



**Logistics Processes and Motorways of the Sea II
LOGMOS Project For the Countries of Caucasus, Caspian Sea
Region and Central Asia**

29 February 2012

Brussels

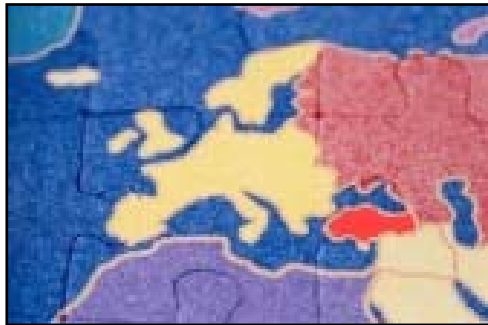


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GEO-ECONOMICAL ABOUT TURKEY



Gateway from/to

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





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GROWING SECTORS

11 % Growth Rate – Highest Rate In the World

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



60% of the Population is below the Age of 30



FOREIGN TRADE

IMPORT: USD 185 Billion

EXPORT: USD 115 Billion

TOTAL FOREIGN TRADE: USD 300 Billion

**Foreign Trade Target
in 2023**

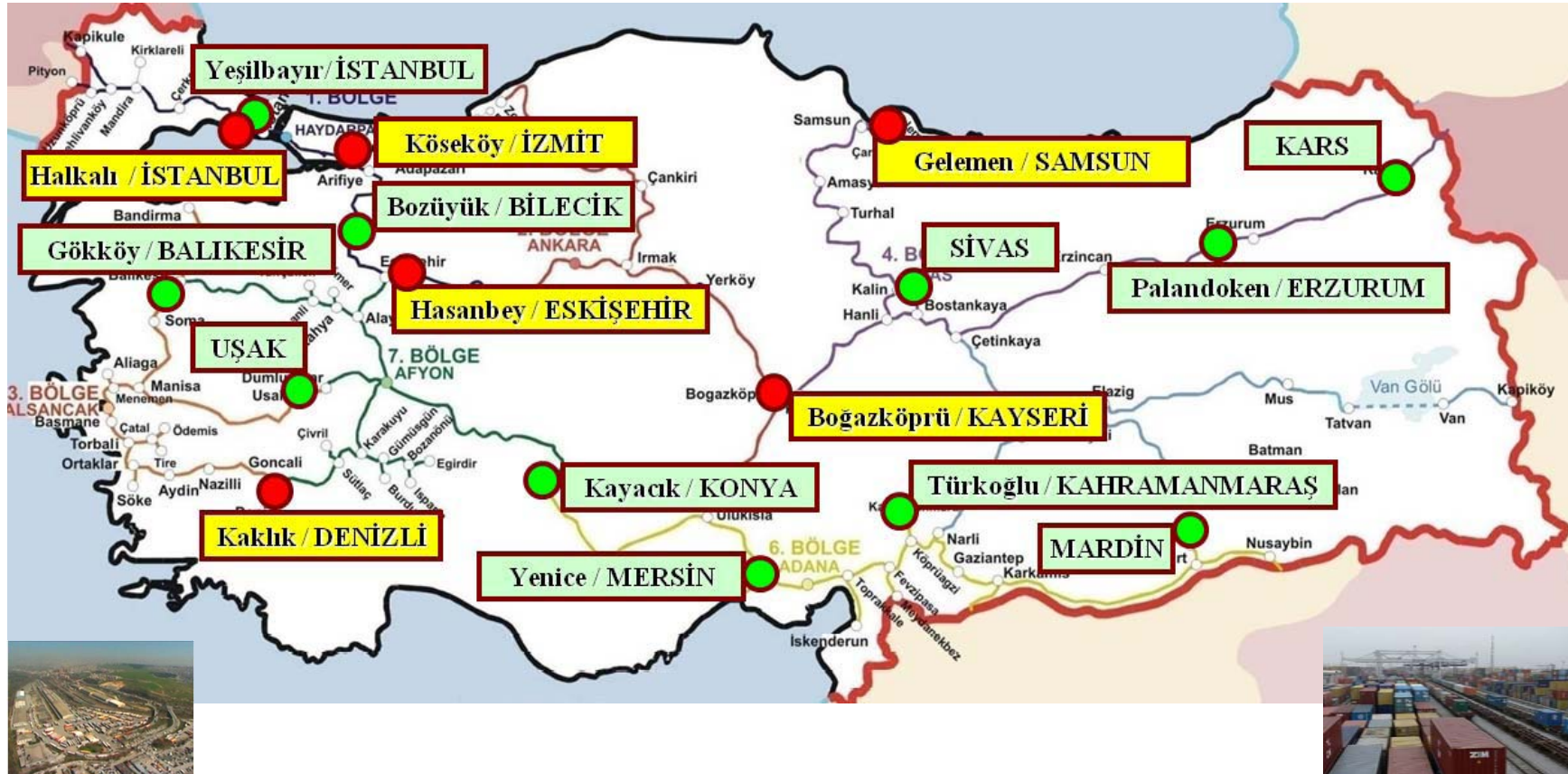
USD 1,2 Trillion



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LOGISTIC CENTRE POSITION OF TURKEY

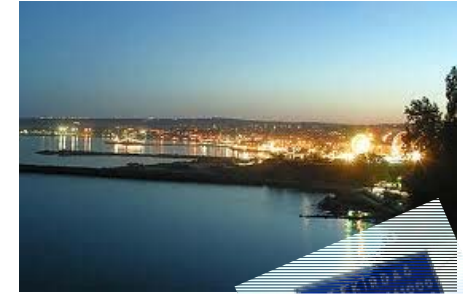




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LOGMOS STUDY TOUR TURKEY



TÜRKİYE LİMAN İŞLETMEÇİLERİ DERNEĞİ





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WHY İstanbul ?





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WHY İSTANBUL ?



- * A UNIQUE ROLE ALONG TRACECA CORRIDOR
- * UNINTERRUPTED HINTERLAND CONNECTIONS
- * GOOD INTERMODAL PRACTICES
- * THE COMMERCIAL CENTRE OF TURKEY
- * SEA-RAIL-ROAD PRACTICES





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WHY İzmir ?





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WHY İZMİR ?



- * EFFICIENT HINTERLAND CONNECTIONS
- * A considerable amount of Turkish exports are shipped from İzmir
- * SEA-RAIL PRACTICES
- * Short Sea Shipping SUCCEES STORIES



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STUDY TOUR PROGRAMME

10 June 2012

Arrival To Hotel

Hotel : TBD

19:30: Welcome Dinner; TBD





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STUDY TOUR PROGRAMME

11 June 2012 (İstanbul Region)

10:15 UN Ro Ro Ambarlı Liman Terminal

11:00 Arrival to Ambarlı

11:00-12:00 Presentation of UN Ro Ro

13:00-14:00 Visit to Marport

14:30-15:00 Visit TCDD

15:00-16:00 Visit Balmak Logistics





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STUDY TOUR PROGRAMME

12 June 2012 (Tekirdağ&İstanbul Anotolian Side)

09:15-09:30 Presentation of Tekirdağ Port

09:30-10:00 Presentation by UND

10:00-10:30 Presentation by Borusan Logistics

10:30 Transfer to Pendik Port

11:30-12:30 Presentation by UN RO RO

13:30 Departure to Derince

15:00-16:30 Site Visit in Kuehne & Nagel





STUDY TOUR PROGRAMME

13 June 2012 (İstanbul)

09:00-13:00 Wrap up Session

13:00-14:00 Lunch in the Hotel

15:00 Departure to the Airport

20:30 Arrival to the Hotel (TBD)





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STUDY TOUR PROGRAMME

14 June 2012 (İzmir Region)

09:30 Departure to İzmir Port

10:00-11:00 Site Visits

11:00 Departure to Manisa CCI

14:00-15:00 Presentation by Manisa CCI

15:00-16:00 Presentation by Barsan Logistics



Manisa CCI OIZ
companies included in
the 2006 survey of the top
500 and the
second top 500
industrial enterprises
of Turkey



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STUDY TOUR PROGRAMME

15 June 2012

09:30 Departure to Çeşme Port

11:00-13:00 Presentation by Ulusoy,

13:00-14:00 Lunch, TBD

14:00 Departure to İzmir

..... Farewell dinner



ULUSOY
ESME LİMAN İŞLETMEŞİ A.Ş.



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LASTLY WHY UN RO RO?

U.N Ro-Ro, founded in 1994 by Turkish trucking companies...

- ❑ In 2007, KKR bought shares of U.N Ro-Ro.
- ❑ U.N Ro-Ro is the largest ro-ro operator between Turkey and Europe.
- ❑ Transporting 40% of Turkish “overland” cargo destined for European countries.
- ❑ Fully integrated transport solution as freight ro-ro for complete units, unaccompanied semi-trailers and drivers, and non-standard additional cargo (cranes, buses, tractors, etc.).
- ❑ High frequency schedule with daily departures.
- ❑ Assured 24/7 availability and on-time delivery of service at lower total cost than via overland routes.
- ❑ Opportunities to integrate use of Port of Izmir to the operations via exchangeable ticketing.
- ❑ Ro-La train operations from Trieste to Salzburg and from Costanta to Arad.

U.N Ro-Ro, intermodal network...



U.N Ro-Ro, Motorways of Sea...

Route	Distance	Start Date
Pendik – Trieste (daily trip)	(1.173 nm)	26.04.1994
Ambarli – Trieste (3 trips per week)	(1.156 nm)	01.01.2002
Mersin – Trieste (2 trips per week)	(1.338 nm)	28.03.2009
Ambarli – Toulon (2 trips per week)	(1.328 nm)	17.05.2011
Pendik – Costanta (3 trips per week)	(228 nm)	19.11.2011



Business Development, 06.02.2012

Trade figures for TRACECA region over last 5 years...

Exports							Imports						
Value 000 \$	2011_11	2010	2009	2008	2007	CAGR	Value 000 \$	2011_11	2010	2009	2008	2007	CAGR
Romania	2 598 908	2 599 380	2 201 936	3 987 476	3 644 162	-8%	Romania	3 522 433	3 449 195	2 257 963	3 547 820	3 112 752	3%
Bulgaria	1 497 504	1 497 384	1 385 544	2 151 534	2 060 171	-8%	Bulgaria	2 277 209	1 702 534	1 116 902	1 840 008	1 951 656	4%
Ukraine	1 566 411	1 260 423	1 004 772	2 187 675	1 481 156	1%	Ukraine	4 422 993	3 832 744	3 156 659	6 106 325	4 519 114	-1%
Moldova	184 612	148 209	118 090	198 468	145 752	6%	Moldova	227 316	110 732	86 520	69 527	52 879	44%
Georgia	981 061	769 271	752 977	997 844	646 082	11%	Georgia	279 320	290 725	285 486	525 041	289 568	-1%
Armenia	218	16	2				Armenia	132	2 626	1 052	1 489	57	
Azerbaijan	1 843 168	1 550 479	1 400 446	1 667 469	1 047 668	15%	Azerbaijan	242 164	252 525	140 599	362 835	185 500	7%
Kazakhstan	879 174	818 900	633 417	890 568	1 079 887	-5%	Kazakhstan	1 815 840	1 392 528	959 455	1 861 131	1 284 049	9%
Turkmenistan	1 371 675	1 139 825	945 655	662 933	339 989	42%	Turkmenistan	382 969	386 342	327 559	389 305	396 723	-1%
Uzbekistan	319 881	282 666	279 964	337 130	225 612	9%	Uzbekistan	876 129	861 373	413 079	580 810	613 810	9%
Tajikistan	155 459	143 890	126 364	176 448	118 107	7%	Tajikistan	302 457	283 689	107 267	147 727	143 352	21%
Kyrgyzstan	163 392	129 202	140 002	191 351	181 311	-3%	Kyrgyzstan	47 571	30 900	31 446	47 974	45 020	1%
TOTAL	11 561 463	10 339 645	8 999 171	13 448 896	10 969 897	1%	TOTAL	14 396 535	12 595 914	8 883 987	15 479 992	12 594 481	3%
TURKEY TOTAL	122 602 218	113 883 218	102 142 818	182 027 198	107 271 750	3%	TURKEY TOTAL	220 232 628	186 644 382	140 928 421	201 988 674	170 082 716	7%
SHARE %	8.44%	8.08%	8.81%	10.18%	10.23%	-2%	SHARE %	6.64%	6.78%	8.30%	7.88%	7.41%	-3%

- ❑ Exports to Traceca constitute 9.44% of total with CAGR (2011-2007) -2%.
- ❑ Imports to Traceca constitute 6.54% of total with CAGR (2011-2007) -3%.
- ❑ Although regional trade is more or less balanced, there are significant imbalances on country basis.

Land trade of Turkey within TRACECA boundries...

	export				import			
	2011	RoRo %	2010	RoRo %	2011	RoRo %	2010	RoRo %
AZERBAIJAN	124,727		116,317		2,990		2,675	
GEORGIA	59,811		45,550		4,062		3,670	
IRAN	92,900		77,887		38,185		34,630	
KAZAKHSTAN	8,225	60%	7,440	51%	1,263	55%	1,194	50%
UKRAINE	17,075	37%	12,535	32%	10,294	62%	8,900	57%
BULGARIA	71,002		68,799		50,080		45,203	
ARMENIA	3,257		3,310		639		623	
KYRGYZSTAN	3,268	5%	1,778	2%	2,443	12%	1,747	14%
MOLDOVA	7,626		4,411		1,644	7%	1,834	6%
UZBEKISTAN	5,520		4,609		5,365		6,127	
ROMANIA	53,858		50,879		38,340		29,156	
TAJIKISTAN	3,213		2,858		1,122		1,488	

*Roder data, number of trucks

- RoRo integration with Romania, Moldova and Ukraine is going to increase following the start of U.N Ro-Ro Pendik – Costanta line.
- Georgia should be considered as a future target destination for a scheduled RoRo route (trade imbalance is a drawback).

Container (TEU) trade figures 2011...

container	export			import		
	transit teu	total teu	transit %	transit teu	total teu	transit %
2011						
Bulgaria	23,260	23,867	97%	21,980	28,765	76%
Georgia	48,708	119,747	41%	10,840	107,430	10%
Iran	511	9,793	5%	0	1,617	0%
Romania	24,697	92,062	27%	42,337	73,479	58%
Ukraine	46,187	75,448	61%	13,155	77,554	17%

- ❑ Transit trade account for the significant portion for Bulgaria, due to land connection.
- ❑ Transit export for Ukraine and transit import for Romania account for the significant portion of container trade.

Product Offering: A Complete Service Package...

Highly Modern Ro-Ro Fleet



- Purpose-built 11 own and 3 chartered ro-ro fleet ensuring reliable daily service.
- New ro-ro vessels will be joining the fleet in the coming years.

Integrated Transport Service



- Modern port facilities with parking and storage area.
- Owner operator model ensures port access in the future.



- Dedicated driver transport services.
- Customs clearance support service in advance of vessel arrival.



- Attractive railway link from the Port of Trieste and Costanta.
- Enables drivers to rest.

Port Operations...



- ❑ Strategically located ports on the Asian and European side of Istanbul
- ❑ Port of Pendik and Port of Ambarlı guarantees access to ro-ro terminal facilities currently operational in the Marmara Region for truck trailers
- ❑ Trieste located strategically providing great access to the Western European destinations.





**Thank You for Your Attention
And
In advance For Your Fruitful Cooperation In
Future**