



Donaukommission  
Commission du Danube  
Дунайская Комиссия



**BUDAPEST**

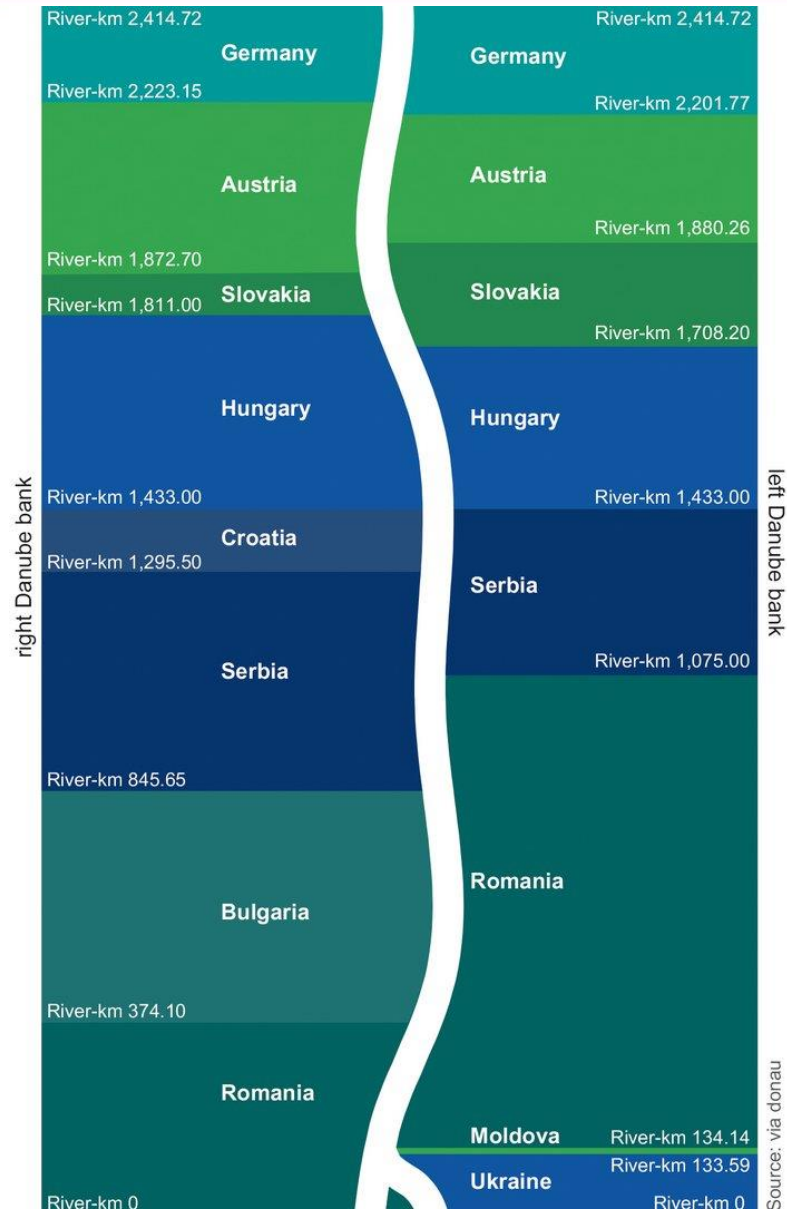


Funded by  
the European Union

# “Linking Türkiye by Danube” – Danube transport promotion event

Alper ÖZEL

Chairman of the Executive Board

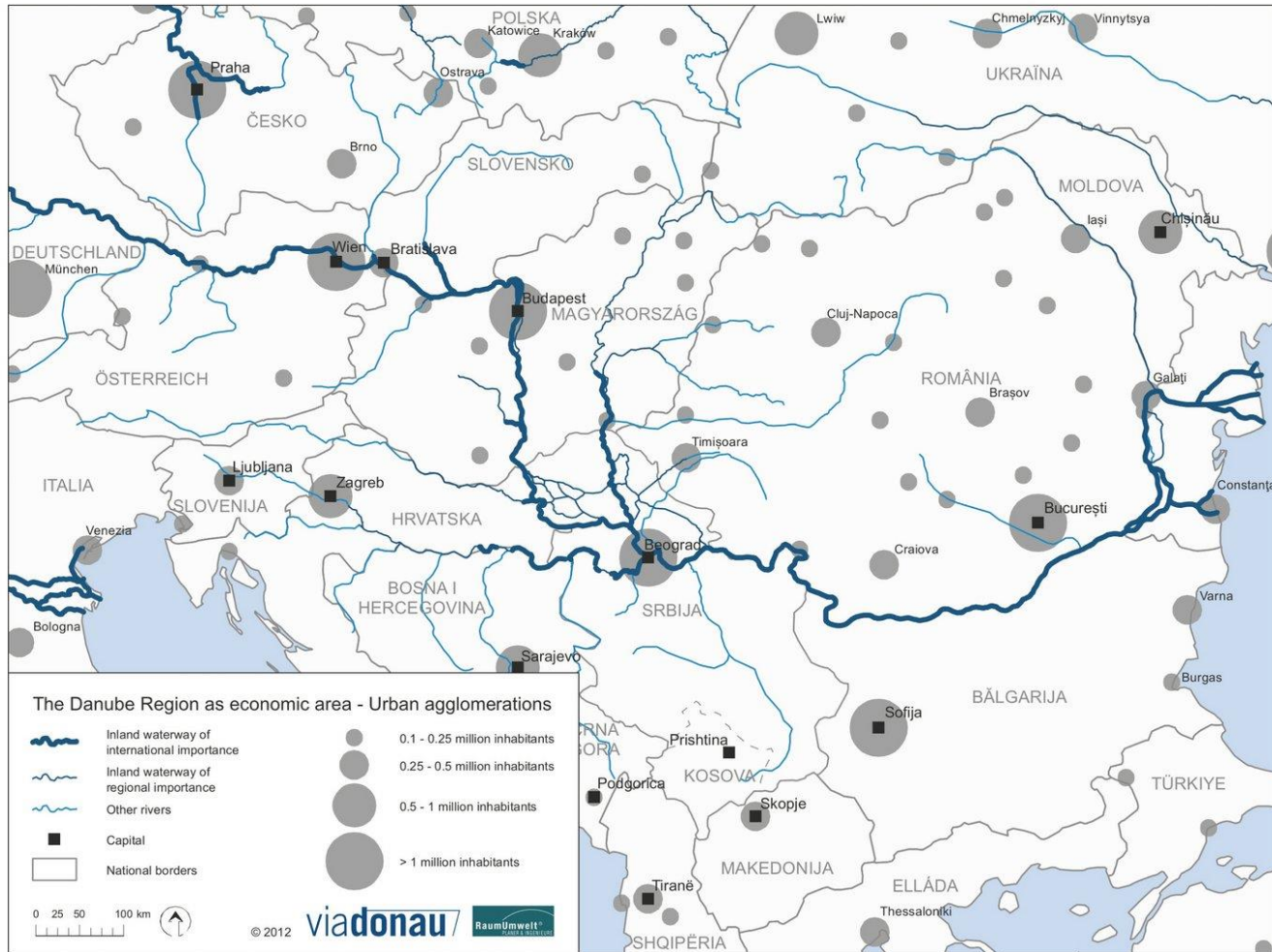


- With a total length of 2,845 kilometres, after the Volga river, the Danube is the second longest in Europe. Almost 2,415 kilometres of the river (from Kelheim to Sulina) are navigable. The Danube flows through ten riparian countries on its way from the Black Forest (Germany) to its delta in the Black Sea (Romania and Ukraine) and is the most international river in the world.

- **Cost-efficient means of transportation**
- **24/7 availability and ample spare capacity**
- **Environmentally friendly & safe**
- **Relief for rail and road infrastructures**
- **Low infrastructure costs**



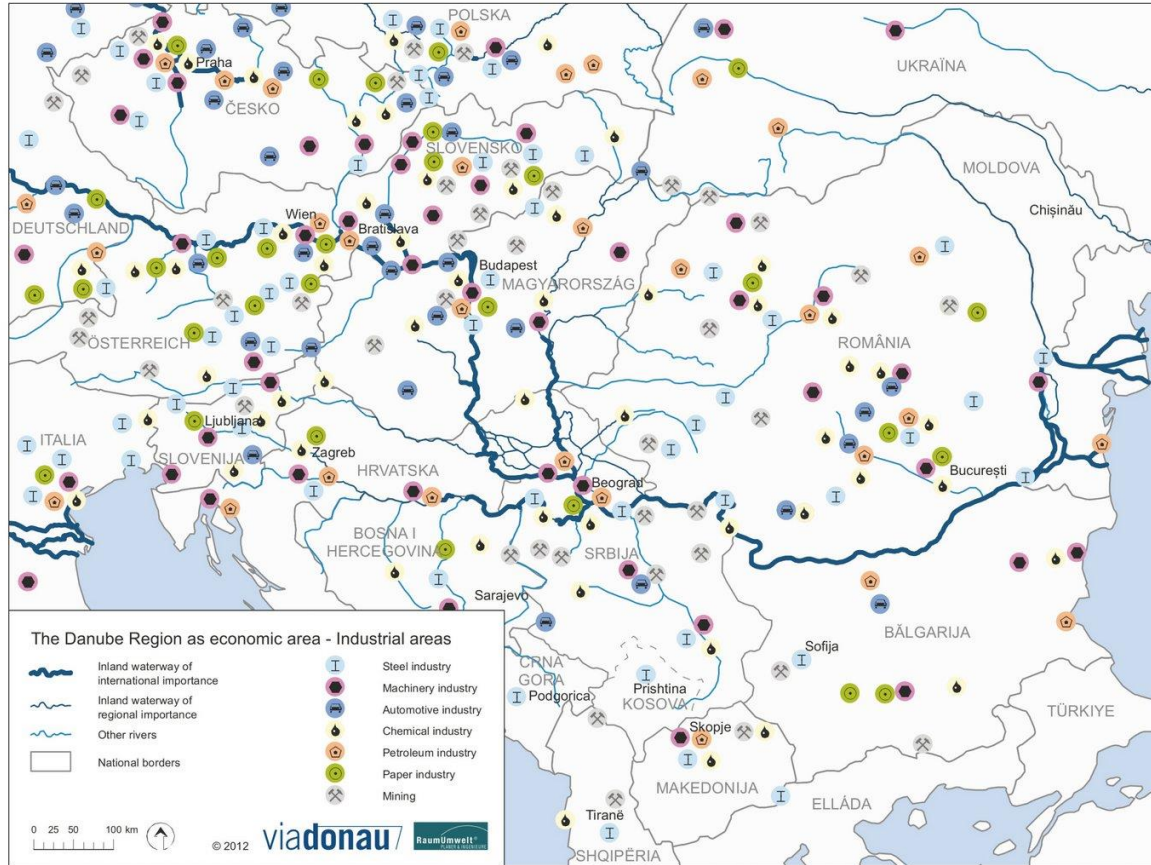
# The Danube as an axis of economic development



In its function as a transport axis the Danube connects key procurement, production and sales markets that have significant European importance. The gradual integration of the Danube riparian states into the European Union has led to the establishment of dynamic economic areas and trading links along the waterway. Slovakia's and Hungary's accession to the EU in 2004 followed by Bulgaria and Romania in 2007 and Croatia in 2013 has seen - the beginning of a new phase of economic development in the Danube region.

With nearly 90 million inhabitants, the Danube region is of great economic interest due to its sheer size alone.

# Industrial areas

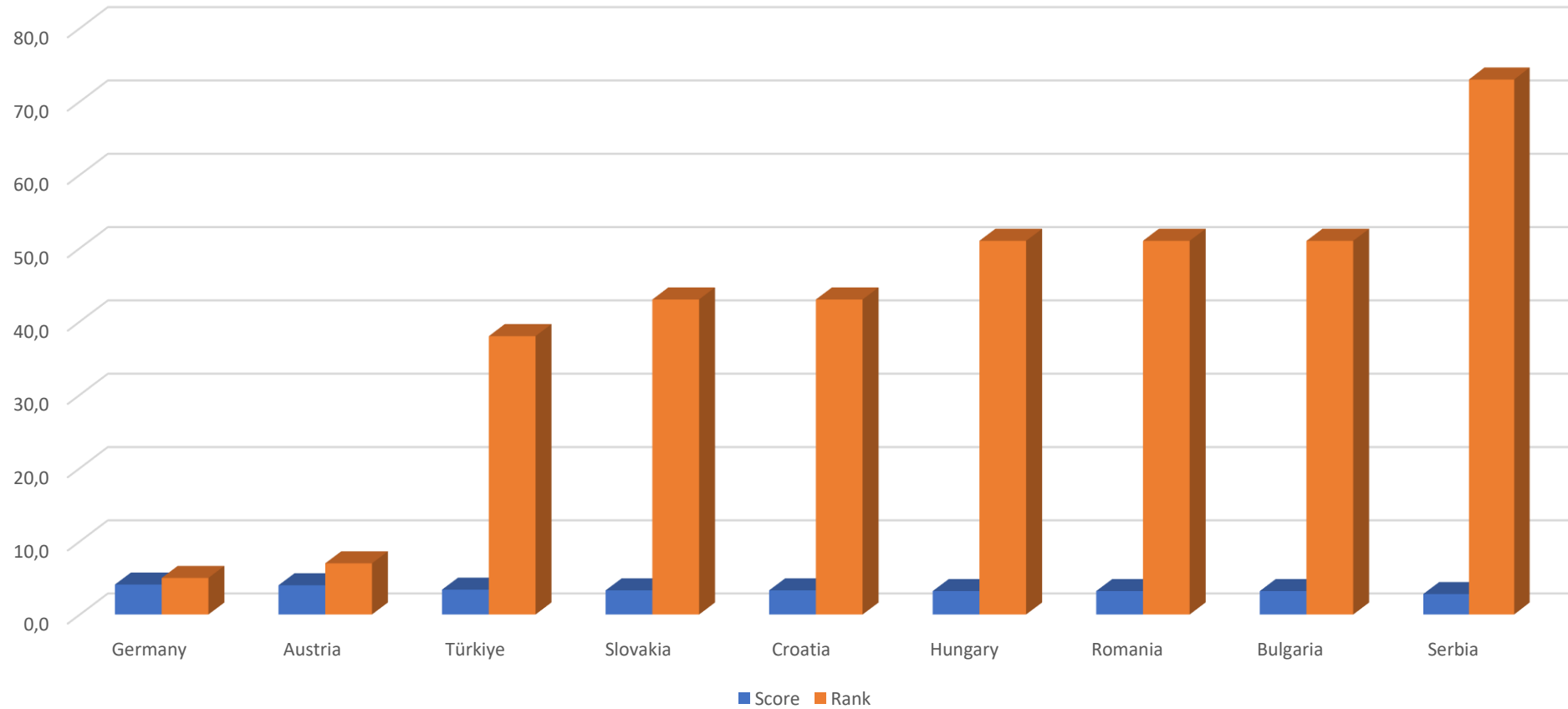


# Agricultural areas

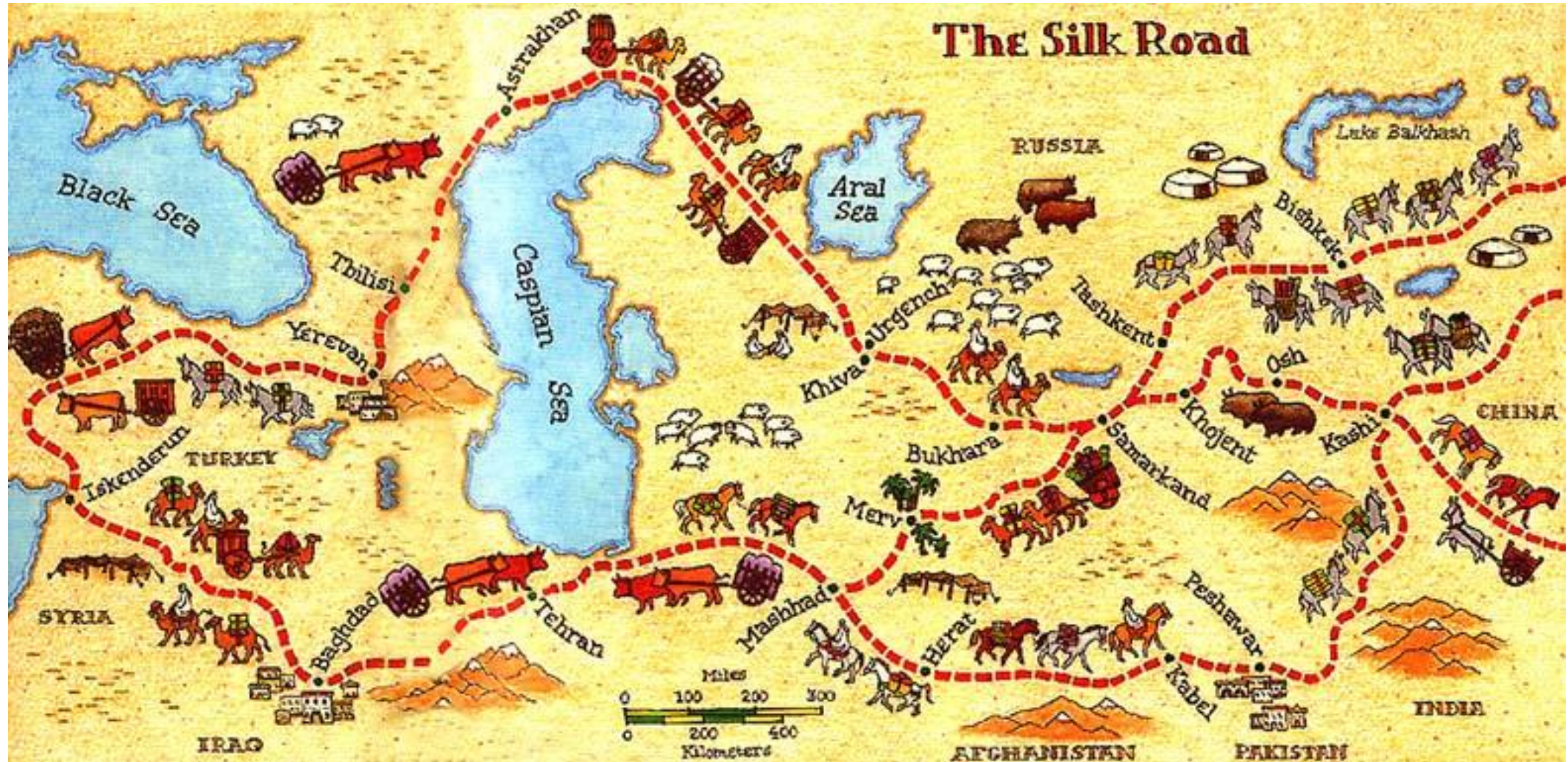


The logistic performance in the Region has to be in harmony to each other.

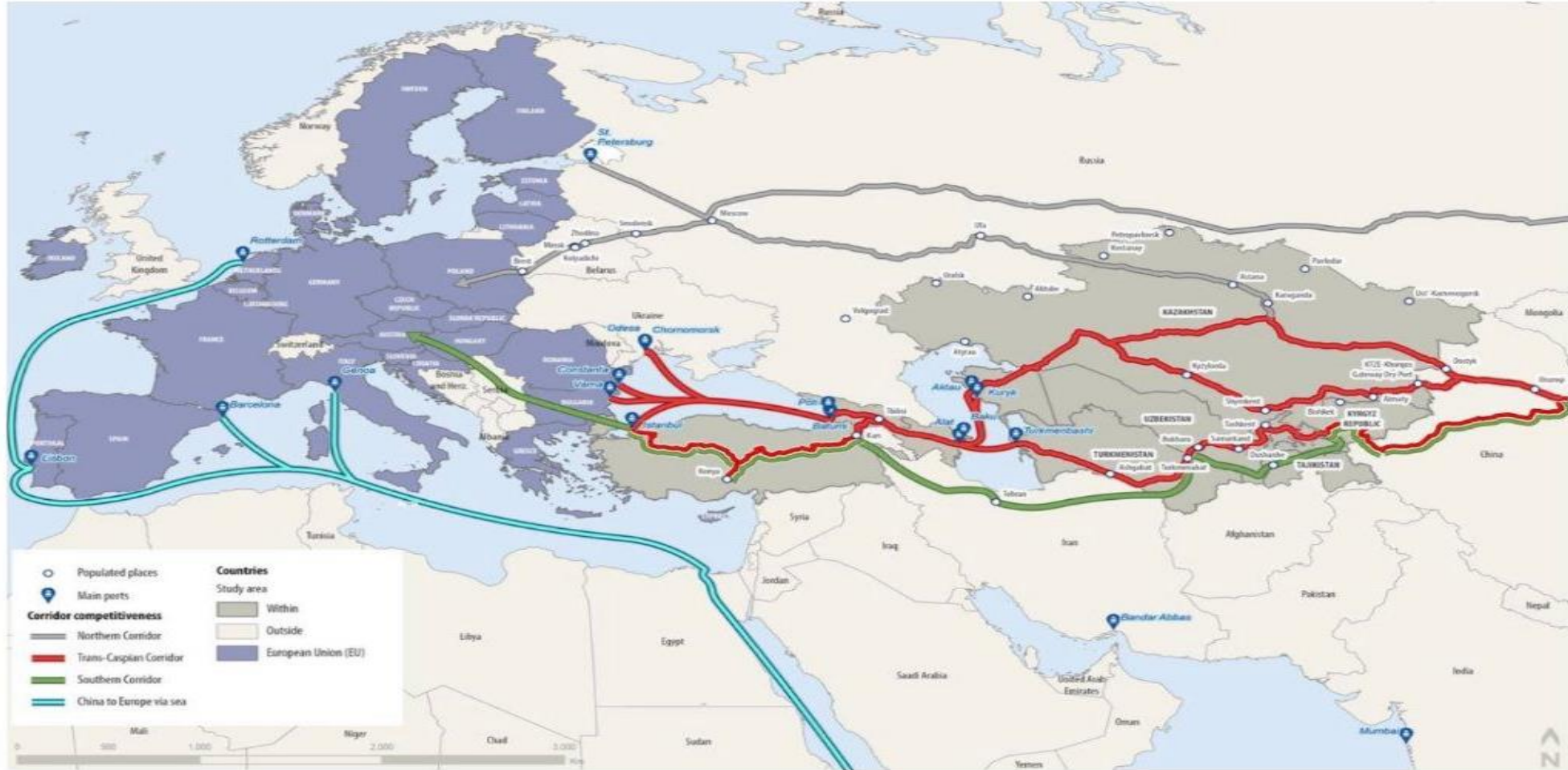
The countries on the route have to improve and raise in the logistic performance index.



# STRONG PAST....



Main Europe-Asia land-based corridors



Source: CPCS.

A 'frictionless transport connection' between Europe - Türkiye and Central Asia (up to China) would increase the benefits.



15:40




Arama Yap



IRU

22.471 takipçi  
3 saat •

IRU Secretary General **Umberto de Pretto** on the **#MiddleCorridor**'s growing strategic importance:

"The Middle Corridor is a vital link connecting **#Europe** and **#Asia**, unlocking economic potential.

"Despite geopolitical challenges, east-west trade has been growing. For example, between January and August 2023, freight volumes from **#China** to Europe along the Middle Corridor increased by 84% compared to the same period in 2022, reaching over 1.6 million tonnes.

"To maximise the potential of the Middle Corridor and increase its capacity, our strategic focus must shift towards the innovative realm of soft solutions facilitating trade and transit."  
**#RoadTransport**

Read more

Çeviriyi gör



**Middle Corridor - effective route for freight transportation between Europe and Asia - IRU SecG...**

en.inform.kz • 3 dakikalık okuma



Ana Sayfa



Açım



Gönder



Bildirimler 20+



İş İlanları

## East-West

East-West or Trans Caspian International Transport Route (TMTM) is intended for the growth of freight traffic from China to Turkey, as well as to the EU countries and vice versa.



SOUTH-WEST

EAST-WEST

NORTH-SOUTH

# STRONG DIALOGUE WITH EU



# The most sustainable transport connections between Europe and Central Asia- Middle Corridor

- Total trade between the EU and Central Asia has grown by 38.8 per cent in the last decade, from €34.2 billion in 2012 to €47.5 billion in 2022, with two-thirds of total trade being imports to the EU.
- Despite growing European-Central Asian trade, China is still the largest driver of cargo volumes between Europe and Asia.

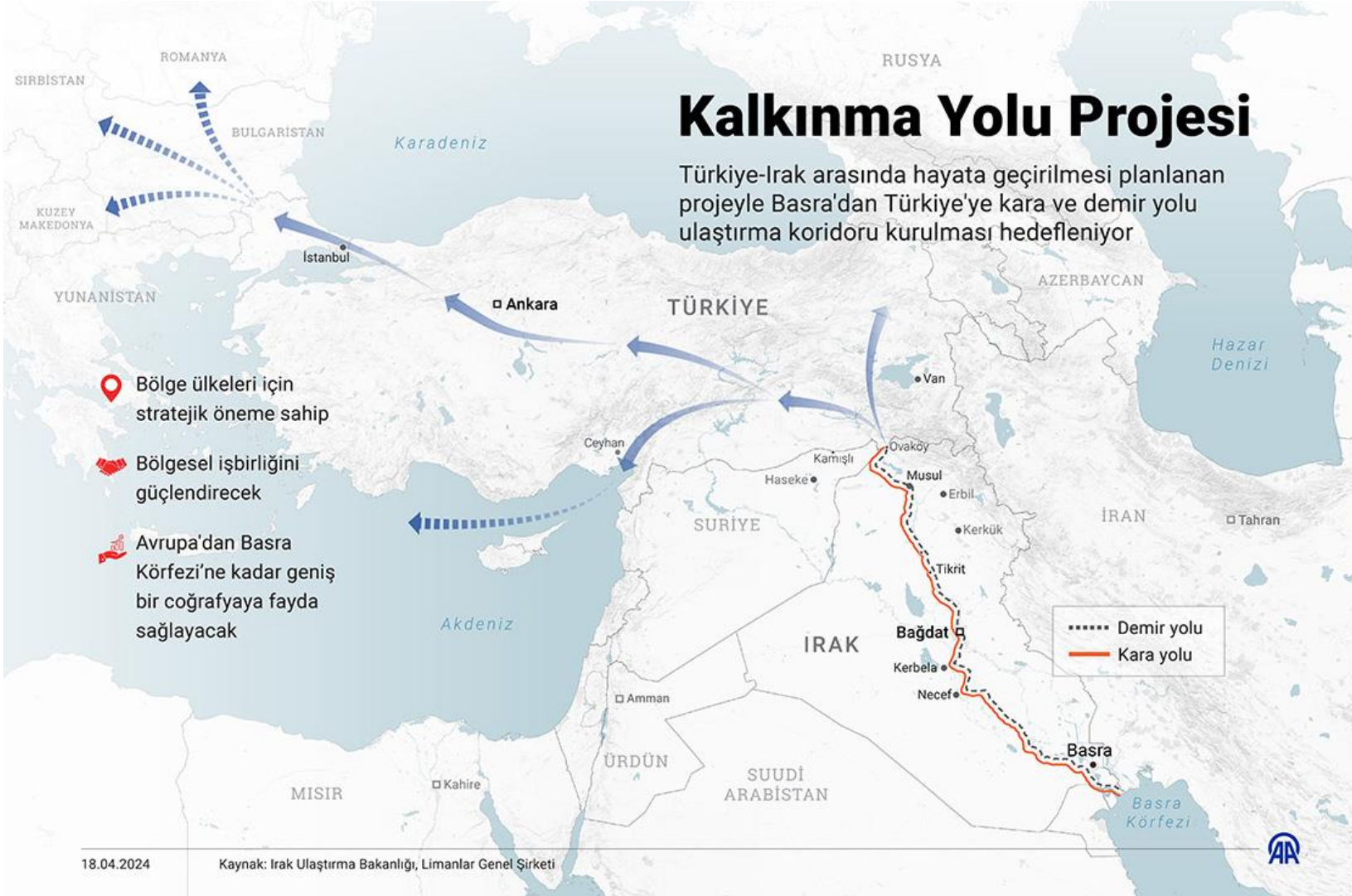
## ORGANIZATION OF TURKIC STATES- EIGHTH SUMMIT OF THE LEADERS



### Vision 2040

Favorable conditions will be created to present the Trans-Caspian International East-West Middle Corridor as a more efficient, sustainable and smooth than International East-West Central Corridors, including by simplifying administrative procedures.

Ensuring uninterrupted operation of transportation corridors, customs-border control points and logistics centers.



MoU signed by:  
Türkiye,  
Qatar,  
UAE,  
Iraq

## ORTA KORİDOR VE KALKINMA YOLU'NU GÜÇLENDİRECEK PROJE "VIA CARPATIA"



The Via Carpatia is a historical route connecting the Baltic Sea and the Aegean Sea/ Black Sea.  
It's the shortest route from the north to the south of Europe.

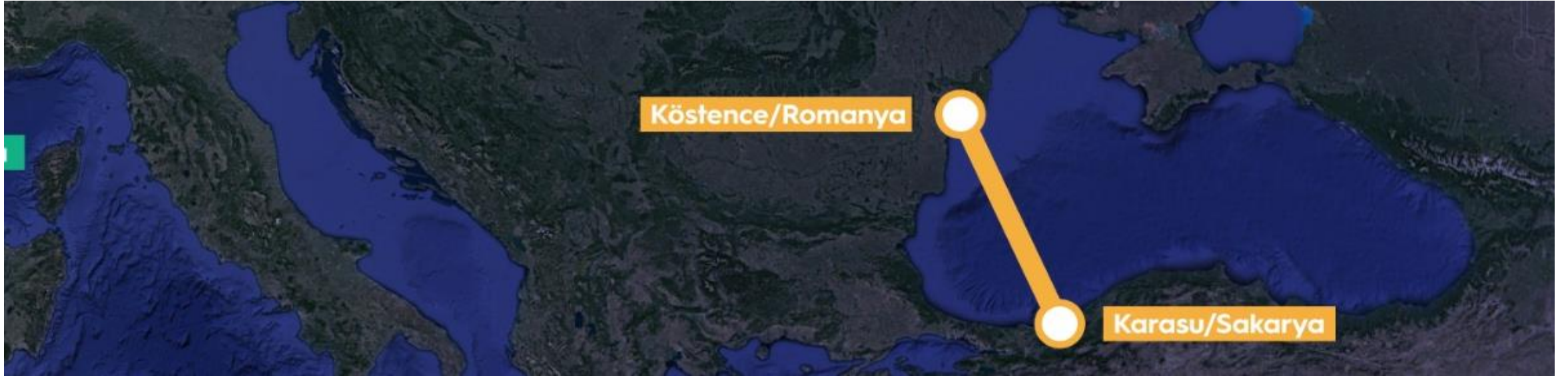
## Via Carpathia



## EU Perspective?



## Ro-Pax Ferries Starting End of June





## Covid-19 and Russia-Ukraine War... TURKEY RE-EMERGES AS THE NEW SUPPLY HUB FOR EUROPE

### EU industrial supply lines need strengthening, commissioner warns

Thierry Breton says coronavirus crisis shows vital supplies are vulnerable to disruption



Thierry Breton said the bloc must review the reliability of its supply chains, diversify its sources and cut the risk of interruptions, while also building domestic capacity in crucial sectors including pharmaceuticals.

**ECONOMY**

### 'Turkey can benefit most from supply chain shift'

European Bank for Reconstruction and Development provided Turkey €1.12B for COVID-19 response projects, says bank's president

Tuba Sahin | 17.06.2020



President of the European Bank for Reconstruction and Development (EBRD) Suma Chakrabarti

**ANKARA**

Turkey stands to benefit the most from a shift of supply chains away from China, according to the president of the European Bank for Reconstruction and Development (EBRD).

Addressing a virtual meeting held by the Foreign Economic Relations Board of Turkey (DEİK) on Wednesday, Suma Chakrabarti said that the coronavirus pandemic forced companies to put considerable emphasis on the resilience and diversification of their supply chains.

"They will have to do so to survive, to recover, to flourish," he added.



- Turkey among countries to gain the most from supply chain diversification, EBRD says
- Upgrade of Customs Union with EU would facilitate trend
- EBRD strongly committed to Turkey, processing loans worth €1 billion in 2020 to date

## TURKEY RE-EMERGES AS THE NEW SUPPLY HUB FOR EUROPE



WORLD ECONOMY

### Companies will shift supply chains away from China after coronavirus crisis, Mark Mobius predicts

“But at the end of the day, I think there’s going to be a diversification where these supply chains get moved into places like Vietnam, Bangladesh, **Turkey**, even Brazil, so that these companies can have a more diversified supply chain,” he added.



### Companies must move supply chains further from China

 Alicia Garcia Herrero 艾西亞 Feb 28 · 4 min read



Alicia Garcia Herrero, Natixis Asia Pacific Chief Economist, Bruegel Senior Fellow

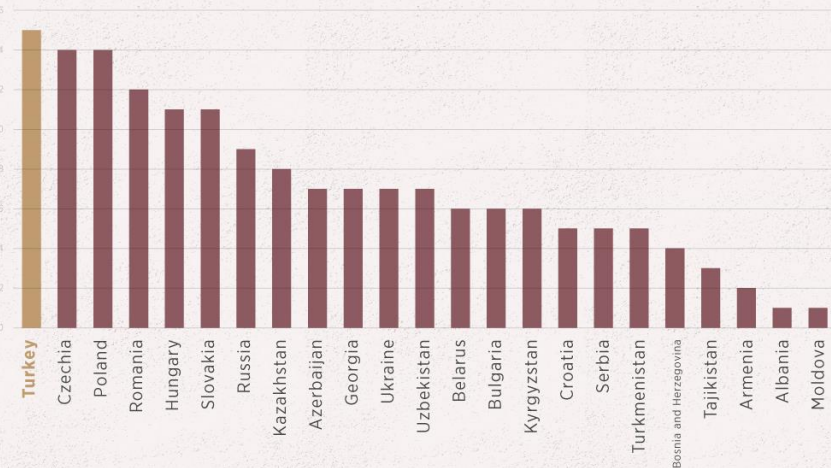
Implementing such wholesale change to supply chains is hard but necessary. Countries with sufficiently large supplies of available labor, adequate logistical capabilities and comparatively low dependence on China will be most attractive for new production sites. Mexico, **Turkey** and Eastern European nations are among those which should soon be busy entertaining visits from major multinationals.

# Turkey on way to become new hub in global supply chain

Turkey, which has become a strategic hub in the post-pandemic reshaping of the global supply chain, continues to be on the radar of multinational corporations with its geopolitical location and cost advantages

Swedish furniture company IKEA, Polish apparel retailer LPP, German pharmaceutical firm Boehringer Ingelheim and Belgian packaging firm DW Reusables are focused on investing in Turkey

**COUNTRIES SET TO BENEFIT THE MOST FROM SUPPLY CHAIN SHIFTS IN EUROPE, ACCORDING TO FITCH RATINGS**



World ▾ Business ▾ Legal ▾ Markets ▾ More ▾

October 6, 2021  
11:38 AM UTC  
Last Updated ago

Retail & Consumer

## IKEA to shift more production to Turkey to shorten supply chain

ISTANBUL, Oct 6 (Reuters) - Sweden's flat-pack furniture giant IKEA is planning to move more production to Turkey to minimise problems with global supply chains and increased shipping costs, the company's chief financial officer for Turkey said. Products it expects to make and then export from Turkey, including armchairs, bookcases, wardrobes and kitchen cabinets, are currently shipped thousands of miles from east Asia to Middle East or European markets.

## “According to Kearney, Turkey’s Star Shines in Global Supply Chain”

📅 13 Ağustos 2021



*Kearney underlined that Turkey has a great advantage with its proximity to Europe, having the same intellectual property rules as the EU and its developed production infrastructure.*



**Kearney**, an international consulting

firm, stated that it was important how Western buyers understood it was important to supply from nearby regions in the pandemic, underlining that Turkey has gained a great advantage in this process with its proximity to Europe, having the same intellectual property rules as the EU and its improved production infrastructure.

**modern**diplomacy Turkey gambles in bid to rival China as a key supply chain node



REGIONS ▾ TOPICS ▾ BUSINESS ▾ SECURITY ▾ NEWS ▾ PUBLICATIONS FINE LIVING ▾ ABOUT ▾ WRITE FOR US

**ECONOMY**

# Turkey gambles in bid to rival China as a key supply chain node





MAY 24, 2021

# Global connectedness spurring Turkey's economic growth

#connectedness #Turkey #DHL #SupplyChains

Turkey is the most globally connected country in South and Central Asia, according to the latest DHL Global Connectedness Index (GCI), having had the 10th greatest gains in international connectedness out of 169 countries in 2017-2019, moving up 10 places to 55th spot.

Located at the crossroads of Europe and the Middle East, Turkey is close to the Balkans, Russia and Central Asia, and has a geographic advantage as it acts as strategic stopover point between Africa and Europe.

## ROAD+SEA INTERMODAL CONNECTIONS

### European routes:

Mersin - Trieste (Italy)  
 Pendik – Trieste (Italy)  
 Çeşme - Trieste (Italy)  
 Ambarlı - Trieste (Italy)  
 Yalova - Trieste (Italy)  
 Yalova - Sete (France)  
 Yalova-Bari (Italy)

*Karasu - Constanza (Romania) – Starting end of June*

### Mediterranean routes:

Taşucu - Beirut (Lebanon)  
 Mersin - Lefkoşa (Turkish Republic of Northern Cyprus)  
 Mersin - Haifa (Israel) – Jordan



### Black Sea Routes:

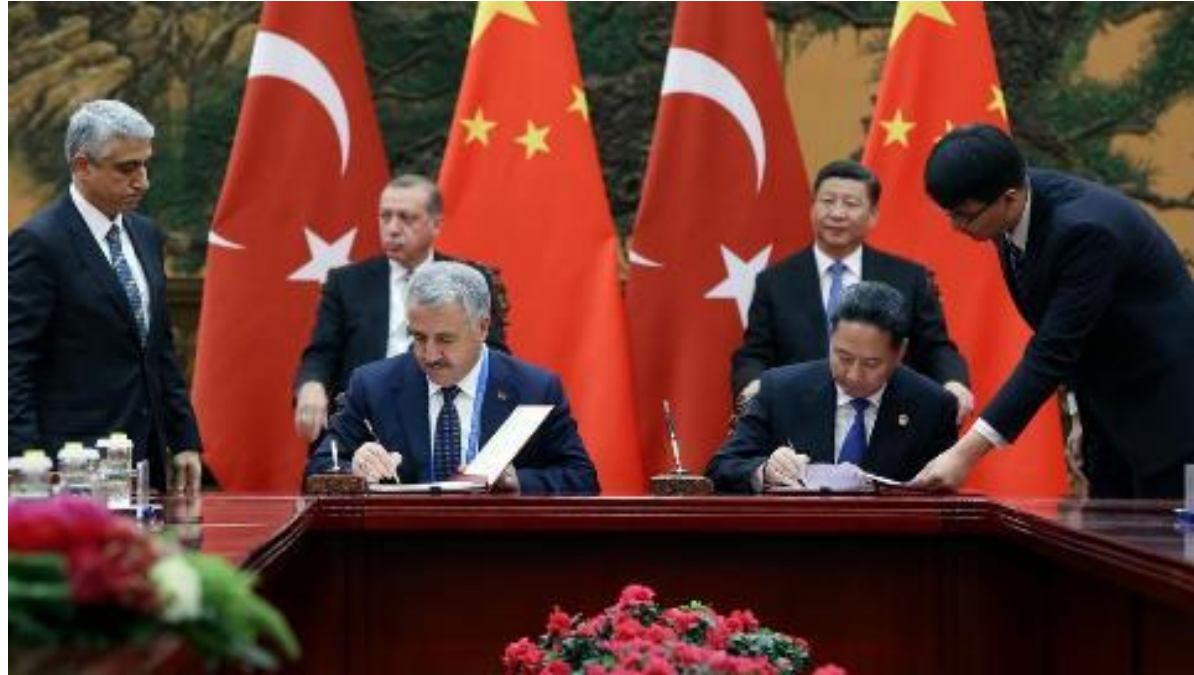
Haydarpaşa- Chernemorsky ( Ukraine-STOPPED AFTER THE WAR)  
 Zonguldak- Chernemorsky ( Ukraine – STOPPED AFTER THE WAR)  
 Karasu- Chernemorsky (Ukraine-STOPPED AFTER THE WAR)

**Karasu-Novorossiysk (Russia)**

**Haydarpaşa-Novorossiysk (Russia)**

**Samsun –Novorossiysk - Tuapse (Russia)**

## Road Transport Agreement signed between Türkiye and China



**For the first time, a bilateral road transport agreement was signed between China and Turkey in 2017 and entered into force in 2019 opening up road transport connections from Europe to China.**

## Chinese trucks cross Caspian Sea in Middle Corridor TIR pilot

Three Chinese TIR trucks have successfully completed a pilot project along the Middle Corridor. This marks a significant step forward for Chinese trucking companies exploring long-distance cross-border road transport along crucial trade corridors.

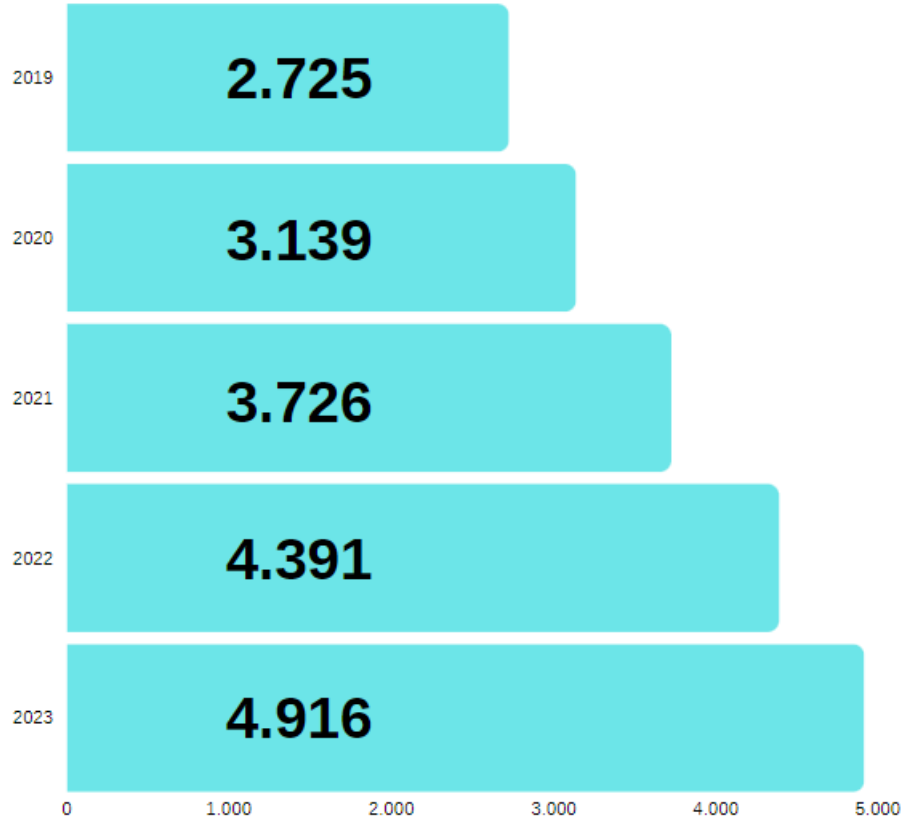




## Türkiye International Road Transportation

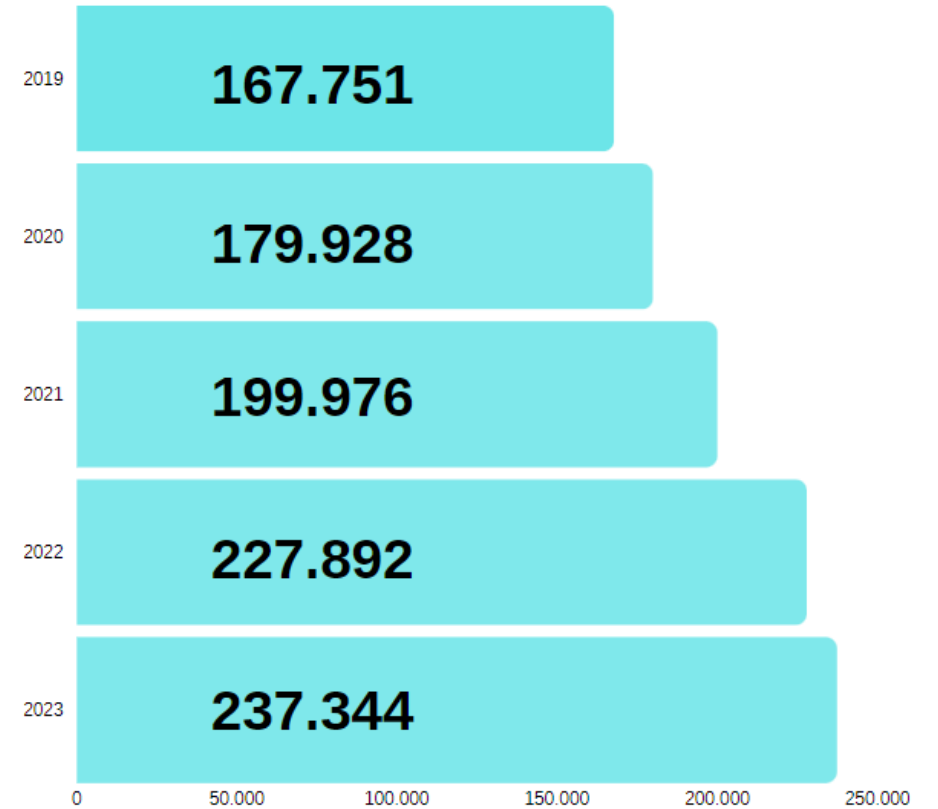
### Licensed Logistic and Transport Companies

(2019-2023)



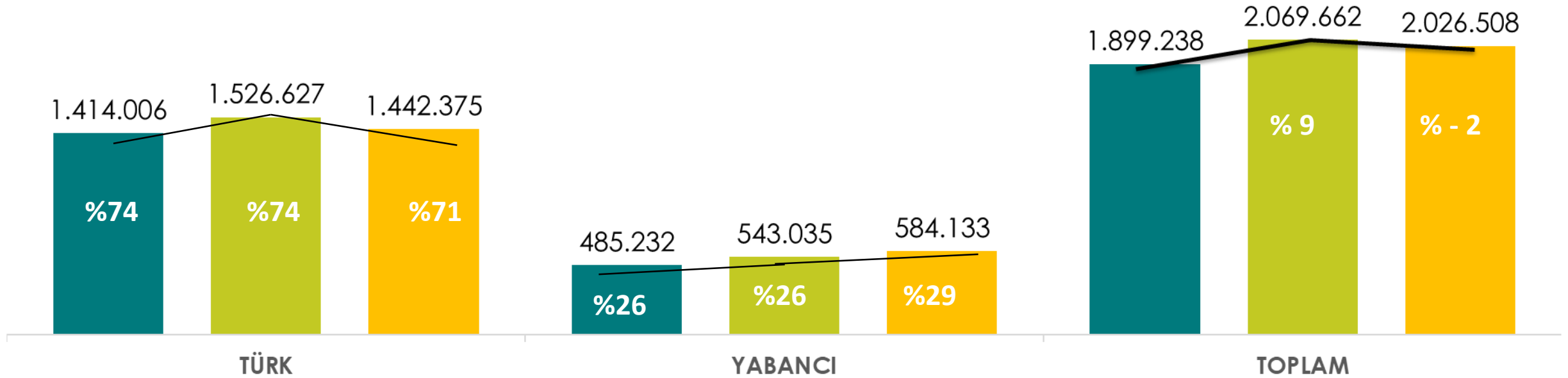
### Registered vehicles for international transport

(2019-2023)



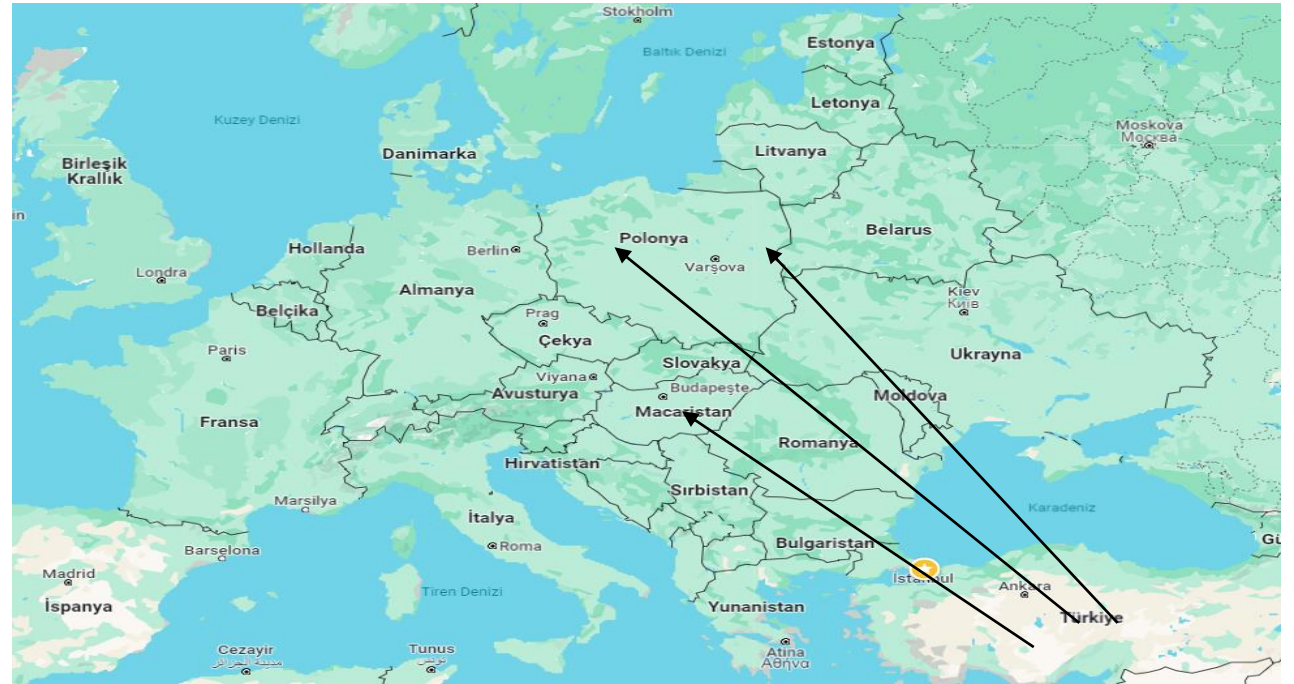
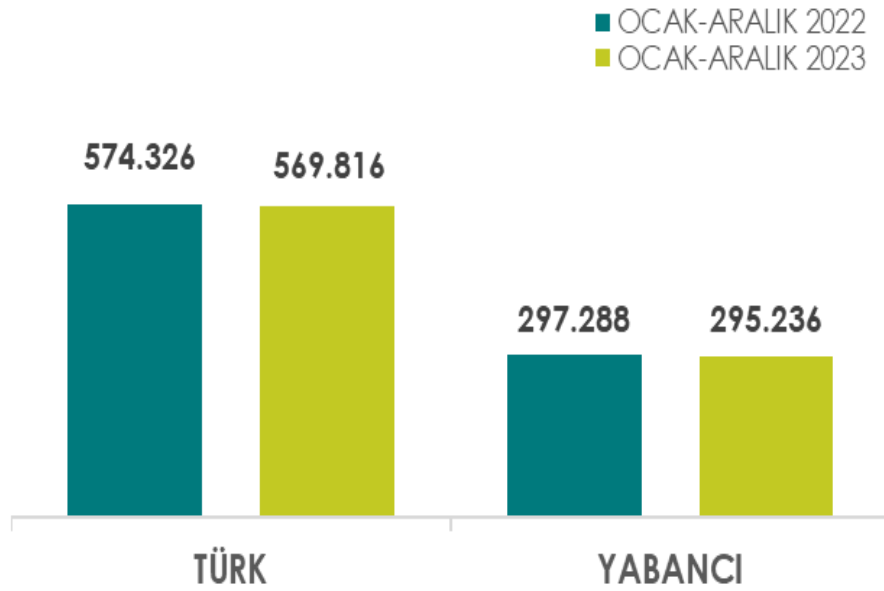
## Export Transportation exceeded 2 Mio.

■ 2021 ■ 2022 ■ 2023



# Export Transportation towards Europe

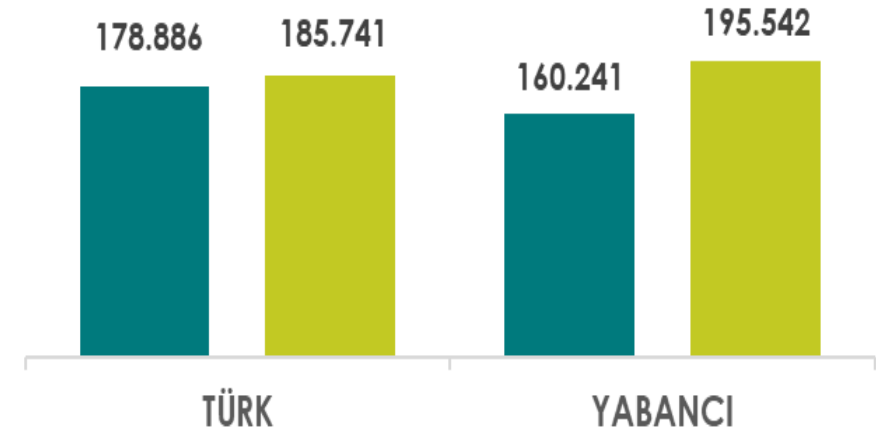
## Share of Turkish Operators %66



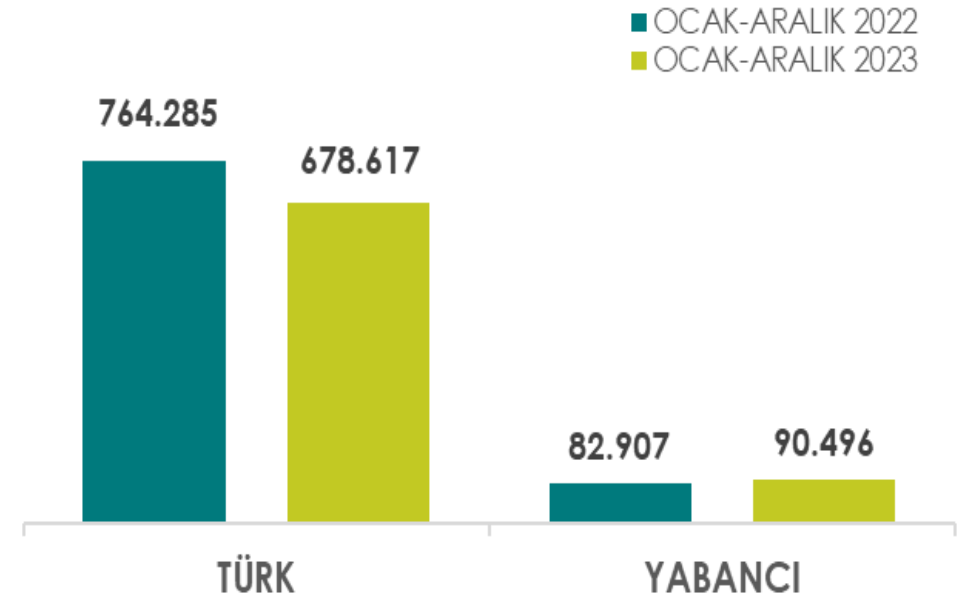
## Export Transportation towards Central Asia Share of Turkish Operators %50



■ OCAK-ARALIK 2022 ■ OCAK-ARALIK 2023

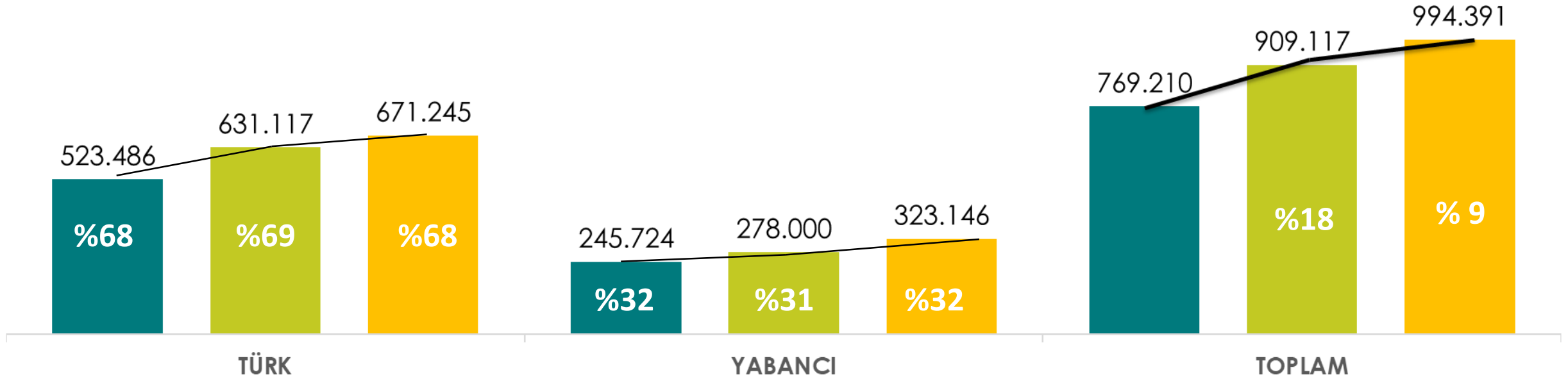


## Export Transportation towards Middle East Share of Turkish Operators %88



## Import Transportation exceeded 1 Mio.

■ 2021 ■ 2022 ■ 2023



## Turkish Export (Modal Split- USD)

Year	Railway	Road	Maritime	Air	Total
2018	755.718.090	69.518.212.155	92.501.094.981	14.127.905.448	176.902.930.674
2019	973.934.916	70.727.154.434	93.953.070.221	14.849.231.002	180.503.390.573
2020	1.284.881.440	67.404.632.832	88.037.175.738	12.732.560.855	169.459.250.865
2021	1.644.123.757	88.001.105.806	116.503.633.234	18.735.586.027	224.884.448.824
2022	2.447.049.692	99.492.027.278	131.023.052.212	20.687.774.210	253.649.903.392
2023	1.957.324.539	104.815.500.262	123.247.345.269	25.512.385.172	255.532.555.242
Share	1%	41%	48%	10%	100%
Change	-20%	5%	-6%	23%	1%
Jan-Mar 23	538.924.887	25.746.410.995	29.689.523.493	5.413.033.207	61.387.892.582
Jan-Mar 24	444.376.049	26.194.284.640	31.555.026.589	5.397.534.320	63.591.221.598
Share	1%	41%	50%	8%	100%
Change	-18%	2%	6%	0%	4%

### Turkish Import (Modal Split- USD)

Year	Railway	Road	Maritime	Air	Total
2018	1.305.206.145	59.717.073.831	118.210.823.653	28.756.744.823	207.989.848.452
2019	1.448.245.009	55.102.358.704	97.737.760.736	29.238.406.450	183.526.770.899
2020	2.136.481.877	60.691.935.744	99.260.695.002	39.260.477.529	201.349.590.152
2021	2.890.978.344	69.667.999.705	139.356.455.721	26.057.025.313	237.972.459.083
2022	2.966.504.741	83.581.119.949	173.136.638.311	38.582.412.680	298.266.675.681
2023	1.994.111.478	96.580.050.939	169.647.114.674	53.840.524.865	322.061.801.956
Share	1%	30%	53%	17%	100%
Change	-33%	16%	-2%	40%	8%
Jan-Mar 23	558.213.786	24.520.237.895	40.757.683.236	15.918.194.390	81.754.329.307
Jan-Mar 24	598.988.528	23.609.739.072	38.593.570.397	10.972.321.707	73.774.619.704
Share	1%	32%	52%	15%	100%
Change	7%	-4%	-5%	-31%	-10%



## Road Transportation/Export in the Region

2023 Germany			
Turkish	German	Others	Total
130.105	4.379	21.952	156.436
83%	3%	14%	100%

2023 Austria			
Turkish	Austrian	Others	Total
13.461	207	3.049	16.717
81%	1%	18%	100%

2023 Slovakia			
Turkish	Slovakian	Others	Total
5.236	1.298	2.397	8.931
59%	15%	27%	100%

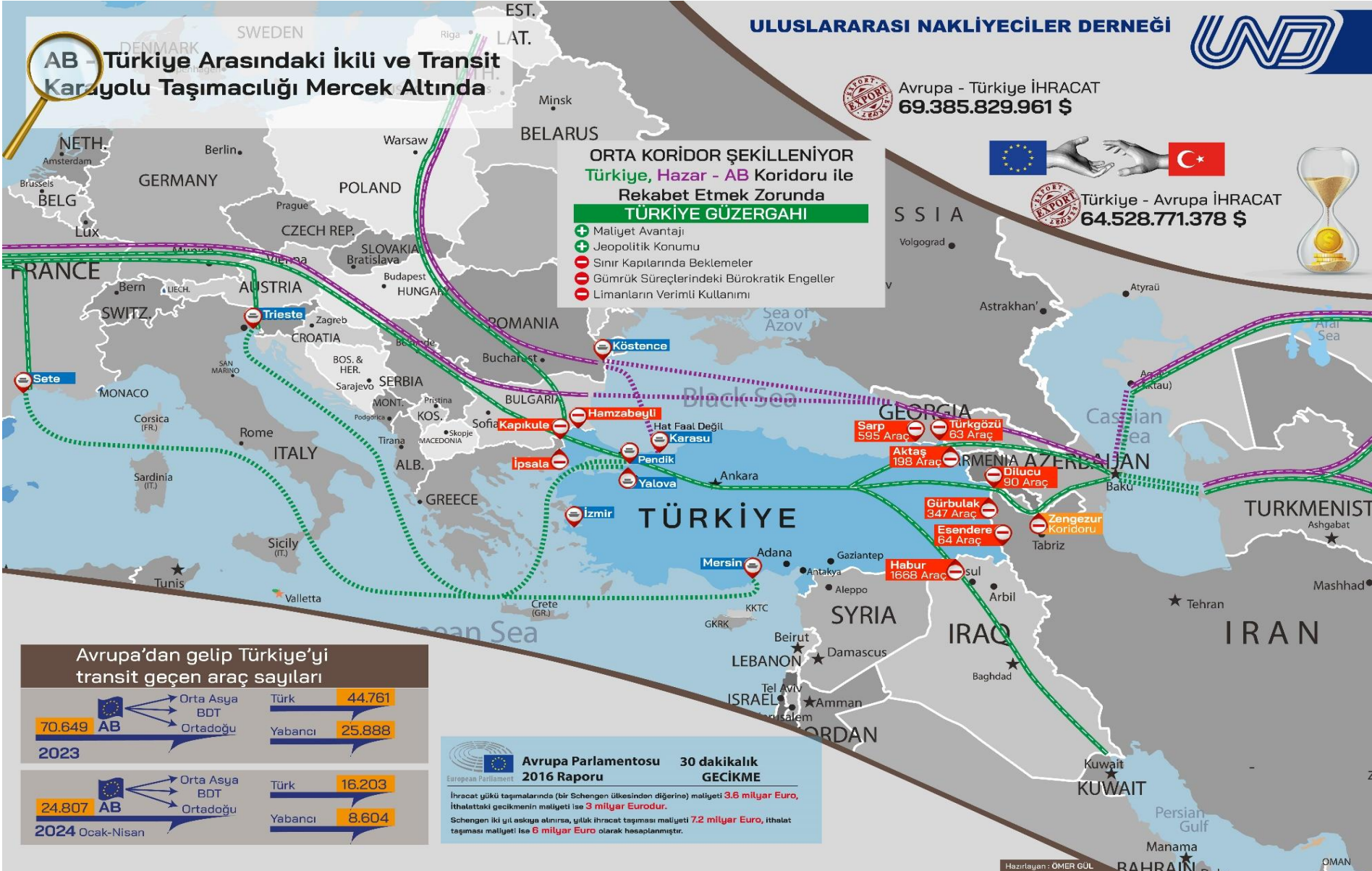
2023 Croatia			
Turkish	Croatian	Others	Total
4.137	652	3.869	8.658
48%	8%	45%	100%

2023 Serbia			
Turkish	Serbia	Others	Total
10.984	27.595	709	39.288
28%	70%	2%	100%

2023 Romania			
Turkish	Romanian	Others	Total
54.974	50.672	2.206	107.852
51%	47%	2%	100%

2023 Bulgaria			
Turkish	Bulgarian	Other	Total
38.673	49.878	2.173	90.724
43%	55%	2%	100%

2023 Moldova			
Turkish	Moldovan	Others	Total
4.161	6.349	1.640	12.150
34%	52%	13%	100%



# Danube Region Hinterland...



# Why to connect?

- **The Danube can open the EU to its near neighbours, the Black Sea region, the South Caucasus and Central Asia**
- **the Region: – is where Europe opens to the east. Existing transport and trade links must be developed (e.g. through the TRACECA transport network connecting the EU through the Black Sea region to the Caucasus and Central Asia);**
- **Connecting Europe and Asia is very important, especially for countries in the Central Asian region and the Danube region. Especially for land locked countries without a direct access to the sea, a good transport infrastructure is essential.**

**Thank You for your attention!**