Turkey – future China of Europe?

Market Place Seminar
Istanbul, October 22nd 2009
Dr. Csaba Székely
GYSEV, CEO
Overview

• Facts about Turkey
• Turkey’s Industry – emerging markets
• Supply chain possibility to Turkey
• Bottlenecks and potentials
• Future potentials
Interesting facts about Turkey

- 783.562 km²,
- Population: 74,816,000
- 17\textsuperscript{th} largest Nominal GDP
- Member of G-20
- Emerging Markets/Developed country
- 35 billionaires (Rank 4)
Blocktrain services to Southeast Europe

- Sopron
- Sturovo
- Villach
- Ljubljana (Zalog)
- Cervignano
- Belgrade (Makis)
- Kelebia
- Sofia
- Skopje
- Thessaloniki
- Istanbul (Halkali)
- Alexandroupolis
- Athens

- Formation yard
- Junction station, final destination
# Blocktrains to/from Turkey

<table>
<thead>
<tr>
<th>Route</th>
<th>Conventional</th>
<th>Intermodal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direction</td>
<td>One way</td>
<td>Both directions</td>
</tr>
<tr>
<td>Operator</td>
<td>Proodos, DBSchenker, Express</td>
<td>ICF</td>
</tr>
<tr>
<td>Train Parameters</td>
<td>1.200 gross tons, 530 meter</td>
<td></td>
</tr>
<tr>
<td>Transport time</td>
<td>5 days</td>
<td>4 days</td>
</tr>
</tbody>
</table>
## Commodities in the blocktrains

<table>
<thead>
<tr>
<th>Conventional Blocktrains</th>
<th>Intermodal Blocktrains</th>
</tr>
</thead>
<tbody>
<tr>
<td>Household products</td>
<td></td>
</tr>
<tr>
<td>Steel and iron products</td>
<td></td>
</tr>
<tr>
<td>Raw materials for textile industry</td>
<td></td>
</tr>
<tr>
<td>Construction materials</td>
<td></td>
</tr>
<tr>
<td>Chemical Products</td>
<td>Automotive parts</td>
</tr>
<tr>
<td>Paper and pulp</td>
<td>Consumer goods</td>
</tr>
<tr>
<td>Other low value products</td>
<td>Other high value products</td>
</tr>
</tbody>
</table>
Bottlenecks and improvement potentials

- Condition of the infrastructure
- Lack of rolling stock
- Inflexibility of railways in general
- Development of round trip trains
- Transit time improvement
Future perspectives

• Slowdown of the Economies in the next period
• Restructuring on the goods market
• Influence of the politics – impact on productions plants
• Competition with other modes
• Increasing influence of ports
Thank you for your attention!