Transport and Logistics Systems Magazine

INTERMODAL

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

2026 • Issue 42

THE SHIFTING AXES IN THE GLOBAL ECONOMY AND THE ERA OF SUPER CORRIDORS

Türkiye Emerges as a Logistics Bridge in Europe-Central Asia Trade

The IRU Report on the Future of Road Transport and Energy Prices

Priorities of Air Cargo to Strengthen Global Standards in a Turbulent World

TURNING CRISES INTO OPPORTUNITIES AND LEARNING TO LIVE WITH CRISES

Intermodal Magazine, taking into account the current global conjuncture and increasing military tensions, once again presents the sector with content that sheds light on the times. In addition to comprehensive articles analyzing developments on land, air, and sea, this issue highlights assessments from global logistics organizations regarding future perspectives on trade corridors and the world map. IRU's analysis of international road transport and IATA's analysis of air cargo provide important data for understanding both the present and the near future. Domestically, representatives of leading professional organizations in the sector discuss Türkiye's global role in logistics and the advantages of ensuring the uninterrupted operation of trade corridors.

As an English-language publication, Intermodal Magazine plays a significant role in understanding sectoral trends and conveying Türkiye's position to international readers. The fact that this issue is becoming an increasingly popular reference publication at international logistics fairs is an indication of this. This content, which will be presented to global logistics players at the Shanghai Fair, will also be an important tool in showcasing Türkiye's logistics strength at the Country Pavilion.

Logistics is, by its very nature, a dynamic sector. Its importance increases, rather than decreases, during times of crisis and war, just as it does during peacetime. Extraordinary times act as a litmus test, revealing the sector's strengths and weaknesses. During these periods, how to keep logistics channels open or how to create new routes becomes a central agenda item. Difficult times also encourage creativity in generating new solutions.

The global economy is going through a period where predictions are difficult due to cyclical crises and geopolitical tensions. Uncertainty prevails in many areas, from macroeconomic indicators to energy prices. Therefore, it is impossible to know with certainty what the world will look like when the magazine's printing process is complete. However, one thing remains constant: every crisis has an end. Logistics, in a sense, is the art of dealing with crises. With this issue, our aim is to capture a snapshot of this extraordinary period and leave a document for the future. Minimizing the damage from crises, building more resilient structures, and preparing for the future with the right investments are of paramount importance. Even more important is being able to turn crises into opportunities. Türkiye; With its geopolitical location, strategic position on global trade routes, advanced logistics infrastructure, and qualified workforce, it possesses a strong potential to achieve this transformation.■

Necmi Çelik
Editor-in-Chief

Turkish Transport News
INTERMODAL
Combined Transport and Logistics Systems Magazine

Issue 42

Publisher
İlker Altun on behalf of
Aysberg Basın Yayın San. Tic. Ltd. Şti.

Editor-in-Chief
Necmi Çelik

Editorial Staff
Gülbin Bektaş
Ali İrfan Alcan
Ekin Seren Altun
İ. Sergen Altun

Advisory Board
Prof. Dr. Stefan Iskan

Foreign News
Dr. Robert Schoenberger

P&R Manager - Advertising
Selma Altun

Graphic Design
Ertan Altun

Multimedia
Sinan Göral

Subscription
Zeynep Ön

Type of Publication
Local periodical

Published by
AYSBERG
Aysberg Basın Yayın San. Tic. Ltd. Şti.
Biracılar Sok. No:10 Mecidiyeköy / İSTANBUL
Tel : +90-212-217 49 59
Fax : +90-212-211 62 77

Printed by
Özgün Ofset
Yeşilce Mah. Aytekin Sok. No:21
Seyrantepe Sanayi 4.Levent / İSTANBUL

ISSN: 1306-7419

A D V E R T

I S I N G   I N D E X

AYSBERG Basın Yayın San. Tic. Ltd. Şti.

BEST

DEİK DIŞ EKONOMİK İLİŞKİLER KURULU FOREIGN ECONOMIC RELATIONS BOARD

DFDS

INTERMODAL Transport and Logistics Systems Magazine

logitrans TÜRKİYE

PASİFİK EURASIA

SGS TransitNet

TAŞIMACILIK REHBERİ

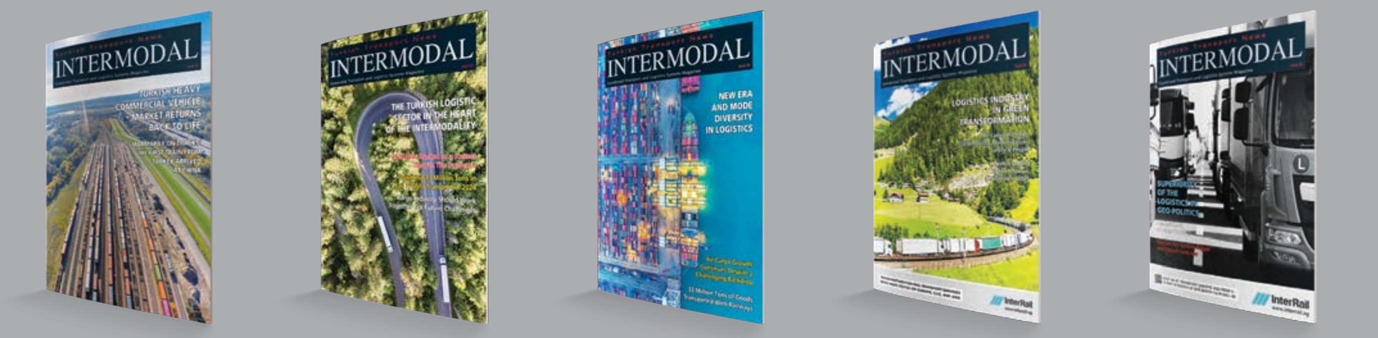
tibett Makina San. ve Tic. A.Ş.

ULUSOY

VEGA Excellence is our driver

Turkish Transport News
INTERMODAL
Combined Transport and Logistics Systems Magazine

C O N T E N T S



WITH CONTRIBUTIONS OF

Abdülkadir URALOĞLU
Minister of Transport and Infrastructure of Republic of Türkiye

Hamdi ERÇELİK
Chairman
TÜRKLİM

Şerafettin ARAS
Chairman
UND

Bilgehan ENGİN
President
UTİKAD

Mustafa GÜLTEPE
President
TİM

İlker ALTUN
Managing Director
AYSBERG Group

Minister of Transport and Infrastructure of Republic of Türkiye

THE RISE OF INTERMODAL TRANSPORTATION IN TÜRKİYE AND INTEGRATION WITH THE MIDDLE CORRIDOR

Abdülkadir URALOĞLU

In an increasingly globalized world, transportation corridors and transit transportation constitute the backbone of economic development, global trade, and international cooperation. In this context, thanks to the 355 billion dollar investment we have made in the transportation and communications sectors over the past 24 years, Türkiye has transcended its position as merely a geographical transit point at the center of Afro-Eurasia and has evolved into a resilient logistical power capable of generating alternative routes in the face of crises. Our ability to reach a population of 1.5 billion and an economic volume exceeding 55 trillion dollars within a 4-hour flight radius further consolidates this role. Another key factor in this transformation has been the recent global conflicts we have witnessed and the subsequent developments, which have once again clearly demonstrated the strategic importance of transportation and logistics.

For example, the uncertainties arising particularly in the Strait of Hormuz due to the Iran-US-Israel conflict have caused significant disruptions in the main arteries of global trade and led to serious interruptions in maritime transportation. This situation has accelerated the search for alternative routes in global trade and has once again brought the importance of alternative transportation corridors to the forefront. At this very juncture, our country, situated at the intersection of Asia, Europe, and Africa thanks to its unique geographical position, has become one of the new backbone routes of global trade by offering safe, fast, and competitive corridors. In particular, the Middle Corridor, with Türkiye at its center, and the developing Development Road Project have emerged as the leading routes in this process.

Under the vision of our Honorable President, the Middle Corridor, which we have advanced, has significantly shortened the transportation time from China to Europe compared to traditional routes. While it is known that shipments passing through the Suez Canal route, where a significant portion of global trade flows, take an average of 35 days, and those via the Cape of Good Hope take approximately 45 days, the reduction of transportation time between China and Europe via the Middle Corridor to as little as 18 days has made this route a strong alternative in terms of both time and cost. Türkiye has enabled the safe and rapid delivery of cargo flows to Europe by offering seamless intermodal transportation opportunities in this corridor through the Marmaray crossing and the Baku-Tbilisi-Kars railway line. The Middle Corridor has gone beyond being merely a transit route and has become one of the most concrete examples of intermodal integration. By strengthening railway, highway, and maritime connections, cargoes transition smoothly between different modes, thereby increasing efficiency. This integration has not only reduced logistics costs but has also enhanced the resilience of supply chains.

In particular, by completing and putting into service major mega transportation projects in recent years such as the Marmaray, the Eurasia Tunnel, the Yavuz Sultan Selim Bridge, the 1915 Çanakkale Bridge, the Osmangazi Bridge, Istanbul Airport, Filyos Port, the Ankara-Eskişehir-İstanbul, Ankara-Konya, and Ankara-Sivas High-Speed Railway Lines, as well as the Northern Marmara, İzmir-İstanbul, Ankara-Niğde, and Aydın-Denizli Motorways, Türkiye has become a regional hub in the rise of intermodal transportation. Furthermore, we are further strengthening our transportation network through ongoing projects including the Rize İyidere Logistics Port, the Ankara-İzmir, Halkalı–Kapıkule, Bandırma-Bursa-Yenişehir-Osmaneli, Mersin-Adana-Osmaniye-Gaziantep, Yerköy-Kayseri, Kırıkkale-Çorum, and Karaman–Ulukışla High-Speed Railway Lines, and the North Ring Railway Project, for which we will soon launch the tender process and commence construction. We also plan to increase the number of our Logistics Centers from 12 to 25.

Furthermore, upon completion of the works on the Kars–Iğdır–Aralık–Dilucu line, which forms the backbone of the Zangezur Corridor, Türkiye will connect the Middle Corridor through one more border crossing, thereby providing multifaceted logistical integration. This development will further strengthen our country's position not only as a transit country but also as a regional logistics hub. The Development Road Project, which is taking shape along the north-south axis, aims to create a new trade backbone starting from the Faw Port in Iraq and extending approximately 1,200 kilometers to Türkiye and from there to Europe. Through this project, carried out in partnership between the United Arab Emirates, Qatar, Türkiye, and Iraq, cargo arriving at the Faw Port will be transported both into our domestic market and to Europe, thus establishing an alternative corridor. This project holds strategic importance in terms of diversifying global trade. Moreover, we foresee that the Development Road Project will contribute approximately 55 billion dollars to our country's economy over a 10-year period. We estimate that, with the establishment of production and logistics centers in our country, an average of 70,000 of our citizens will be employed each year.

Let there be no doubt in anyone's mind that Türkiye will continue to enhance its transit capacity and competitiveness through increasing infrastructure investments.

Visionary projects such as the intermodal integration of the Middle Corridor and the Development Road Project with the Zangezur Connection will provide concrete responses to the search for alternative routes in global trade. Türkiye stands ready to lead the way toward a more sustainable, efficient, and integrated future in logistics. ■


transport logistic
SHANGHAI
TÜRKİYE
Connecting Continents
Delivering Excellence!
Stronger Together: Türkiye's logistics leaders at Transport Logistic China 2026
Join us at the Türkiye Pavilion!
TURKISH LOGISTICS PAVILION
Booth W3.301
DEiK
DIŞ EKONOMİK İLİŞKİLER KURULU
FOREIGN ECONOMIC RELATIONS BOARD
LOGISTICS BUSINESS COUNCIL
deikiletisim
deikint
CLK WORLDWIDE
Makes The World Accessible
DESTAN
HAREKET
HİB
SERVICES EXPORTERS' ASSOCIATION
ISTANBULOGISTICS GROUP
lima LOGISTICS
PASİFİK EURASIA
WELD

LOGISTICAL REASON IN TIMES OF CRISIS: TÜRKİYE, THE MIDDLE CORRIDOR, AND THE STRATEGIC RESPONSIBILITY OF THE NEW ERA

Şerafettin ARAS
Chairman

Today, the world is witnessing not only a security crisis, but also a search for a new order in trade, supply, and logistics. The conflict escalating along the U.S.-Israel-Iran axis since February 28, 2026, has seriously shaken trade and energy flows around the Strait of Hormuz; risk, cost, and uncertainty in maritime transport have grown rapidly. Disruptions on this route directly affect energy markets, freight rates, insurance costs, delivery times, and global supply planning.
In such periods, countries either bear the burden of the crisis, or transform it into a strategic advantage through collective wisdom, rapid reform, and regional cooperation. This is the main issue facing Türkiye today. The developments can strengthen Türkiye's claim to be a reliable, fast, and flexible logistics hub between Europe and Asia. As risk increases in maritime transport, cargo shifts toward safer alternatives. The Türkiye-Middle Corridor route, especially through Azerbaijan and Georgia, can become one of the main arteries of the new era. Studies show that it offers a shorter and faster alternative; transit times can be reduced to 13-21 days and the route is approximately 2,000 kilometers shorter than the northern corridor.
However, opportunity alone is not enough. If there is no system capable of carrying it, cargo flows will shift elsewhere. The real question is whether transit countries such as Türkiye, Bulgaria, Azerbaijan, and Georgia can take the necessary decisions quickly enough.
The first step is to turn the Bulgaria-Türkiye-Azerbaijan-Georgia line into a genuine speed corridor. Border crossings must be redesigned physically, administratively, and digitally. Waiting times, fragmented procedures, and incompatible data flows are major obstacles.
The objective is clear: joint border gates, joint control points, advance data sharing, a single window system, one-stop processing, risk-based inspection, and fast-track models. Coordinated border management reduces repetitive controls and speeds up crossings.
As risk increases in maritime transport, a shift toward road transport is inevitable. But to attract cargo, roads alone are not enough; decisions, coordination, and courage are required.
The second critical issue is establishing a European access regime. Driver visas, transit permits, quota restrictions, and bottlenecks limit the shift to land routes. Türkiye must open not only eastern routes, but also western gates.
The driver visa issue is now a supply chain security problem. A special, fast, multiple-entry, long-term logistics visa regime must be established for professional drivers carrying international freight.
The third issue is the abolition of transit permits and quotas, or at least their suspension during times of crisis. Quota regimes punish not only the carrier, but also the industrialist, the exporter, and the consumer. The correct reflex is not restriction, but facilitating transport. Türkiye must advocate this approach.
If maritime risk is increasing and cargo is shifting to land, artificial obstacles must be reduced. As long as quotas, long waiting times, fragmented checks, and visa bottlenecks continue, discourse about an "alternative corridor" cannot be credible.
The fourth issue is the simplification and digitalization of customs procedures. Competition is measured by data flow speed, inspection efficiency, and predictability. Türkiye and regional countries must accelerate joint data sharing, e-documents, e-permits, e-CMR, and digital platforms.
Inter-agency cooperation is as decisive as interstate cooperation. A Corridor Executive Mechanism with measurable targets must be established. Modern corridors grow not only through infrastructure, but through governance capacity.
Although increasing maritime risk may seem negative, if managed correctly, it can become a historic opportunity to expand the Middle Corridor and reposition Europe-Asia transport. Crises make reforms compulsory. Türkiye and the region must show similar resolve.
What is needed today is not to complain about the crisis, but to institutionalize, together with neighboring countries, the logistical capacity to manage it.
Because the issue is no longer simply to carry cargo.
The issue is to determine the new direction of trade.

INTERMODAL TRANSPORT AND THE MIDDLE CORRIDOR: TÜRKİYE'S STRATEGIC LOGISTICS OPPORTUNITY

Bilgehan Engin
President

Global trade is entering a period where resilience, predictability and sustainability are becoming as important as cost and speed. Recent disruptions across major trade routes have shown that logistics systems can no longer depend on a single corridor, mode or geography. For this reason, intermodal transport has become a strategic necessity rather than only an operational preference. In this new environment, resilience is becoming the new currency of global trade.

Intermodal transport enables goods to move through different modes such as road, rail and maritime transport without handling the cargo itself. This model improves efficiency, reduces operational risks and supports lower-emission transport chains, especially when rail and maritime connections are effectively integrated.

The Russia–Ukraine war, continuing security risks in the Red Sea and Suez Canal, and periodic tensions around the Strait of Hormuz have all demonstrated the vulnerability of global supply chains. These developments have increased transit times, costs and uncertainty, while reinforcing the need for diversified and reliable trade routes.

In this context, the Middle Corridor is no longer merely an alternative route; it is becoming an essential component of global supply chain resilience. Extending from China through Central Asia and the Caspian Sea to Türkiye and Europe, the corridor offers a more balanced and diversified connection between East and West. In this context, the Middle Corridor is no longer merely an alternative route; it is rapidly becoming a strategic necessity for ensuring continuity and balance in global trade flows.

Railway projects such as the Baku–Tbilisi–Kars line, the Marmaray crossing, port-connected logistics centers, and ongoing infrastructure investments are strengthening Türkiye's intermodal transport capacity. These developments enable uninterrupted cargo flows, optimize transit times, and make logistics costs more predictable and manageable.

Türkiye's role should not be limited to being a transit country. With its ports, rail connections, road network, logistics centers and customs capacity, Türkiye has the potential to become a regional logistics, distribution and value-added services hub. This positions Türkiye not only as a transit hub, but increasingly as a defining actor in regional and intercontinental logistics.

Beyond physical infrastructure, environmental regulations are also shaping the future of logistics. The European Union's Green Deal and its carbon adjustment mechanisms are accelerating the transition toward low-emission transport models across supply chains. In this context, intermodal transport, particularly when supported by rail integration, stands out as one of the most effective solutions for reducing carbon emissions in logistics operations. For Türkiye, which has strong trade ties with the European Union, the transition to low-emission logistics is also becoming a competitiveness issue. Intermodal solutions supported by rail and short-sea shipping will play a critical role in meeting environmental expectations and preserving Türkiye's position in European supply chains.

However, infrastructure alone is not sufficient to unlock the full potential of the Middle Corridor. The potential of intermodal transport can only be achieved through simplified border procedures, harmonized regulations, digitalized customs processes, stronger public-private cooperation and predictable corridor management.

Looking ahead, Türkiye's growing role in intermodal transport will not only enhance its transit capacity but also accelerate the development of value-added logistics services. Integrated ecosystems combining warehousing, distribution, packaging, and digital logistics solutions will further strengthen Türkiye's ambition to become a regional logistics hub.

The future of logistics will be shaped by countries that can offer reliable, sustainable and integrated transport solutions. Türkiye has the geography, infrastructure and sectoral experience to be one of these countries. The priority now is to transform this potential into predictable corridor performance, stronger intermodal integration and higher value-added logistics services. In this respect, the rise of intermodal transport and the development of the Middle Corridor represent not only a logistics opportunity, but also a strategic economic and geopolitical opportunity for Türkiye. ■

DIGITAL ERA BEGINS FOR CUSTOMS GUARANTEES

REPUBLIC OF TÜRKİYE
MINISTRY OF TRADE

The Ministry of Trade has launched the Guarantee Information System as part of efforts to make customs procedures faster, more transparent and more traceable. Having become operational in December, the System enables running inquiries on all information relating to guarantees submitted to customs administrations through a single digital platform, allowing processes to be managed more efficiently.

According to the Ministry, the Guarantee Information System consolidates at a single point all data related to individual, collective and blanket guarantee letters, as well as cash guarantees. In addition to basic information such as the type, status and issue date of guarantees, the System also provides access to details including the obliged party, guarantee amount and remaining balance, declarations linked to the guarantee, warehouse codes, the customs administration handling the transaction and the bank issuing the guarantee. This integrated structure is expected to create a more transparent and comprehensive flow of information relating to customs guarantees.

Officials state that managing guarantee procedures through a single centralized structure under the Guarantee Information System will facilitate control and audit processes for customs administrations and reduce uncertainties for companies. The system is expected to reduce the need for manual tracking, shorten processing times and improve operational efficiency. In the next phase, the system is also planned to be opened to obliged parties and representatives. This step is expected to enable companies to monitor all guarantees processed by customs administrations in real time and in detail.

Port Operators Association of Turkey

TÜRKİYE'S RISE IN INTERMODAL TRANSPORT AND THE INTEGRATION OF THE MIDDLE CORRIDOR

Hamdi ERÇELİK
Chairman

Türkiye's advantage in freight transport does not stem from geography alone. Its real strength lies in the fact that this geography produces simultaneous access to multiple seas, corridors and markets. The same geographical depth is also strengthening Türkiye's attractiveness in cruise tourism, where security, operational reliability and the country's exceptional natural and cultural assets are expected to sustain the recent positive momentum. Therefore, the rise of intermodal transport in Türkiye should not be read as a temporary logistics trend, but as a structural response to the new demands of competitiveness, resilience and supply chain diversification.

Turkish ports handled 553.3 million tonnes of cargo and around 14 million TEU in 2025. Official 2025 trade-logistics data show that USD 153.8 billion of Türkiye's exports and USD 196.0 billion of its imports moved by sea, corresponding to 56.3% and 53.7% of trade value respectively; on a tonnage basis, sea transport accounted for 86.5% of Türkiye's total foreign trade. The passenger side confirms the same maritime momentum; in 2025, cruise calls to Turkish ports rose to 1,375 vessels, while cruise passenger traffic reached approximately 2.14 million, the highest level of the last twelve years.

Türkiye is also already a powerful attraction point for Gulf countries in tourism, services, investment and trade; if current conjunctural dynamics are managed wisely, this attraction can evolve into a wider commercial magnet for all parties linked to the Europe–Asia–MENA triangle. In other words, intermodality in Türkiye is not being built on a weak base. It is emerging on top of an already powerful maritime, logistics and market platform.

Recent geopolitical shocks have accelerated this transition. Red Sea disruptions, the weakening of Suez traffic and the security risks around the Strait of Hormuz have reminded cargo owners that efficiency without resilience is no longer sufficient. More importantly, the Iran–U.S.–Israel war has weakened the long-standing assumption that Gulf hubs can always function as neutral, low-risk organising centres. This does not mean that Dubai has lost its importance. It means that cargo owners are re-pricing concentration risk, and Türkiye is emerging as the most credible nearby diversification platform for East–West and MENA-linked flows.

This is why the Middle Corridor matters. Yet the strategic issue is no longer whether Türkiye sits on the corridor. It does. The real question is whether Türkiye can convert location into performance. The Middle Corridor should also be read together with the Iraq Development Road. If properly integrated, the Development Road can function as the southern feeder axis of the Middle Corridor, extending its catchment from the Gulf through Iraq to Türkiye and onward to Europe, while also reinforcing a Gulf–Mediterranean access logic through Türkiye's southern ports, rail projects and production zones. The strategic prize is not corridor multiplication for its own sake, but corridor orchestration across east–west and south–north geographies.

From this perspective, port competition is increasingly becoming connection competition. The Ministry of Transport and Infrastructure recorded only 20 ports with rail siding connections as of 2026. This shows the scale of the challenge. Port competitiveness will no longer be measured by quay length alone. It will increasingly be measured by rail access, back-up area planning, logistics centres, terminal predictability, customs digitalisation and hinterland integration. Last-mile rail and multimodal nodes are no longer auxiliary investments; they are the architecture of competitiveness.

Nor should Türkiye be framed as a mere transit bridge. Its expanding network of logistics centres, rail sidings, free zones, organised industrial zones and customs-enabled production areas gives it the institutional and territorial depth to consolidate, process, distribute and re-export cargo. Türkiye's real opportunity lies not only in capturing transit traffic, but in converting corridor flows into warehousing, multimodal transfer, light manufacturing and regional distribution value for Europe, the Middle East and North Africa.

Türkiye has already shown that corridor credibility is not a theoretical claim. Under the Black Sea Grain Initiative, the Joint Coordination Centre in Istanbul coordinated inspections, vessel movements and safe passage procedures, helping enable the transport of nearly 33 million tonnes of grain and other foodstuffs. In strategic terms, this proved that Türkiye can do more than host infrastructure: it can also provide corridor governance, operational discipline and security assurance under wartime conditions.

For this reason, Türkiye should not present itself as an emergency detour created by crisis. It should position itself as the organising centre of a resilient Eurasian logistics architecture. If Turkish ports are effectively integrated with rail systems, logistics zones and digital processes, the Middle Corridor will not simply pass through Türkiye; it will be structured in and through Türkiye. ■

TÜRKİYE-AZERBAIJAN-GEORGIA COOPERATION STRENGTHENS THE MIDDLE CORRIDOR

The 7th Türkiye-Azerbaijan-Georgia Business Forum, organized by the Foreign Economic Relations Board (DEİK), the Georgian Chamber of Commerce and Industry, and the Azerbaijan Export and Investment Promotion Agency, was held in Tsinandali, Georgia. The event brought together Turkish Minister of Trade Prof. Dr. Ömer Bolat, Georgian Minister of Economy and Sustainable Development Mariam Kvrivishvili, Azerbaijani Minister of Economy Mikayil Jabbarov, and business representatives from the three countries. Speaking at the forum, DEİK President Nail Olpak emphasized the strategic importance of regional cooperation and described the Middle Corridor as not only a transport route but also a broader production and investment platform. Olpak also highlighted the role of regional energy projects such as TANAP, the Baku–Tbilisi–Ceyhan Oil Pipeline and the Baku–Tbilisi–Erzurum Natural Gas Pipeline in strengthening regional integration, adding that the region could also become a renewable energy corridor. Turkish Minister of Trade Prof. Dr. Ömer Bolat underlined the importance of digital integration along the Middle Corridor and noted that the Baku–Tbilisi–Kars Railway has reshaped the region's logistics network.

STRENGTHENING OUR POSITION AS A CENTRAL LOGISTICS HUB

Mustafa GÜLTEPE
President

In recent years, global trade has been reshaped not only by price-driven competition, but also by speed, reliability, sustainability, and supply chain resilience. Countries capable of managing the distance between production hubs and consumer markets in a more predictable, cost-efficient, and environmentally sustainable manner are gaining a strategic advantage over their competitors. At the heart of this transformation lies intermodal transportation. The integration of road, rail, maritime, and, when necessary, air transport within a complementary system elevates logistics beyond a mere transportation activity, transforming it into a critical structure that determines the speed, security, and competitiveness of trade itself.

Türkiye is entering this new era with a powerful geographical advantage. Its proximity to the markets of Europe, Asia, the Middle East, and North Africa, combined with its expanding port infrastructure, organized industrial zones, railway connections, and extensive highway network, positions our country as a natural logistics hub. Yet in today's world, geographical location alone is no longer sufficient. This advantage must be transformed into an integrated, efficient, and sustainable logistics capacity. In this regard, Türkiye's increasing investments in recent years in railway infrastructure, port connectivity, logistics centers, and integration with international transport corridors are of exceptional significance.

Within this framework, the Middle Corridor represents not merely a transit route for Türkiye, but a multidimensional sphere of economic opportunity. Also referred to as the Trans-Caspian International Transport Route (TITR), the Middle Corridor stands out as a strategic multimodal transportation network connecting the markets of China and Europe through Central Asia, the Caspian Sea, the Caucasus, and Türkiye. By integrating railway, maritime, and road transport links, this route further reinforces Türkiye's strategic role as a bridge at a time when the demand for alternative, secure, and more sustainable transportation solutions in Europe-Asia trade is steadily intensifying.

The significance of the Middle Corridor becomes even more pronounced in an era marked by rising geopolitical risks, the restructuring of supply chains, and the growing need for alternative routes. Approximately 2,000 kilometers shorter than the Northern Corridor, the Middle Corridor offers substantial potential to reduce transit times between China and Europe to as little as 18 days. This advantage creates a powerful competitive edge for our exporters in terms of speed, cost efficiency, delivery reliability, and inventory management.

The rise of intermodal transportation is directly linked to Türkiye's export ambitions. Sustainable export growth depends not only on production capacity, but also on the ability to deliver products to target markets in a timely, secure, and cost-competitive manner. The combination of rail's cost efficiency and low-carbon advantage over long distances, maritime transport's high capacity, and road transport's flexibility makes the intermodal model a strong alternative. Factors such as the European Green Deal, carbon footprint considerations, and carbon border adjustment mechanisms will further elevate the importance of rail- and sea-based integrated transport models.

A key factor strengthening Türkiye's role in the Middle Corridor is the significant investment made in logistics infrastructure in recent years. Realizing this potential depends on strong railway networks, modern ports, fast customs procedures, and integrated transport capabilities. In this context, the Eastern Türkiye Middle Corridor Railway Development Project and the Istanbul Northern Railway Crossing Project are critical steps, while the World Bank's approval of USD 2 billion in financing in 2026 demonstrates international support for Türkiye's vision of becoming a global logistics hub.

Looking ahead, success will depend on how well infrastructure investments are supported by digitalization, accelerated customs procedures, standardized border crossings, and high service quality. Unlocking the full potential of the Middle Corridor requires coordination among countries, data sharing, and operational harmonization. With its manufacturing strength and logistics capacity, Türkiye is well positioned to be at the center of this integration.

In conclusion, intermodal transportation is not merely an area of development but a strategic transformation that enhances export competitiveness, supports sustainability, and positions Türkiye as a strong logistics hub in Europe-Asia trade. ■

NEW FOCUS ON THE MIDDLE CORRIDOR: FROM STRATEGY TO IMPLEMENTATION

The transition from political coordination to operational implementation is gaining momentum along the Middle Corridor, which has emerged as one of the key alternative logistics routes between Europe and Asia. During a high-level roundtable meeting held in Brussels, stakeholders discussed the concrete measures required to make the corridor faster, more predictable, and more attractive for investment.

IRU emphasized that the performance of the corridor depends not only on infrastructure investments, but also on border facilitation, digitalization, and cross-border cooperation among participating countries.

Time losses undermine competitiveness

Also known as the Trans-Caspian route connecting China to Europe via Central Asia, the Caspian Sea, and the South Caucasus, the Middle Corridor stands out with its multimodal structure integrating rail, maritime, and road transport.

With trade volumes continuing to increase, the corridor is increasingly viewed as a strategic alternative that enhances supply chain diversification between Europe and Asia. However, industry representatives point out that one of the major challenges along the route remains border delays and operational bottlenecks.

Marc Billiet, Deputy Director of EU Goods Transport at IRU, noted that connectivity along the corridor is not limited to physical infrastructure alone. Due to its multimodal nature, coordination and predictability between countries are equally critical for ensuring efficient operations.

Digitalization and TIR systems take center stage

Digital applications aimed at accelerating border crossings were also among the key topics discussed during the meeting. IRU highlighted that digital solutions such as the TIR system, eTIR, and eCMR can significantly improve efficiency at border crossings.

The organization also announced that it is involved in eCMR pilot projects under the European Union's Global Gateway strategy and continues to support the digitalization of transport documentation throughout the corridor.

Industry representatives stated that initiatives such as TIR Green Lanes could help reduce delays while increasing the speed and efficiency of logistics operations.

Strong message on investment and coordination

During the Brussels discussions, policymakers, financial institutions, and industry representatives shared a common view regarding the strategic importance of the Middle Corridor for Europe-Asia trade.

Participants emphasized that ongoing infrastructure investments, regulatory improvements, and digital integration efforts are strengthening the corridor's reliability and competitiveness.

According to experts, if political commitment is maintained and operational facilitation tools are fully implemented, the Middle Corridor could become one of the main trade arteries of Eurasian logistics. ■

BECOMING A GLOBAL AND SECURE LOGISTICS HUB

İlker ALTUN
Managing Director - Aysberg Group

Global oil crises have always had deep and far-reaching effects on individual economies. The latest disruption, driven by escalating military tensions in the Gulf and the crisis in the Strait of Hormuz, has once again triggered a severe shock to oil and natural gas supplies. As a result, economies worldwide have been pushed into a serious energy crisis. The European Union and major Far Eastern economies—particularly South Korea and Japan—have experienced significant supply disruptions, forcing them to tap into strategic reserves. China, however, requires special attention. Its heavy reliance on oil imports, especially from the Persian Gulf and Iran, makes it particularly vulnerable. Of course it will take some time to see what kind of changes US President Donald Trump's visit to China in mid-May will bring about, both in terms of the direction of the trade wars and the global balance of power.

Today, both the global economy and the Western world are facing what is arguably the most severe oil crisis since the 1970s. Unlike the crisis triggered by the 1990 Gulf War, the current situation has distinct characteristics. While direct military tensions may ease, the long-term impact of rising oil and natural gas prices is likely to persist. Although prices have recently eased to around $85, expecting a return to earlier levels would be unrealistic. This implies that logistics and transportation costs will remain structurally high. Europe has been among the regions most affected. Road transport dominates intra-European freight movement, resulting in a strong dependence on fossil fuels. Trucks and heavy commercial vehicles account for approximately 78% of total freight in ton-kilometers—a share that continues to rise. Countries such as France, Germany, Italy, Poland, and Spain together represent nearly two-thirds of total road freight activity. This makes the sector highly sensitive to fluctuations in energy prices.

Although Türkiye has benefited from diversifying its energy sources, it has not been immune to rising costs. The logistics sector has been affected through multiple channels. Fuel prices have increased significantly across land, air, and sea transportation. Maritime routes have lengthened due to ongoing disruptions. The Red Sea had already posed challenges, and the Strait of Hormuz crisis has further complicated global shipping. Even the Cape of Good Hope—once considered an impractical alternative—has re-emerged as a contingency route during periods of heightened risk. Meanwhile, insurance premiums, particularly war-risk coverage, have surged, and financing costs have also increased.

The impact of geopolitical tensions in the Middle East on logistics, especially in 2026, is substantial and cannot be overlooked. A medium- to long-term strategic outlook is therefore essential. Trade corridors play a critical role in global logistics. The Northern Corridor has largely lost its functionality since the Russia–Ukraine war in 2022. In contrast, the Middle Corridor has emerged as the most viable alternative. With China as a key player, this corridor offers the most efficient route connecting the Far East to Europe. Türkiye occupies a central and strategic position within this network—not only as a transit country but also as a major stakeholder.

As global trade patterns evolve, the importance of the Middle Corridor is expected to grow even further. To capitalize on this opportunity, Türkiye must accelerate its infrastructure investments. This includes the modernization and expansion of railway networks, as well as stronger integration between rail, road, and port systems. Timely planning and execution of investments are essential, as delays could leave the country vulnerable to future disruptions. While learning from past crises is important, preparing for the future with the right strategies is even more critical. Türkiye is well aware of its logistical advantages and should fully leverage the opportunities presented by the Middle Corridor.

At the same time, global trade routes and transportation modes are continuously evolving. North–south axis is becoming just as important as traditional east–west axis. Just as diversification is essential in supply chain management, it is equally vital in logistics systems. In this context, intermodal transportation stands out as the most effective solution for both present and future needs. Investments should be guided by this perspective.

Public and private stakeholders in Türkiye's logistics sector must work together more closely, focusing on the broader vision of transforming the country into a global and secure logistics hub—not only through land transport, but also by strengthening its capabilities in air and maritime logistics.

A NEW EQUATION IN LOGISTICS: CARBON, COMPETITION AND THE REALITY OF ZERO EMISSIONS

▶ The logistics sector, the invisible backbone of global trade, is going through the most comprehensive and multilayered transformation in its history. For decades, competition in logistics was defined by speed, cost, capacity and operational flexibility. Today, however, these parameters increasingly give way to carbon footprint, emissions management, energy efficiency and sustainability performance. Competition in logistics is no longer limited to transporting cargo on time and at competitive costs. The environmental cost of that transportation now carries as much weight as speed and pricing.

The European Green Deal, the Carbon Border Adjustment Mechanism (CBAM), science-based climate targets and growing regulatory pressure worldwide place the logistics sector before not only an environmental challenge, but also a direct commercial and strategic test. Carbon emissions no longer appear merely as a line item in sustainability reports. They increasingly emerge as a concrete cost factor reflected in corporate balance sheets, a new threshold for exports and a defining element of competitiveness. Under this new equation, the performance of logistics companies directly affects their customers' ability to access global markets.

As carbon budgets are rapidly shrinking, logistics is no longer viewed merely as a transportation activity. It has become a strategic infrastructure component that shapes the export term sustainability of manufacturers, positions of brands within global supply chains and competitiveness of countries in international trade. This reality forces the sector to question existing business models, abandon long-standing habits and rebuild itself through a long-term transformation perspective.

Electric trucks, alternative fuels, HVO, biofuels, hydrogen and battery-powered systems all stand out as important tools for carbon reduction in logistics. Yet market realities show that these technologies alone are not sufficient to achieve zero-emission targets. The real turning point lies in how transportation is planned and which transport modes are used across different distances. Redesigning transportation architecture can deliver faster and more effective carbon reduction results than technological transformation alone.

At this point, intermodal transportation and the integration of rail and maritime transport are now central to sustainable logistics. Reducing dependence on road transport over long distances makes it possible to lower emissions at the very beginning of the process - before operations even start. The right combination of road, rail, and sea transport not only reduces carbon emissions, but also creates new advantages in capacity management, cost optimization, and supply chain security. Therefore, intermodal solutions are gradually evolving from being a preference into a mathematical and strategic necessity for the sector.

Meanwhile, the zero-emission target reshapes the balance of power within the logistics industry. Companies capable of measuring, reporting, and managing carbon data gain transparency and trust advantages in the eyes of customers, while those that fail to invest in this area risk being pushed out of competition. In the new era, carbon management is no longer just an environmental responsibility; it is emerging as a strategic capability that determines market share, customer loyalty, and long-term growth. ■

A CALL FOR SOLUTIONS TO DELAYS AND PENALTIES IN LOGISTICS

Representatives from the Logistics Committee of the Service Exporters' Association (HİB) and the International Transporters Association (UND) raised their demands for the removal of penalties imposed under Article 235 of the Customs Law and for the acceleration of border crossing procedures during a meeting with Minister of Trade Prof. Dr. Ömer Bolat.

The HİB Logistics Committee called for an end to the disproportionate penalties imposed on transport operators under Article 235 of the Customs Law and requested amendments to the legislation at the meeting held with the Miniter of Trade Prof. Dr. Ömer Bolat.
Operational challenges at border gates and inland customs offices, along with proposed solutions, were also discussed in detail.

Outcomes of Sofia meetings reviewed

One of the key agenda items was the outcome of the meetings held in Sofia by the UND delegation.
Field observations and findings from discussions with Bulgaria's General Directorate of Customs, the General Directorate of Border Police, the Food Safety Agency and the Embassy of the Republic of Türkiye in Sofia were shared during the meeting. Particular attention was given to proposals aimed at accelerating border crossing procedures, eliminating operational bottlenecks and strengthening bilateral coordination.

Key agenda items

The main issues highlighted during the meeting included:

- The proposal to open the Dereköy–Malko Tarnovo route to minivans and panel vans
- High handling charges imposed in Bulgaria
- Waiting times at border crossings occasionally reaching 72 hours
- Penalties imposed on the sector under Article 235 of the Customs Law

High number of participants

In addition to HİB Board Members and UND executives, Deputy Minister of Trade Volkan Ağar and Director General for International Trade in Services Tarık Sönmez also attended the meeting.
Participants conducted extensive evaluations regarding the current state of the sector and possible solutions to ongoing challenges.
Participants stated that Minister Bolat showed close interest in the sector's current problems, addressed the agenda items in detail together with the relevant departments and adopted a solution-oriented approach. During the meeting, instructions were given to ensure that the issues discussed would be resolved in a short timeframe.
HİB and sector representatives thanked Minister Bolat and his team for their constructive approach toward protecting the competitiveness of the logistics sector and improving operational processes. They emphasized that the meeting was an important step toward strengthening public-private sector cooperation and ensuring more efficient trade flows. ■

A MAJOR STEP FROM PASİFİK EURASIA IN TÜRKİYE'S EXPORT LOGISTICS

PASİFİK EURASIA TO CONNECT AEGEAN EXPORTERS TO CHINA VIA RAILWAY

Pasifik Eurasia is connecting the Aegean Region directly to China via railway for the first time with its initial 50-container block train service. The train, which will transport products from Türkiye's largest white goods manufacturers to Shanghai, one of China's most important trade centers, also opens a new chapter in Türkiye-China trade relations.

► Following its recent operations along the Middle Corridor, Pasifik Eurasia has now launched its first İzmir-origin block train service. As one of Türkiye's leading companies in international railway transportation, Pasifik Eurasia is reinforcing its role as a key logistics orchestrator with this new line extending from İzmir to China. The İzmir-Shanghai route directly connects the Aegean Region to China and beyond via railway, marking a new phase in Türkiye's export logistics. Departing from İzmir Biçerova Station with 50 containers, this operation reflects the on-the-ground implementation of the company's long-developed integrated logistics vision.

After earlier China-bound train services from Istanbul, Pasifik Eurasia is now extending this logistics capacity to different production centers, achieving another milestone. By expanding its railway transportation capabilities through İzmir, the company aims to transform Türkiye's logistics connection with China into a more widespread and sustainable structure.

The operation, launched from İzmir Biçerova Station with its first 50-container service, represents the practical realization of Pasifik Eurasia's integrated logistics vision. The company positions this project not merely as the opening of a single line, but as the beginning of a permanent logistics corridor that will more strongly connect Türkiye's production capacity to global trade networks.

Exporter expectations and industrial needs directly reflected in planning

Pasifik Eurasia's approach goes beyond simple transportation, focusing instead on designing logistics end-to-end. This perspective played a decisive role in structuring the İzmir-Shanghai line. Factors such as cargo continuity, station capacity, operational efficiency, and distribution capabilities on the Chinese side were evaluated comprehensively, while exporter expectations and the real needs of industrial stakeholders were directly incorporated into the planning process.

At the center of this structure, Biçerova Station stands out as a critical hub reflecting Pasifik Eurasia's operational capabilities. The station plays a strategic role in cargo consolidation, ensuring port-rail integration, and enabling uninterrupted operations. As a result, cargo from the Aegean Region is integrated into the railway system in a planned and competitive manner.

With this line, Pasifik Eurasia aims to make railway transportation more accessible and predictable for exporters, highlighting its advantages especially for time-sensitive sectors. Improved delivery scheduling, reduced supply chain risks, and enhanced operational visibility are among the key benefits of this model.

Integrated solutions will also be offered to SMEs

While initially led by the white goods sector, Pasifik Eurasia aims to expand the cargo composition in the medium term. By incorporating sectors such as machinery, automotive sub-industry, textiles, chemicals, and food, the line is expected to evolve into a more balanced and high value-added transportation structure. This approach aligns with the company's goal of offering integrated solutions not only to large-scale cargo owners but also to SMEs.

With the objective of establishing a multi-centered and two-way logistics flow, Pasifik Eurasia is repositioning the route, which has so far primarily operated from China to Türkiye, to also include export shipments from Türkiye to China. This will preserve existing supply chains while creating a more balanced and sustainable trade volume through the addition of export cargo.

Pasifik Eurasia: A value-creating and direction-setting player in logistics

This initiative, which strengthens its position along the Middle Corridor, is seen as a concrete step in Pasifik Eurasia's vision of positioning Türkiye at the center of the Eurasian logistics network. Through collaborations with various logistics centers in China, particularly in Shanghai, and its multi-stakeholder structure, Pasifik Eurasia is building an integrated logistics network not just between two points, but across a vast geography.

Sustainability and digitalization are also key priorities in this project. While the carbon-reducing impact of railway transportation aligns with Pasifik Eurasia's green logistics approach, digital tracking systems and data-driven management infrastructure provide customers with a transparent and traceable operational experience.

The İzmir-Shanghai line is seen not as an end result but as the beginning of a broader growth strategy. With plans to scale this corridor through new logistics centers, increased service frequency, and an expanded destination network, Pasifik Eurasia is strengthening its ambition to become a value-creating and direction-setting player in logistics by connecting Türkiye's diverse production regions to global markets. ■

__Lars Hoffmann__
VP and Head of DFDS Business Unit Mediterranean

DFDS INTEGRATES FREIGHT FERRY AND RAIL TO CONNECT MEDITERRANEAN TRADE ROUTES

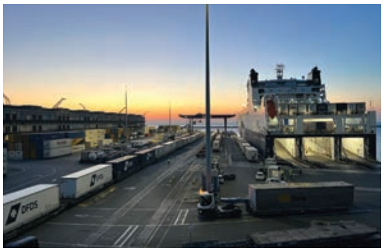
DFDS integrates freight ferry and rail to connect Mediterranean trade routes.

DFDS Business Unit Mediterranean operates a fully integrated logistics model across the region, combining sea and rail into a seamless intermodal network.
This approach enables end-to-end transport solutions, connecting ports and inland markets across the Mediterranean with Europe, North Africa and the UK through a single, coordinated system.
At the core of this model is DFDS's extensive freight ferry network, built on high-frequency services linking key ports across Türkiye, Italy, France, Tunisia and Egypt. These sea routes connect Eastern Mediterranean and Turkish industrial hubs with Southern European gateways such as Trieste and Sète. Through these connections, DFDS facilitates cargo flows between the Mediterranean basin and wider European markets, supporting both north–south and east–west trade lanes.

DFDS

DFDS's network extends trade corridors toward North Africa, supported by key routes such as Damietta–Trieste and Marseille–Tunis. The launch of the Damietta–Trieste route in 2024 establishes a direct link between Egypt and Southern Europe, strengthening connections between North Africa and inland European markets while reinforcing Trieste's role as a central gateway for Mediterranean cargo flows.
The Marseille–Tunis route further supports connectivity between Europe and North Africa, linking Tunisia with Southern Europe and integrating these flows into the wider network.
Beyond its maritime operations, DFDS Business Unit Mediterranean is distinguished by its intermodal infrastructure, built around strategic hubs in Trieste and Sète. These hubs connect freight ferry services with an extensive rail network reaching deep into Europe. From Trieste, rail connections link to major logistics centres such as Cologne, Bettembourg and Wels, while Sète connects to Northern Europe through the Sète–Calais rail corridor. This structure enables efficient cargo distribution from Mediterranean ports to key inland destinations.

The Sète–Calais corridor has recently been reinforced with a doubling of rail capacity, increasing frequencies and supporting growing demand for cargo transport between Southern France, the Channel area and Northern Europe. This enhancement strengthens the reliability and scalability of northbound flows and provides an efficient alternative to long-distance road transport.
By integrating freight ferry routes with rail-based intermodal solutions, DFDS enables streamlined cargo movement across multiple regions, improving predictability, transit efficiency and network flexibility while contributing to lower emissions.
Lars Hoffmann, Vice President and Head of DFDS Business Unit Mediterranean, states:



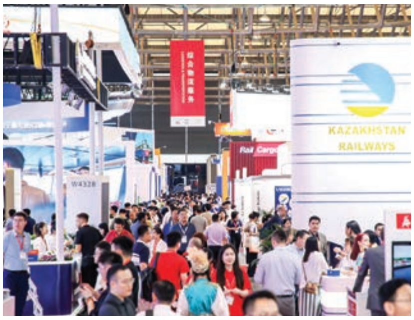
"By combining our freight ferry network with strong rail connections through hubs such as Trieste and Sète, we provide customers with efficient and reliable access to a wide European hinterland. Our integrated approach allows us to connect key markets across the Mediterranean with greater flexibility and operational efficiency."
Together, its maritime network, intermodal hubs and expanding rail connections position DFDS Business Unit Mediterranean as a key logistics integrator across the region, connecting trade corridors between Türkiye, North Africa, and Southern and Northern European markets.

TURKEY'S LOGISTICS SECTOR TO BE PROMOTED AT TRANSPORT LOGISTIC CHINA 2026

► Drawing attention to Turkey's strategic position in the logistics sector and its growing visibility in global markets ahead of Transport Logistic China 2026, DEİK Logistics Business Council Chairperson N. Fatih Şener said the following in his assessment: "Global trade has entered a new era shaped by the rapid growth of e-commerce, accelerating digitalization, and sustainability-driven policies. At the same time, it has become one of the primary arenas of strategic competition among major global powers.

The logistics sector, in particular, has undergone profound transformation in recent years due to successive geopolitical crises, wars, and regional conflicts. The Russia–Ukraine war, security concerns in the Red Sea, ongoing tensions involving the United States, Israel, and Iran, as well as developments around the Strait of Hormuz, have not only created political and humanitarian challenges but have also significantly disrupted global supply chains. These developments have highlighted the growing importance of security, continuity, and flexibility in international logistics networks.

Thanks to its geostrategic location, Türkiye has emerged as one of the key actors in alternative trade corridors. Strategic initiatives such as the Middle Corridor and the Development Road Project position Türkiye as a secure and reliable transit gateway connecting Europe, Asia, and the Middle East. At a time when risks associated with the Northern Corridor and Red Sea routes continue to reshape global trade flows, Türkiye's role in transit transportation



DEİK Logistics Business Council Chairperson N. Fatih Şener stated that Turkey has become more visible in global logistics thanks to its geostrategic location, strengthening infrastructure, and role in alternative trade corridors.

has become increasingly visible and strategically important.

According to the Ministry of Trade, Türkiye's total service exports reached USD 122.5 billion in 2025. Of this amount, USD 42.4 billion was generated by the logistics and transportation sector, accounting for approximately 35% of total service exports. The Ministry aims to increase this figure to USD 50 billion by the end of 2026, reflecting Türkiye's ambition to expand its share in the global logistics market and further strengthen the sector's competitiveness.

Located at the crossroads of Europe, Africa, Central Asia, and Russia, Türkiye sits at the center of a trade volume worth nearly USD 10 trillion. Within a four-hour flight radius, the country has access to 67 nations with a combined GDP of USD 30 trillion and a consumer market of approximately 1.3 billion people. These advantages, combined with Türkiye's strategic geographic position, make the country a critical logistics hub along both east-west and north-south trade axes.

In recent years, Türkiye has significantly strengthened its logistics infrastructure through major investments. The number of logistics centers supporting intermodal transportation has increased, port capacities have expanded, and railway networks have been modernized.

Through the Railway Logistics Development Project, the Ministry of Transport and Infrastructure continues to invest in strategic railway connection lines, improved freight efficiency, and enhanced logistics center performance, reinforcing Türkiye's vision of becoming a regional logistics hub.

Established in 2013, the DEİK Logistics Business Council works to enhance the international effectiveness and competitiveness of Türkiye's logistics sector. In cooperation with industry stakeholders, the Council develops initiatives in digitalization, sustainability, and infrastructure development, while representing Türkiye's logistics vision on global platforms. Our primary objective is to accurately analyze regional and global supply chain dynamics and develop solution-oriented approaches that address emerging needs in foreign economic relations.

DEİK Logistics Business Council Chairperson N. Fatih Şener

As the DEİK Logistics Business Council, we had the privilege of representing the Turkish logistics sector on an international platform for the first time at the Transport Logistic Fair in 2019. Following the successful participation at Transport Logistic Munich 2025, we are proud to once again showcase the strength and potential of the Turkish logistics industry at Transport Logistic China 2026, taking place in Shanghai from 24-26 June 2026.

Located in Hall W3, Stand 301, the Türkiye Logistics Pavilion will serve as an important platform for Turkish logistics companies to establish new international partnerships while promoting Türkiye's strategic location, logistics capabilities, and integrated service expertise to a global audience. Looking ahead, the DEİK Logistics Business Council remains committed to supporting sectoral transformation, advancing digitalization and sustainability-focused initiatives, and further strengthening the position of the Turkish logistics industry within global value chains."

Mine Kaya
General Manager
SGS TransitNet

SGS TRANSITNET STRENGTHENS INDUSTRY COLLABORATION WHILE ADVANCING DIGITAL TRANSIT SOLUTIONS ACROSS EUROPE

"The future of customs and transit operations lies in digitalization, operational efficiency, and strong industry partnerships. Our goal is to help logistics companies move faster, more securely, and more competitively across international markets."

▶ As global supply chains become increasingly complex, logistics operators are seeking solutions that combine speed, compliance, transparency, and cost efficiency. SGS TransitNet continues to support the industry with its digital transit platform, extensive guarantee network, and customer-focused service model, while further strengthening its position through strategic partnerships with leading industry associations.

Supporting the logistics industry through strategic partnerships

A major milestone for SGS TransitNet was the cooperation agreement signed with UTİKAD (International Forwarding and Logistics Service Providers Association) in May 2026. The partnership aims to enhance operational efficiency within the logistics sector and provide UTİKAD members with privileged access to SGS TransitNet's transit declaration and logistics support services.

Through this collaboration, UTİKAD members can benefit from SGS TransitNet's international transit network, digital infrastructure, customs expertise, and operational support capabilities. The agreement also creates opportunities for joint projects and sector-focused information initiatives that contribute to the continued development of the logistics industry.

Commenting on the partnership, Mine Kaya stated:

"Through our cooperation with UTİKAD, we aim to provide members with faster, safer, and more competitive access to transit solutions. We believe this partnership will create significant opportunities in common transit operations, digitalization, customs processes, and operational efficiency."

The agreement follows SGS TransitNet's cooperation protocol signed with the Heavy Transport Association (AND) in May 2025, which introduced operational and financial advantages for AND members through SGS TransitNet's facilities and specialized customs services.

Driving efficiency through digital customs solutions

At the core of SGS TransitNet's offering is a secure, multilingual, web-based e-transit platform that allows users to create, submit, monitor, and manage transit declarations from a single interface.

"Digitalization is transforming customs operations," said Kaya. "Our objective is not only to simplify transit procedures but also to provide our customers with greater visibility, control, and confidence throughout the entire transport process."

The platform allows logistics operators to manage export, import, and transit declarations through a single system while monitoring shipments in real time.

Financial strength and operational reliability

One of SGS TransitNet's strongest competitive advantages is its position as a principal responsible company with significant financial capacity and extensive guarantee coverage across Europe. With guarantee coverage approaching EUR 700 million and a network spanning 25 countries, SGS TransitNet provides customers with a reliable framework for international transit operations.

Authorized consignor advantage in Türkiye

SGS TransitNet remains the first principal responsible company in Türkiye to hold both Authorized Economic Operator (AEO) and Authorized Consignor authorizations. Through its facilities in Çerkezköy and Çatalca, export and transit formalities can be completed directly at SGS TransitNet locations without presenting goods to an internal customs office.

SGS
TransitNet

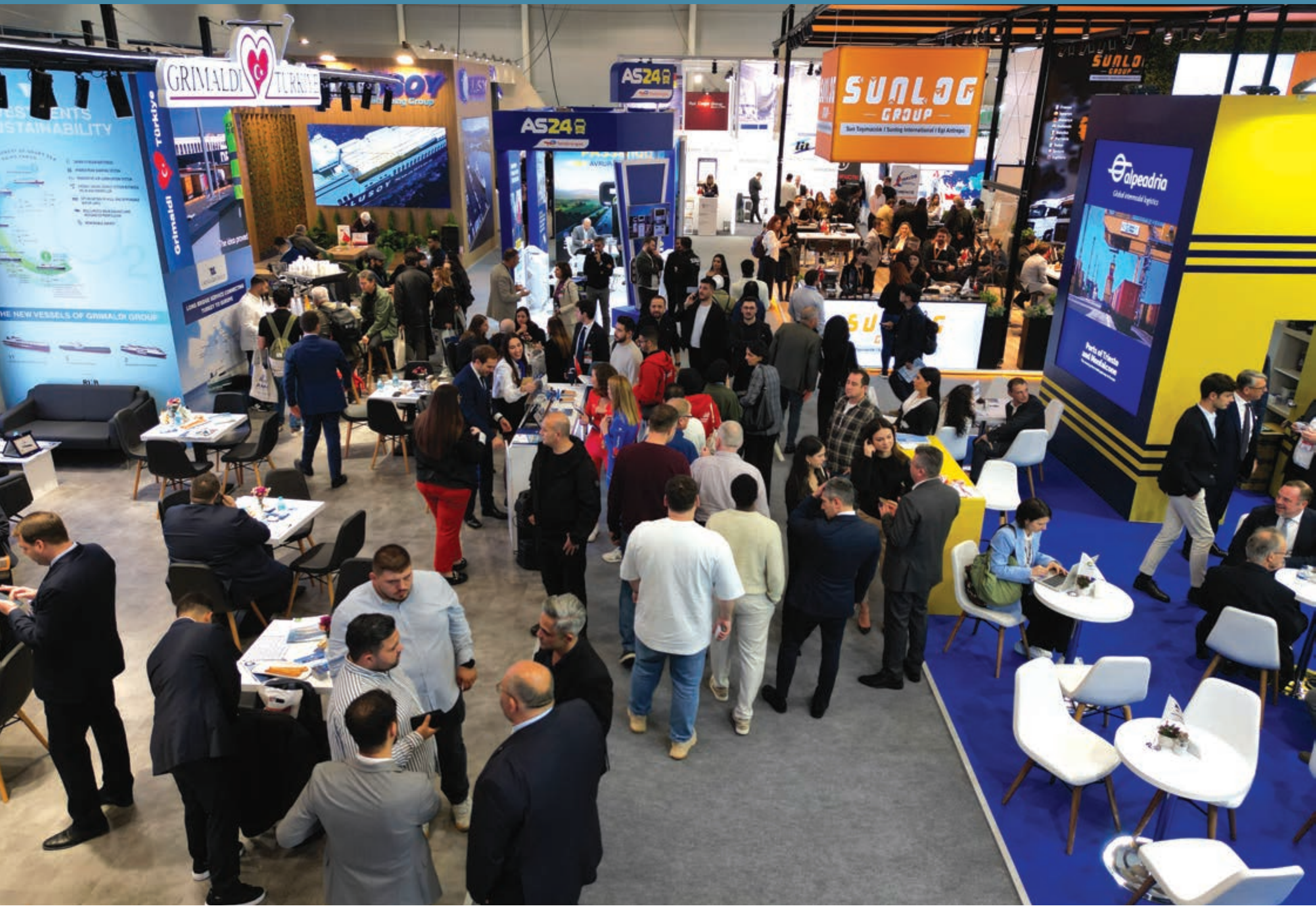
A growing network for international Trade

By combining digital innovation, extensive guarantee capacity, international expertise, and close collaboration with industry stakeholders, SGS TransitNet continues to strengthen its role as a trusted partner for logistics operators navigating an increasingly demanding global trade environment.

"As logistics becomes more connected and data-driven, our focus remains clear," Kaya concluded. "We will continue investing in technology, operational excellence, and industry partnerships that help our customers grow and compete successfully across international markets." ■

logitrans 2026 WILL PLAY A STRATEGIC ROLE AT THE INTERSECTION OF TRADE CORRIDORS

logitrans TÜRKİYE
international transport logistics exhibition



The first quarter of 2026 witnessed an extraordinary period marked by global tensions and conflicts. In such a context—where serious disruptions and bottlenecks were experienced across land, air, and maritime trade corridors—Türkiye once again demonstrated its central role in ensuring the uninterrupted flow of trade routes. Considering these unique conditions of this year, logitrans 2026 will open its doors in a period when tensions and conflicts have largely eased and the factors threatening global trade have diminished. Therefore, the role and importance of logitrans 2026 will be significantly higher for the sector this year.

Recognized as the most important and largest meeting platform of Türkiye's logistics sector, the International ogitrans Transport Logistics Exhibition will host the industry in 2026 with new missions. In times of such crisis, logitrans 2026 will serve as a common meeting platform where sector stakeholders share their experiences regarding the risks faced by both

At a time when global trade routes are being reshaped, logitrans 2026 will position Türkiye at the heart of logistics, driving dialogue on sustainability, innovation, and future corridors.

logistics and global trade routes, as well as possible solutions. Environmentally friendly practices, green logistics regulations, technological innovations, electrification, and decarbonization processes will find a broader discussion ground at logitrans 2026. Sustainability will gain special importance not only in terms of the European Union's carbon targets—particularly the restrictive and binding criteria for road transport—but also in terms of managing sector dynamics and creating rapid solutions during crises and wartime conditions. For this reason, sustainable logistics will be one of the main themes of logitrans.

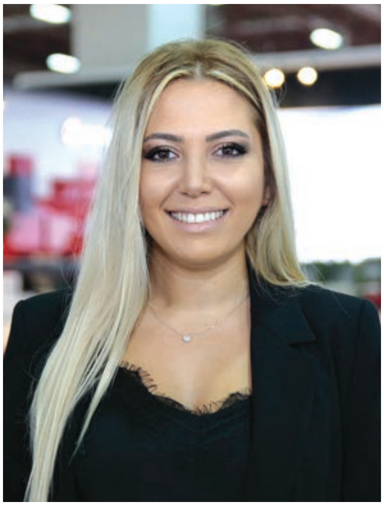
Having closed 2025 with record achievements, high quality, and strong participant satisfaction, logitrans is preparing for a remarkable opening in 2026 that will resonate across the sector. The fair will not only bring together logistics stakeholders but will also create a significant agenda through its panels, special sessions, and award ceremonies.

While logitrans 2026 is expected to surpass 2025 in terms of both domestic and international participation, it will also reach a record space with the addition of new halls and Exhibition areas. Alongside leading companies that regularly participate each year, the new energy brought by first-time exhibitors will position logitrans as the undisputed meeting platform of the logistics world.

Taking place in Istanbul between November 11–13, 2026, logitrans will host numerous companies and institutions from Türkiye and neighboring regions. With international participation increasing every year, the exhibition is expected to feature around 200 companies and institutions from more than 20 countries, including Türkiye. Country pavilions, which add color, dynamism, and an international dimension to the fair, will be among the highlights and attract strong visitor interest. logitrans, to be held at the Eurasia Show and Art Center in Yenikapı, is expected to reach a high number of visitors during the fair.

logitrans has a much greater mission this year

Ekin Seren Altun, Deputy General Manager of EKO Fair Organization, emphasized that due to the unique global context of 2026, the importance of logitrans and its role as a meeting point for the sector will be felt more strongly, and that the exhibition will



Executive Director of EKO MMI Fair Ekin Seren Altun

raise the bar even higher this year: "Every year, we expand our exhibition area both through the diversity brought by first-time participants and through additional square meters. The pavilions, stands, and exhibition areas of participating companies—designed with modern and functional architecture—make a significant contribution to the colorful and dynamic atmosphere of the fair. Together with our participants, we believe that we have created a major ecosystem through logitrans, both in Türkiye and in the surrounding region. This year as well, we will represent the logistics sector at the highest level and welcome our visitors at full capacity. At a time when the logistics sector is, in a sense, passing through a critical crossroads, logitrans will be a strong platform for meetings, exchange of ideas, sharing of experience, and new collaborations."

Highlighting that the success of a fair

is measured not only by the number of participants and sectoral representation but also by the ecosystem it creates, Altun continued: "We see that logitrans is approaching nearly 100% representation of its sector. The strong interest shown by logistics companies in this year's exhibition, following 2025, makes us very happy. A significant portion of the exhibition areas had already been contracted while the 2025 fair was still ongoing. The sincere efforts of participating organizations to secure and maintain their exhibition spaces increase our confidence in the fair every year."

The role and strategic importance of the middle corridor has increased further

Reminding that the exhibition will continue to provide an opportunity to address the importance of new trade routes for the healthy development of global trade, Altun stated: "In 2026, while the bottlenecks in maritime transport and cost increases—particularly those linked to oil prices—demonstrate the sector's resilience in the face of global crises, they also reveal its vulnerability. Thanks to its unique geographical position and strong logistics infrastructure, Türkiye is located at the intersection of trade corridors. The northern and southern corridors are still affected by the global conflict environment. Therefore, the Middle Corridor maintains its strategic importance for global trade and east–west logistics routes.

Connecting the East and the West, Europe and the Far East, as well as China, the Middle Corridor is undeniably a critical route. In the conditions of 2026, it is increasingly acknowledged that Türkiye is the most important country and transit route on this corridor. The growing interest in logitrans from Europe, Asia, and surrounding regions clearly demonstrates that Türkiye has become one of the most important logistics hubs both regionally and globally."

Stating that Türkiye's importance on the global logistics map is increasing with changing trade routes, Altun continued: "With its capacity and infrastructure across road, air, sea, and rail transport, Türkiye is rapidly advancing toward becoming not only a regional but also a global logistics hub. Trade routes are changing, and the importance of global trade corridors is increasing. Türkiye, with its geographical location and strong logistics infrastructure, lies at the intersection of these corridors. In this context, logitrans provides a strong platform for establishing collaborations within the intercontinental supply chain between Europe and Asia and for bringing together all stakeholders of the logistics sector. With broad international participation, logitrans will further strengthen Türkiye's strategic position in Eurasia. This function of the exhibition stands out as the highest common denominator for all stakeholders in the logistics sector, which is both a source of satisfaction and motivation for us. Today, regardless of global tensions, Türkiye has become both a logistics base and an international supply chain hub in Eurasia. The strong interest shown in logitrans confirms this reality. We once again underline the critical role that logitrans plays in Türkiye's goal of reaching a logistics market size exceeding 100 billion dollars. With this awareness, we continue to work every year to contribute to this goal at the highest level."

NGOs are our strongest stakeholders

Emphasizing that logitrans has become a platform that creates significant added value for the logistics sector each year, Altun said: "In addition to the participation of international organizations and companies, the strong support of commercial institutions that make up Türkiye's logistics sector greatly contributes to our efforts to position logitrans as the most important platform of Türkiye in global logistics. The participation and support of sectoral associations and NGOs are extremely valuable to us. Discussion platforms and panels organized with leading civil society organizations such as UND, UTİKAD, and CILT Türkiye shed light on the future of the sector. Especially panels organized in cooperation with NGOs provide important perspectives on both the present and future of the industry. These events make a serious contribution to shaping the sector's vision. As one of the most important logistics events in the Eurasian region, logitrans has become a must-attend organization for anyone who wants to closely follow developments in the sector and gain new perspectives." ■

"WE STAND AS A TRUSTED SOLUTION PARTNER FOR THE MARITIME AND LOGISTICS INDUSTRIES"

Tibet Makina Reinforces Its Position in Maritime and Logistics.

Founded in 1970 by Temuçin Arbak, Tibet Makina has evolved into a high-performance engineering and manufacturing company, delivering specialized aluminum, hybrid, and steel gear and bearing systems across a broad industrial spectrum - most notably defense, energy, maritime, and logistics. With high-precision components engineered within a diameter range of 100 mm to 4500 mm, the company operates as a qualified supplier to multiple critical industries, while continuously investing to elevate its 56-year legacy of manufacturing excellence.
In the domain of turret bearings and gear systems engineered for the defense industry, Tibet Makina is positioned among a select group of global manufacturers holding proprietary licenses and patents. As an active member of the Defense and Aerospace Cluster (SAHA), the company maintains a strategic partnership footprint alongside leading defense organizations, most prominently ASELSAN.
Within the maritime and logistics sectors - where Tibet Makina maintains direct and advanced manufacturing capabilities - the company generates substantial added value by enabling the localized production and supply of critical gear and bearing systems integrated into ship-mounted cranes, deck cranes, jib cranes, port cranes, mobile and overhead crane infrastructures, container handling systems, container forklifts, and radar assemblies. In addition, the company manufactures high-performance bogie slewing rings for railway and road vehicle applications, as well as high-precision, durable slewing rings and bearing systems engineered for aviation radar technologies.
Tibet Arbak, Vice Chairman of the Board and General Manager, emphasized the strategic imperative of manufacturing high value-added machinery and equipment within Türkiye. He underlined the importance of sustaining an integrated industrial ecosystem in which the entire value chain is anchored by domestically established companies - a principle that has consistently shaped the company's production vision for over five decades.

Tibet Arbak
General Manager

Addressing the maritime and logistics sectors, Arbak highlighted that, in addition to delivering custom-engineered solutions for heavy-duty machinery, Tibet Makina also manufactures rotational and bellows bearings deployed in trailers and towing vehicles used in ground operations.
He further stated:
"Any operational interruption of a port crane or forklift caused by gear or bearing failure can trigger a cascade of critical disruptions, resulting in substantial financial impact for the operator. At Tibet Makina, we manufacture for every machine equipped with rotating systems in strict alignment with internationally recognized standards of the highest quality, precision, and structural endurance."
Arbak further emphasized that the company delivers precision-engineered components across a wide range of industries, including maritime, aviation, energy, automotive, medical, and industrial machinery applications. He also highlighted their advanced capabilities in the production and machining of titanium and aluminum alloys, reinforcing Tibet Makina's position as a reliable and high-performance solution partner for all industries utilizing rotating systems.

THE ERA OF SUPER CORRIDORS IN GLOBAL TRADE

As the routes of global trade are being reshaped, logistics super corridors are emerging as the new drivers of speed, integration and competitiveness. With her strategic location, expanding infrastructure and growing multimodal transport capabilities, Türkiye is positioning itself to become one of the key players in this major transformation.

Global trade patterns and supply chain structures are undergoing a profound transformation in recent years, driven by geopolitical disruptions, post-pandemic supply chain volatility, rising energy costs and the accelerating pace of digitalization. In this new era, simply moving goods from one point to another is not enough and managing the entire process in a way that is faster, more reliable, traceable and sustainable makes all the difference. These dynamics have placed the concept of "logistics super corridors" at the center of global trade.

Trade routes are no longer viewed merely as physical transit pathways, but as strategic ecosystems where data flows are managed, financial processes are integrated and multi-stakeholder partnerships are established. By integrating rail, road, maritime and air transport, digitalizing customs procedures and deploying smart logistics systems, these corridors are becoming the new arena of global competition.

The North-South Corridor, on the other hand, offers an alternative trade route linking India, Iran and Russia, reinforcing the increasingly multipolar structure of global trade. While these projects encourage greater diversification and resilience in supply chains, they also create a new field of competition among countries. Competition is now shaped not only by cost and speed, but also by infrastructure quality, border crossing times, operational efficiency, the level of digital integration and sustainability performance.

Türkiye's strategic role strengthens

With her strategic location at the intersection of three continents, Türkiye holds a significant advantage in this new era of global trade. Serving as a natural bridge between Europe, Asia and the Middle East, Türkiye continues to strengthen this position through investments in ports, railway projects, logistics centers and improvements in customs procedures. In particular, the expansion of multimodal transport capabilities and increased investment in digitalization make Türkiye's role within logistics super corridors even more critical.

How is the sector preparing for this transformation?

Global logistics players also reshape their strategies in line with this transformation. International transport and logistics companies increase investments to create more integrated operations, establish a presence across multiple corridors and strengthen their digital infrastructure. The use of next-generation technologies also become increasingly widespread in storage, distribution and last-kilometer delivery solutions.

Logistics companies operating in Türkiye actively adapts to this process both to support the country's ambition of becoming a regional logistics hub and to secure a stronger position in global competition. Partnerships, joint investments and expansion into new markets are among the sector's top priorities.

This strategic transformation shaping the future of logistics affects not only industry players, but also all stakeholders within the global economy. In the coming years, super corridors are expected to become one of the defining factors determining the speed, direction and rules of global trade. ■

Alternative routes, intensifying competition

As trade flows between Asia and Europe are being rebalanced, projects such as the Middle Corridor, the Development Road and the North-South Corridor are emerging not only as alternative routes, but also as complementary trade corridors. Efforts to diversify China-based manufacturing and supply chain structures are driving companies and countries toward more flexible and secure logistics solutions. This trend is further increasing the strategic importance of logistics super corridors. Stretching from China through Central Asia, across the Caspian Sea to Türkiye and onward to Europe, the Middle Corridor draws attention for its time advantages and balanced cost structure. Meanwhile, the Development Road Project aims to strengthen connectivity between the Middle East and Europe by creating a new trade axis extending from the Persian Gulf to Türkiye.

The IRU Intelligence Briefing report on the future of road transport and energy prices

TRANSPORT COSTS WILL BE ON RISE IN THE COMING YEARS, WHILE ENERGY CRISIS REDUCES THE COMPETITIVENESS OF EU INDUSTRIES

The International Road Transport Union (IRU) has published a comprehensive report examining the cost impact of oil price fluctuations on road transport amidst the US-Israel-Iran conflict and analyzing the expected trajectory of energy prices in the near future. The report also assesses predictions regarding the competitiveness of the European Union. The IRU Intelligence Briefing report is titled "Ever more uncertainty: European road freight dynamics 2024 to 2026 and beyond - Key insights and strategic levers." A broad summary of the report offers valuable perspectives for understanding the effects of a crisis on logistics in general and international road transport in particular. IRU report said; "Global trade dynamics are also shifting. New US tariff measures and elevated trade tensions are expected to weigh on export-oriented industrial corridors, particularly in machinery and chemicals, while import-driven corridors may see increased activity as trade flows are redirected rather than reduced.This will lead to greater divergence in corridor performance and reduced visibility for long-term planning.Structural constraints continue to limit the sector's ability to respond."

The report described the outlook

for the road transport sector for the first quarter of 2026 and beyond with the following words; “It’s an exceptionally uncertain time for European road freight. Volatile energy prices, supply shortages, new regulations, inflation, and weak consumer demand paint a bleak picture of the road ahead. While the latest data showed that freight volumes had stabilised over 2023-2024, and IRU Intelligence research estimated continued moderate growth over 2025-2026, the war in Iran has fundamentally altered the outlook for 2026 onwards. The sector is now facing a more fragmented, cost-intensive and uncertain operating environment.”

Global trade dynamics are shifting

European road freight entered 2026 in an environment of exceptional uncertainty. While volumes had stabilised over 2023-2025 and were expected to grow moderately in 2026, the outbreak of war in Iran on 28 February 2026 and escalating global trade tensions have fundamentally altered the outlook.This comes after a series of major disruptions in recent years, during which the freight sector demonstrated a strong ability to adapt and maintain continuity of operations. Forecasting short-term freight volumes is now less reliable, as operators face a volatile mix of rising costs, shifting trade flows and structural capacity constraints.
Fuel prices surged by around 20% across the EU in the weeks following the outbreak of war, significantly increasing operating costs and compressing already tight margins.
At the same time, supply chains are being reconfigured. Trade rerouting may support freight demand in certain corridors, but broader spillover effects, such as higher inflation and weaker consumer demand, risk dampening overall activity.
Global trade dynamics are also shifting. New US tariff measures and elevated trade tensions are expected to weigh on export-oriented industrial corridors, particularly in machinery and chemicals, while import-driven corridors may see increased activity as trade flows are redirected rather than reduced.This will lead to greater divergence in corridor performance and reduced visibility for long-term planning.
Structural constraints continue to limit the sector’s ability to respond. Driver shortages are worsening,fleet renewal is slowing, and the transition to zero-emission vehicles remains constrained by infrastructure and investment challenges. Meanwhile, regulatory developments, including CO2-based tolling and the introduction of ETS2, the EU’s new emissions trading system, will redefine the competitiveness of truck technologies over the coming years.
In this context, competitiveness will depend less on volume growth and more on operational resilience. Improving efficiency - via higher asset utilisation, reduced empty runs and optimised routing - remains the most immediate lever for transport operators and shippers. At the same time, investment in workforce retention, fleet modernisation and strategic positioning along evolving freight corridors will be critical to stay relevant in the future.
Overall, while initial pre-war forecasts were projecting volume growth,the sector is now facing a more fragmented, cost-intensive and uncertain operating environment. Agility and adaptability will be key determinants of success.

Demand is recovering, trade volumes are expected to grow 14% by 2031

European road freight operates in an environment shaped by competing forces. Demand is recovering, driven by moderating inflation, improving consumer spending, and trade volumes which are expected to grow 14% by 2031.
Yet the conditions enabling that recovery, including stable energy costs, predictable trade patterns, and a supportive regulatory environment, are shifting.The expansion of the EU EmissionsTrading System (ETS2), the rollout of distance- based CO2 tolling,

potential diesel production cuts, and persistent driver shortages are raising costs. Meanwhile, geopolitical events are adding uncertainty to the trade flows that generate freight demand. For operators, fleet managers, shippers, and freight forwarders, navigating this environment requires clarity on where volumes are heading, what is driving costs, and where capacity will tighten. This report aims to equip operators, shippers and freight forwarders with actionable insights to navigate these challenges for better strategic planning and to seize opportunities in the evolving European road freight landscape.

Key lessons from historical crises

For the current war in Iran, the key lessons from these historical crises are that, regardless of the nature of the shock, three factors matter most:

• The duration of the conflict.
• The speed and scale of public intervention. As seen in 2022, rapid fiscal responses, amounting to several hundred billion euros, helped contain the economic contraction. The timing of intervention is also critical.

In 1990, central bank restraint was sufficient, but in 2008, policy support came too late, after freight activity had already collapsed. In 2022, a EUR 600-700 billion fiscal package deployed within months limited the contraction to roughly one-third of the 2008 level.

The structural energy dependence of national economies. Figures illustrate the strategic role played by the energy supply mix in shaping responses to the crisis. During the 2008 financial crisis, French freight volumes contracted -18.5%, far worse than in Germany with a -6%. Germany went on to recover within two years. On the other hand, in the 2022 crisis, France proved more resilient partly due to its nuclear-based energy system, feeding cheaper energy to its industrial users. Freight volumes declined by only 3% and recovered within a year. While Germany, more reliant on gas imports, experienced a sharper decline in freight volume dropping by -7% and still below pre-crisis levels as of 2024.

Current energy shock and impact on road freight forecast

Economic forecasts are being disrupted by the current energy shock forcing modelists to revisit assumptions developed under pre-war conditions. Initial estimates from mid-March 2026 point to a measurable macroeconomic impact. For example Barclays suggests that sustained higher oil prices could reduce global economic growth by around 0.2 percentage points, resulting in 2.8% growth in 2026, reflecting the drag from increased energy costs on consumption and industrial activity.5 Similarly, the International Energy Agency (IEA) estimates that a scenario in which both crude oil and liquefied natural gas (LNG) prices remain elevated throughout 2026 could reduce GDP growth by around 0.3 percentage points, while also lowering global trade growth by approximately 0.5 percentage points. 6 While predicting freight volumes remains challenging in this volatile environment, IRU draws lessons from past energy crises, as outlined in the previous section, to adapts its freight forecasting model. Prior to 28 February, 2026, EU road freight volumes were expected to continue recovering steadily, with a year-on-year volume growth projected at 0.5% in 2026 and 1.0% in 2027. Volumes for 2026 and 2027 were expected to exceed the 2021 peak. Several macroeconomic projections supported this forecast. EU inflation was expected to stabilise at 2.1% in 2026 and 2.2% in 2027, coupled with a positive economic growth projected at around 1.4% in 2026 and 1.5% in 2027.

Energy future prices and growth forecasts are highly changeable

Since the start of the war in Iran disrupted economic indicators, invalidating previous road freight forecasts. Uncertainty around the conflict's duration and the scale of its impact makes future freight volumes difficult to project.

The performance of road freight depends on numerous economic indicators, including inflation, purchasing power, national investment in infrastructure, and population size. In the current context, two parameters are particularly important to monitor, and a dedicated IRU road freight forecast modelling tool highlights the effect of two key factors on freight activity:

• Economic growth (year-on-year percentage change) is the primary driver of freight volumes. It serves as a reliable proxy for demand shaping overall freight activity.

• Brent crude price (USD per barrel) is a secondary factor influencing freight activity, but to a lesser extent than economic growth.

Its high volatility during energy crises is explicitly incorporated into the IRU model to account for potential impacts on freight activity. As energy future prices and growth forecasts are highly changeable during this particular time, IRU has developed a tool to assess potential scenarios based on Brent value and growth predictions.

Freight operations and contract negotiations extremely challenging

Navigating these uncertain times makes freight operations and contract negotiations extremely challenging. Fuel prices, for a start, are soaring worldwide. EU countries are adopting different strategies to mitigate the impact on prices at the pump, including capping consumption and reducing government taxes, such as excise duty. IRU monitoring from mid-March reveals a 20% surge in EU diesel prices with the largest increase observed in Spain (27%, reaching EUR 1.79 per litre) and the highest price found in Ireland (EUR 2.3 per litre). Diesel has also exceeded EUR 2 per litre in Finland, France, Germany, Italy, and the Netherlands. Surging diesel prices are driving up truck operating costs, which may lead to higher freight rates and, in some cases, reduced demand for road transport if industrial output slows. This dynamic has already been reflected in recent market analyses, including Freight Perspectives which highlights in its March 2026 analysis that rising operating costs and market conditions are putting upward pressure on freight rates. This pattern is consistent with developments already observed in maritime and air freight, where fuel cost increases have translated into higher transport rates and, in some cases, softer demand conditions. Diesel is not the only energy source seeing prices rise. Attacks on Middle East production sites, notably in Qatar, have pushed up natural gas prices in Europe. Combined with lower than usual stockpile replenishment, this is likely to challenge the competitiveness of EU industries.

Maritime traffic and air freight rates

Last but not least, the conflict is disrupting global supply chains. Maritime traffic in the Gulf and surrounding routes is facing delays and rerouting, which is likely to push up global freight costs. Early market reports suggest that freight rates on key long-haul routes, including Asia– Europe, have increased by as much as 30% to 50% in the short term amid rising risk premiums and rerouting. Similarly, air freight rates on certain routes have surged by as much as 70%, reflecting capacity constraints and the diversion of shipments from disrupted maritime routes.

At the same time, supply chains may become more regionalised, with greater redistribution of flows within Europe, in particular along port-to- inland corridors. These disruptions may also divert supply chains towards reshoring or nearshoring production to Europe, boosting intra- EU freight activity. Manufacturing output could also slow down due to energy supply shortages, also affecting freight volumes.

Overall, the war is creating a complex mix of forces. Higher operating costs may constrain freight activity, while supply chain reconfiguration and closer regional sourcing could boost intra-EU freight activity. Freight volumes will depend on which effects dominate as the situation evolves. ■

IRU’S PERSPECTIVE; 2026 COULD BE ONE OF ZERO GROWTH IN TONNE-KILOMETRES

Transport costs are highly likely to rise in the coming years, alongside an energy crisis that is likely to reduce the competitiveness of EU industries. While road transport performance is unlikely to collapse as it did in 2008, the year 2026 could be one of zero growth in tonne-kilometres. Key uncertainties, and potential safeguards, include the record-high level of household savings in the EU – which may fall and boost consumption – and trade deals between the EU and other economies, which may increase exports.

European fleets are slowly transitioning to alternative-fuel vehicles, although uptake of alternatively-fuelled trucks remains uneven. Progress varies significantly across the EU,16 reflecting disparities in infrastructure deployment, government subsidies and investment capacity.This fragmented transition further widens the competitiveness gap between operators in the face of rising fossil fuel cost.

SEAMLESS GLOBAL TRANSPORT GAINS STRENGTH THROUGH THE TIR SYSTEM

Managed by the International Road Transport Union under the authority of the United Nations, the TIR system further strengthens its role in global road transport through new border facilitation measures and expanding transport corridors.

As the world's only global customs transit system, TIR has been connecting countries through international road transport for more than seventy five years. Thanks to its secure and mutually recognized system, the system ensures that goods are sealed at the point of origin and are transported without being opened, facilitating the border crossings.

Managed by IRU under a United Nations mandate, TIR allows transiting as many as needed along the way, via a secure, multilateral and multimodal structure. Thanks to this tried-and-tested structure, the border crossing times are shortened significantly while the transportation costs decrease greatly.

One of the recent developments is TIR prioritization at the border gates. All Central Asian countries, as well as Romania, Moldova, China, Mongolia and Saudi Arabia, have implemented priority lanes or windows for TIR.

TIR operators using the electronic preliminary notification system TIR-EPD can use these designated lanes or windows for their low risk transportations by informing the customs administrations beforehand.

One of the most interesting new TIR system practice has been launched in Iraq. Having become operational in Iraq in April, TIR was made mandatory for all goods transported by road. The integration of the electronic pre-declaration system has increased safety and efficiency. New and faster trade routes were opened via Iraq to the Gulf countries and the Middle East.

Thanks to the TIR system, transit times on routes from Europe to the Gulf region and from Türkiye to Kuwait and Jordan have been reduced to just days, providing a significant time saving compared to maritime transport. TIR operations have been growing in the Middle East, including in the Gulf Cooperation Council counties. The United Arab Emirates has now become one of the top largest issuer of TIR carnets globally.

TIR continues to gain momentum in China. The increase in the number of licensed operators and vehicles increased the use of TIR on the routes from China to Europe. High number of border crossings and inland cities facilitate operators for several cross-border TIR routes.

The types of cargo moved under TIR now range from e-commerce products to dangerous goods, from cold-chain products to bulky and heavy cargo. With an extending geography and increased number of practices, TIR continues to further strengthen the strategic role of roads in global trade.

TÜRKİYE EMERGES AS A LOGISTICS BRIDGE IN EUROPE-CENTRAL ASIA TRADE

The critical role of Turkish transporters in the European Union's Central Asia expansion is highlighted. Service Exporters Union Board Member Murat Baykara underlined that removing artificial barriers and simplifying visa procedures would position Türkiye as a strategic logistics partner while strengthening the EU's global competitiveness.

► The Freight Transportation and Logistics Services Committee of the Service Exporters Union (HİB) held a press conference at the Şehit Ömer Halisdemir Conference Hall of the Foreign Trade Complex to share the sector's assessments for 2025 and its targets for the post-2026 period. Speaking at the meeting, HİB Board Member and Chair of the Freight Transportation and Logistics Services Committee Murat Baykara underline that the logistics and freight transportation sector plays a critical role not only in service exports but also in ensuring the sustainability of Türkiye's goods trade.

Baykara further remarked that "The logistics and freight transportation sector is one of our country's most strategic service sectors due to the size of the domestic market, its contribution to exports and its role in enabling goods trade. In 2024, Türkiye generated more than 40 billion US dollars in logistics and transportation exports, with nearly half of this figure generated by freight transportation. As of November 2025, annualized logistics and transportation exports reached 42 billion and 250 million US dollars, of which 19 billion and 570 million US dollars was recorded as freight transportation exports."

"Türkiye holds a regional logistics hub position"

Highlighting the sector's growing institutional capacity, Baykara said the number of HİB members has increased from 255 to 701 since 2022, making the sector the third largest within HİB. Baykara stated that this growth was driven by sectoral support mechanisms, financing opportunities and national and international initiatives.

Emphasizing that Türkiye's strong transportation infrastructure provides a significant competitive advantage, Baykara said the integration of ports, airports, highways and railways has positioned the country as a regional

logistics hub. Baykara noted that Türkiye provides access to a vast market within a radius of 1,000–1,200 kilometers by road and within a three-hour flight distance by air.
Stating that road transport plays a critical role in trade with the European Union and neighboring countries, Baykara said road export volumes have increased by 55 percent over the past decade, reaching 85.8 billion US dollars.
Referring to maritime transport, Baykara stated that container volumes have increased by 62 percent while handled cargo volumes have risen by 38 percent, emphasizing the need for stronger port infrastructure.

Baykara also noted that air cargo accounts for 13 percent of exports and has recorded 47 percent growth in tonnage terms and told that rail transport is of strategic importance along the Europe-Central Asia-China corridor.

“The Middle Corridor gains critical importance”

Telling that Europe-Asia trade is expected to triple over the next five years, Baykara added that the Middle Corridor stands out as one of the most efficient routes in this process.
Baykara stated that Türkiye could assume a central role in global transit transportation through the corridor.

Remarking the Trans-Caspian Middle Corridor as no longer an alternative route but a critical artery for global trade, Baykara said that the European Union has increased its investments in Central Asia, but stronger logistics integration with Türkiye is essential for the sustainability of this strategy.
Stating that Türkiye is the EU’s sixth largest trading partner and a major hub in Eurasian logistics, Baykara said road transport quotas and visa-related issues have increased trade costs and created operational inefficiencies. Baykara added that Türkiye’s exports to the EU could increase by 12 percent if these restrictions are lifted.

INTEGRATION IN TRANSPORT STRENGTHENS THROUGH LOGISTICS CENTERS

While Türkiye has contributed 39 billion US dollars to transport infrastructure over the past 23 years, the transport budget for 2026 has reached 571 billion Turkish liras, with rail investments accounting for 53 percent of the total allocation.

► Minister of Transport and Infrastructure Abdulkadir Uraloğlu shared assessments regarding transport investments and the country's 2053 vision during the presentation of the 2026 budget. Uraloğlu stated that efforts are ongoing 2 thousand and 3 construction sites across Türkiye with more than 103 thousand personnel, adding that the sector directly employs 235 thousand people.

Noting that approximately 300 billion US dollars has been invested in the transport sector over the past 23 years, Uraloğlu announced that the current investment program includes 2 thousand and 171 projects with a total value of 5.2 trillion Turkish liras. Uraloğlu also stated that an allocation of 571 billion Turkish liras has been earmarked for 2026.

Railway investments increase

Having stated Eroglu that rail accounts for 53 percent of the 2026 transport budget, while road investments represent 39 percent, Uraloğlu emphasized that this allocation reflects Türkiye's goal of increasing the share of rail in both freight and passenger transport. Having recalled that 91 percent of transport operations in Türkiye are currently carried out by road, Uraloğlu stressed that expanding rail transport is critical in terms of energy efficiency and sustainability.

Green transition and emission targets

Highlighting the importance of environmental considerations in transport projects, Uraloğlu announced that 62 million tons of emissions have been prevented through the Marmaray project. Noting that the number of electric vehicles in Türkiye has exceeded 321 thousand and the number of charging points has surpassed 35

REPUBLIC OF TURKEY
MINISTRY OF TRANSPORT
AND INFRASTRUCTURE

thousand, Uraloğlu added that green transformation initiatives are continuing in both the maritime and aviation sectors.

Logistics centers and rail integration

Telling that 12 logistics centers are currently active across Türkiye and that the goal is to increase this number to 25, Uraloğlu noted that industrial zones, ports and free zones are integrated into the railway network. Uraloğlu added that efforts are ongoing continuing on the Filyos, Çukurova, Karasu and Dörtyol-Hassa projects.

Growth and records in Maritime Transport

Stating that cargo handling volumes have exceeded 456 million tons, Uraloğlu said that the ports of Ambarlı, Kocaeli, Tekirdağ, Mersin and Aliağa are now ranked among the world's 100 busiest ports. Uraloğlu also noted that the Turkish merchant fleet had risen to 10th place globally as of 2025. Uraloğlu further stated that revenue from strait transit fees increased from 38 million US dollars to 223 million US dollars, while the production capacity and export value of Turkish shipyards also recorded significant growth. Uraloğlu added that 44 projects with a total investment value of 189 billion Turkish liras were completed and put into service in 2025.

A VOLATILE RANKING IN THE WORLD'S BUSIEST AIRPORTS AMIDST A TURBULENT ATMOSPHERE

Airports Council International (ACI) World revealed the 2025 rankings of the world's busiest airports, highlighting the industry's leading hubs across total passengers, international passengers, air cargo, and aircraft movements. Atlanta's Hartsfield-Jackson airport remains the busiest globally with 106 million passengers in 2025.

These airports play a critical role in the global air transport system, anchoring connectivity and enabling the efficient movement of people and goods worldwide. As of January 2026, ACI serves 811 members, operating over 2,200 airports in more than 160 countries worldwide.

Due to the war launched by the US and Israel against Iran, major airports in the region have also experienced significant disruptions in flights and passenger traffic. Dubai, Abu Dhabi and Doha airports have been deeply affected by this war. The extent of changes in airport rankings in 2026 compared to 2025 will become clear when updated figures are released.

Airports Council International (ACI), the trade association of the world's airports, is a federated organization comprising ACI World, ACI Africa, ACI Asia-Pacific and Middle East, ACI EUROPE, ACI Latin America and the Caribbean and ACI North America. In representing the best interests of airports during key phases of policy development, ACI makes a significant contribution toward ensuring a global air transport system that is safe, secure, efficient, and environmentally sustainable.

According to the figures provided by ACI;
• Atlanta's Hartsfield-Jackson airport remains the busiest globally with 106 million passengers in 2025, despite a slight decrease from 2024.
• Dubai, Tokyo, Dallas, and Shanghai airports all landed in the top 5 as global passenger traffic rose to 9.8 billion in 2025.
• ACI highlights the need for airport investment amid rising demand, infrastructure challenges, and geopolitical impacts on air travel.
- Atlanta stays dominant: It has held the No. 1 spot for 27 of the last 28 years, handling over 100 million passengers annually. Dubai remains the top international hub. While Atlanta leads overall traffic, Dubai continues to dominate international travel flows.
-Asia's strong rebound: Airports like Tokyo Haneda, Shanghai Pudong, and Guangzhou are climbing rapidly thanks to post-pandemic recovery and regional demand.
-Istanbul's rise: Istanbul Airport ranks 8th globally and is becoming one of Europe's most important transit hubs, with continued growth and capacity expansion.
ACI World Director General Justin Erbacci commented on the traffic data: "We congratulate the world's busiest airports for managing growing air travel demand amid increasing operational complexity. These hubs keep people and goods moving, supporting global trade, tourism, and economic growth in their communities and regions. To help keep pace with rising demand, governments must prioritize sustained investment in airports and the broader aviation ecosystem."
From 2026 onward, airport revenues are expected to exceed pre-pandemic levels and grow in line with passenger demand. However, the pace of recovery will depend on financing conditions, inflationary pressures, regulatory frameworks, and broader geopolitical and economic uncertainty. Justin Erbacci made the following assessment about revenue performance;
"Passenger demand has fully rebounded, but airport revenues are still catching up, underscoring the financial pressures airports continue to face. As global air travel demand is set to grow strongly in the coming decades, policymakers must support regulatory frameworks that allow airports to strengthen their financial resilience and invest in the infrastructure needed to sustain connectivity and economic growth."

ACI World Director General Justin Erbacci

Total passengers highlights-The top 10 busiest airports represent 9%
• In 2025, global total passengers are estimated to have reached 9.8 billion, representing an increase of 3.6% from 2024 or a gain of 7.3% from 2019 results.
• The top 10 busiest airports for total passenger traffic represent 9% of global passenger traffic.
• Hartsfield-Jackson Atlanta remains 1st with 106.3 million passengers.
• Dubai remains 2nd with 95.2 million passengers.
• Tokyo Haneda rises to 3rd with 91.7 million passengers.
• Asia-Pacific airports are rebounding strongly, driving changes in global airport rankings.
• Shanghai Pudong records the biggest jump in the top 10, rising from 10th to 5th.This growth was supported by international traffic recovery, visa policy easing, and expanded connectivity.
• Guangzhou Baiyun rebounds to 9th position, up from 57th in 2022.
• 4 airports in the top 10 are in the United States, reflecting continued market strength. They all have significant domestic passenger shares (80-95% domestic traffic).

Global aviation context in 2025-Geopolitics reshaping traffic flows:
• Resilient but fragile global economy: Global GDP grew ~3.0–3.2% in 2025, above expectations but below historical norms, with ongoing risks from trade tensions, protectionism, and policy uncertainty affecting air travel demand.
• Lower fuel prices and easing inflation supported demand: Jet fuel prices fell (~-13% YoY) and inflation eased, boosting purchasing power and sustaining strong passenger demand despite volatility.
• Global recovery led by international traffic: Global airport traffic rose 3.6% in 2025, driven by international demand and Asia-Pacific recovery, while North American and European hubs neared saturation.
• Capacity becoming a key constraint: Growth was increasingly limited by infrastructure and slot constraints in some regions, aircraft delivery backlogs, and air navigation limitations.
• Geopolitics reshaping traffic flows: Airspace closures and conflicts increased flight times and costs, prompting rerouting and shifting traffic toward alternative hubs.

INTERNATIONAL PASSENGERS*

2025	2024	2019	AIRPORT	2025	% CHANGE VS 2024	% CHANGE VS 2019
1	1	1	DUBAI	95.192.160	3.1	10.3
2	2	2	LONDON	79.874.784	0.9	5.0
3	3	5	INCHEON	73.554.772	4.1	4.1
4	4	7	SINGAPORE	69.402.000	3.5	2.7
5	5	3	AMSTERDAM	68.767.548	2.9	-4.1
6	7	14	ISTANBUL	66.608.849	5.8	68.3
7	6	6	PARIS	66.135.938	2.6	-5.3
8	9	4	HONG KONG	60.824.359	14.9	-14.7
9	8	8	FRANKFURT	57.528.528	2.4	-8.8
10	10	15	DOHA	54.338.667	3.1	40.1

International passengers enplaned and deplaned.

CARGO*

2025	2024	2019	AIRPORT	2025	% CHANGE VS 2024	% CHANGE VS 2019
1	1	1	ATLANTA	106.302.208	-1.6	-3.8
2	2	4	DUBAI	95.192.160	3.1	10.2
3	4	5	TOKYO	91.679.814	6.7	7.2
4	3	10	DALLAS	85.660.127	-2.5	14.1
5	10	8	SHANGAI	84.994.227	10.7	11.6
6	8	6	CHICAGO	84.814.099	6.0	0.2
7	5	7	LONDON	84.482.126	0.7	4.4
8	7	28	ISTANBUL	84.437.710	5.5	61.8
9	12	11	GUANGZHOU	83.582.952	9.5	13.9
10	6	16	DENVER	82.427.962	0.1	19.4

*Cargo: Loaded and unloaded freight and mail in metric tonnes. **Includes transit freight.*

TOTAL PASSENGERS*

2025	2024	2019	AIRPORT	2025	% CHANGE VS 2024	% CHANGE VS 2019
1	1	1	HONG KONG	5.070.256	2.7	5.4
2	2	3	SHANGAI	4.096.016	8.6	12.7
3	4	6	ANCHORAGE AK	3.854.614	4.2	40.4
4	5	4	LOUISVILLE KY	3.396.437	13.5	21.7
5	7	12	MIAMI FL	3.128.165	13.6	49.5
6	3	2	MEMPHIS TN	2.969.502	-20.9	-31.3
7	6	5	INCHEON KR	2.954.684	0.3	6.9
8	8	8	DOHA	2.614.214	-0.1	18.0
9	10	9	TAIPEI	2.499.899	10.1	14.6
10	9	17	GUANGZHOU	2.439.248	2.4	27.0

Total passengers enplaned and deplaned, passengers in transit counted once.

• China's reopening boosting global hubs: The return of Chinese travel accelerated growth across Asia-Pacific and major hubs, strengthening global connectivity.
• Cargo trends and supply chain shifts: Air cargo volumes stabilized near record levels, supported by e-commerce and faster, restructured global supply chains.

International passengers

• International passenger traffic reached 4.0 billion in 2025, representing a gain of 5.9% vs 2024 and 8.3% vs 2019.
• The top 10 busiest airports for international passenger traffic represent 17% of total international traffic.
• Dubai remains 1st, while London Heathrow and Incheon hold onto 2nd and 3rd respectively.

Air cargo almost 129 million tonnes

• Air cargo volumes are estimated to

have increased by 2.9% year-over-year (almost +8.8% versus 2019), to almost 128.9 million metric tonnes in 2025.

• Air cargo traffic is more concentrated amongst the main airports. Air cargo volumes in the top 10 airports represent close to 26% of global air cargo traffic.

• The increase is driven by strong e-commerce demand and supply chain adjustments.

• Hong Kong and Shanghai Pudong remain in 1st and 2nd rank respectively, and Anchorage gains 3rd rank.

Asia dominates cargo traffic, especially Greater China (Hong Kong, Shanghai, Guangzhou).

Express hubs in the U.S. like Memphis (FedEx) and Louisville (UPS) remain crucial.

Anchorage's high ranking comes from its strategic location for trans-Pacific cargo refueling.

Major global passenger hubs (Dubai, Doha, Frankfurt) also remain strong cargo players.

Aircraft movements

• Global aircraft movements are estimated to be around 101.5 million in 2025, representing a gain of 2.3% from 2024 results or +0.2% vs 2019.

• The top 10 airports for aircraft movement represent 6.4% of global aircraft movements.

• Chicago O'Hare ranks 1st, followed by Atlanta, and Dallas/Fort Worth.

ACI stated in its announcement that the ranking of the busiest airports offers a unique first look at global air traffic, and that the full rankings will be finalized in July 2026. These rankings are based on detailed information from more than 2,700 airports worldwide. ACI World's comprehensive dataset is considered to provide the highest accuracy and reliability in airport travel demand rankings. ■

İGA İSTANBUL AIRPORT IS RISING IN INTERNATIONAL PASSENGER TRAFFIC

► İGA İstanbul Airport (İST) rose seven places in international passenger traffic compared to 2019 and climbed one position from 2024 to rank 6th in 2025. İGA İstanbul Airport ranked one place ahead of Paris Charles de Gaulle Airport and surpassed major global hubs such as Hong Kong International Airport, Frankfurt Airport, and Hamad International Airport.

On an annual basis, İGA İstanbul Airport recorded a 5.8% increase in international passenger traffic in 2025, making it one of the fastest-growing airports in this category. In terms of total passenger traffic, however, the airport slipped one position, moving from 7th place in 2024 to 8th place in 2025.

In air cargo, İGA İstanbul Airport did not rank among the top 10 airports. Meanwhile, in cargo volume Hong Kong International Airport and Shanghai Pudong International Airport maintained their first and second positions, respectively, while Ted Stevens Anchorage International Airport ranked third. ■

MAIN PILLARS AND PRIORITIES OF AIR CARGO TO CONSOLIDATE GLOBAL STANDARDS AND ENHANCING SECURITY

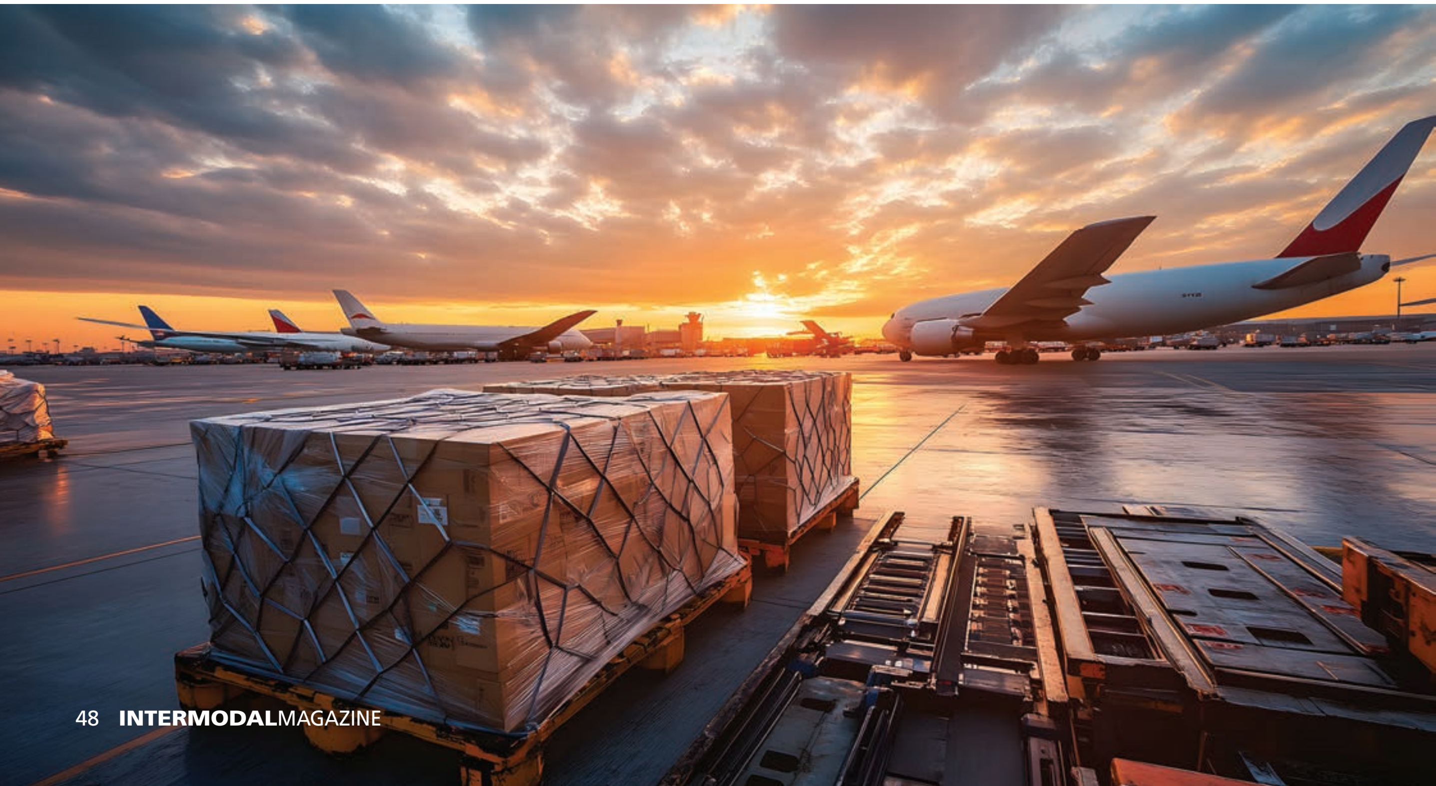
The International Air Transport Association (IATA) highlighted three priorities for the global air cargo industry: Accelerating digitalization, Strengthening and implementing global standards and Enhancing safety and security.

Brendan Sullivan, IATA's Global Head of Cargo made a comprehensive speech at the opening of the World Cargo Symposium, held in Lima,Peru. Sullivan said; "Working together to strengthen digitalization, global standards, and supply chain security will position air cargo well to continue supporting economic growth by connecting products to markets."

Here is a comprehensive summary of Brendan Sullivan's presentation; Last year, I spoke about how air cargo delivers when supply chains are under strain. This year, our theme is Advancing Air Cargo in a Dynamic World. Dynamic from almost every angle - geopolitics, trade, technology and more. Our task is clear: to navigate change and deliver the connectivity the global economy depends on.

The months ahead will test our resolve. Evolving U.S. trade policies are reshaping trade flows. Hostilities in the Middle East are disrupting airspace and adding operational complexity. The operating environment is becoming more uncertain - not less.

Let me bring this down to something tangible: a shipment



of fresh Peruvian blueberries, moving in temperature-controlled conditions from exporters here in Lima to customers in cities across the world. That shipment connects local producers to global markets. It sustains jobs, generates export revenue, and depends on a system that delivers speed, safety and reliability - especially when timing matters most.

Major advances in air cargo
A few years ago, moving that shipment of blueberries across borders was far more complex and challenging than it is today. Temperature control was not always continuous end-to-end. Visibility was often lost between warehouse, truck, and aircraft handovers, and monitoring was often periodic rather than real time.
Shipment data often had to be entered multiple times - for airlines, forwarders, and customs - because systems, data standards, and regulatory requirements were not fully aligned across the global supply chain. Security declarations, advance customs information, and airline operational data often sat in parallel systems that did not fully connect.

Global Head of the IATA Cargo Division Brendan Sullivan

AIR CARGO PROVIDING RESILIENCE WHILE UNCERTAINTY AND DISTRUPTIONS IN GLOBAL TRADE CONTINUE

► The air cargo sector held one of its most important gatherings of 2026 in mid-March in Lima, the capital of Peru. Organized by IATA, the World Cargo Symposium brought together airlines, air cargo officials, and experts from many countries around the world. Held amidst a global climate marked by regional conflicts and wars the WCS highlighted the strategic importance of air cargo in times of crisis. It also demonstrated the vulnerability of air cargo to crises on global trade routes that disrupt logistics flows. Major players in the Middle East and Gulf region faced significant delays, stops and problems in both passenger and cargo operations. The closure of the Strait of Hormuz to traffic and the ongoing war conditions caused a serious disruption in the supply of oil and petrochemical products, resulting in a sharp fluctuation in oil prices, with the price of Brent crude oil soaring from $70 to $115 per barrel. Due to the volatility in oil prices and the observed problems in jet fuel supply, IATA Director General Willie Walsh had to make the following and remarkable statement; "The IEA's assessment of potential jet fuel shortages is sobering. We have also estimated that by the end of May we could start to see some cancellations in Europe for lack of jet fuel. This is already happening in parts of Asia. Along with doing everything possible to secure alternative supply lines, it's important that authorities have well-communicated and well-coordinated plans in place in case rationing becomes necessary, including for slot relief".
The Air Cargo 2025 report, presented at the World Cargo Symposium (WCS) in Lima, sheds light on the vital role of air cargo in global trade. A brief summary of the report is below; Air cargo played a particularly important role in the global economy in 2025 by supporting both short term adjustment and longer term adaptation. First, it enabled large scale frontloading of trade flows to the United States, allowing firms to avoid or postpone the impact of new tariffs. Second, it facilitated the restructuring of global trade relationships, helping firms diversify suppliers and markets in response to restricted market access and heightened policy uncertainty. Together, these effects helped prevent a slowdown in global trade,

Digital processes were less mature. Documentation moved as PDFs and emails rather than structured data. Each supply chain partner typically held their own version of shipment data rather than working from a shared view. And operational predictability depended heavily on manual coordination-phone calls to confirm release status, manual document checks, and direct coordination between partners.
For shippers, this meant reduced confidence that products would arrive in optimal condition, less predictability around delivery times, and greater uncertainty when committing goods to international markets. When shipping perishable products measured in hours-not days-that uncertainty has real consequences.
Today, our blueberry shipment moves through a system that is stronger, smarter, and more sustainable. Its journey will be supported by smarter fleet planning and routing that improves efficiency and reduces

environmental impact.Its transport emissions can now be measured using standardized tools such as IATA CO2 Connect for Cargo - improving transparency on emissions for customers and regulators.It will be tracked continuously- improving visibility and helping partners respond faster when disruption occurs.

-Temperature conditions will also be monitored more consistently, supported by CEIV Fresh-certified handling standards - helping protect product quality and cold chain integrity.
-Packaging and logistics processes are more resource-efficient - helping reduce waste across the supply chain.
-And better access to global logistics networks is helping smaller exporters connect to international markets more reliably than before.
Behind the scenes, things have changed as well…. Supply chain security processes have advanced - from stronger shipper validation to improved cargo screening and risk targeting. Safety frameworks have evolved - particularly around dangerous goods compliance, digital documentation, and automated validation.And ONE Record is enabling shared shipment data across the supply chain - supporting faster, more reliable, and more secure shipment processing.

Julia Seiermann
IATA's Head of Industry Analysis

What still needs to be done

The system is stronger today. But the environment is more demanding… For example, there is no guarantee that the tariff environment in place when a shipment is booked will still apply when it is loaded or delivered. Trade patterns can shift quickly, sourcing regions can change within a single season, and demand can reroute flows almost overnight. Supply chains must be agile enough to adapt in real time.

Regulatory complexity is also increasing, with evolving advance data requirements, changing import rules, and different security expectations across markets.

And customer expectations continue to rise. If real-time tracking is available on one route, customers expect it everywhere.

Building the global standards needed to advance air cargo in a dynamic world is not something we complete once. It is something we must continue doing - deliberately, and together.

The work that we do together through IATA is more important than ever-and we are finding ways to do it more effectively with sharper focus on three critical priorities.

Advancing digitalization

If our Peruvian blueberry shipment is going to move seamlessly across borders, the entire supply chain must be digitalized. But cargo data still sits in fragmented systems - creating duplication, delay risk, and compliance exposure. This is particularly challenging in high-volume environments such as e-commerce, where large amounts of house waybill data must remain fully aligned with airline master air waybill records across multiple systems and jurisdictions.

which instead expanded by 2.4%, exceeding expectations held by major international institutions in spring 2025. Third, air cargo played a critical role in supporting the AI investment boom by transporting a large share of AI related goods, thereby sustaining a key driver of global economic growth.

Looking ahead, air cargo is likely to remain a cornerstone of global trade resilience. In a context of continued trade policy uncertainty and sustained demand from AI related sectors, its ability to support rapid adjustment and structural adaptation will remain critical into 2026 and beyond.

2025 was characterized by an unusually restrictive and volatile trade policy environment in the United States, affecting global economic activity. Average applied US tariffs rose to around 17%, a level last observed in the 1930s.

This environment prompted businesses worldwide to adapt rapidly, relying primarily on two strategies: frontloading trade flows to pre-empt tariff increases and restructuring trade relationships to reduce exposure to trade barriers. Foreign exporters and US importers alike accelerated shipments to the United States to secure market access before any new tariffs took effect. At the same time, firms began to reassess suppliers and destination markets. US businesses sought alternatives to tariff exposed suppliers, particularly in China, increasingly turning to other Asian economies. Exporters facing reduced access to the US market redirected shipments elsewhere. China's experience illustrates this adjustment: while exports to the United States declined, those to the European Union and other Asian markets expanded sufficiently to more than offset these losses.

The distinctive role of air cargo in the global economy

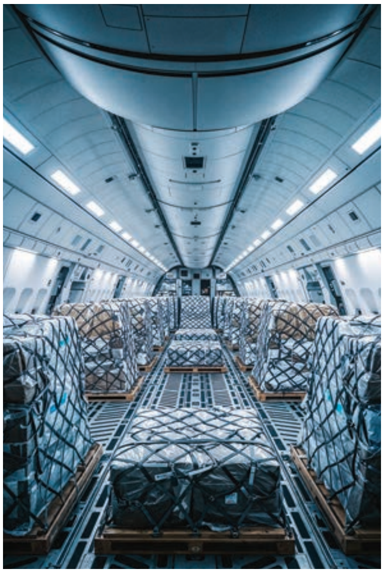
Air cargo also plays a distinctive and critical role in international trade. While it accounts for less than 1% of global trade by weight, it represents close to one-third of global trade by value.This reflects air cargo's unique ability to provide speed, reliability, security, and specialized handling for high-value and time-sensitive goods. Key commodities transported by air include high-value goods, pharmaceuticals, live animals, perishable goods, and dangerous goods. Only a minority of products rely heavily on air transport, but for those that do, air cargo is indispensable. Around 60% of traded products are never or only rarely transported by air, typically because they have a low value-to-weight ratio, are not time-critical, or cannot be transported safely by air. Almost 30% of products are occasionally transported by air, often reflecting segmentation within product categories. The remaining 11% of products rely heavily on air cargo, with more than half of their trade

This is where ONE Record plays a critical role. And the direction is clear. From January this year, the ONE Record standard became the preferred method for cargo data sharing. Airlines representing more than 70% of global air waybill volume are on track to implement it, supported by a growing ecosystem of technology providers, freight forwarders and other digital supply chain partners.

The next step is acceleration: Airlines and forwarders must scale implementation. Governments need to accept ONE Record data in regulatory filings. Technology providers must continue building secure, interoperable platforms.

This is just one of many digital advances we must make as an industry…and this will be turbo-charged with the power of AI.

IATA will launch the Air Cargo AI Excellence Hub to accelerate safe, practical AI adoption across the cargo ecosystem. We will also introduce AI SME - a mobile and web application



that enables operational teams to access cargo and safety standards simply by asking questions, placing user experience at the center of how standards are applied in day-to-day operations. As anyone who has worked with the Dangerous Goods Regulations knows, finding the right paragraph is sometimes half the job.

AI SME will make that much easier. Together with our strategic partners, we are exploring AI interoperability proof-of-concepts. Through a cargo interline use case, we are examining how AI agents could help airlines using different systems to collaborate in real time on bookings, disruptions, and cancellations.

The goal is simple but powerful: using digitalization and AI to help airlines and the supply chain work together more easily and more effectively.

Strengthen global standards and Implementation

Of course technology alone is not enough. Global standards must be implemented consistently. If not, shipments face different data requirements, security formats, and inspection processes. Fragmentation drives complexity - and complexity increases the risk of delays.

Unfortunately, we face some headwinds. The global Dangerous Goods Regulations (DGR) are strong.

But there is increasing divergence in how they are applied. The DGR allows state and operator variations - often for valid safety reasons. But as these multiply, they add operational complexity. Today there are more than 1,200 state and operator variations. For companies shipping globally, that is a significant compliance burden.

For example, some airlines require additional approvals or documentation for lithium battery shipments, even when they meet baseline DGR requirements. Others apply additional conditions or restrict shipments that are technically permitted.

Variations will always exist. But they must remain transparent, justified, and as closely aligned as possible with global standards - strengthening safety without creating unnecessary complexity. Alignment is not only about regulations. It also depends on access to the infrastructure that enables cargo to move.

Problems in slot allocations

At some major hubs, cargo carriers receive only temporary or ad hoc slots rather than historic allocations - including examples such as Bogotá and Dubai. In some markets, cargo flights are restricted to night-time operations, such as midnight to early morning windows in parts of Asia. Even at major global hubs like Heathrow and Gatwick, cargo operators do not typically receive historic slots, limiting operational flexibility and long-term planning.

Operational constraints can go further - including shorter parking limits, curfews, and local operating rules that add complexity.

The Worldwide Airport Slot Guidelines are clear: allocation must be fair, transparent, and non-discriminatory, regardless of

value transported by air. This group includes electronics (around 60% for laptops and 77% for smartphones), pharmaceuticals (for example, 72% for vaccines), and high-value or highly time-sensitive perishables such as fresh-cut roses and truffles (both around 82%). Some products depend almost entirely on air transport: more than 99% of global trade in memory chips and gold is carried by air.

Because air cargo serves fundamentally different economic needs from other transport modes, its evolution can diverge significantly from that of maritime or land transport. While trade by air and by other modes tended to move broadly in tandem in the late 2010s, air cargo outperformed other modes between 2020 and 2022 before converging again in 2022–23. Trade by air expanded sharply between 2023 and 2025, increasing by 35% over that period during which trade by other modes of transport remained broadly flat. Measured in volume (cargo tonne kilometres, CTK), air cargo rose by 17% between 2023 and 2025, reflecting both higher demand and changes in the composition and value of goods transported.

As a result, the share of trade transported by air reached an exceptionally high level in 2025. For a sample of 42 countries that consistently reported trade by air since 2015, air cargo accounted for 29.5% of total trade value, surpassing the previous peak observed during the pandemic in 2020 Frontloading, trade restructuring, and the expansion of trade in AI-related goods all contributed to this outcome.

Air cargo supported the AI boom as AI emerged as a key driver of global growth in 2025

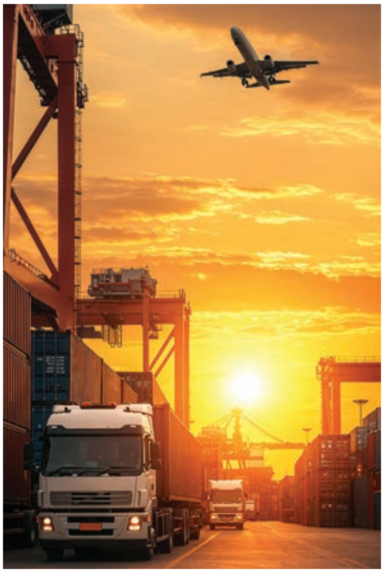
Investment in AI reached elevated levels in 2025. Global venture capital investment is estimated around USD 110 billion, private sector investment at USD 200-400 billion, and total global spending on AI approached USD 1 trillion. While the impact of AI on global productivity remains uncertain and is the subject of ongoing debate, these investments nonetheless made a significant contribution to economic growth. In the United States, investment in AI related hardware, software, research and development, and new data centers contributed an estimated 0.97 percentage points to real GDP growth in the first three quarters of the year, accounting for 39% of total GDP growth over that period.3

Trade in AI-related goods expanded from USD 2.1 trillion in 2015 to USD 3.9 trillion in 2025. Many of these goods rely heavily on air transport. Equipment, which accounts for 31% of AI related trade, is transported by air at rates of 66%, including key products such as data storage units and servers, which rely on air cargo for 68% and 56% of their trade, respectively. Intermediate operation type. The solution is not to ring-fence capacity for cargo, but to ensure local processes align with these principles and maximize capacity for all users.

As global commerce evolves and demand for rapid, reliable delivery grows, fair cargo access to infrastructure is not just an operational issue - it is an economic one.

Safety and security of the supply chain

Of course, speed and access mean little without safety and security. ICAO Annex 18 remains the global foundation for the safe transport of dangerous goods by air. But modernization is essential. Today's supply chain is digital, fast-moving, and exposed to new risks - including undeclared dangerous goods, lithium battery misuse, and deliberate attempts to exploit cargo systems. Modernizing Annex 18 ensures regulation reflects operational reality and strengthens the entire



supply chain against emerging threats. Modernization must also remain aligned with ICAO Annex 17 - ensuring security becomes smarter, faster, and more consistent, without compromising security outcomes.

Ultimately, supply chain safety and security are shared responsibilities. They cannot be delivered by one stakeholder alone. They require coordinated action across the entire ecosystem, including strong public-private partnerships. That is how we ensure global trade continues to move safely and securely - no matter how the threat landscape evolves.

And when our global system works as it should, its impact is felt most clearly at the shipment level - and by the businesses that depend on predictable global trade.

Reliable air cargo connectivity turns local production into global opportunity. It connects businesses to markets. It supports jobs and economic growth. And it keeps global trade moving - even as the world around it changes.

Advancing air cargo in a dynamic world means ensuring that shipment - and millions like it - continue to move safely, reliably, and predictably, no matter how the world changes. Because global trade will continue to evolve. And air cargo will continue to enable it. ■

inputs, representing 68% of AI related trade, are transported by air at rates of 74%, and include critical components such as memory chips, which are almost exclusively shipped by air. Although comprehensive global data by mode of transport are not available, data from a sample of countries consistently reporting trade by air suggests that around three quarters of trade in AI related goods was carried by air in 2025.

Moreover, the value of air cargo trade in AI related goods grew by 20% compared with 2024, underscoring air cargo's central role in sustaining the AI boom. Conversely, AI related goods have become increasingly important for air cargo itself. In 2025, they accounted for 53.5% of the value of air transported trade, while representing only 7% of its volume. The close interdependence between air cargo and AI driven economic activity is therefore likely to persist.

Sustaining global trade and economic growth by air cargo

The experience of 2025 illustrates the critical role of air cargo in sustaining global trade and economic growth during periods of heightened uncertainty. Faced with volatile and restrictive trade policies, businesses relied on air cargo to frontload shipments, reconfigure trade relationships, and avoid severe disruptions to supply chains. These mechanisms helped reduce the risk of supply shortages and mitigated upward pressure on prices, contributing to stronger than expected trade and economic outcomes.

Beyond its role in responding to trade policy shocks, air cargo also proved essential in supporting the AI boom by enabling the rapid and reliable transport of high value, time sensitive inputs and equipment. As AI emerged as a key driver of global growth in 2025, air cargo helped ensure that investment translated into economic activity rather than being constrained by logistical bottlenecks.

Absent air cargo, frontloading would have been far more limited, trade restructuring slower and more costly, and AI related investment more vulnerable to supply constraints. The likely outcome would have been weaker trade growth, higher inflationary pressures, and lower GDP growth.

Overall, air cargo once again demonstrated its role as part of the global economy's resilience architecture. It absorbs short term shocks-whether stemming from trade policy changes, health emergencies, or geopolitical disruptions-while simultaneously enabling longer term structural adaptation through supplier diversification, the development of new trade lanes, and the support of emerging growth drivers such as AI. ■

MIDDLE EAST DISRUPTION IMPACTS CARGO MARKETS, DEMAND FALLS 4.8% IN MARCH

The International Air Transport Association (IATA) released data for March 2026 global air cargo markets showing.

Total demand, measured in cargo tonne-kilometers (CTK), fell by 4.8% compared to March 2025 levels (-5.5% for international operations).

Capacity, measured in available cargo tonne-kilometers (ACTK), decreased by 4.7% compared to March 2025 (-6.8% for international operations).

"Air cargo demand fell 4.8% in March compared to the previous year. This was mostly due to severe disruptions at major Gulf hubs due to war in the Middle East. The timing of the usual post–Lunar New Year slowdown also added to the decline. The underlying demand trends, at this point, appear strong and the recent World Trade Organization and International Monetary Fund revisions to trade and GDP projections continue to see growth in 2026. Importantly, air cargo networks are providing the flexibility needed to support global supply chains as they adjust to geopolitical, tariff, and operational strains. All eyes are on fuel supply and price, which are expected to test the industry's resilience in the coming months," said Willie Walsh, IATA's Director General.

Several factors in the operating environment should be noted:

Global industrial production grew by 3.1% year-on-year in February, marking the 38th consecutive month of expansion. The global goods trade rose by 8.0% year-on-year in February.

Jet fuel prices rose sharply in March, up 106.6% year-on-year, alongside a 43.1% increase in crude oil prices and a 320% surge in refining margins.

Global manufacturing sentiment remained in growth territory in March, easing slightly from February. The Purchasing Managers' Index (PMI) stood at 51.4. The PMI for new export orders was 50.1-both above the 50-point expansion threshold-signaling positive conditions for air cargo demand.

HIGH RAILWAY INVESTMENTS BUT LIMITED TRANSPORT CAPACITY

Despite substantial investments in railway infrastructure in recent years, Türkiye has yet to achieve the expected increase in freight transportation volumes. The "From Investments to Transportation: The Search for Efficiency and Productivity in Railways" highlights the mismatch between infrastructure investments and actual freight transport volumes, with a particular focus on freight transportation. According to the report, the core issue is not the expansion of the rail network itself, but rather the inability to utilize this infrastructure in an efficient and sustainable way.

Rail freight share continues to decline

As of 2023, rail accounted for only 4.2 percent of Türkiye's total freight transport volume, while its share in foreign trade stood at just 0.8 percent. Given Türkiye''s growing export volume, these figures indicate that rail transport continues to occupy a limited position within the broader logistics system.

In 2024, rail freight transport declined by 4 percent year-on-year in net tons and by 0.4 percent in net ton-kilometers. This downward trend is affecting not only transport volumes, but also the overall efficiency of public investments in railway infrastructure.

A 13,919-kilometer network, low capacity utilization

As of the end of 2024, railway operations in Türkiye are carried out across a national rail network spanning 13,919 kilometers. 11,668 kilometers of this total consist of conventional lines, 219 kilometers of fast rail lines and 2,032 kilometers of dedicated high-speed train infrastructure. However, since nearly 90 percent of the network consists of single-track lines, this limits capacity and operational flexibility in freight transport.

Although 43 percent of conventional lines are electrified and 50 percent are equipped with signaling systems, these technical improvements have not translated into a comparable increase in freight volumes. Many lines continue to operate below their full potential.

Despite the presence of more than 350 organized industrial zones across Türkiye, only a small number are connected to the railway network through dedicated siding lines.

While the number of ports with rail

The "From Investments to Transportation" report by the Railway Transport Association (DTD) reveals that freight volumes in Türkiye's rail sector have yet to reach the desired level despite significant investments in railway infrastructure. According to the report, equipment shortages, low capacity utilization and limited private sector participation are slowing the sector's growth.

connections reached 18 by the end of 2024, these links have a limited impact on transport volumes remains.
The inability to establish a seamless and efficient rail logistics chain between production centers and ports continues to push freight towards road transport. This situation not only increases logistics costs, but also weakens rail transport share within the freight market.

Freight distribution: Concentration on bulk cargo

According to 2024 data, ore and metal residues accounted for the largest share of rail freight transport, representing 36.5 percent of total volumes. Iron ore, borate and chromium products were among the leading commodities in this category.
Manufactured minerals and construction materials ranked second with a 20.5 percent share, including products such as gypsum, clinker, sand and cement. The vehicles and machinery segment accounted for 13.9 percent of total rail freight, consisting mainly of empty containers and industrial machinery. These figures indicate that rail transport in Türkiye remains heavily concentrated in traditional bulk and heavy cargo segments.

Shortage of locomotives and wagons

As of the end of 2024, the system included 551 mainline locomotives and 108 shunting locomotives. However, 20 percent of the traction fleet is more than 40 years old, while another 32 percent falls within the 30–39 age range. The aging fleet is increasing breakdown rates and making planned and reliable freight operations more difficult.
The wagon fleet faces similar challenges. The high average age of wagons and the limited level of technical diversification restrict capacity, particularly for intermodal transport and cargo requiring specialized equipment. Insufficient maintenance and repair facilities also negatively affect operational continuity.

The private sector's growing but limited role

In 2023, private rail operators accounted for 20.42 percent of total freight transport measured in ton-kilometers, while their share of overall freight volumes stood at 17.57 percent. By the end of 2024, a total of 3,969 wagons owned by 39 companies were actively in service, with privately owned wagons accounting for 26.2 percent of total rail freight operations.
Despite this growth, financing difficulties, high costs and regulatory uncertainties continue to limit private sector investment in locomotives and wagons.

Moving beyond infrastructure investment

According to the report by DTD, achieving real growth in rail freight transport will require more than the construction of new railway lines.

The report stresses the need for fleet modernization, expanded maintenance capacity, stronger regulatory frameworks and greater support for private sector participation.
For railway investments in Türkiye to convert into actual freight growth, a balance must be established between infrastructure development and transport capacity. Otherwise, infrastructure investments alone will not be sufficient to deliver the expected transformation in the logistics sector. ■

EXPORTS OF 111 BILLION DOLLARS WITH 2.1 MILLION TRIPS

According to data released by the International Transporters Association (UND), 41 percent of Türkiye's exports worth of 273 billion US dollars were transported by road.

UND announced the international road transport figures for 2025 during the "2025 Transport Statistics Evaluation Meeting," attended by Minister of Trade Prof. Dr. Ömer Bolat, Deputy Minister of Trade Sezai Uçarmak and Deputy Minister of Transport and Infrastructure Durmuş Ünüvar. The meeting held on 13 March also brought together UND Chairman Şerafettin Aras, UND Vice Chairman Ergun Bilen, other board members and senior public sector representatives. Speaking at the meeting, Şerafettin Aras underlined the critical role of the logistics sector in turning Türkiye's export ambitions into reality. Aras said that "If this country is producing, exporting and growing, logistics is the driving force behind it. Transport is the key factor that makes Türkiye's export targets achievable in practice."

Aras also stressed that transport is not only an economic sector, but also a strategic one, noting that a strong national fleet and robust logistics infrastructure are essential for safeguarding Türkiye's foreign trade security.

41 Percent of exports transported by road

Şerafettin Aras stated that a significant share of Türkiye's 273 billion US dollars in goods exports in 2025 was transported by road. In 2025, a total of 2 million and 145 thousand road transport trips were carried out, transporting export cargo worth approximately 111 billion US dollars.

Aras noted that all modes of transport complement one another, but emphasized that road transport provides the fastest connection between production sites and export gateways and further remarked as follows: "Road transport is not an alternative to other transport modes; it complements them. Road transport is the mode closest to the point of production. It is also the mode closest to the border gate for exports."

Europe stands at the center of transportation operations

Aras stated that the largest share of Türkiye's road-based export transport operations is carried out to Europe. Noting that in 2025, export goods worth of 72 billion and 298 million US dollars were transported to Europe through 992 thousand 546 trips, Aras further said that export cargo worth of 16 billion and 960 million US dollars was transported to the Caucasus and Central Asia through 271 thousand trips, while exports of 21 billion and 597 million US dollars were carried to the Middle East and North Africa through 870 thousand trips.

Aras underlined that the European corridor remains the center of gravity for Türkiye's foreign trade, adding that nearly half of the country's exports to Europe are transported by road.

Significant increase on the Syria route

Sharing the figures relating to the southern transport corridor, Aras noted a significant increase in transport activity on the Syria route in particular. Stating that the number of transport operations on the route rose from 189 thousand and 862 in 2024 to 276 thousand and 962 in 2025, representing growth of approximately 46 percent.

He added that the Syria corridor holds strategic importance not only for regional trade, but also for future logistics initiatives such as the Iraq Development Road project.

RO-RO transport becomes a strategic option

Aras also highlighted the growth in RO-RO transport operations, stating: "A total of 268 thousand and 376 RO-RO transport operations were carried out in 2025. 202 thousand and 48 of these operations were performed on the Western RO-RO lines. Aras noted that RO-RO routes have become a strategic component of logistics infrastructure by easing congestion at border crossings and ensuring the continuity of exports.

Concluding the meeting, UND Chairman Aras emphasized the strategic importance of international road transport for Türkiye and said: "International road transport generates foreign currency revenue, creates employment and produces added value within the country. Road transport is the backbone of Türkiye's exports. This backbone is supported by the national fleet."

IRAQ TRANSIT CORRIDOR CREATES NEW OPPORTUNITIES FOR TURKISH TRANSPORTERS

New trade routes in the region following Iraq's accession to the TIR system raise hopes for the 3.500 logistics companies based in Mersin, which operate a massive fleet of 15 thousand vehicles.

The new trade routes in the region following Iraq's accession to the TIR system were discussed at the Mersin Chamber of Commerce and Industry (MTSO). Murat Aktoğ, Member of the MTSO Board and the Union of Chambers and Commodity Exchanges of Türkiye (TOBB) Logistics Council, emphasized that direct access through Iraq to strategic markets such as Saudi Arabia, the United Arab Emirates and Jordan once again reinforces Mersin's position as Türkiye's logistics capital.
Hosted by the MTSO, the TIR Carnet and Iraq Transit Corridor Information Meeting brought together representatives from the Union of Chambers and Commodity Exchanges of Türkiye (TOBB) and the International Road Transport Union (IRU).
Speaking at the meeting following Iraq's accession to the TIR system, Murat Aktoğ, Member of the MTSO Board and the TOBB Logistics Council, opened his remarks by highlighting Mersin's logistics strength. Aktoğ noted that the city is home to 3 thousand and 500 logistics-focused companies, including one thousand and 500 operating in international transport, supported by a massive fleet of 15 thousand vehicles.

Mersin plays a critical role in logistics operations

Can Özkaymak, Head of TOBB's Transport and Logistics Department, remarked that the transport sector is the driving force behind foreign trade. Recalling that the TOBB has been successfully operating the TIR system since 1966, Özkaymak stated that their main objective is to accelerate transport flows and improve trade efficiency.

Ereke: "The new transit corridor in Iraq is of strategic importance for the Turkish logistics sector"

IRU Regional and Middle East Permanent Representative Ereke highlighted the strategic importance of the transit corridor launched through Iraq for the Turkish logistics sector. Stating that Iraq joined the TIR system as of April 1, 2025 after nearly 22 years, Ereke said the development allows Turkish transporters to gain direct access to markets such as Kuwait, Jordan and Saudi Arabia by using the Iraqi corridor. Underlining that the use of TIR carnets is mandatory for transit operations through Iraq, Ereke said customs procedures have been digitalized and vehicles entering through the İbrahim Halil Border Gate are directed to exit gates without waiting times.
Noting that meetings with Saudi Arabia regarding visa procedures and the full reopening of the Arar Border Gate will soon be finalized, Ereke said that the reopening of the border gate would allow transporters to bypass the high transit costs currently associated with routes through Jordan. ■

MORE COUNTRIES TO IMPLEMENT ICS2 FOR ROAD TRANSPORT

The deployment of the European Union's Import Control System 2 (ICS2) is entering a critical phase for road goods transport. From the beginning of the year, several EU countries will decommission the old system and entry summary declarations must be submitted via ICS2.

► The Import Control System 2 (ICS2) of the European Union will be implemented gradually in more countries. The EU gradually decommissions the ICS1 system in order to maintain the smooth flow of goods and prevent bottlenecks at borders.
As of January, Ireland, Spain, France, Italy, Lithuania, Hungary, Finland, Greece and Bulgaria will apply ICS2 for road transport. The United Kingdom will also apply the system for Northern Ireland. As of June, Croatia, Latvia, Poland, Romania and Slovakia will follow. Several countries, including Austria, Germany, Denmark, and others, have already been applying ICS2 since the last quarter of the previous year.
ICS2 requires the preparation of a separate entry summary declarations for each consignment of goods entering or transiting through the EU by road. This declaration requires the submission of comprehensive shipment data regarding sender, recipient, property description and transportation details prior to entry into the EU. The goal is to enable customs to conduct advanced risk assessments and identify potential threats.
The new system means important changes in operational processes for the companies which carry out operations especially in road transport. Accurate and timely data exchange between the operators, logistics service providers and cargo owners is of critical important. Incomplete or incorrect declarations might cause delay in border transits and operational problems.

IRU supports the sector

International Road Transport Union (IRU) emphasizes that the application of ICS2 is not only a technical development for road transport but brings along a significant transformation which require new business processes and closer coordination across the supply chain. IRU is working closely with the European Commission, national authorities and industry partners to ensure implementation timeframes accommodate the readiness of both public and private sectors. Our goal is to maintain the smooth flow of goods and prevent bottlenecks at borders.
Following IRU's advocacy, the Commission is developing a multiple filing option for road transport under ICS2. This will allow different parties to contribute data to a single entry summary declaration. However, this functionality is expected in the second half of 2026. Until then, single filing remains mandatory for road transport.
IRU is also providing guidance, training and tools to help operators integrate ICS2 requirements into their workflows. ■

SMART TRANSFORMATION FROM WAREHOUSING TO DISTRIBUTION:

THE FUTURE OF LOGISTICS LIES IN AUTOMATION

▶ The logistics sector currently undergoes a profound transformation as the global trade accelerates, e-commerce volumes grow exponentially, and customer expectations have reached the level of "same-day delivery". At the center of this shift are next-generation automation systems. Digital infrastructures, robotic solutions and data analytics applications are now used across a wide spectrum of operations, from warehouses and distribution networks to fleet management and customs procedures.

According to industry representatives, automation no longer serves merely as a tool for reducing operational costs; it has evolved into a strategic investment that delivers speed, transparency, traceability and sustainability.

Smart transformation in warehousing

Warehouse operations rank among the most visible areas of next-generation automation. Automated sorting systems, autonomous mobile robots (AMRs), automated guided vehicles (AGVs), smart shelving solutions and sensor-based inventory tracking systems accelerate

Digitalization, robotic systems, and AI-powered solutions transform the supply chain from end to end. Competition is now shaped less by speed and capacity and more by data management and integration capabilities.

order preparation processes while minimizing error rates.
The growing volume of small but high-frequency e-commerce orders particularly drives the rise of micro-fulfillment centers and high-speed sorting technologies. Companies aim to achieve end-to-end visibility by integrating warehouse management systems (WMS) with transportation management systems (TMS).

Proactive management through artificial intelligence

Another critical dimension of next-generation automation lies in data analytics and artificial intelligence applications. Big data obtained from numerous sources, ranging from vehicle tracking systems to IoT sensors supports route optimization, demand forecasting and capacity planning.
This enables companies to anticipate potential delays in advance and develop alternative scenarios against weather conditions, border congestion and operational disruptions. Reactive management increasingly gives way to proactive planning across the sector.
Automation investments do not diminish the importance of the workforce; rather, they transform its role. As repetitive operational tasks decline, employees focus more on areas such as system management, data analysis and process improvement. In logistics, digital literacy and analytical thinking become just as critical as technical expertise.
According to experts, the future competitiveness of logistics companies will depend not only on the technologies they possess, but also on the quality of the workforce managing those technologies.

Sustainability remains on the automation agenda

Efforts to reduce carbon emissions and improve energy efficiency also shape automation investments. Smart route planning systems optimize fuel consumption, while warehouse automation solutions enable more efficient energy use. As a result, companies address both cost efficiency and environmental sustainability within the same framework. ■

FOREIGN TRADE ACCORDING TO GENERAL TRADE SYSTEM BY TOP TWENTY COUNTRIES, 2025, 2026

	MARCH					JANUARY-MARCH				
	2025		2026			2025		2026		
	Value	Share	Value	Share	Change %	Value	Share	Value	Share	Change %
Exports										
Total	**23.405.613**	**100,0**	**21.899.038**	**100,0**	**-6,4**	**65.294.134**	**100,0**	**63.227.123**	**100,0**	**-3,2**
Germany	1.855.788	7,9	1.820.331	8,3	-1,9	5.320.936	8,1	5.452.223	8,6	2,5
United Kingdom	1.502.929	6,4	1.419.476	6,5	-5,6	4.027.992	6,2	3.943.881	6,2	-2,1
USA	1.413.892	6,0	1.378.053	6,3	-2,5	3.979.444	6,1	3.830.116	6,1	-3,8
Italy	1.231.228	5,3	1.216.609	5,6	-1,2	3.303.004	5,1	3.374.111	5,3	2,2
France	975.088	4,2	995.607	4,5	2,1	2.585.154	4,0	2.706.064	4,3	4,7
Spain	882.707	3,8	846.760	3,9	-4,1	2.472.710	3,8	2.525.883	4,0	2,2
Romania	896.936	3,8	802.830	3,7	-10,5	2.112.488	3,2	1.840.918	2,9	-12,9
Iraq	946.851	4,0	659.845	3,0	-30,3	2.919.966	4,5	2.326.820	3,7	-20,3
Netherlands	701.777	3,0	522.121	2,4	-25,6	1.951.204	3,0	1.796.662	2,8	-7,9
Bulgaria	601.738	2,6	521.098	2,4	-13,4	1.440.968	2,2	1.391.738	2,2	-3,4
Poland	580.171	2,5	519.103	2,4	-10,5	1.502.246	2,3	1.621.029	2,6	7,9
Russia	619.276	2,6	513.083	2,3	-17,1	1.637.329	2,5	1.473.267	2,3	-10,0
UAE	578.821	2,5	409.415	1,9	-29,3	2.385.460	3,7	1.859.915	2,9	-22,0
Greece	493.518	2,1	394.921	1,8	-20,0	1.378.179	2,1	1.020.407	1,6	-26,0
Belgium	386.718	1,7	382.703	1,7	-1,0	1.165.567	1,8	1.140.423	1,8	-2,2
China	260.291	1,1	374.609	1,7	43,9	733.952	1,1	1.001.754	1,6	36,5
Egypt	339.201	1,4	343.828	1,6	1,4	997.123	1,5	1.047.668	1,7	5,1
Morocco	314.349	1,3	332.006	1,5	5,6	848.306	1,3	912.486	1,4	7,6
Ukraine	329.059	1,4	312.101	1,4	-5,2	872.941	1,3	852.777	1,3	-2,3
Slovakia	159.842	0,7	287.612	1,3	79,9	380.630	0,6	591.021	0,9	55,3
Others	8.335.432	35,6	7.846.930	35,8	-5,9	23.278.532	35,7	22.517.957	35,6	-3,3
Imports										
Total	**30.600.208**	**100,0**	**33.119.711**	**100,0**	**8,2**	**87.780.460**	**100,0**	**91.894.622**	**100,0**	**4,7**
China	4.004.796	13,1	4.759.324	14,4	18,8	11.629.000	13,2	13.167.361	14,3	13,2
Russia	3.288.354	10,7	3.511.364	10,6	6,8	11.549.305	13,2	9.087.279	9,9	-21,3
Germany	2.486.727	8,1	2.538.131	7,7	2,1	6.472.865	7,4	6.618.611	7,2	2,3
Switzerland	1.020.706	3,3	1.620.086	4,9	58,7	3.161.480	3,6	4.578.899	5,0	44,8
USA	1.258.994	4,1	1.515.988	4,6	20,4	3.958.702	4,5	4.680.206	5,1	18,2
Italy	1.503.451	4,9	1.355.278	4,1	-9,9	3.677.389	4,2	3.466.228	3,8	-5,7
France	1.525.621	5,0	1.179.604	3,6	-22,7	3.188.515	3,6	2.803.038	3,1	-12,1
South Korea	754.757	2,5	910.109	2,7	20,6	2.278.921	2,6	2.433.162	2,6	6,8
Spain	983.695	3,2	880.411	2,7	-10,5	2.258.786	2,6	2.289.494	2,5	1,4
United Kingdom	586.315	1,9	653.445	2,0	11,4	1.559.031	1,8	1.679.772	1,8	7,7
India	478.003	1,6	636.922	1,9	33,2	1.432.336	1,6	1.575.863	1,7	10,0
Poland	485.879	1,6	588.654	1,8	21,2	1.323.998	1,5	1.753.093	1,9	32,4
Malaysia	451.329	1,5	495.218	1,5	9,7	1.286.248	1,5	1.356.414	1,5	5,5
Kazakhstan	343.889	1,1	490.631	1,5	42,7	907.430	1,0	1.629.781	1,8	79,6
Romania	419.897	1,4	477.572	1,4	13,7	1.075.940	1,2	1.190.477	1,3	10,6
Brazil	398.798	1,3	422.780	1,3	6,0	1.052.630	1,2	1.255.092	1,4	19,2
UAE	589.853	1,9	403.987	1,2	-31,5	2.350.543	2,7	1.863.045	2,0	-20,7
Netherlands	431.420	1,4	402.503	1,2	-6,7	1.238.205	1,4	1.116.175	1,2	-9,9
Japan	312.625	1,0	389.789	1,2	24,7	1.023.165	1,2	1.022.241	1,1	-0,1
Belgium	323.817	1,1	371.229	1,1	14,6	956.366	1,1	995.112	1,1	4,1
Others	8.951.282	29,3	9.516.687	28,7	6,3	25.399.605	28,9	27.333.280	29,7	7,6

TurkStat, Foreign Trade Statistics, March 2026
*** Countries are ranked by March, 2025 figures.*
**** Thousand US $*