LOGISTICS AND TRANSPORTATION INDUSTRY IN TÜRKİYE

June 2023

INVEST.GOV.TR
AGENDA

WHY INVEST IN TÜRKİYE

LOGISTICS INDUSTRY IN TÜRKİYE

TRANSPORTATION INDUSTRY IN TÜRKİYE
10 reasons to invest in Türkiye

1. ROBUST ECONOMY
2. DOMESTIC + ACCESSIBLE MARKETS
3. STRATEGIC LOCATION
4. FAVOURABLE DEMOGRAPHICS
5. SKILLED AND COMPETITIVE LABOR FORCE
6. CONTINUOUS REFORM PROCESS
7. BUSINESS-FRIENDLINESS
8. LUCRATIVE INCENTIVES
9. BENIGN R&D ECOSYSTEM
10. SECTORAL OPPORTUNITIES
3 main reasons to invest in Logistics

1. Robust Economy
2. Strategic Location
3. Domestic & Accessible Markets
ROBUST ECONOMY

TRACK RECORD GROWTH AND BRIGHT FUTURE WITH PROVEN RESILIENCE

11th largest economy in the World

RANKING OF ECONOMIES BY GDP AT PPP

<table>
<thead>
<tr>
<th></th>
<th>2003</th>
<th>2019</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>USA</td>
<td>CHINA</td>
<td>CHINA</td>
</tr>
<tr>
<td>2.</td>
<td>CHINA</td>
<td>USA</td>
<td>USA</td>
</tr>
<tr>
<td>3.</td>
<td>JAPAN</td>
<td>INDIA</td>
<td>INDIA</td>
</tr>
<tr>
<td>4.</td>
<td>JAPAN</td>
<td>JAPAN</td>
<td>JAPAN</td>
</tr>
<tr>
<td>5.</td>
<td>GERMANY</td>
<td>GERMANY</td>
<td>GERMANY</td>
</tr>
<tr>
<td>6.</td>
<td>RUSSIA</td>
<td>RUSSIA</td>
<td>RUSSIA</td>
</tr>
<tr>
<td>7.</td>
<td>FRANCE</td>
<td>INDONESIA</td>
<td>INDONESIA</td>
</tr>
<tr>
<td>8.</td>
<td>UK</td>
<td>BRAZIL</td>
<td>BRAZIL</td>
</tr>
<tr>
<td>9.</td>
<td>BOLIVI</td>
<td>UK</td>
<td>UK</td>
</tr>
<tr>
<td>10.</td>
<td>ITALY</td>
<td>FRANCE</td>
<td>FRANCE</td>
</tr>
<tr>
<td>11.</td>
<td>MEXICO</td>
<td>MEXICO</td>
<td>MEXICO</td>
</tr>
<tr>
<td>12.</td>
<td>INDONESIA</td>
<td>ITALY</td>
<td>ITALY</td>
</tr>
<tr>
<td>13.</td>
<td>SPAIN</td>
<td>TÜRKİYE</td>
<td>TÜRKİYE</td>
</tr>
<tr>
<td>14.</td>
<td>CANADA</td>
<td>S.KOREA</td>
<td>S.KOREA</td>
</tr>
<tr>
<td>15.</td>
<td>S.KOREA</td>
<td>SPAIN</td>
<td>SPAIN</td>
</tr>
<tr>
<td>16.</td>
<td>S.Arabia</td>
<td>CANADA</td>
<td>CANADA</td>
</tr>
<tr>
<td>17.</td>
<td>IRAN</td>
<td>S.Arabia</td>
<td>S.Arabia</td>
</tr>
<tr>
<td>18.</td>
<td>TÜRKİYE</td>
<td>IRAN</td>
<td>EGYPT</td>
</tr>
</tbody>
</table>


AVGARE ANNUAL GDP GROWTH (%)

<table>
<thead>
<tr>
<th>2002-2022</th>
<th>5.4</th>
</tr>
</thead>
<tbody>
<tr>
<td>TÜRKİYE</td>
<td></td>
</tr>
</tbody>
</table>

REAL GDP GROWTH (INDEX: 2002=100)

<table>
<thead>
<tr>
<th>Year</th>
<th>USA</th>
<th>CHINA</th>
<th>TÜRKİYE</th>
<th>POLAND</th>
<th>ROMANIA*</th>
<th>BULGARIA*</th>
<th>CZECHIA</th>
<th>HUNGARY</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>100</td>
<td>120</td>
<td>220</td>
<td>140</td>
<td>160</td>
<td>180</td>
<td>200</td>
<td>220</td>
</tr>
<tr>
<td>2003</td>
<td>120</td>
<td>140</td>
<td>240</td>
<td>160</td>
<td>180</td>
<td>200</td>
<td>220</td>
<td>240</td>
</tr>
<tr>
<td>2004</td>
<td>140</td>
<td>160</td>
<td>260</td>
<td>180</td>
<td>200</td>
<td>220</td>
<td>240</td>
<td>260</td>
</tr>
<tr>
<td>2005</td>
<td>160</td>
<td>180</td>
<td>280</td>
<td>200</td>
<td>220</td>
<td>240</td>
<td>260</td>
<td>280</td>
</tr>
<tr>
<td>2006</td>
<td>180</td>
<td>200</td>
<td>300</td>
<td>220</td>
<td>240</td>
<td>260</td>
<td>280</td>
<td>300</td>
</tr>
<tr>
<td>2007</td>
<td>200</td>
<td>220</td>
<td>320</td>
<td>240</td>
<td>260</td>
<td>280</td>
<td>300</td>
<td>320</td>
</tr>
<tr>
<td>2008</td>
<td>220</td>
<td>240</td>
<td>340</td>
<td>260</td>
<td>280</td>
<td>300</td>
<td>320</td>
<td>340</td>
</tr>
<tr>
<td>2009</td>
<td>240</td>
<td>260</td>
<td>360</td>
<td>280</td>
<td>300</td>
<td>320</td>
<td>340</td>
<td>360</td>
</tr>
<tr>
<td>2010</td>
<td>260</td>
<td>280</td>
<td>380</td>
<td>300</td>
<td>320</td>
<td>340</td>
<td>360</td>
<td>380</td>
</tr>
<tr>
<td>2011</td>
<td>280</td>
<td>300</td>
<td>400</td>
<td>320</td>
<td>340</td>
<td>360</td>
<td>380</td>
<td>400</td>
</tr>
<tr>
<td>2012</td>
<td>300</td>
<td>320</td>
<td>420</td>
<td>340</td>
<td>360</td>
<td>380</td>
<td>400</td>
<td>420</td>
</tr>
<tr>
<td>2013</td>
<td>320</td>
<td>340</td>
<td>440</td>
<td>360</td>
<td>380</td>
<td>400</td>
<td>420</td>
<td>440</td>
</tr>
<tr>
<td>2014</td>
<td>340</td>
<td>360</td>
<td>460</td>
<td>380</td>
<td>400</td>
<td>420</td>
<td>440</td>
<td>460</td>
</tr>
<tr>
<td>2015</td>
<td>360</td>
<td>380</td>
<td>480</td>
<td>400</td>
<td>420</td>
<td>440</td>
<td>460</td>
<td>480</td>
</tr>
<tr>
<td>2016</td>
<td>380</td>
<td>400</td>
<td>500</td>
<td>420</td>
<td>440</td>
<td>460</td>
<td>480</td>
<td>500</td>
</tr>
<tr>
<td>2017</td>
<td>400</td>
<td>420</td>
<td>520</td>
<td>440</td>
<td>460</td>
<td>480</td>
<td>500</td>
<td>520</td>
</tr>
<tr>
<td>2018</td>
<td>420</td>
<td>440</td>
<td>540</td>
<td>460</td>
<td>480</td>
<td>500</td>
<td>520</td>
<td>540</td>
</tr>
<tr>
<td>2019</td>
<td>440</td>
<td>460</td>
<td>560</td>
<td>480</td>
<td>500</td>
<td>520</td>
<td>540</td>
<td>560</td>
</tr>
<tr>
<td>2020</td>
<td>460</td>
<td>480</td>
<td>580</td>
<td>500</td>
<td>520</td>
<td>540</td>
<td>560</td>
<td>580</td>
</tr>
<tr>
<td>2021</td>
<td>480</td>
<td>500</td>
<td>600</td>
<td>520</td>
<td>540</td>
<td>560</td>
<td>580</td>
<td>600</td>
</tr>
<tr>
<td>2022</td>
<td>500</td>
<td>520</td>
<td>620</td>
<td>540</td>
<td>560</td>
<td>580</td>
<td>600</td>
<td>620</td>
</tr>
</tbody>
</table>
STRATEGIC LOCATION

HUB FOR MULTINATIONALS TO MANUFACTURE, EXPORT AND MANAGE

Working Hours Intersect with 16 Time Zones

PROXIMITY TO MAJOR MARKETS
1.3 billion people and $28T GDP in Europe, MENA and Central Asia at 4 hour flight-distance

CONNECTIVITY
Turkish Airlines connects you to 323 destinations in 127 countries

MANUFACTURING & EXPORT HUB FOR MULTINATIONALS AS WELL AS MANAGEMENT HUB FOR MULTINATIONALS

Exporting 85% of its production

Exporting 87% of its production

Production base for MENA

Its largest production facility worldwide

B/S/H/
89 countries
22 countries

66 countries
70 countries
63 countries
80 countries
89 countries
14 countries
30 countries

invest.gov.tr
Impressive economic growth leading to a sizeable middle class with increasing purchasing power

$10,998
2002

$39,301
2022

Domestic market further supported by emerging urban centers

24 urban centers
With populations over 1 million

Domestic market + EU market + Free Trade Area

Customs Union with the EU allows direct access to the market

1 billion consumers

85 million in Türkiye

476 million in FTA area

458 million in EU

in 28 countries with Free Trade Agreements

Source: TurkStat, Eurostat
AGENDA

- WHY INVEST IN TÜRKİYE
- LOGISTICS INDUSTRY IN TÜRKİYE
- TRANSPORTATION INDUSTRY IN TÜRKİYE
**LOGISTICS PLAN AND POLICIES**

**PILLARS OF LOGISTICS MASTER PLAN**

- **Making Türkiye regional logistics hub by attracting transit cargo to Türkiye**
- **Directing resources to productive investments and prioritizing**
- **Decreasing logistics costs**
- **Increasing logistics maturity, improving technology and human capacity**

Source: Ministry of Transport and Infrastructure
LOGISTICS ACTIVITY IN TURKEY

FOREIGN TRADE IS MAIN DRIVER OF LOGISTICS SECTOR

Foreign Trade Statistics, 2013-2022

<table>
<thead>
<tr>
<th>Year</th>
<th>Export</th>
<th>Import</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>$261</td>
<td>$161</td>
</tr>
<tr>
<td>2014</td>
<td>$251</td>
<td>$167</td>
</tr>
<tr>
<td>2015</td>
<td>$214</td>
<td>$151</td>
</tr>
<tr>
<td>2016</td>
<td>$202</td>
<td>$149</td>
</tr>
<tr>
<td>2017</td>
<td>$239</td>
<td>$164</td>
</tr>
<tr>
<td>2018</td>
<td>$231</td>
<td>$177</td>
</tr>
<tr>
<td>2019</td>
<td>$210</td>
<td>$181</td>
</tr>
<tr>
<td>2020</td>
<td>$220</td>
<td>$170</td>
</tr>
<tr>
<td>2021</td>
<td>$271</td>
<td>$225</td>
</tr>
<tr>
<td>2022</td>
<td>$364</td>
<td>$254</td>
</tr>
</tbody>
</table>

Foreign Trade Growth Estimate, 2023-2025

<table>
<thead>
<tr>
<th>Year</th>
<th>Estimate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2023</td>
<td>$345</td>
</tr>
<tr>
<td>2024</td>
<td>$363</td>
</tr>
<tr>
<td>2025</td>
<td>$384</td>
</tr>
</tbody>
</table>

Source: Turkstat, Medium Term Program Foreign Trade (GTS) 2023-2025
Main export partners of Türkiye: Germany, the USA, the UK, Iraq and Italy.
Main import partners of Türkiye: China, Russia, Germany, the USA and Italy.

Source: Turkstat, Ministry of Trade
Note: CAGR between 2019-2022
*Numbers are in Billion ($)
Growth Rates of GDP and Transport and Storage (%)

- GDP Growth Rate
- Transport Growth Rate

Share of Transport and Storage in GDP (%)

Source: TurkStat
LOGISTICS ACTIVITY IN TÜRKİYE

EXPSORTS AND IMPORTS BY MODE OF TRANSPORT

**Exports by Mode of Transportation, 2018-2022**

- **Sea:** CAGR 8.4%
- **Rail:** CAGR 34.4%
- **Road:** CAGR 10.8%
- **Air:** CAGR 10%
- **Other:** CAGR 10.7%

**Imports by Mode of Transportation, 2018-2022**

- **Sea:** CAGR 9.1%
- **Rail:** CAGR 22.9%
- **Road:** CAGR 11%
- **Air:** CAGR 7.6%
- **Other:** CAGR 28.6%

Source: Turkstat.
Note: CAGR (Compound Annual Growth Rate) between 2018-2022 Other: Posta and other courier services

Source: invest.gov.tr
**Logistics Activity in Türkiye**

**Transport Activities in Balance of Payments (Million $) (2013-2022)**

- **Source:** CBRT, TurkStat

**International Service Trade Statistics (2016-2021)**

- **(Tourism excluded)**

- **Transport Export Import Balance**
- **Share of Transport Export in Total Service Export**
- **Share of Transport Import in Total Service Import**

*Source: CBRT, TurkStat*
LOGISTICS ACTIVITY IN TÜRKİYE

EXPORTS AND IMPORTS BY VALUE OF GOODS AND BY MODE OF TRANSPORTATION

Source: Turkstat
Note: Share of other modes (Postal and courier activities) are about 0.75% in export and 18.9% in import for 2022.
The number of scheduled ships
The total deployed annual capacity in TEU
The number or regular liner shipping services from and to the country
The number of liner shipping companies that provide services from and to the country
The number of other countries that are connected to the country through direct liner shipping services
The average size in TEU of the ships deployed by the scheduled service

Source: UNCTAD, Global Infrastructure Connectivity Index
TÜRKİYE OFFERS A STABLE ENVIRONMENT AND FAST GROWTH FOR THE LOGISTICS INDUSTRY AS A WHOLE

Agility Emerging Markets Logistics Index 2022

Türkiye is ranked as the 11th best country in logistics out of 50 emerging markets

Score

1. Domestic opportunities
2. International opportunities
3. Business fundamentals
4. Digital Readiness

Source: Emerging Market Index 2022
LOGISTICS ADVANTAGES OF TÜRKİYE

THE MIDDLE CORRIDOR IS MORE ECONOMICAL AND FASTER COMPARED TO THE NORTHERN CORRIDOR

Source: Ministry of Transport and Infrastructure
THE GEOGRAPHIC LOCATION OF TÜRKİYE ALLOWS INVESTORS TO REACH EUROPEAN AND ASIAN CAPITALS IN A FASTER WAY

Source: Ministry of Transport and Infrastructure
ON 7TH NOVEMBER 2019, FREIGHT TRAIN DEPARTED CHINA AND WENT CENTRAL EUROPE BY PASSING BELOW THE BOSPHORUS VIA ISTANBUL'S MARMARAY TUNNEL FOR THE FIRST TIME.

Route of First Train (11,500 km)
Xi'an (China)-Kazakhstan-Türkiye-Azerbaijan-Georgia-Bulgaria-Serbia-Hungary-Slovakia-Czech Republic (Prague)

~700,000 tons freight
~600 trains
LOGISTICS CAPABILITIES OF TÜRKİYE
EUROPE | RO-RO + ROAD

Source: Türkiye's Logistics Capabilities Report, Investment Office.
Source: Türkiye’s Logistics Capabilities Report, Investment Office.
LOGISTICS CAPABILITIES OF TÜRKİYE

ASIA | SEA | IMPORT

Source: Türkiye's Logistics Capabilities Report, Investment Office.
LOGISTICS CAPABILITIES OF TÜRKİYE
EUROPE / N. AFRICA / SEA / IMPORT

Source: Türkiye’s Logistics Capabilities Report, Investment Office.
In 7 hours flight distance:
- 40% of World’s passenger & cargo traffic
- Over 60 capitals

98 freighter destinations (2021) expected to reach 120 in 2025.

FLEET:
- 257 Narrow Body
- 109 Wide Body
- 20 Freighter

A330F Range
~2 Hours

B777F Range
~5 Hours

~7 Hours

~10 Hours

~12 Hours
Türkiye will be more lucrative location for three reasons

Local production close to consumption markets becomes more favorable
Less shipping duration becomes more desirable
Increasing importance of capacity flexibility

Source: Ministry of Transport and Infrastructure
TÜRKİYE STANDS TO GAIN THE MOST FROM A SHIFT OF SUPPLY CHAINS

Emerging Europe Attractiveness Score
(a higher score is better)

The score takes into account factors such as average wages, size & growth of the active population, extent & quality of transport infrastructure, access to basic utilities, preferential trade agreements, access to raw inputs, and current size of the mid-range manufacturing sector in each country among other factors to create a framework to identify countries with potential to benefit from supply chain diversification.

Source: ILO, UN, World Bank, Trade Map, Fitch Solutions: “Emerging Europe To Benefit From Shifts In Mid-Level Manufacturing Supply Chains” July 13, 2020
NEW LOGISTICS MASTER PLAN

SIGNIFICANT CONTRIBUTIONS IS EXPECTED FROM LOGISTICS MASTER PLAN

- **Export (Billion $)**
  - 2035 (Long Term): 470
  - 2053 (Vision): 987

- **Transit Income (Billion $)**
  - 2035 (Long Term): 54
  - 2053 (Vision): 214

- **Cost Saving (Billion $)**
  - 2035 (Long Term): 25
  - 2053 (Vision): 113

Source: Ministry of Transport and Infrastructure

invest.gov.tr
TRANSPORTATION POLICIES

PILLARS OF TRANSPORTATION POLICIES

Creating a sustainable transportation infrastructure

Prioritizing transportation investments with the corridor approach and strengthening international connections

Providing alternative financing for realization of transport projects by utilizing PPP and External Credit public investment models

Supporting multimodal and balanced transportation by increasing rail freight and passenger transportation

Source: Ministry of Transport and Infrastructure
INVESTMENTS IN TRANSPORT

SECTORAL SHARE OF INVESTMENTS IN TRANSPORTATION AND COMMUNICATION (2003-2022)

<table>
<thead>
<tr>
<th>Sectors</th>
<th>Billion TL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Road</td>
<td>995.9</td>
</tr>
<tr>
<td>Railway</td>
<td>346.6</td>
</tr>
<tr>
<td>Airway</td>
<td>150.6</td>
</tr>
<tr>
<td>Maritime</td>
<td>19.9</td>
</tr>
<tr>
<td>Communication</td>
<td>140.5</td>
</tr>
</tbody>
</table>

Total: 1,653.5 Billion TL

Source: Ministry of Transport and Infrastructure
**INFRASTRUCTURE INVESTMENTS IN TRANSPORT**

Investing in transportation has remarkably transformed Türkiye’s infrastructure landscape yet Türkiye is determined to improve it further.

<table>
<thead>
<tr>
<th>Category</th>
<th>2003</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dual Carriageway</td>
<td>6.101 km</td>
<td>28.816 km</td>
</tr>
<tr>
<td>High Speed Railway</td>
<td>0 km</td>
<td>1.460 km</td>
</tr>
<tr>
<td>Maritime Containers Transport</td>
<td>190 million Tons</td>
<td>542 million Tons</td>
</tr>
<tr>
<td>Number of Airports</td>
<td>26</td>
<td>57</td>
</tr>
</tbody>
</table>

Source: Ministry of Transport and Infrastructure
THE SHARE OF RAIL IN TRANSPORT INVESTMENTS CONTINUE TO RISE

Investment Budget Percentages of Transport Subsectors (Current Situation)

Investment Budget Percentages of Transport Subsectors (Projection)

Source: Ministry of Transport and Infrastructure
## INVESTMENTS IN TRANSPORTATION

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

<table>
<thead>
<tr>
<th>SECTORS</th>
<th>Investment (Billion $)</th>
<th>GDP Contribution (Billion $)</th>
<th>Production Effects (Billion $)</th>
<th>Employment Effects (Annual average, Thousand people)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Road Transport</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Highway</td>
<td>112.4</td>
<td>124.5</td>
<td>225.5</td>
<td>215</td>
</tr>
<tr>
<td>Divided road</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other motorway</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Rail Transport</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>High speed lines</td>
<td>36.8</td>
<td>38.5</td>
<td>83.4</td>
<td>88.8</td>
</tr>
<tr>
<td>Speed lines</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conventional lines</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Air Transport</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Airport related investments</td>
<td>16.2</td>
<td>201.5</td>
<td>439.5</td>
<td>386.4</td>
</tr>
<tr>
<td><strong>Maritime Transport</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Marinas</td>
<td>2</td>
<td>22.1</td>
<td>41.8</td>
<td>27.6</td>
</tr>
<tr>
<td>Freight ports</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fishing shelters and yards</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>167.4</td>
<td>386.6</td>
<td>832.7</td>
<td>784.2</td>
</tr>
</tbody>
</table>

Source: Ministry of Transport and Infrastructure
The total length of highways currently in service is **3,633 km**. Following the completion of the highway projects under construction and planning stages, it is aimed to increase the total length of the highway to **8,164 km** in 2035.
TÜRKİYE IS COMMITTED TO TRANSFORMING ITS RAIL TRANSPORT INFRASTRUCTURE FROM CONVENTIONAL TO HIGH SPEED

RAILWAY MAP OF TÜRKİYE

Source: Ministry of Transport and Infrastructure
TÜRKİYE HAS SIGNIFICANTLY IMPROVED AND UPGRADED ITS AIRPORT INFRASTRUCTURE AND CONTINUES TO INVEST IN AIRPORTS

AIRPORT MAP OF TÜRKİYE

Source: Ministry of Transport and Infrastructure
OPPORTUNITIES IN TRANSPORTATION

LOGISTICS CENTERS

- 26 logistics centers
- 73.2 million tons additional transport capacity
- 19 million m² container storage and handling area

Source: Ministry of Transport and Infrastructure
CONTAINER PORTS IN TÜRKİYE

PORT CLUSTERS PROVIDES SIGNIFICANT TRADE OPPORTUNITIES

ALTAŞ AMBARLI
- Akçansa
- Kumport
- Mardaş
- Marport

Haydarpaşa

GEMLİK
- Borusan
- Gemport
- Rodaport

GULF of ISKENDERUN
- Assan
- Limak Iskenderun

MIP

TCDD İzmir

Çelebi Bandırma

GULF of IZMIT
- DP World Yarımca
- Evyap
- Limaş
- Safiport
- Yılpıort

Port Akdeniz

Çelebi Bandırma

Samsunport

Alport Trabzon

Park Denizcilik Hopa

ALİAĞA-NEMRUT
- Soçar Terminali
- Ege Gübre
- Nemport

Port Cluster

Individual Ports

invest.gov.tr
JUNCTION LINE INVESTMENTS CONTINUE FOR PORTS, WHICH ARE OF GREAT IMPORTANCE FOR INTERNATIONAL TRADE.

- Yeşilyurt Port
- Samsun Port
- Filyos Port
- İzmit Gulf
- Asya Port
- Rota Port
- Bandırma Port
- İzmir Port
- Çandarlı Port
- Nem Port
- Bandırma Port
- Haydarpasa Port
- Tekirdağ Port
- Derince Port
- Evyap Port
- İzmir Port
- Çukurova Reg. and İskenderun Gulf
- Mersin Port
- İskenderun Port
- Zonguldak Port
- Haydarpaşa Port
- İzmir Çandarlı Port
- Tekirdağ Port
- Zonguldak Port
- Yeşilyurt Port
- Evyap Port
- DP World Yarımca
- Kozlu Pier
- Ekincler Pier
- Gübretaş Pier
- Iskemir Pier

**PORT CONNECTIONS**

<table>
<thead>
<tr>
<th>Existing Lines</th>
<th>Km</th>
<th>Under Construction</th>
<th>Km</th>
<th>Planned</th>
<th>Km</th>
</tr>
</thead>
<tbody>
<tr>
<td>H. Paşa</td>
<td>2.5</td>
<td>Samsun Yeşilyurt Gelemen</td>
<td>6.76</td>
<td>Belde Port</td>
<td>1</td>
</tr>
<tr>
<td>İzmir</td>
<td>5.3</td>
<td></td>
<td></td>
<td>Rota Port</td>
<td>1.5</td>
</tr>
<tr>
<td>Nemport</td>
<td>3.4</td>
<td></td>
<td></td>
<td>Hatay Atakaş</td>
<td>3</td>
</tr>
<tr>
<td>Bandırma</td>
<td>5.1</td>
<td></td>
<td></td>
<td>Asyaport</td>
<td>4</td>
</tr>
<tr>
<td>Mersin</td>
<td>13.8</td>
<td>Çukurova Reg. and İskenderun Gulf</td>
<td>36</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Samsun</td>
<td>14.6</td>
<td>Filyos Port</td>
<td>12</td>
<td></td>
<td></td>
</tr>
<tr>
<td>İskenderun</td>
<td>19.0</td>
<td>İzmir Gulf Industrial Centers</td>
<td>10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Derince</td>
<td>7.5</td>
<td>İzmir Çandarlı</td>
<td>7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tekirdağ</td>
<td>1.6</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Zonguldak</td>
<td>1.7</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yeşilyurt</td>
<td>0.2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Evyap</td>
<td>1.9</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DP World Yaremca</td>
<td>1.0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kozlu Pier</td>
<td>4.3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ekincler Pier</td>
<td>3.3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gübretaş Pier</td>
<td>0.3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>İskemir Pier</td>
<td>3.0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL** 88.5 6.8 74.5

Source: Ministry of Transport and Infrastructure
JUNCTION LINES CONNECTED TO OIZS

The share of railways in combined transportation applications is increased with the junction lines construction in organized industrial zones, which have a high share in freight transportation.

Source: Ministry of Transport and Infrastructure
THANK YOU