were made by sea, 11.89 percent by road, 0.7 percent by rail and 0.45 percent by air. Engin added that "Around 15 billion US dollars of the exports worth of 112.5 billion US dollars are comprised of income generated from goods. The service exports at the end of the year are expected to reach 117 billion US dollars."

Engin also shared information about the Import Control System 2 (ICS2) Version 3 information seminars held by UTİKAD in order to raise awareness regarding their effective participation in the ICS2 practice and their effective participation in the Trade Facilitation Coordination Committee meetings held by the Ministry of Trade.

Noting that important studies such as the Logistics Sector Report, Guideline on Prevention of Undeclared/Hidden Hazardous Materials for Customers and Logistics Sector Report, the Undeclared/Hidden Dangerous Goods Prevention Guide for Customers and the Recommendation Guide for Measures to be Taken against Fraud Attempts were published in 2024, President Engin underlined that UTİKAD TV became a platform broadcasting contents on the latest developments in the logistics sector.

Commenting on another study carried out by UTİKAD Women Logisticians Focus Group in 2024, President Engin announced that they will make the impact of the women employees in the logistics sector visible this year with the "Report on Impacts of Women in Logistics Sector". President Engin told that: "We aim to decrease the obstacles before the women employees in the logistics sector, ensuring that the women benefit from national and international subsidies and supports and increase the employment of women at the executive level and increase the number of company structures where women can reveal their positive values in the decision making processes with the analyses shared under the "Report on Impacts of Women in Logistics Sector".

Ulusoy: "Reverse mentoring is an approach making difference in the business world"

UTİKAD Vice President Ayşem Ulusoy gave information on the "Reverse

Mentoring" project to be launched by UTİKAD in 2025. Ulusoy commented on the project as follows: "Contrary to the ordinary practices, the 'Reverse Mentoring' program changes the master-apprentice relation. University students provide guidance to managers regarding the business life. The visions of the university students will contribute to the development of companies." ■

2025 EXPECTATIONS OF THE SECTOR

- Improvement of the Transit Transportations Made through Türkiye
- Increasing Infrastructure Investments in Goods Transportation by Railway
- Improvement of the Visa Issuance Processes
- Increasing the Transit Certificate Quota
- Actions to Be Taken to Resolve Driver Shortage
- Reviving of Competition in Maritime Container Transport
- Studies Carried out to Ensure the Competitiveness of the Middle Corridor
- Alignment with the Sector of the Legislation Setting the International Goods Transport Rules Including Mainly Transport Works Organization Regulation
- Provision of Supports and Subsidies by the Public Authority to the Transport Sector for Ensuring Compliance with EU Green Deal
- Facilitation of the Application Processes for Green Logistics Certificate
- Regulation of Taxes for the Development of E-Commerce
- Facilitation of the Processes for Obtaining Authorized Economic Operator Status
- Improvement of NCTS – Phase 5 Processes
- Facilitation of Warehouse Processes for Transit Cargos

AIR CARGO KEY TO SUPPLY CHAIN RESILIENCE IN GLOBAL ECONOMY

The International Air Transport Association (IATA) emphasized the vital role of air cargo in maintaining global supply chain resilience and called on governments and industry to remain focused on delivering the fundamental expectations of customers-safety and security, digitalization and sustainability.

► Whether supporting global trade, enabling e-commerce, or delivering vital humanitarian aid, the value of air cargo has never been clearer. To meet customer expectations and navigate an increasingly complex environment, the air cargo industry must continuously strengthen safety and security, fast-track digitalization, and deliver on its sustainability commitments,” said Brendan Sullivan, IATA’s Global Head of Cargo at the opening of the 18th World Cargo Symposium (WCS) in Dubai, UAE.

Here is Mr. Sullivan’s comprehensive speech about the future perspective of air cargo;

It’s always a pleasure to return to the Middle East, a region that plays a vital



IATA's Global Head of Cargo
Brendan Sullivan

role in global air cargo connectivity, innovation, and resilience. I want to start by sharing a story. Since October 2023, attacks on commercial vessels in the Red Sea brought one of the world’s busiest shipping lanes to a standstill. Supply chains were disrupted. Deliveries were delayed. Shockwaves were felt across global trade routes. Among the affected cargo was a shipment of vital medical supplies headed for clinics in Sudan and Yemen that were under strain from conflict and shortages. With ocean freight stalled and the humanitarian clock ticking, relief organizations, had to act fast. Direct Relief, one of the groups involved, made a crucial decision to shift part of

the shipment from sea to air. When the global supply chain stumbled, air cargo proved its agility—adapting, responding, and delivering. That's what we do. In moments of uncertainty, we bring reliability. When others stall, we keep moving. When time is critical, air cargo delivers. And we have seen that yet again as the world rushes to get relief supplied to Myanmar in the aftermath of March's earthquake.

Of course, these are extreme circumstances. But they're a powerful reminder of air cargo's vital role—day in, day out—beyond the headlines of conflicts and relief efforts. On an average day, 180,000 tonnes of goods reach their destination by air. This is



the lifeblood of global trade—driving growth, creating jobs, and spreading prosperity.

Current trade tensions are deeply concerning. It's no secret—we believe trade drives prosperity. The more the world trades, the better off we all are. So, whatever the resolution of current trade tensions is, we know that air cargo will be there to deliver the goods people need and want. And to do that it is critical that we remain focused on the fundamental expectations of our customers—that we are safe, operate with modernized processes and are driving towards sustainability.

Today, I want to speak not just about

policy or performance metrics—but about the real stories behind these priorities. Stories that illustrate how safety, digitalization and sustainability are driving our business today and into the future.

Safety & security - shipments of lithium batteries continue to surge

To start, let me take you to a cargo terminal in East Asia. A routine inspection. The airwaybill listed “mobile phone accessories” which is nothing out of the ordinary. But one package caught an inspector's attention. It contained damaged, undeclared lithium batteries. The successful intervention of the inspector stopped a serious safety risk, that was just hours away from being loaded onto an aircraft.

And that happened because of our industry's safety culture and the supports we have put in place. The inspector had just completed IATA's dangerous goods training. He was helped by DG AutoCheck which caught the mismatch between what was declared and what was in the box. And the airline's station was CEIV Lithium Batteries-certified, meaning strong, consistent processes were in place. Shipments of lithium batteries continue to surge. More and more people are using devices powered by lithium batteries, with ever increasing amounts of stored energy— in addition to phones, cameras and tablets, we are seeing bigger batteries in power tools, e-bikes, and drones. As those shipments increase in number, the number of incidents or potential incidents will rise unless we are even more vigilant. We must step-up our efforts even further...

First, by stopping rogue shippers: Too many lithium battery shipments enter the system undeclared or mis-declared. That's unacceptable. It puts aircraft at risk. It puts lives at risk. Civil aviation

authorities must take firm enforcement action against non-compliant shippers. And we need governments to actively support ICAO's work to strengthen Annex 18—the global framework for the safe transport of dangerous goods by air.

Second, we must ensure that training is rigorous, and compliance is universal. Last year over 85,000 professionals were trained through IATA's Competency-Based Training and Assessment (CBTA) Center for Dangerous Goods. Our CEIV Lithium Batteries certification continues to expand—raising the bar across the supply chain, with 121 organizations already on board. From manufacturers and shippers to freight forwarders and airlines, every link in the chain must be competent, informed, and accountable.

Setting the standard in air cargo—we're seeing real impact

Let me take a moment to talk about CEIV, IATA's Center of Excellence for Independent Validators. Now in its 10th year, CEIV is transforming how the industry handles specialized cargo by embedding compliance into everyday operations through rigorous, standardized training and assessment. Since the launch of the first CEIV for Pharma in 2014, the program has expanded to include Live Animals, Fresh, and Lithium Batteries—each raising the bar in handling, transparency, and trust.

We're seeing real impact: Over 600 companies across 65 countries are CEIV Pharma-certified. More than 250,000+ trade lanes operate using CEIV standards

99% of certified companies say CEIV fosters a culture of continuous improvement

This is the future of air cargo standards—collaborative, transparent, and constantly advancing. We thank



the industry for their trust, as together, we continue building the foundation of a modern safety culture.

Security: An evolving threat landscape

Just as safety demands vigilance, so does security. Civil aviation must never be used as a pawn in geopolitical disputes. Acts like forcing down aircraft or hiding incendiary devices in cargo must be condemned—clearly and without exception. Following recent incidents where incendiary devices were concealed in packages and ignited, some States imposed new security measures. But without coordination, responses were inconsistent. Some were ineffective. Others were later reversed. It was far from the joined-up risk-based approach based on global standards that was needed.

IATA developed guidance to help airlines and supply chain partners manage the incendiary device threat—guidance that was endorsed across the industry. And we continue to

collaborate closely with ICAO and its member states, the TSA, the European Commission and other civil aviation authorities in support of coordinated, proportionate, and effective policy responses. We urge states to live up to their Annex 17 obligations, to share baseline factual threat information so that airlines can assess risks and respond effectively.

Whether it is safety or security, the industry is best placed to understand its operations and the associated safety and security risks. And the best results come when governments and industry work together -collaboratively and transparently- to create and implement the global standards that have guided our industry for over a century.

Let's shift gears to digitalization

Let's shift gears to digitalization and another story that you will all be familiar with. A fire at an electrical substation closed a major airport hub in Northern Europe..... no prizes for guessing which one. A flight carrying a time-critical pharmaceutical shipment,

destined for a cancer clinic in the country, was unable to land. Every hour counted.

Thanks to integrated digital systems, the shipment was instantly rerouted. Customs documentation was adjusted in real time. Tracking updates from a verified data logger verified through the IATA Air Cargo Device Assessment Program reassured both the shipper and the consignee that the shipment was still in good condition. And most importantly—the patient received their treatment on time.

That's the power of digitalization in the future. If safety is our foundation, digitalization is our accelerator. It makes us faster, more transparent, and more resilient. But digitalization is not just about speed. It is also about helping navigate an increasingly fragmented regulatory environment. Airlines are expected to comply with advance data requirements in the jurisdictions they operate to. These requirements are growing in number and complexity, increasing risks of inconsistent implementation or compliance. And

when things go wrong, airlines can face penalties as high as USD 100,000 per violation. Not the governments that created system complexity. And not the supply chain partner who submitted erroneous data to the airline. This fragmented data environment is especially challenging for e-commerce shipments, where multiple house waybill filings can conflict with the airline's master air waybill. This is where ONE Record comes in. ONE Record enables seamless, end-to-end data exchange across the entire supply chain. It cuts out duplication, closes data blind spots, and strengthens compliance with regulatory requirements. The industry's goal is clear: by January 2026, ONE Record will become the preferred method of sharing data. And we're well on the way. Airlines representing 72% of global air waybill volume are on track to implement it. More than 100 IT providers and 10,000 freight forwarders are already aligned. Open-source tools like NE:ONE, supported by a German government backed consortium, are making it easier for smaller players to adopt this standard. The goal is a single source of truth for every shipment—reducing ambiguity, error, and the risk of sanctions. But implementation must accelerate.

We urge: Airlines and forwarders to act now and implement ONE Record. Governments to accept ONE Record in their regulatory data filing requirements

Developers to build compatible, secure, and open platforms

At the same time, digitalization isn't one-size-fits-all. As air cargo advances on its digital journey, our standards must evolve with it. LAR Verify—our new web-based portal for live animal transport—is a prime example. It provides instant access to destination-

200.000 LIVE ANIMAL SHIPMENTS GLOBALLY



IATA data shows that there were close to 200,000 live animal shipments globally in 2024-up 11% since 2019.

► The International Air Transport Association (IATA) has launched LAR Verify, a digital portal to improve the welfare and safe transport of live animals by air. Using LAR Verify, airlines, shippers and freight forwarders can access accurate operator and destination-specific requirements as defined by the IATA Live Animals Regulations (LAR). The regulations have formed the basis for the worldwide transport of live animals by air for more than 50 years. The new portal offers an automated compliance solution for live animal shipments, streamlining planning, booking, acceptance and handling. "The volume of specialized cargo -live animals in particular- continues to grow. To manage this opportunity safely and efficiently, a single digital portal that provides access to relevant LAR regulations and facilitates data sharing is mission critical. As envisioned by IATA's ONE Record initiative, the release of LAR Verify is a key milestone towards

achieving a single source of truth for live animal shipments," said Brendan Sullivan, IATA's Global Head of Cargo. LAR Verify can be embedded into cargo management systems, making it easier to integrate into existing workflows. It provides details on: -State and operator regulations, including on the export, import, transit and transfer of live animals- Documentation requirements such as import licenses per destination -Animal classification along with technical standards such as container requirements and labelling- Live updates on regional embargoes and trade regulations, including requirements around managing disease outbreaks Through an API, shippers and freight forwarders can also upload all required documents for airline verification. Once all documents are correct, airlines can issue a physical acceptance of the cargo, negating the need to move live animals until their travel is confirmed. ■

specific regulations, helping improve compliance, enhance animal welfare, and reduce risk. It's a clear model for how targeted digital tools can meet the specific needs of specialized cargo while supporting the broader vision of a fully digital, connected supply chain. Digitalization is not just about replacing paper with pixels. It's also about culture. Our Digitalization Leadership Charter combined with the Digital Cargo Alliance brings together close to 40 signatories around shared

principles: interoperability, data security, sustainability, and innovation. And across IATA, we are exploring the potential of AI, insourcing digital talent, launching proof-of-concepts, and prioritizing cybersecurity. Why does this matter? Because digitalization enables us to anticipate disruption—not just react to it. It empowers us to serve customers better, comply with regulators more easily, and reduce friction in global trade. It is, in short, how we future-proof our industry.



The third pillar is sustainability in aviation

The third pillar is sustainability. Let me tell you one final story— a bit closer to home - illustrating our commitment to achieve net zero carbon emissions by 2050.

A Hokkaido scallop that was harvested in Japan yesterday morning will be eaten in Nobu, a Japanese restaurant in Dubai. This journey is remarkable—not just for its speed, but for the steps taken to reduce its environmental footprint. More than that, it represents a global supply chain that connects producers—whether from mature or emerging markets—to international customers, supporting livelihoods and driving economic growth around the world.

This scallop, together with other fresh produce from Japan, was flown on an Emirates aircraft partly powered by Sustainable Aviation Fuel (SAF) produced in Singapore, recorded through the just-launched SAF Registry that enables SAF book & claim. The shipment followed IATA's

CEIV Fresh standards—ensuring temperature-controlled handling that reduced waste and spoilage. It travelled in reusable and recyclable packaging and was handled by dnata ground crews using efficient, low-emissions enhanced GSEs. For the shipper, this wasn't just seafood—it was a promise to deliver quality produce with minimal cost to the environment. And this goal is shared across the air cargo industry. The air cargo industry is embracing sustainability principles, in-flight and on the ground. Waste reduction and the implementation of circularity strategies have become part of the standard way in which we conduct our operations.

Airlines and handlers are focusing on alternatives to plastic, focusing on reduction, reuse and recycling. As an example, Atlas Air, now reuses shredded cardboard as packaging material, significantly reducing plastic waste.

IATA has issued guidance to eliminate single-use plastics across aviation and

the cargo supply chain and included these principles into handling standards.

Sustainable Aviation Fuel (SAF)

We're also taking action to address our biggest environmental cost: carbon emissions. Momentum around Sustainable Aviation Fuel is growing fast, with players across the value chain stepping up.

DHL and IAG Cargo renewed their SAF agreement—60 million liters, avoiding 165,000 tonnes of CO₂. Kintetsu World Express and IAG signed for 640,000 liters.

Korean Air and CEVA Logistics expanded their SAF partnership. Lufthansa Cargo and Maersk committed to 400 tonnes by year-end. At least seven shipper-forwarder SAF deals were signed in the past year—including Formula 1's investment deals with Qatar Airways and DHL. And soon, IATA's CO₂ Connect for Cargo will help calculate shipment emissions more accurately—factoring in SAF, aligned with our reporting

methodology.

Without belittling these efforts, they are, frankly, nowhere near the volumes that we need to be speaking about. We don't have enough SAF. And the cost of what is available needs to come down. We remain committed to our 2050 goal. But the ramp-up to that has been disappointing to say the least. Governments have not provided the policy support needed, even though they have a playbook at hand with how the wind and solar energy industries expanded.

In fact, they continue to send completely mixed signals by subsidizing fossil fuel extraction. And the major fuel producers have been slow-walking—or sidelining—planned investments in SAF. Additionally, aircraft manufacturers have backed off their commitments for medium-term delivery of CO2 saving products such as hydrogen powered aircraft. Airlines are committed and determined. But this is not our show alone. We need much more action behind the words of regulators, fuel suppliers and manufacturers.

Our story is still being written in air cargo

So here we are. In a world that is anything but predictable, air cargo continues to deliver. Each and every day we deliver so reliably that much of what we do to power the global economy and drive prosperity is taken for granted. And through every shock, that value is illuminated for all to see. From a faulty lithium battery intercepted, to a cancer medicine rerouted, to a scallop carefully delivered—these are not just anecdotes. They are proof that we make good on our aspirations even whether we are in the spotlight or not. Let us continue to tell these stories. Let us continue to write this next chapter together. ■

TOTAL DEMAND IN AIR CARGO FLUCTUATES ON MONTHLY BASE

- With the March data, an increase was observed again in the global air cargo markets. In February 2025 period, there was a decrease in air cargo for the first time since mid-2023. The International Air Transport Association (IATA) released data for March 2025 global air cargo markets showed total demand, measured in cargo tonne-kilometers (CTK), increased by 4.4% compared to March 2024 levels (+5.5% for international operations), a historic peak for March. Capacity, measured in available cargo tonne-kilometers (ACTK), expanded by 4.3% compared to March 2024 (+6.1% for international operations). “March cargo volumes were strong. It is possible that this is partly a front-loading of demand as some businesses tried to beat the well-telegraphed 2 April tariff announcement by the Trump Administration. The uncertainty over how much of the 2 April proposals will be implemented may eventually weigh on trade. In the meantime, the lower fuel costs—which are also a result of the same uncertainty—are a short-term positive factor for air cargo. And, within the temporary pause on implementation we hope that political leaders will be able to shift trade tensions to reliable agreements that can restore confidence in global supply chains,” said Willie Walsh, IATA’s Director General. Several factors in the operating environment should be noted:
 - March volumes typically rise after a lull in February, and this single-digit increase is in line with pre-COVID growth trends.
 - Jet fuel prices dropped 17.3% year-on-year, marking nine straight months of year-on-year declines.
 - The sharp rise in US tariffs and new trade rules, especially the 2 May ban on duty-free imports from China and Hong Kong, may have prompted companies and buyers to make purchases in advance

to avoid significant import fees.

- World industrial output grew 3.2% year-on-year, and trade volumes expanded 2.9%. Many key Consumer Price Inflation (CPI) indices fell: US inflation was 2.4%, down 0.4 points from February, EU CPI was 2.5% and Japan’s rate fell 0.1% to 3.6%. China remains in deflation but this eased to -0.1%.
- March Regional Performance Asia-Pacific airlines saw 9.6% year-on-year demand growth for air cargo in March, the strongest growth among the regions. Capacity increased by 11.3% year-on-year. North American carriers saw a 9.5% year-on-year increase in demand growth for air cargo in March. Capacity increased by 6.1% year-on-year. European carriers saw a 4.5% year-on-year increase in demand growth for air cargo in March. Capacity increased 2.0% year-on-year. Middle Eastern carriers saw a -3.2% year-on-year decrease in demand growth for air cargo in March. Capacity increased by 0.8% year-on-year. It’s possible the weakness in this market is due to year-on-year comparison with the strong growth at the start of 2024 resulting from disruption to Red Sea maritime freight. Latin American carriers saw 5.8% year-on-year demand growth for air cargo in March. Capacity increased 4.7% year-on-year. African airlines saw a -13.4% year-on-year decrease in demand for air cargo in March, the slowest among the regions. Capacity increased by 10.5% year-on-year.
- Trade Lane Growth: The Europe-North America route was the busiest trade lane in March. The largest trade lane by market share, Asia-North America, also grew strongly, possibly encouraged by front-loading shipments ahead of potential increased tariffs. Europe-Middle East and Africa-Asia were the only trade lanes to decline in March. ■

SUSTAINABILITY DEVELOPS FAST IN HEAVY COMMERCIAL VEHICLES SECTOR

► The Heavy Commercial Vehicles Association (TAiD) told that “The global heavy commercial vehicles sector forms the backbone of transportation and undertakes a great responsibility in terms of its environmental impacts. The sustainability oriented transformation of the sector increases by gaining momentum”. The Association shared the latest developments including important steps for the future of the sector.

Undertaking around 40 percent of the global transportation processes, the heavy commercial vehicles sector is also an important source of the global carbon emissions. Therefore, the environment oriented transformation regarding sustainability increases by gaining momentum. Electrification, alternative fuels, smart transportation systems, technologies increasing efficiency, sustainable solutions implemented for production play an important role for decreasing the environmental impacts in the heavy commercial vehicles sector. However, the sustainable is not only considered as an environmental requirement in the heavy commercial vehicle sector, like in all other sectors, but also requires an important strategy providing economic and social benefits. The sector aims for achieving a greener future with economic growth and development of business models while decreasing the environmental impacts.

The Heavy Commercial Vehicles Association (TAiD) evaluated the sustainability studies and latest developments in the commercial vehicle sector.

The emissions from heavy commercial vehicles are expected to decrease by 2030

According to the World Energy Outlook 2023 report published by the International Energy Agency (IEA), the transportation sector generates around 23 percent of the global carbon emissions. According to the report, the heavy commercial vehicles sector undertaking road transport services (trucks, lorries, buses etc.) generate 40 percent of these emissions. The fossil fuel consumption of the vehicles cause high carbon (CO₂) and other greenhouse gas emissions. However, according to 2022 report of OECD, the emissions caused by these vehicles are expected to decrease by 30 percent by 2030. However, radical changes in the sector and sustainable technologies are required to be implemented fast in order to realize this goal. Electric vehicles are improved day by day for achieving sustainability goals. Electric heavy commercial vehicles offset the carbon emissions and strengthen the transformation in the sector. 1 percent of the new heavy commercial vehicles sold across the world in 2023 was electric vehicles. According to BloombergNEF

(BNEF) data, this ratio is expected to increase to 30 percent by 2040. Electric trucks and buses will especially play an important role in domestic transportation. The manufacturers, thus, make serious investments and expand their electric vehicle portfolios.

Alternative fuels take on a role in sustainability

The use of fossil fuels is expected to be decreased and saving are expected to be ensured in limited resources with the use of alternative fuels. Moreover, fuels such as Liquefied Natural Gas (LNG) and biodiesel ensure lower emission levels as compared to diesel engines. LNG can decrease carbon emissions by 20-25 percent while biodiesel ensures 60 percent lower CO₂ emissions.

Digitalization and smart transportation

The digitalization and smart transportation systems increase efficiency in the heavy commercial vehicles sector and help with the decrease of the environmental impacts. The smart fund management systems ensure that the vehicles run at an optimum speed and in an optimum route and decrease the



fuel consumption and emissions significantly. According to 2023 report by McKinsey & Company, the smart transportation systems might decrease the fuel consumption in the sector by 10 to 15 percent. Moreover, the autonomous vehicles are expected to get a market share up to 30 percent in the transportation sector by 2040. Autonomous vehicles optimize the traffic flow and can prevent unnecessary fuel consumption and significantly decrease the impact on the environment.

Carbon emission decrease in trailers

The trailers can contribute to the decrease in emissions by optimizing the fuel consumption of the trucks. In line with the VECTO goals set for the heavy commercial vehicles, the carbon emissions are expected to be decreased by 10 percent by 2030 with the improvements such as the aerodynamic design of trailers, equipment with lightened materials and tire solutions. Moreover, the electrification transformation of the trailers has accelerated. Especially the electric

solutions provided for reefer vehicles will decrease the carbon emissions caused by coolants by 100 percent and support environmental sensitivity. Moreover, the carbon emissions of the trucks can be decreased by up to 40 percent thanks to the powered axles and battery technology integrated to trailers. These innovative solutions play an important role in the sustainable future of transportation and take an effective step for the decrease of environmental impacts.

Economic transformation

The investments regarding sustainability not only provide environmental benefits but also contribute to the economy. As of 2023, the annual growth ratio of sustainability oriented investments regarding the heavy commercial vehicle sector is 7.5 percent. Most of these investments are directed to the electric vehicle infrastructure, new generation battery technologies and sustainable fuel solutions. According to 2022 report issued by GlobalData, the global investments made in the electric vehicle infrastructure as of

2023 are expected to exceed 30 billion US dollars. These investments do not only protect the environment but also provide support for creation of new business opportunities and ensuring economic growth.

Difficulties in sustainability goals and future expectations

There are still some difficulties required to be overcome in order to achieve environmental sustainability goals in the heavy commercial vehicles sector. Obstacles such as the ranges of electric vehicles, high battery costs and insufficient charging infrastructure make the transition process difficult. However, the range problems are expected to be resolved and the electric vehicles are expected to be more accessible by 2030. The IEA 2023 Global Energy Outlook report anticipates that the electric vehicles will constitute 40 percent of the heavy commercial vehicle sales by 2030. Moreover, with the improvement of the energy efficiency and renewable energy infrastructures, the carbon emissions in the sector are expected to decrease by 30 percent. ■

FOREIGN TRADE ACCORDING TO GENERAL TRADE SYSTEM BY TOP TWENTY COUNTRIES, 2024, 2025

	FEBRUARY					JANUARY-FEBRUARY				
	2024		2025		Change %	2024		2025		Change %
	Value	Share	Value	Share		Value	Share	Value	Share	
Exports										
Total	21.092.067	100,0	20.761.122	100,0	-1,6	41.093.428	100,0	41.920.878	100,0	2,0
Germany	1.724.945	8,2	1.688.980	8,1	-2,1	3.486.427	8,5	3.469.762	8,3	-0,5
United Kingdom	1.062.331	5,0	1.245.267	6,0	17,2	2.084.041	5,1	2.524.653	6,0	21,1
USA	1.340.179	6,4	1.195.146	5,8	-10,8	2.546.328	6,2	2.565.322	6,1	0,7
Italy	1.161.844	5,5	1.085.832	5,2	-6,5	2.167.263	5,3	2.076.059	5,0	-4,2
Iraq	1.070.428	5,1	1.011.589	4,9	-5,5	2.166.928	5,3	1.976.954	4,7	-8,8
Spain	796.473	3,8	802.106	3,9	0,7	1.563.513	3,8	1.591.477	3,8	1,8
UAE	558.724	2,6	796.871	3,8	42,6	1.013.059	2,5	1.808.070	4,3	78,5
France	807.887	3,8	761.260	3,7	-5,8	1.551.507	3,8	1.602.649	3,8	3,3
Netherlands	671.266	3,2	629.977	3,0	-6,2	1.317.313	3,2	1.251.889	3,0	-5,0
Romania	623.786	3,0	584.092	2,8	-6,4	1.127.748	2,7	1.196.625	2,9	6,1
Russia	667.235	3,2	522.124	2,5	-21,7	1.294.880	3,2	1.019.043	2,4	-21,3
Poland	500.696	2,4	480.160	2,3	-4,1	975.365	2,4	922.885	2,2	-5,4
Greece	294.306	1,4	462.345	2,2	57,1	670.123	1,6	887.586	2,1	32,5
Bulgaria	359.168	1,7	412.472	2,0	14,8	734.046	1,8	834.186	2,0	13,6
Belgium	387.071	1,8	397.738	1,9	2,8	741.012	1,8	779.505	1,9	5,2
Saudi Arabia	315.431	1,5	365.869	1,8	16,0	616.542	1,5	666.062	1,6	8,0
Egypt	349.960	1,7	345.520	1,7	-1,3	624.615	1,5	658.612	1,6	5,4
Libya	242.925	1,2	286.887	1,4	18,1	454.791	1,1	544.386	1,3	19,7
Syria	182.055	0,9	278.170	1,3	52,8	356.648	0,9	527.004	1,3	47,8
Ukraine	276.696	1,3	272.532	1,3	-1,5	519.380	1,3	544.286	1,3	4,8
Others	7.698.662	36,5	7.136.183	34,4	-7,3	15.081.898	36,7	14.473.865	34,5	-4,0
Imports										
Total	27.859.430	100,0	28.532.566	100,0	2,4	54.045.469	100,0	57.234.640	100,0	5,9
Russia	4.027.257	14,5	3.862.955	13,5	-4,1	8.354.428	15,5	8.261.162	14,4	-1,1
China	3.442.551	12,4	3.541.714	12,4	2,9	6.342.944	11,7	7.627.990	13,3	20,3
Germany	2.216.848	8,0	2.143.032	7,5	-3,3	4.129.193	7,6	3.997.427	7,0	-3,2
USA	1.334.326	4,8	1.268.748	4,4	-4,9	2.734.327	5,1	2.699.140	4,7	-1,3
Switzerland	876.681	3,1	1.234.198	4,3	40,8	1.676.979	3,1	2.140.894	3,7	27,7
Italy	1.543.061	5,5	1.224.519	4,3	-20,6	2.731.462	5,1	2.174.709	3,8	-20,4
UAE	385.386	1,4	938.257	3,3	143,5	859.908	1,6	1.759.866	3,1	104,7
France	1.168.300	4,2	846.381	3,0	-27,6	2.052.674	3,8	1.693.200	3,0	-17,5
South Korea	672.048	2,4	712.468	2,5	6,0	1.244.675	2,3	1.524.312	2,7	22,5
Spain	834.049	3,0	667.224	2,3	-20,0	1.459.737	2,7	1.274.375	2,2	-12,7
India	479.205	1,7	519.520	1,8	8,4	885.141	1,6	955.355	1,7	7,9
United Kingdom	524.402	1,9	446.651	1,6	-14,8	1.096.995	2,0	972.443	1,7	-11,4
Poland	478.031	1,7	430.443	1,5	-10,0	871.595	1,6	838.156	1,5	-3,8
Netherlands	431.651	1,5	425.835	1,5	-1,3	803.815	1,5	807.197	1,4	0,4
Malaysia	330.852	1,2	413.816	1,5	25,1	598.409	1,1	834.862	1,5	39,5
Romania	328.309	1,2	369.220	1,3	12,5	611.688	1,1	656.336	1,1	7,3
Japan	370.128	1,3	331.118	1,2	-10,5	742.510	1,4	710.536	1,2	-4,3
Belgium	404.925	1,5	331.055	1,2	-18,2	777.733	1,4	632.502	1,1	-18,7
Brazil	250.749	0,9	298.219	1,0	18,9	531.032	1,0	654.019	1,1	23,2
zech Republic	331.424	1,2	289.452	1,0	-12,7	599.016	1,1	598.893	1,0	0,0
Others	7.429.244	26,7	8.237.740	28,9	10,9	14.941.207	27,6	16.421.266	28,7	9,9

TurkStat, Foreign Trade Statistics, February 2025

** Countries are ranked by February, 2025 figures.

*** Thousand US \$

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