

# Turkey - Transport and Logistics: Infrastructure development to drive growth (Strategy, Performance and Risk Analysis)

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## Abstracts

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### SUMMARY

Turkey has free-trade agreements with Albania, Bosnia Herzegovina, Chile, EFTA member countries (Switzerland, Norway, Iceland and Liechtenstein), the Faroe Islands, Ghana, Kosovo, Lebanon, Egypt, Georgia, Israel, Jordan, Singapore, South Korea, Syria, Macedonia, Malaysia, Mauritius, Moldova, Montenegro, Morocco, Palestine, Serbia and Tunisia. Companies from these nations are exempt from corporate tax, income tax, custom tax and VAT. Free trade agreements ease the inflow and outflow of goods between Turkey and these nations, translating to higher volumes - a major advantage for logistics service providers operating in Turkey.

MarketLine's Premium industry reports provide a comprehensive overview of the market and include sections on: risk and reward, key industry trends and drivers, SWOT analysis, competitive landscape, innovation, deals, key developments, and industry benchmarking to compare key performance indicators with regional and global markets.

### Key highlights

Fleet expansion initiatives to drive active fleet growth

Turkey's active fleet size recorded a CAGR of 21.9%, from 189 aircraft in 2012 to 509 in 2017, and is forecast to post a CAGR of 10.1%, from 572 in 2018 to 841 in 2022,

primarily driven by procurements necessitated by the expansion initiatives of airline operators. In January 2018, Turkish Airlines and Airbus signed a memorandum of understanding for 20 A350-900, plus the option for five additional aircraft if required. Similarly, in December 2017, Pegasus Airlines, the leading LCC in Turkey, placed an order for 25 A321neo ACF (Airbus Cabin Flex configuration).

#### Increase in trade to drive ocean fleet size growth

Turkey's fleet size recorded a CAGR of -0.7%, falling from 1,333 vessels in 2012 to 1,285 in 2017. However, it is anticipated to post a CAGR of 0.3%, from 1,280 in 2018 to 1,298 in 2022 driven by a recovery in imports and exports. Turkey's total imports, which registered a CAGR of -5.0%, from US\$249.7bn in 2012 to US\$193.4bn in 2017, are expected to post a CAGR of 2.8%, from US\$201.4bn in 2018 to US\$224.7bn in 2022. Exports, which recorded a CAGR of -3.0%, from US\$206.8bn in 2012 to US\$177.7bn in 2017, are expected to post a CAGR of 5.6%, from US\$189.1bn in 2018 to US\$235.2bn in 2022.

#### Increase in the volume of commercial and passenger vehicles to drive fleet size of road vehicles

Turkey's road fleet size recorded a CAGR of 6.2%, rising from 12.8 million vehicles in 2012 to 17.3 million in 2017, and is anticipated to post a CAGR of 6.3%, from 18.4 million in 2018 to 23.5 million in 2022. This will primarily be due to a rise in the use of commercial and passenger vehicles. Turkey's passenger vehicles recorded a CAGR of 6.9%, from 8.6 million in 2012 to 12.1 million in 2017 and is anticipated to post a CAGR of 6.9%, from 12.9 million in 2018 to 16.9 million in 2022.

## SCOPE

**Risk & Reward Index:** The risk & reward index compares the position of Turkey's transport and logistics industry with other countries in the region in terms of specific risk and reward parameters.

**Industry Snapshot and Industry View:** Key transport and logistics industry statistics include freight traffic, freight volume, fleet size, passengers, import and export gross value added, FDI and trends driving market performance.

**Industry SWOT Analysis:** Discover the strengths, weaknesses, opportunities and threats impacting market performance and investment in Turkey's transport and

logistics market.

**Industry Benchmarking:** Benchmark how Turkey's transport and logistics market is performing compared to regional and global markets in terms of GVA, fleet size and freight traffic by mode.

**Competitive Landscape:** Overview of industry players compared with their peers across a set of indicators.

## **REASONS TO BUY**

How is the market performing in terms of indicators such as freight traffic, freight volume, fleet size, passengers, import and export, gross value added and FDI?

How risky is it to invest in the Turkey transport and logistics industry compared to other countries in Europe?

What is driving the performance of key industry segments such as land, air, water and rail?

Who are the leading players in the Turkey transport and logistics industry and their presence in respective segment?

What trends are being witnessed within the Turkey transport and logistics industry?

What are the Turkey transport and logistics industry's strengths and weaknesses and what opportunities and threats does it face?

What are the recent developments and innovations in the Turkey transport and logistics industry?

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