# TRENDS IN TURKISH LOGISTICS INDUSTRY

# 2014: 2. Quarter Results

***April-June, 2014: Performances***

***July-September, 2014: Expectations***

**July, 2014**

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## EXECUTIVE SUMMARY

### *GENERAL*

- “Trends in Turkish Logistics Industry” is a longitudinal study reported quarterly since the last quarter of 2013. This study attempts to measure the perceptions of senior managers in logistics industry with regard to two topics; performances and expectations. It is a unique study in terms of its scope in the Turkish logistics market and well regarded among the parties in the industry.
- Second Quarter results of the year 2014 reflects performances in April-May-June 2014 and expectations in July-August-September 2014.
- 16,5% response rate is achieved within the determined population of the study.

### ***Performances (April – June 2014)***

- “International transportation” is the most performed function (75,7%) by logistics companies
- In transportation activities, as it overlaps with Turkey’s actual structure, “road transportation” is performed by logistics companies intensively (54,5%).
- It is identified that logistics companies intensively give services to “Textile Industry (68,1%)”, “Food Industry (60,6%)” and “Automotive sub-industry (59%)”.
- 68,1% of managers participated in research evaluated the price competition as “high”. On the other hand, service quality (63,6%) and service speed (71,2%) competition is found as “medium”.
- Only 17,4% of managers participated in research expressed that the public sector knows the logistics industry “accurately”. Moreover, a ratio of 7,6% of managers participated in research is observed that public opinion knows the logistics industry “correctly”. It is found out that the results are compatible with previous quarter’s results.
- It is observed that the managers participated in research evaluated that there is an exchange of information (87,6%) and cooperation (77,2%) between companies.

- 48,4% of managers participated in research expressed that the companies they give service trust to logistics industry in “medium” level. It is found out that the results are compatible with previous quarter’s results.
- The most important problems in logistics industry are “price-based competition (81,8%)”, “qualified human resource (59%)” and “lack of legislation (46,9%)”.
- A ratio of 45,3% of managers surveyed represented that in the past three month period (April-May-June) the number of white collar employees has “increased” compared with the last year’s same period.

***EXPECTATIONS (April-June 2014)***

- 60,6% of managers stated foreign capital investment will stay in the same level.
- It is observed that managers’ “growth expectation” of industry’s overview has been changed negatively compared with previous period. Although only a 16,6% of managers stated the “the industry will downsize”, 54,5% of managers stated “the growth in logistics industry will not change”.
- When asked to logistics managers whether he/she was planning to invest to industry and 57,5% ratio of managers answered the question as “no”.
- The expectations of logistics industry from government is as follows; “legislation regulations (57,5%)”, “controlling and ensuring the standardization (54,5%)” and “solving infrastructure problems (36,3%)”.
- 63,1% of logistics managers stated they will employ new employees in following 3 months (July-August-September) period.

## 1. INTRODUCTION

“Trends in Turkish Logistics Industry” is a longitudinal study reported quarterly since the last quarter of 2013 by Beykoz Vocational School of Logistics. This study attempts to measure the perceptions of the top managers in logistics industry with regard to two topics; performance and expectations in every three months period. Different perspectives in periods can be easily analyzed. It is a unique study in terms of its scope in the Turkish logistics market and well regarded among the parties in the industry.

This report ensures an important framework for logistics industry representatives in a way of decision making process, transferring the correct scientific data to related levels of public and raising public awareness. “Trends in Turkish Logistics Industry” can be mentioned as a reflection of Beykoz Vocational School of Logistics’ experience exceeding five years.

This report is presented to your evaluation as 2014’s 2$^{nd}$ Quarter results. The evaluation can be made in regard to two topics; performance and expectations. Performances are comprised of 2014’s April-May-June period. Expectations are covered 2014’s July-August-September periods.

## 2. METHODOLOGY OF THE RESEARCH

### 2.1. General Description of the Research

This report is based on a research is composed between the dates of 16 June – 30 June 2014 by Beykoz Vocational School of Logistics, Center of Logistics Applications and Research. Sample of this research is based on the members of UTIKAD (Association of International Forwarding and Logistics Service Providers). UTIKAD is also the partner and supporter of this longitudinal study. UTIKAD is an active member of International Federation of Freight Forwarders Association (FIATA) which is the largest non-governmental organization in the field of transportation in the world. A sample size which is derived judgementally from a database consists of 400 firms primarily including members of UTIKAD is reached at a rate of 16,5% by mail and web-based form. When compared with last year's 16% ratio of sample, it is said to be that the industry's attention to research is increased. However, it has to be noted that there were important constraints during data collection.



"Trends in Turkish Logistics Industry" theme which is determined according to "performances" and "expectations" is stated as a result of evaluation of senior managers. All the surveyed companies/institutions senior managers were asked a control question in order to confirm that survey is replied by themselves.

### 2.2. Scope of Research and Data Collection Form

Research is comprised of logistics industry's performances and experiences. In this context, 15 different questions are prepared and present to the evaluation of senior managers of logistics industry. All of the 15 questions are closed-ended. Unlike 2014, 1st Quarter report "the number of white and blue collar employees" and for expectations part "the number of new employees" questions are added to the survey.

### 2.3. The Method of Data Collection and Description of Sample

The database consisting of 400 companies which are registered to UTIKAD (Association of International Forwarding and Logistics Service Providers) had been implemented a survey every three months period (quarterly) by Beykoz Vocational School of Logistics. The evaluation was made in last month and published to public opinion. In the table below 2014 published results periods are included.

**Results Identification of Publishing Periods (2014)**

| Year of 2014 Results | Release Date | Reference Period: Performances | Reference Period: Expectations |
|---|---|---|---|
| Quarter 1 | 31 March 2014 | (January-March 2014) | (April-June 2014) |
| Quarter 2 | 30 June 2014 | (April-June 2014) | (July-September 2014) |
| Quarter 3 | 30 September 2014 | (July-September 2014) | (October-December 2014) |
| Quarter 4 | 31 December 2014 | (October-December 2014) | (January-March 2015) |

The survey is delivered to all of 400 companies by mail and internet and a representative sampling rate of 16.5% is reached. This and the previous survey participation rates are listed in the table below.



| Research Period | N | Population Representation Ratio |
|---|---|---|
| Quarter 4 (October-December, 2013) | 40 | 10% |
| Quarter 1 (January-March, 2014) | 64 | 16% |
| Quarter 2 (April-June, 2014) | 66 | 16,50% |

The respondent companies are listed in Appendix 1.

## 3. RESULTS OF THE RESEARCH

### 3.1. 2014 SECOND QUARTER PERFORMANCES (APRIL-JUNE, 2014)

The performances of logistics industry of April-May-June period of 2014 are described as below.

#### 3.1.1. Scope of Logistics Industry

The variety of services offered by logistics companies are continued in the second quarter of 2014 (See Figure 1). The "international transportation" is observed as the most performed function by logistics companies (75,7%). The functions like "national transportation (60,6%)", "handling (57,5%)" and "warehousing (54,5%)" are observed with high density in this quarter.



**Figure 1:**
The Main Functions in Logistics Industry:
The Evaluation of 2. Quarter of 2014

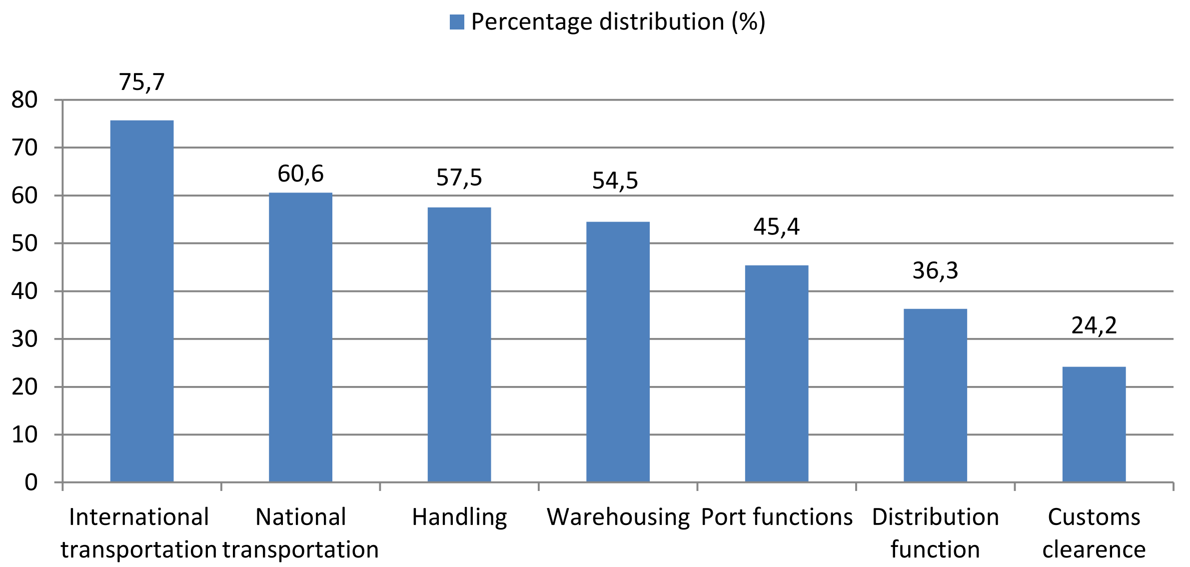


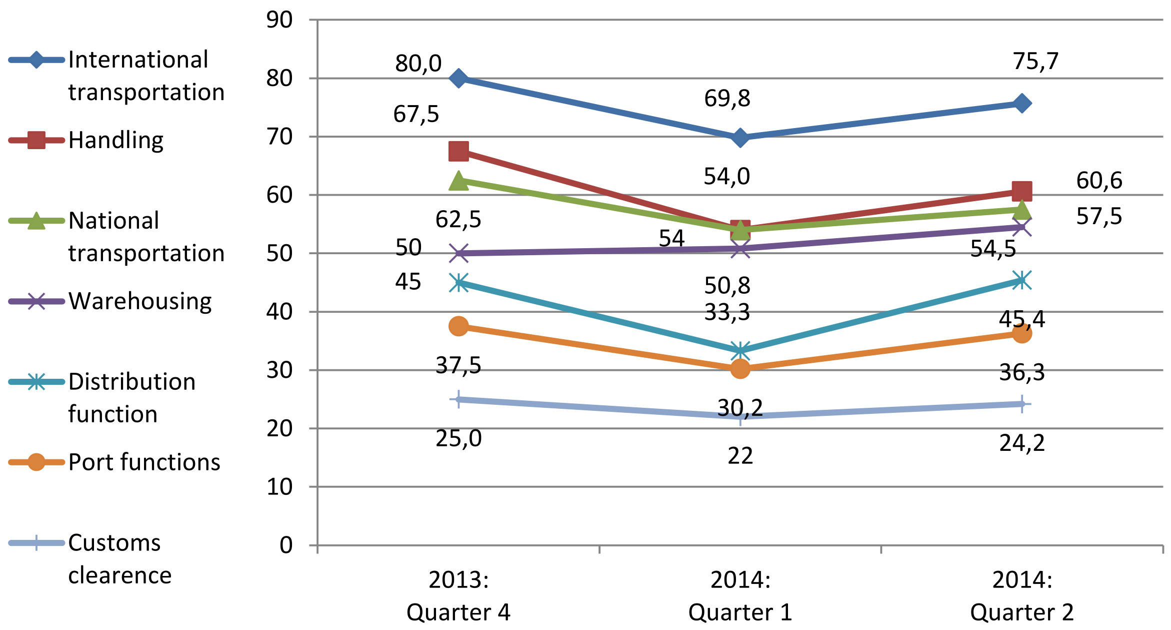
**Table 1:** The Main Functions in Logistics Industry: Comparative Table*

| Functions | 2013: Quarter 4 (%) | 2014: Quarter 1 (%) | 2014: Quarter 2 (%) |
|---|---|---|---|
| International transportation | 80,0 | 69,8 | 75,7 |
| Handling | 67,5 | 54,0 | 57,5 |
| National transportation | 62,5 | 54,0 | 60,6 |
| Warehousing | 50,0 | 50,8 | 54,5 |
| Distribution function | 45,0 | 33,3 | 36,3 |
| Port functions | 37,5 | 30,2 | 45,4 |
| Customs clearence | 25,0 | 22,0 | 24,2 |

** Because more than one option is selected, the total exceeds 100%.*

In terms of logistics activities logistics companies operating in Turkey has provided an important diversification and it is observed that it is sustainable.

**Figure 2:**
Logistics Industry Basic Function Areas (%)



### 3.1.2. Transportation Modes in Logistics Industry

According to second quarter of 2014 results, in transportation activities, as overlap with Turkey's existing structure, "road transportation" is performed with high density (54,4%)(See Figure 3). On the other hand, Turkey's recent "intermodal / multimodal transport" options in this regard appear to be a significant preference of enterprises (51.5%) in the second quarter of 2014 (See Table 2).

**Figure 3:**
Transportation Modes in Logistics Industry:
The Evaluation of 2. Quarter of 2014

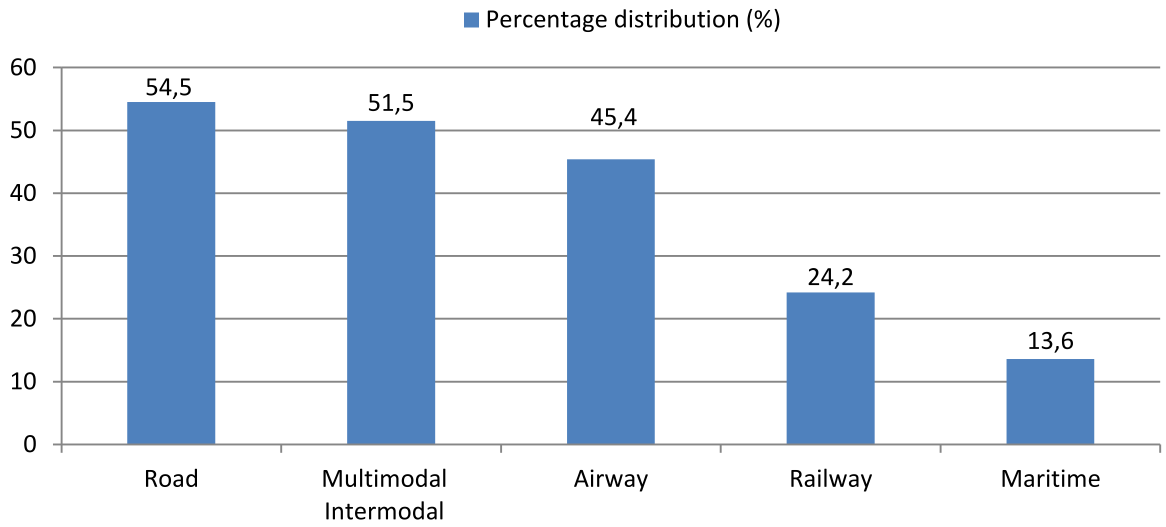




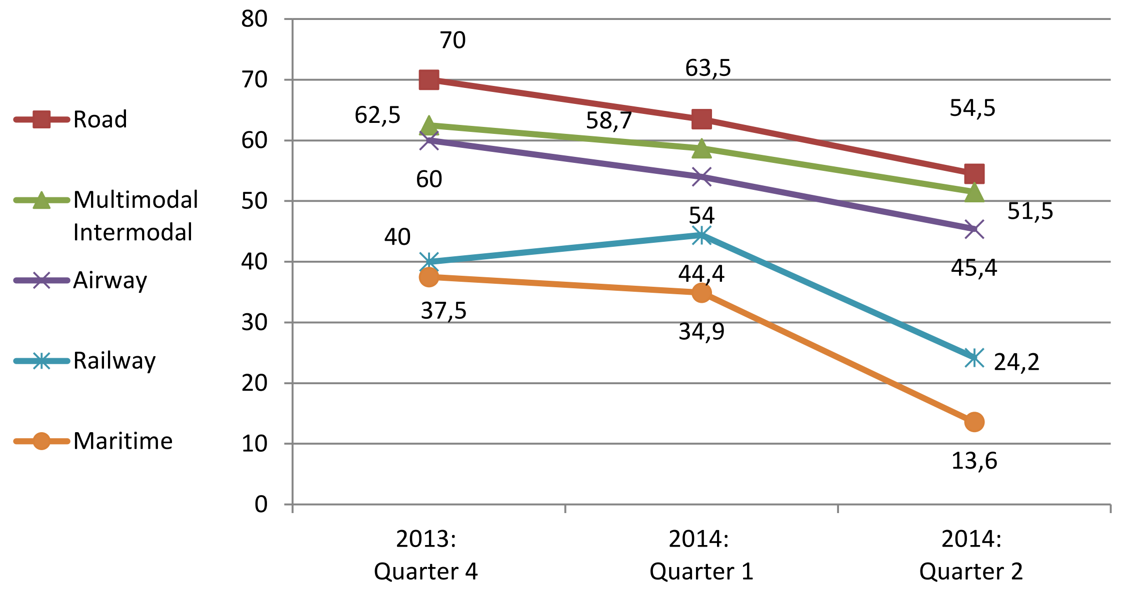

**Table 2:** Transportation Modes in Logistics Industry: Comparative Table*

| Transportation Services | 2013: 4. Quarter (%) | 2014: 1. Quarter (%) | 2014: 2. Quarter (%) |
|---|---|---|---|
| Road | 70,0 | 63,5 | 54,5 |
| Multimodal/Intermodal | 62,5 | 58,7 | 51,5 |
| Airway | 60,0 | 54,0 | 45,4 |
| Railway | 40,0 | 44,4 | 24,2 |
| Maritime | 37,5 | 34,9 | 13,6 |

** Because more than one option is selected, the total exceeds 100%.*

As of the second quarter of 2014, logistics companies operating in Turkey, in terms of modes of transport, it is observed that companies provide a significant diversification. Rail and multimodal transportation options in future are expected to be increased.

**Figure 4:**
Transportation Modes in Logistics Industry
The Evaluation of 2. Quarter of 2014 (%)

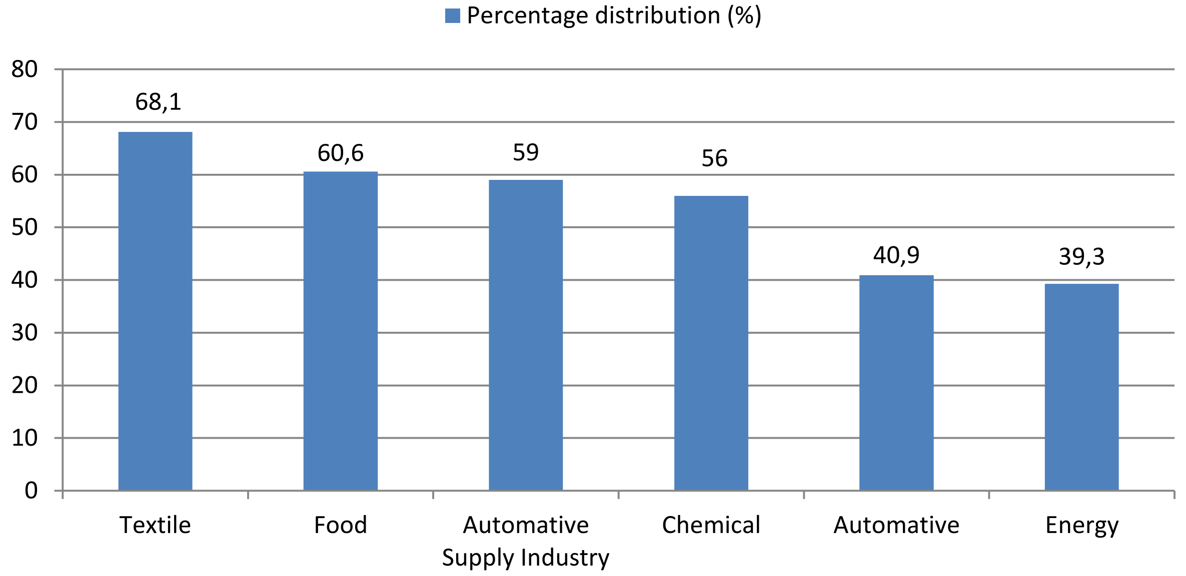





### 3.1.3 Logistics Industry Sectors

Logistics industry sectors in the second quarter of 2014 have been observed that correlates with Turkey’s foreign trade structure. The most served industries are; “Textile Industry (68,1%)”, “Food Industry (60,6%)”, “Automotive supply industry (59%)” and “Chemical (56%)”(Figure 5).

Figure 5:
Logistics Industry Sectors
The Evaluation of 2. Quarter of 2014




On the other hand compared with 2014's first quarter, it is observed that there is significant decline especially in chemical and food industry (See Table 3).



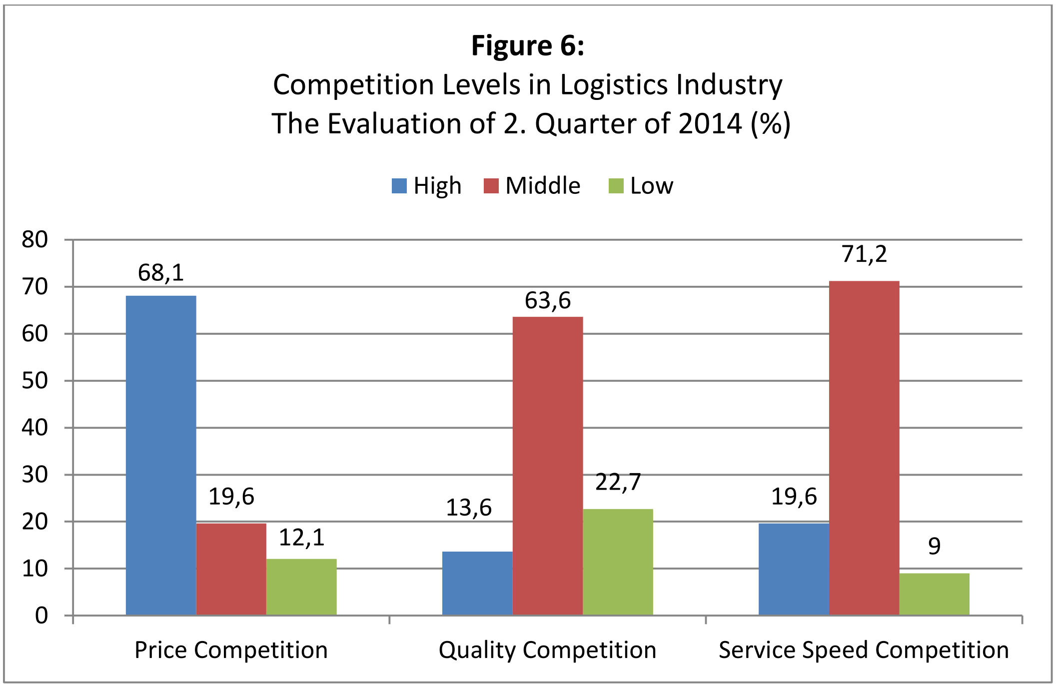
**Table 3:** Logistics Industry Sectors: Comparative Table

| Logistics Industry Sectors | 2013: 4. Quarter (%) | 2014: 1. Quarter (%) | 2014: 2. Quarter (%) |
|---|---|---|---|
| Textile | 77,5 | 68,3 | 68,1 |
| Food | 60,0 | 69,8 | 60,6 |
| Automative Supply Industry | 60,0 | 65,1 | 59,0 |
| Chemical | 57,5 | 76,2 | 56,0 |
| Automative | 50,0 | 58,7 | 40,9 |
| Energy | 45,0 | 47,6 | 39,3 |

** Because more than one option is selected, the total exceeds 100%.*

### 3.1.4. Competition Levels in Logistics Industry

68,1% of managers surveyed in the research evaluated price competition as “high” in the logistics industry. Moreover, service quality (63,6%) and service speed (71,2%) competition is considered as “middle”. (See Figure 6).



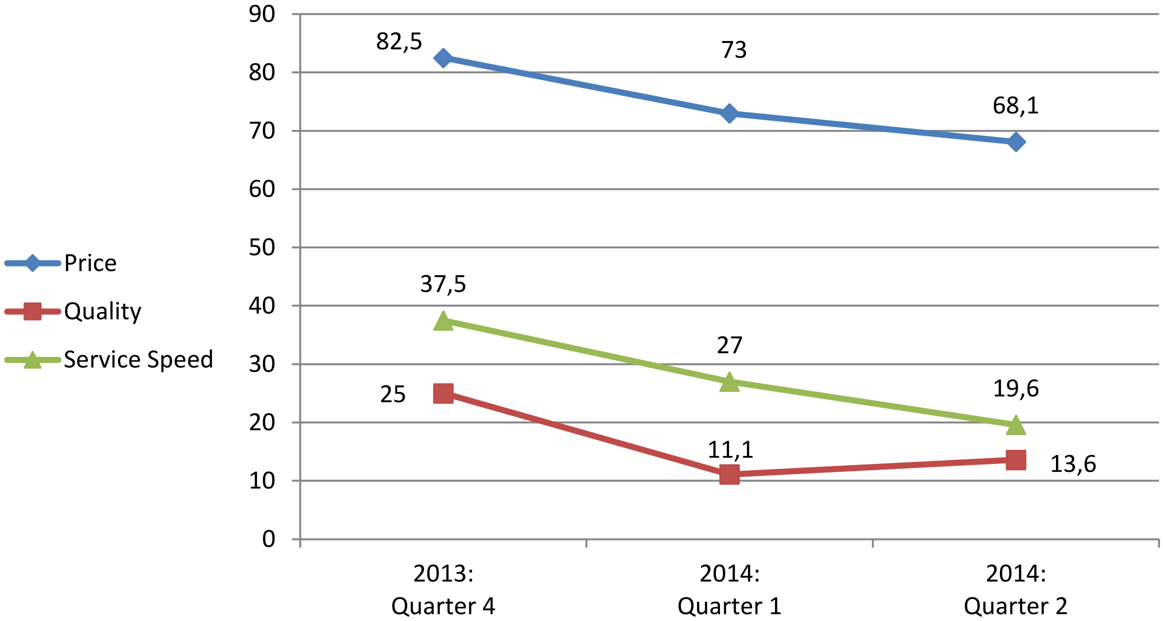



When compared with 2014’s first quarter results, the level of price competition and service speed competition which is defined as “high” has been decreased however the level of “service quality” competition which is defined as “middle” has been significantly increased (See Table 4).

**Table 4:** Competition Levels in Logistics Industry: Comparative Table

| Evaluation | Price Competition (%) | | | Quality Competition (%) | | | Service Speed Competition (%) | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2013: 4. Quarter | 2014: 1. Quarter | 2014: 2. Quarter | 2013: 4. Quarter | 2014: 1. Quarter | 2014: 2. Quarter | 2013: 4. Quarter | 2014: 1. Quarter | 2014: 2. Quarter |
| High | 82,5 | 73,0 | 68,1 | 25,0 | 11,1 | 13,6 | 37,5 | 27,0 | 19,6 |
| Middle | 10,0 | 12,7 | 19,6 | 47,5 | 49,2 | 63,6 | 57,5 | 57,1 | 71,2 |
| Low | 7,5 | 14,3 | 12,1 | 27,5 | 31,7 | 22,7 | 5,0 | 15,9 | 9,0 |

**Figure 7:**
Competition Levels in Logistics Industry (%)*






* *"high" responses were evaluated.*

### 3.1.5. Overview of Public and Government to Logistics Industry

17,4% of managers surveyed in the research implies that only small proportion of government knows the logistics industry “accurately”. 74,6% of high proportion knows the industry missing. On the other hand, 7,6% of managers surveyed in the research implies that only small proportion of public knows the logistics industry “accurately” however 70,7% of high proportion knows the industry (See Figure 8).

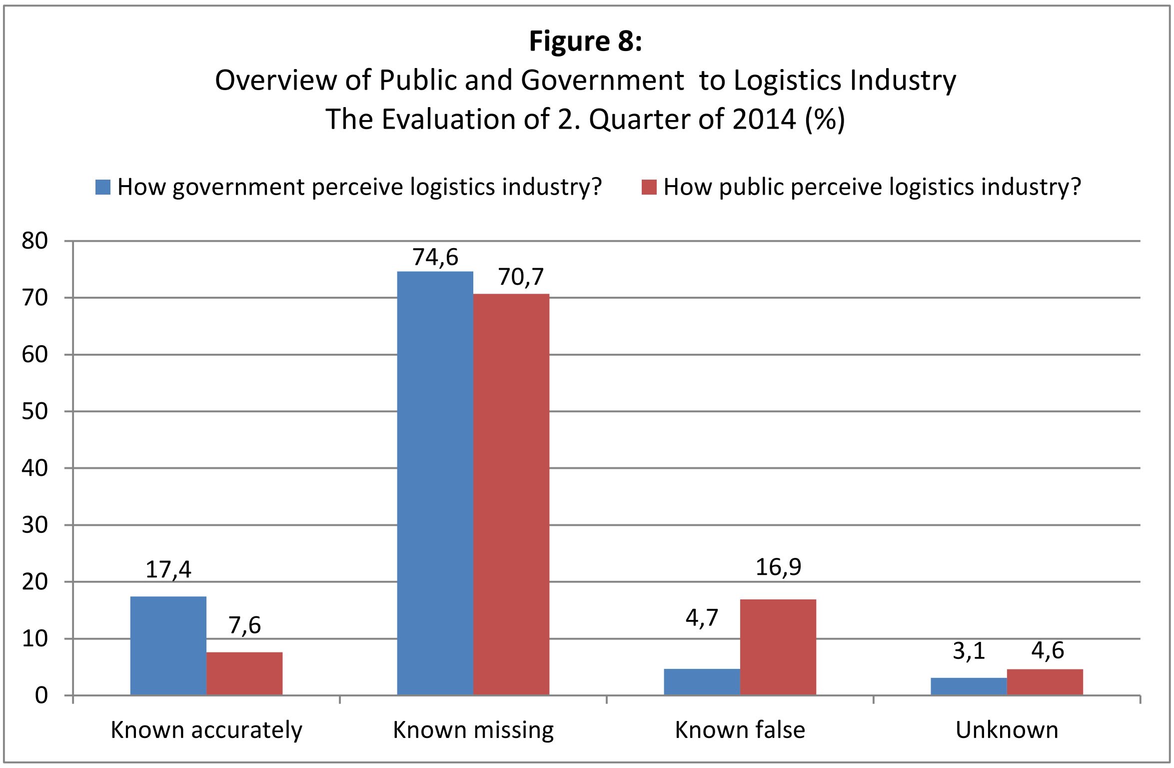
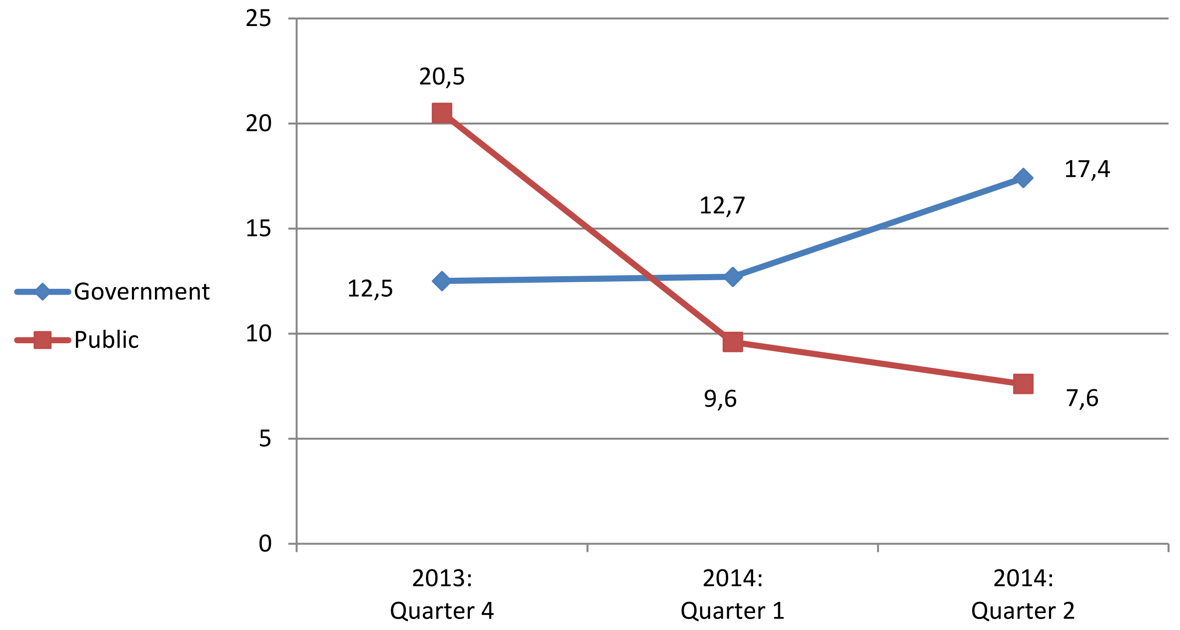


**Table 5:** Overview of the Public and Government to Logistics Industry: Comparative Table

| **Evaluation** | **How government perceives logistics industry? (%)** | | | **How public perceives logistics industry? (%)** | | |
|---|---|---|---|---|---|---|
| | **2013: Quarter 4** | **2014: Quarter 1** | **2014: Quarter 2** | **2013: Quarter 4** | **2014: Quarter 1** | **2014: Quarter 2** |
| Known accurately | 12,5 | 12,7 | 17,4 | 20,5 | 9,6 | 7,6 |
| Known missing | 70,0 | 79,4 | 74,6 | 59,0 | 60,3 | 70,7 |
| Known false | 17,5 | 6,3 | 4,7 | 17,9 | 23,8 | 16,9 |
| Unknown | 0 | 1,6 | 3,3 | 2,6 | 6,3 | 4,6 |

**Figure 9:**
Overview of the Public and Government to Logistics Industry (%)*

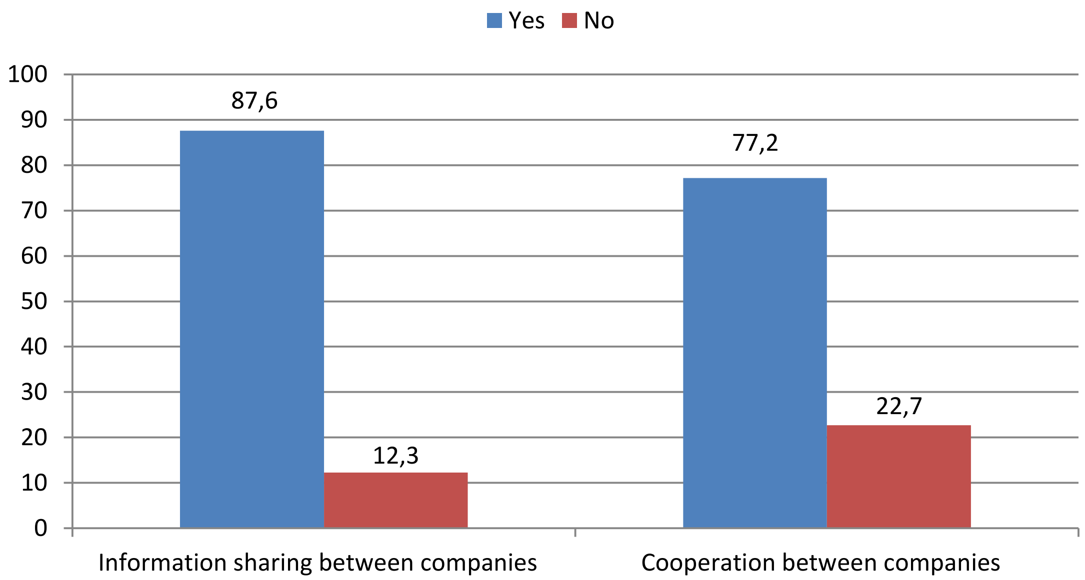



** "Known accurately" responses were evaluated.*

### 3.1.6. Cooperation Level in Logistics Industry

The 87,6% of the managers who participated in the research mentioned that there is a high level of information sharing in logistics industry. Also, 77,2% of the participants points out a high level cooperation between companies in the industry (See Figure 10).

**Figure 10:**
Cooperatipn Level in Logistics Industry
The Evaluation of 2. Quarter of 2014 (%)

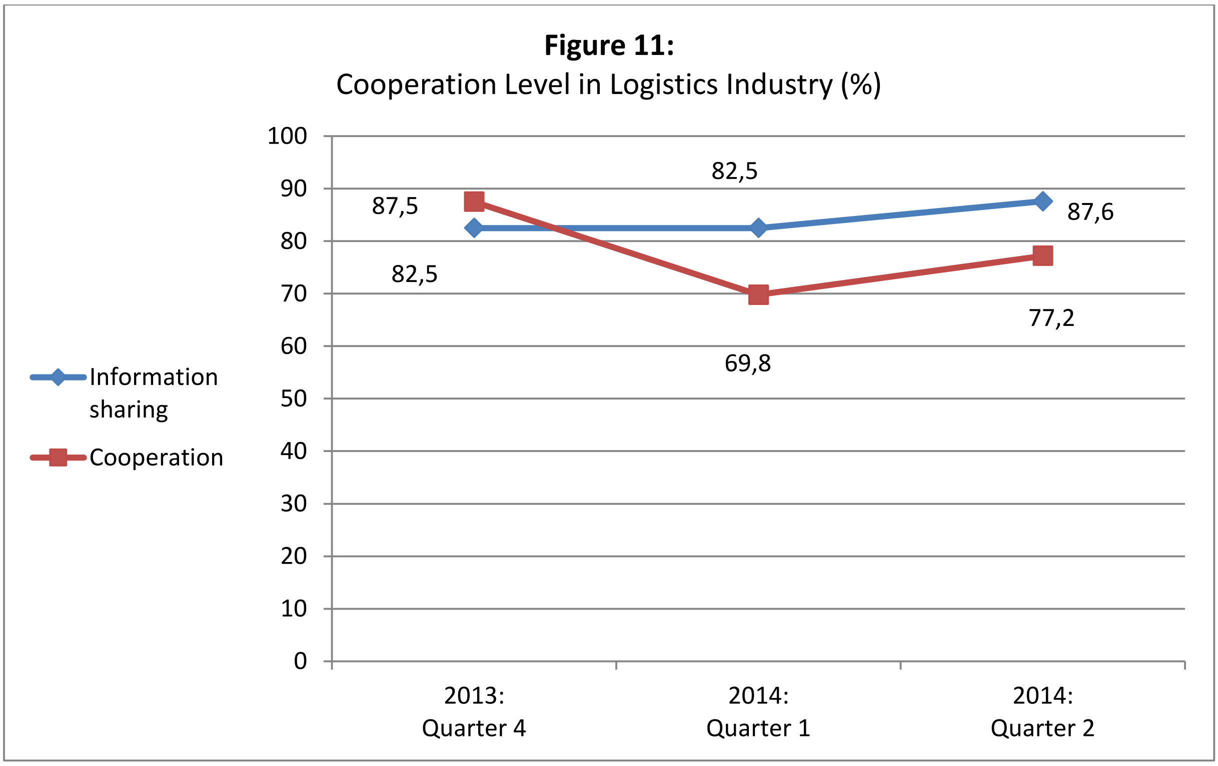





When the results are compared with the first quarter of year 2014, a significant increase can be observed both in information sharing and cooperation levels (See Table 6).

**Table 6:** Cooperation Level in Logistics Industry: Comparative Table

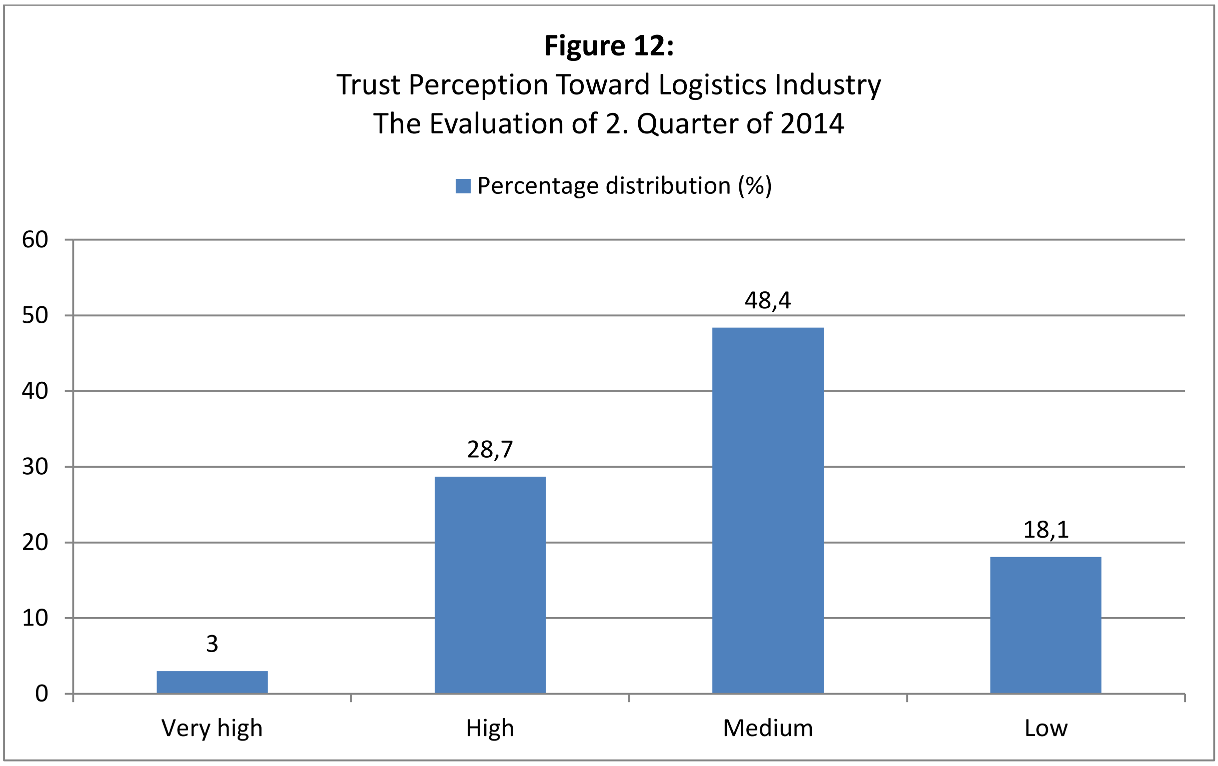
| Evaluation | Information sharing between Companies (%) | | | Cooperation between companies (%) | | |
|---|---|---|---|---|---|---|
| | 2013: Quarter 4 | 2014: Quarter 1 | 2014: Quarter 2 | 2013: Quarter 4 | 2014: Quarter 1 | 2014: Quarter 2 |
| Yes | 82,5 | 82,5 | 87,6 | 87,5 | 69,8 | 77,2 |
| No | 17,5 | 17,5 | 12,3 | 12,5 | 30,2 | 22,7 |






### 3.1.7. Trust Perception Toward Logistics Industry

The 48,4% of the logistics managers who participated to the research mentioned that trust perception toward logistics industry by logistics service users is at medium level. 28,7% of the participants point out the trust level as "high" (See Figure 12).



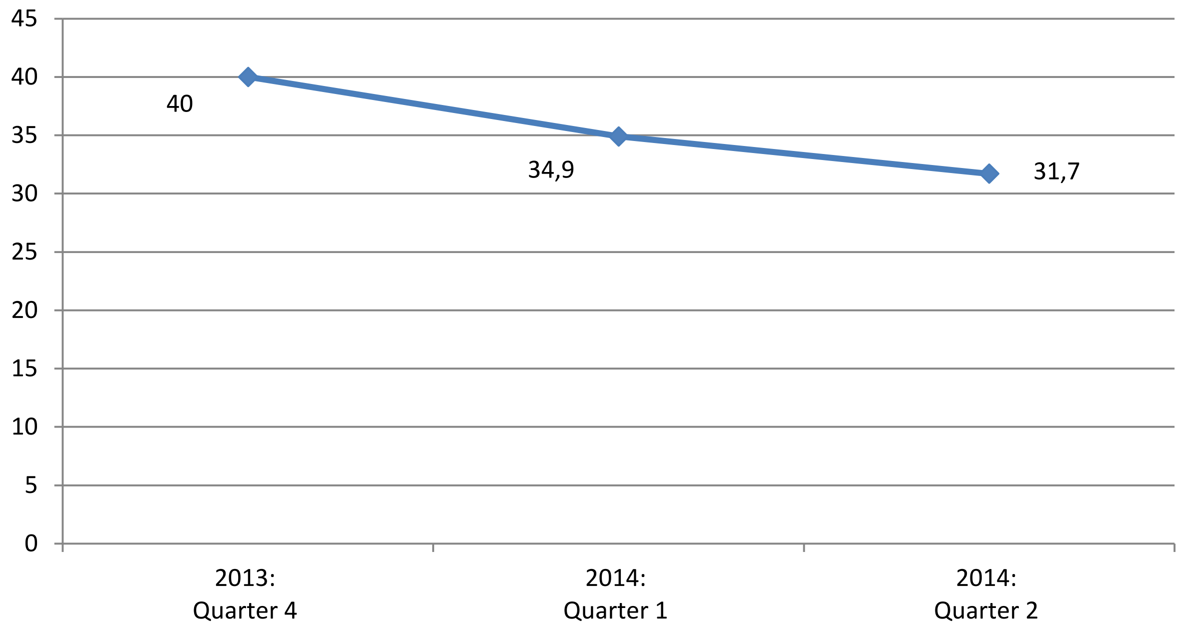

When the results are compared with the first quarter of year 2014, a decrease is observed in the trust perception toward logistics industry (See Table 7).



**Table 7:** Trust Perception Toward Logistics Industry: Comparative Table

| Level | 2013: Quarter 4 (%) | 2014: Quarter 1 (%) | 2014: Quarter 2 (%) |
|---|---|---|---|
| Very high | 2,5 | 1,6 | 3,0 |
| High | 37,5 | 33,3 | 28,7 |
| Medium | 55,0 | 47,6 | 48,4 |
| Low | 5,0 | 17,5 | 18,9 |

**Figure 13:**
Trust Perception Toward Logistics Industry*

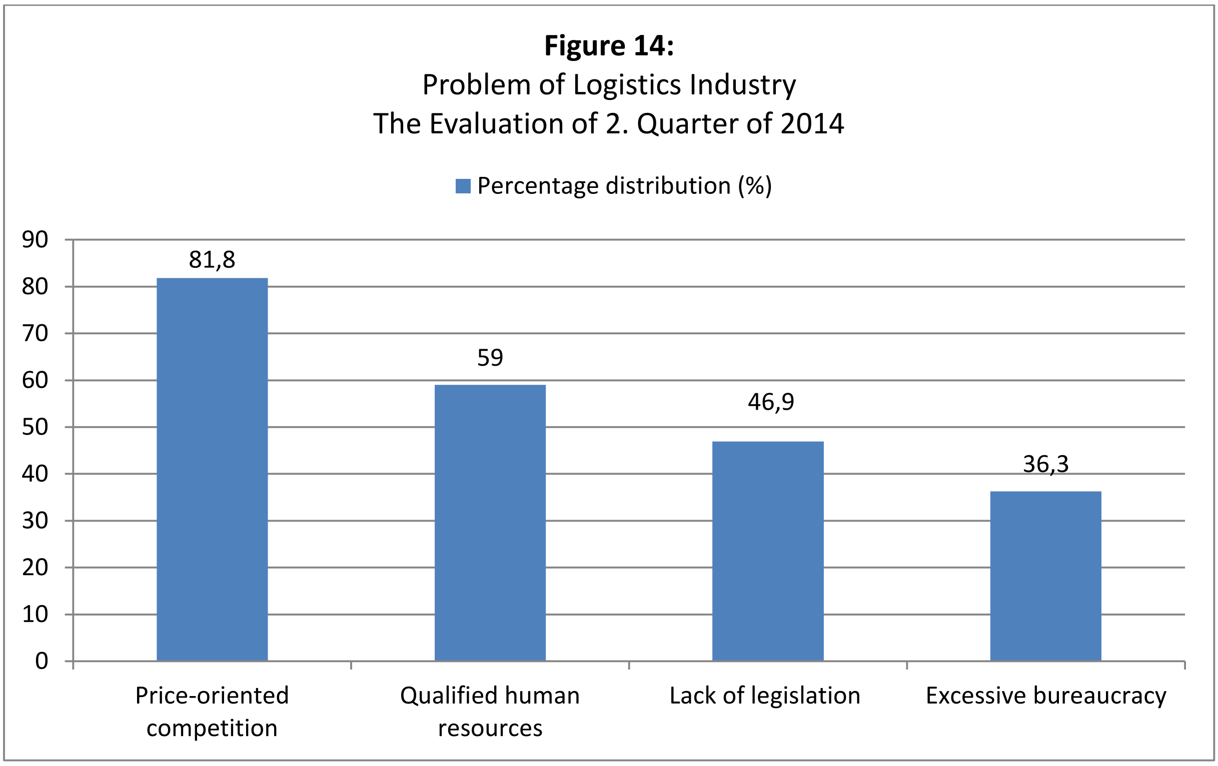



* The sum of responses of “very high” and “high” were evaluated.



### 3.1.8. Problems of Logistics Industry

Participants point out that price-oriented competition is one of the most important problems of logistics industry with a rate of 81,8%. In addition, qualified human resources are also found as an important problem for logistics industry with a rate of 59%. (See Figure 14).




When the results are compared to first quarter of year 2014, the problem of price-oriented competition has experienced a significant increase from 58,7% to 81,8%. The problem of qualified human resources has increased from 49,2% to 59% while excessive bureaucracy has increased from 20,6% to 36,3% (See Table 8).



**Table 8:** Problems of Logistics Industry: Comparative Table

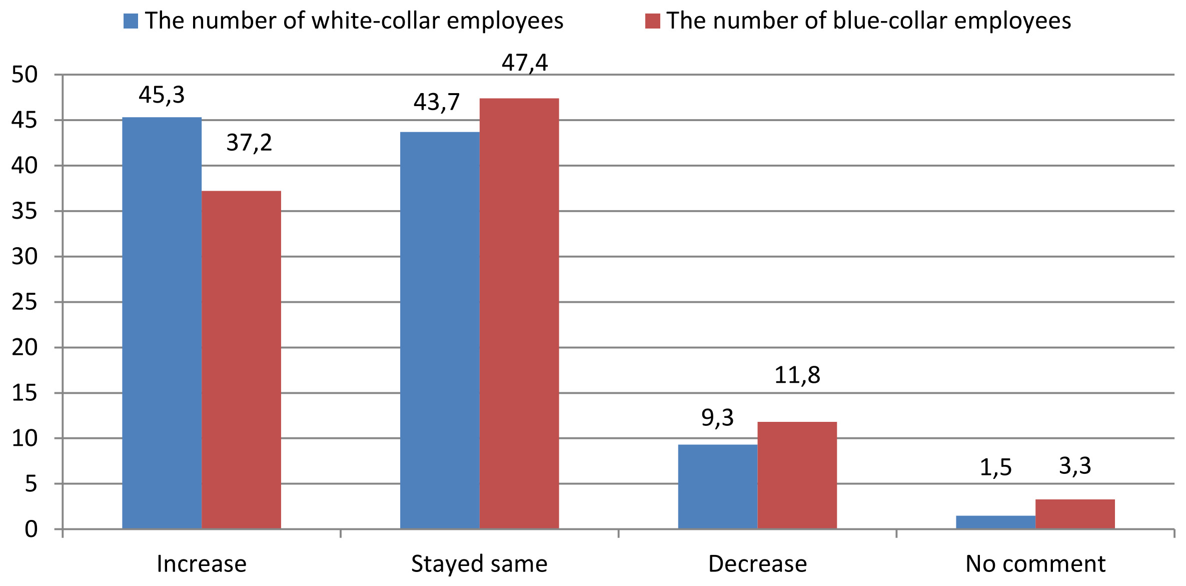
| Evaluation | 2013: Quarter 4 (%) | 2014: Quarter 1 (%) | 2014: Quarter 2 (%) |
|---|---|---|---|
| Price-oriented competition | 45,0 | 58,7 | 81,8 |
| Qualified human resources | 9,0 | 49,2 | 59,0 |
| Lack of legislation | 35,0 | 58,7 | 46,9 |
| Excessive bureaucracy | 10,0 | 20,6 | 36,3 |

** Since more than one choice is marked, the total exceeds 100%.*

### 3.1.9. Number of Employees in Logistics Industry

The 45,3% of the managers that participated to the research mentioned that the number of white-collar employees in their firms has increased in last three months (April-May-June) comparing to the same period of last year. The 47,4% of the participants said the number of blue-collar employees stayed the same, and no new employee was employed (See Figure 15).

**Figure 15:**
Number of Employees in Logistics Industry
The Evaluation of 2. Quarter of 2014




**Since this question is asked as an open-ended question in the previous survey, a comparison has not been made.*

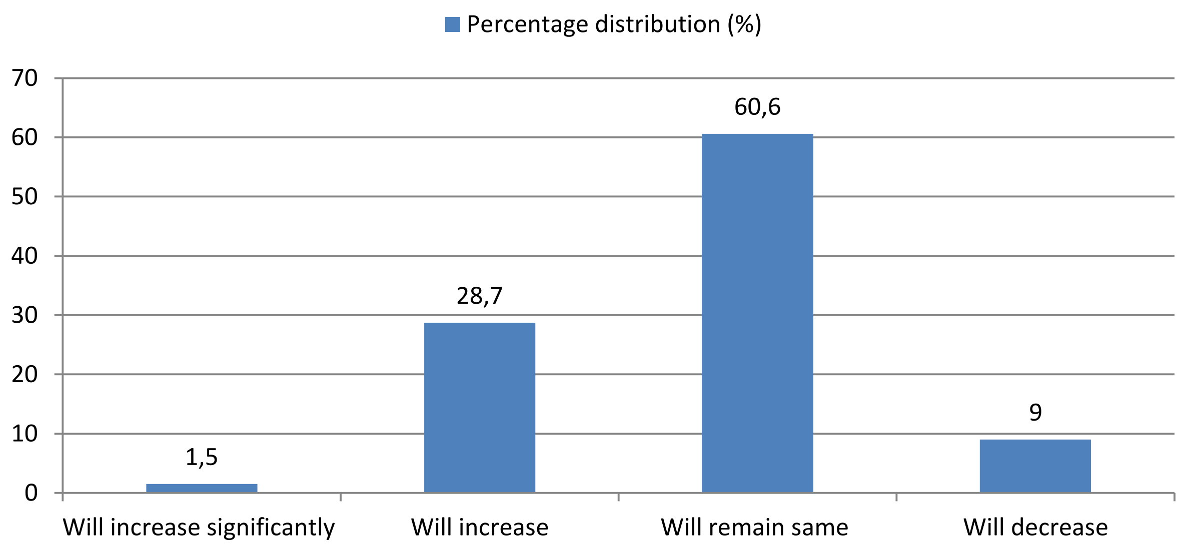
## 3.2. EXPECTATIONS (JULY-SEPTEMBER, 2014)

In this part, the expectations for July-August-September 2014 are asked to the managers of logistics industry. Evaluations are given below.

### 3.2.1. Expectation of Foreign Capital Investment in Logistics Industry

The 1,5% of the managers that participated to the research think that the foreign capital investments will increase significantly, while 28,7% of them mentioned that there will be an increase. 9% of the managers said foreign capital investments will decrease (See Figure 16).

**Figure 16:**
Expectation For Foreign Capital Investment
The Evaluation of 2nd Quarter of 2014



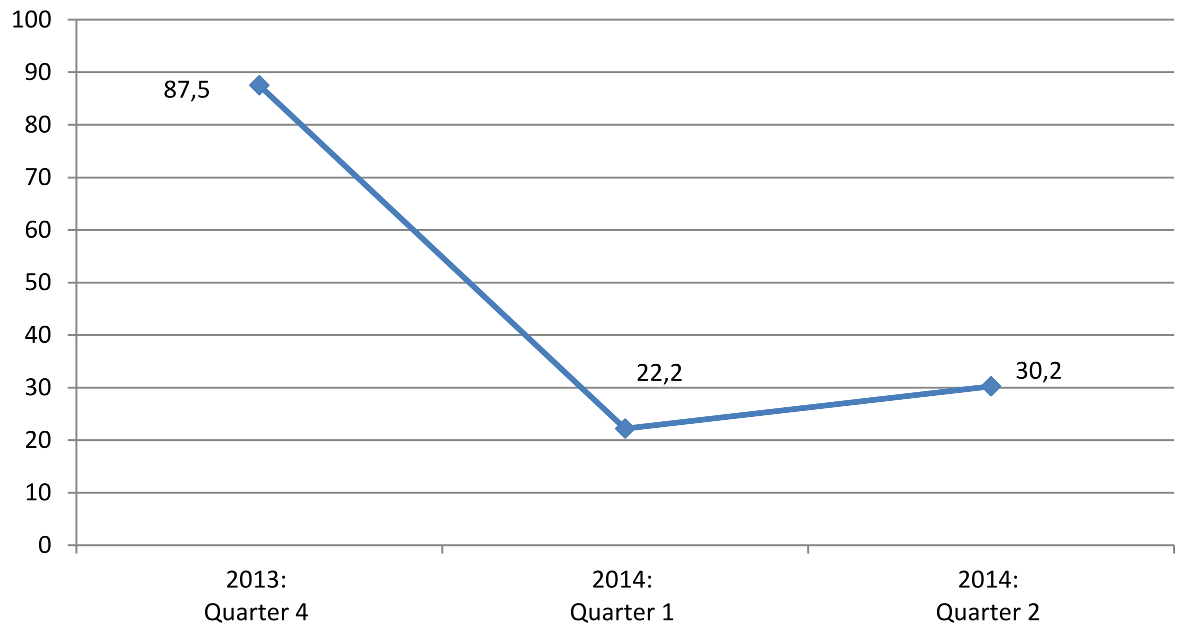



When it is compared to the first quarter of the year 2014, an increase can be observed in the expectation of foreign capital investment in the logistics industry (See Table 9). However, compared to the fourth quarter of the year 2014, this increase is not much.

**Table 9:** Expectation For Foreign Capital Investment: Comparative Table

| Evaluation | 2013: Quarter 4 (%) | 2014: Quarter 1 (%) | 2014: Quarter 2 (%) |
|---|---|---|---|
| Will increase significantly | 22,5 | 3,2 | 1,5 |
| Will increase | 65,0 | 19,0 | 28,7 |
| Will remain same | 7,5 | 61,9 | 60,6 |
| Will decrease | 5,0 | 15,9 | 9,2 |

**Figure 17:**
Expectation For Foreign Cpital Investment (%) *

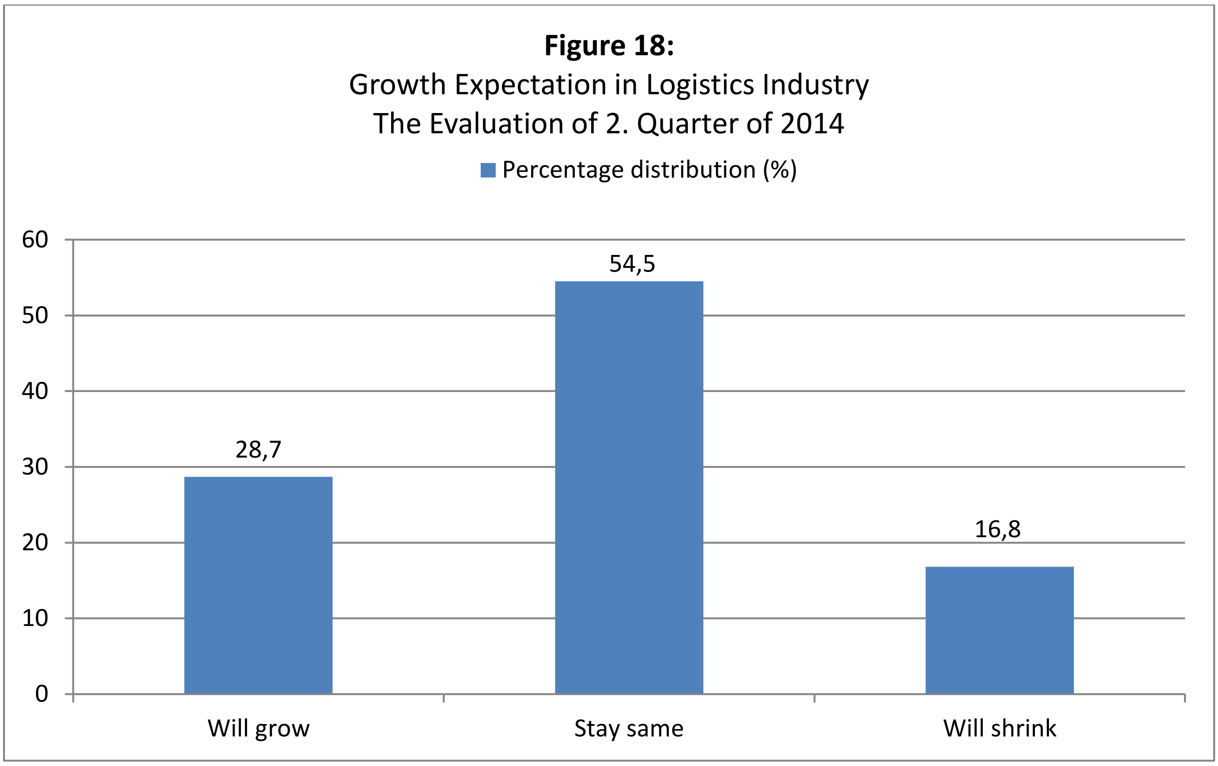





* The sum of responses of “increase significantly” and “will increase” were evaluated.

### 3.2.2. Growth Expectation in Logistics Industry

The 16,6% of the managers that participated in the research express their opinions toward the growth expectation of the industry in three months, and they mention that logistics industry will shrink. On the other hand, 54,5% of the participants mention that the industry will remain same, and the rest expresses their opinions as the industry will grow. (See Figure 18).



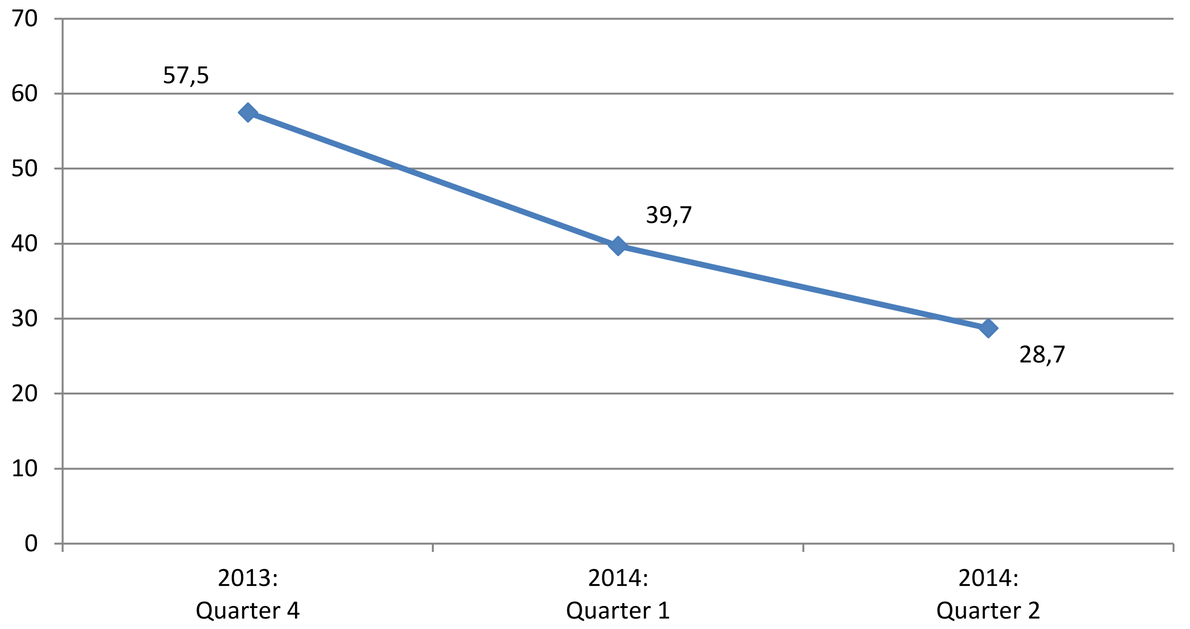

When these results are compared with the first quarter of the year 2014, a decrease is observed in growth expectation of the logistics industry (See Table 10). The rate of those who expressed their opinions toward a increase in logistics industry decreased from 39,7% to 28,7%. This continuous decrease since fourth quarter of year 2013 should be followed up seriously.



**Table 10:** Growth Expectation in Logistics Industry: Comparative Table

| Evaluation | 2013: Quarter 4 (%) | 2014: Quarter 1 (%) | 2014: Quarter 2 (%) |
|---|---|---|---|
| Will grow | 57,5 | 39,7 | 28,7 |
| Stay same | 35,0 | 44,4 | 54,5 |
| Will shrink | 2,5 | 12,7 | 16,8 |

**Figure 19:**
Growth Expectation in Logistics Industry (%)

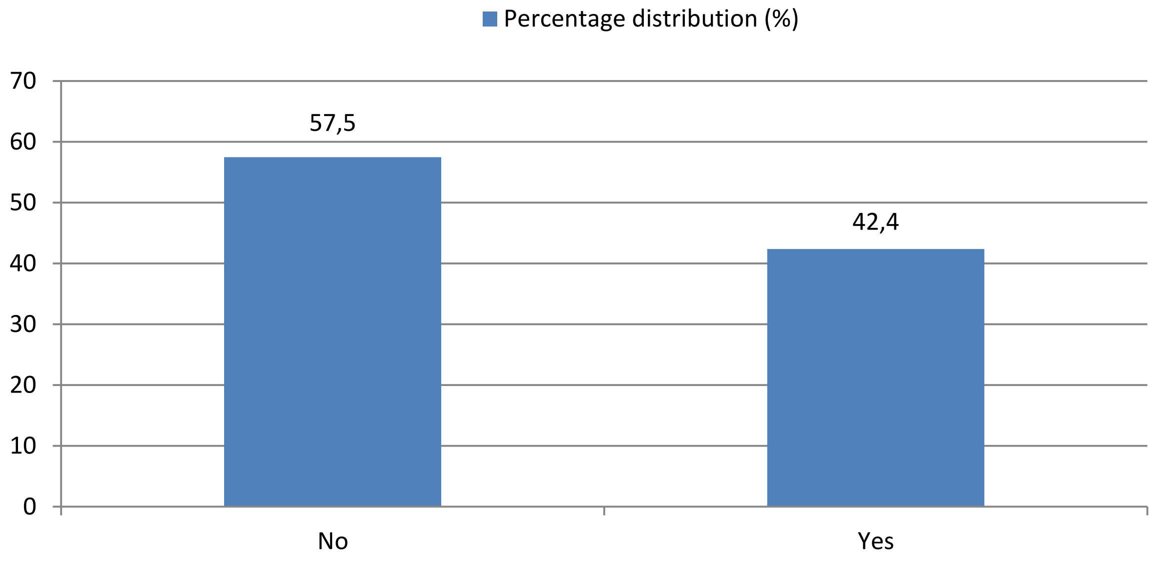



### 3.2.3. Investment Planning In Logistics Industry



Logistics managers are asked whether they plan to invest in the logistics industry in the next three months, and 57,5% of them replied as “no”. (See Figure 20).

**Figure 20:**
Investment Planning in The Logistics Industry
The Evaluation of 2. Quarter of 2014

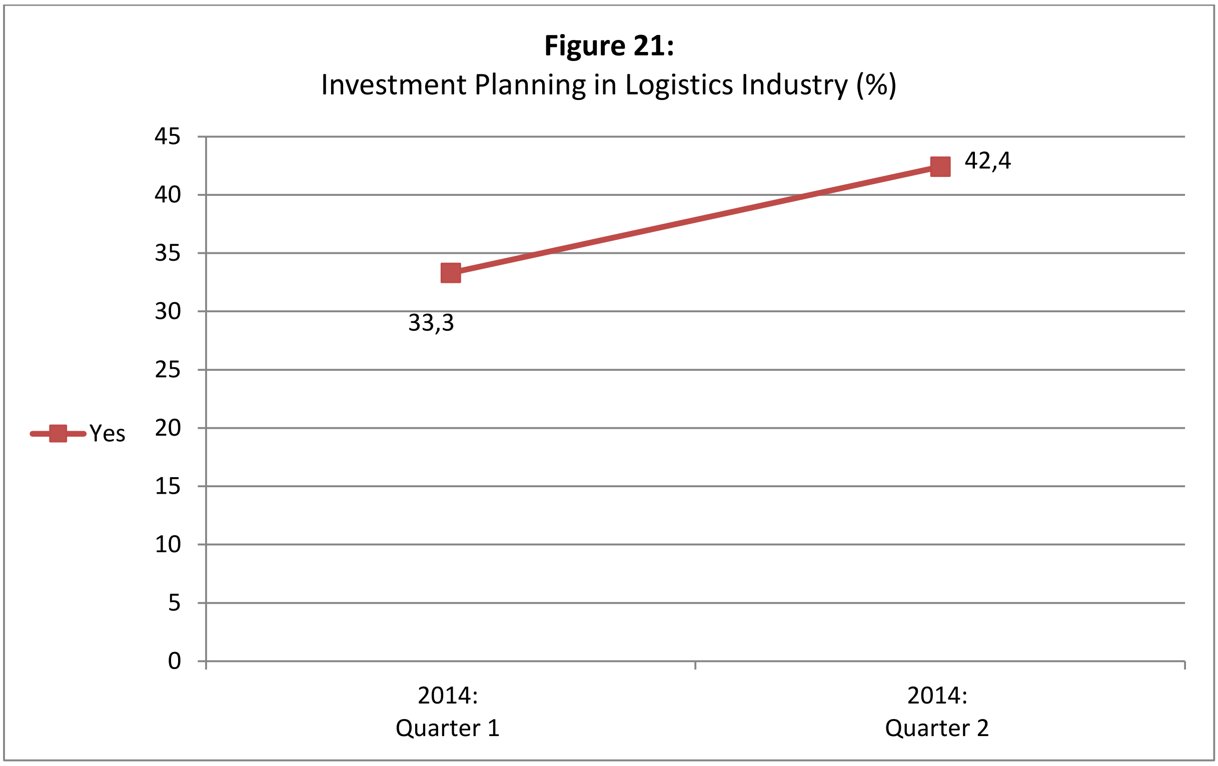





When these results are compared with the first quarter and second quarter of year 2014, an increase is observed in the rate of planning investment from 33,3% to 42,4% in logistics industry. The rate of participants who do not plan an investment is decreased from 66,7% to 57,5% (See Table 11).

**Table 11:** Investment Planning In Logistics Industry: Comparative Table

| Evaluation | 2014: Quarter 1 (%) | 2014: Quarter 2 (%) |
|---|---|---|
| No | 66,7 | 57,6 |
| Yes | 33,3 | 42,4 |






### 3.2.4. Expectations of Logistics Industry from Government

The priority results show that the expectations of logistics industry from the government in the first order is about regulation in the legislation with the rate of 65,5%. In the second order the expectation is about governance and standardization with the rate of 62%, and in the third order logistics industry expects a solution to the infrastructre problems with the rate of 41,3% (See Figure 22).

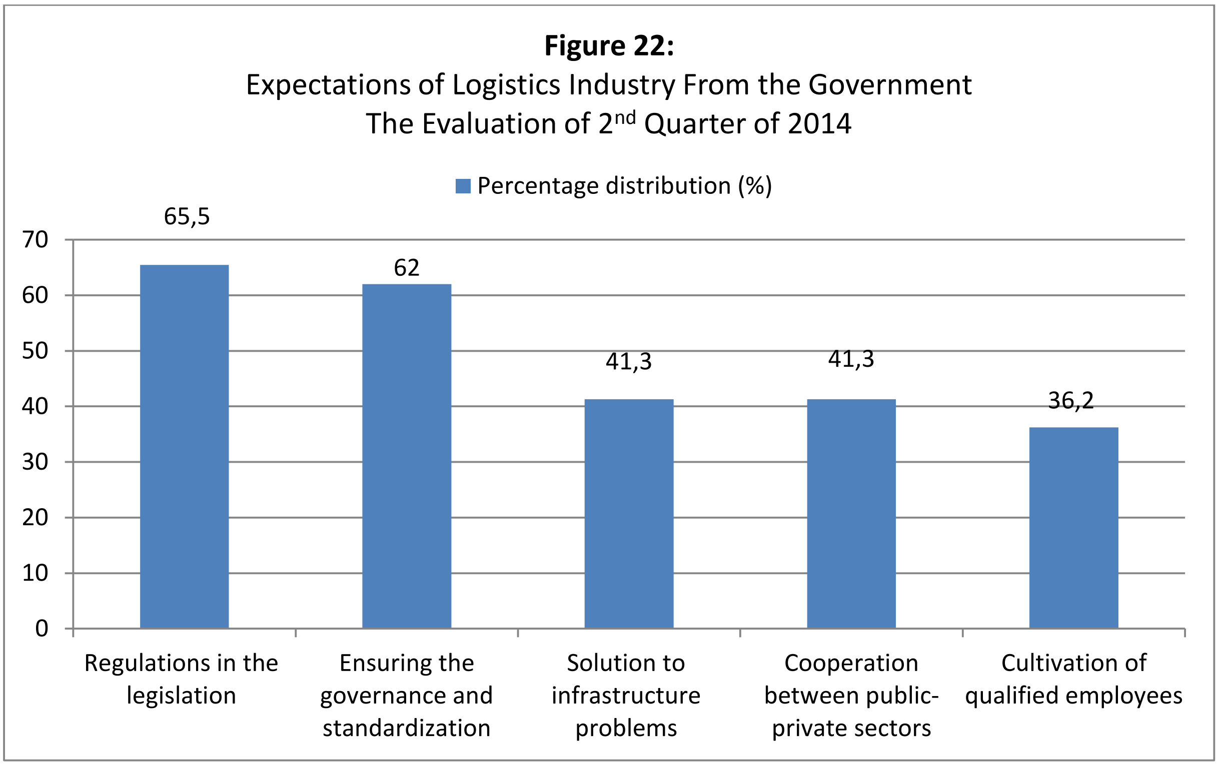





**Table 12:** Expectations of Logistics Industry from the Government: Comparative Table

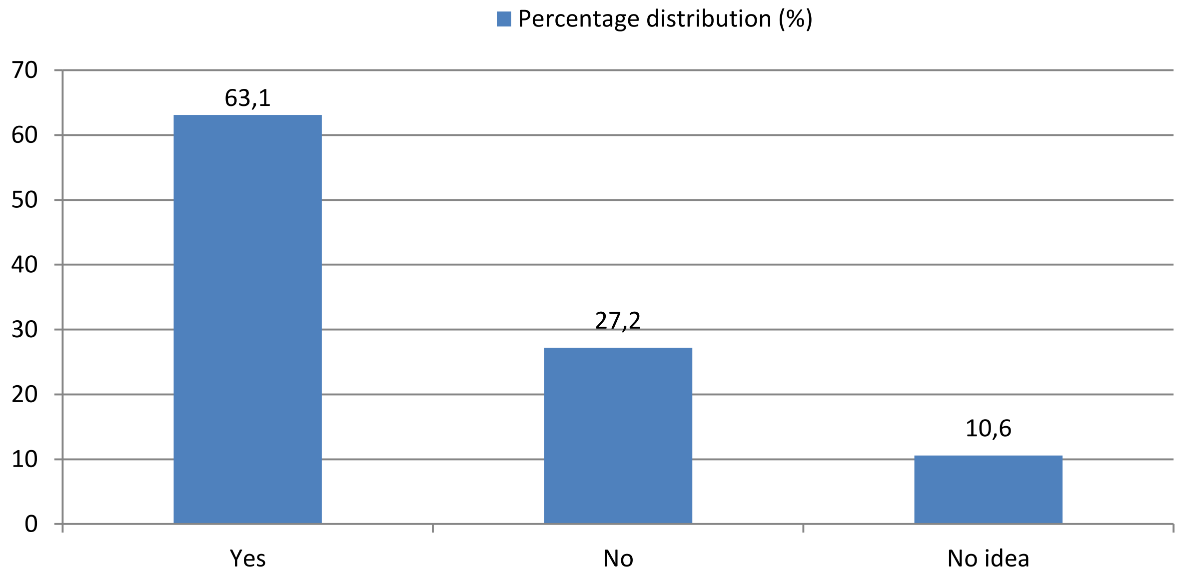
| Evaluation | 2013: Quarter 4 (%) | 2014: Quarter 1 (%) | 2014: Quarter 2 (%) |
|---|---|---|---|
| Regulations in the legislation | 60,0 | 76,2 | 65,5 |
| Ensuring the governance and standardization | 27,5 | 61,9 | 62,0 |
| Solution to infrastructure problems | 32,5 | 52,4 | 41,3 |
| Cooperation between public-private sectors | 25,0 | 39,7 | 41,3 |
| Cultivation of qualified employees | 7,5 | 49,2 | 36,2 |

** Since more than one choice is marked, the total exceeds 100%.*

### 3.2.5. Employment of New Employees in Logistics Industry

The 63,2%  of the managers that participated to the research mentioned that they will employ new employees in next three months (July-August-September). 27,2% of them will not employ new employees (See Figure 23).

**Figure 23:**
Employment of New Employees of The Logistics Industry
The Evaluation of 2. Quarter of 2014






**Since this question is asked as an open-ended question in the previous survey, a comparison has not been made.*

## APPENDIX – 1: THE LIST OF PARTICIPATING ORGANISATIONS TO THE RESEARCH

- A.HARTRODT İSTANBUL LOJİSTİK LTD. ŞTİ.
- ADA DENİZCİLİK
- ADD NAKLİYAT
- AKDOĞAN EĞİTİM VE PROJE YÖNETİM DANIŞMANLIK LTD. ŞTİ.
- ALBATRANS ULUSLARARASI NAKLİYAT
- ALFA FREIGHT
- ALIŞAN ULUSLARARASI TAŞIMACILIK VE TİC. A.Ş.
- ARAS KARGO A.Ş.
- ARC GLOBAL LOJİSTİK A.Ş.
- ARKAS LOJİSTİK
- ATAKO TAŞIMACILIK DENİZCİLİK A.Ş.
- ATİLLA YILDIZTEKİN LOJİSTİK DANIŞMAN
- BALO BÜYÜK ANADOLU LOJİSTİK ORGANİZASYONLAR A.Ş.
- BOLTE LOJİSTİK HİZMETLERİ LTD. STİ.
- BOSMAR TRANS ULUSLARARASI TAŞIMACILIK LOJİSTİK TİC. LTD. ŞTİ.
- CEHA LOJİSTİK
- CEVA LOJİSTİK
- CONMAR DENİZCİLİK
- ÇOBANTUR TURİZM TİCARET VE NAKLİYAT LTD. ŞTİ.
- DACHSER TURKEY
- DAIMON LOJİSTİK
- DFD LOGISTICS
- DİNÇER LOJİSTİK

- DSV HAVA VE DENİZ TAŞIMACILIK A.Ş.
- EKOL LOJİSTİK
- ELMAS GRUP LOJİSTİK
- EROL KARDEŞLER TURİZM SEYAHAT VE NAKLİYAT SAN. LTD. ŞTİ.
- ETİS LOJİSTİK A.Ş.
- FARMALOJİSTİK A.Ş.
- FEDEX EXPRESS
- GENEL TRANSPORT
- GLOBAL ULAŞTIRMA LTD. ŞTİ.
- GNV LOJİSTİK
- GÜNAY GÜMRÜK MÜŞAVİRLİĞİ
- HOROZ LOJİSTİK KARGO HİZMETLERİ VE TİCARET A.Ş.
- İNCİ LOJİSTİK
- KAMP LOJİSTİK TİCARET A.Ş.
- KITA LOJİSTİK
- KONSPED
- KÜHNE+NAGEL NAKLİYAT LTD. ŞTİ.
- LATEK LOJİSTİK TİCARET A.Ş.
- MAERSK DENIZCILIK A.Ş.
- MALL LOJİSTİK
- MARMARİS GEMİ ACENTALIĞI A.Ş.
- MARS LOGISTICS
- MCL ULUSLARARASI KONSOLİDASYON VE LİMAN HİZMETLERİ LTD. ŞTİ.
- MERDEN LOJİSTİK
- NARES ULUSLARARASI TAŞIMACILIK TİC. LTD. ŞTİ.

- NAVİGA LOJİSTİK
- NOVEL ULUSLARARASI TAŞIMACILIK TEKSTİL SANAYİ TİCARET LTD. ŞTİ.
- O2 LOJİSTİK YÖNETİM DANIŞMANLIK
- OGLİ PLATFORM
- OMSAN LOJİSTİK
- ONITAS ULUSLARARASI NAKLİYAT
- ORİGİN LOJİSTİK TAŞIMACILIK TİCARET A.Ş.
- PTS
- REIBEL TAŞIMACILIK VE TİCARET A.Ş.
- SİGMA LOGISTICS & CONTAINER
- SMART LOJİSTİK ULUSLARARASI TAŞIMACILIK LTD. ŞTİ.
- SOLMAZ GÜMRÜK MÜŞAVİRLİĞİ A.Ş.
- SÜRAT LOJİSTİK A.Ş
- TRANS OKYANUS DENİZCİLİK LTD. ŞTİ.
- UFUK NAKLİYAT LTD. ŞTİ.
- UNSPED GÜMRÜK MÜŞAVİRLİĞİ VE LOJİSTİK HİZMETLERİ
- VERA LOJİSTİK HİZMET SANAYİ VE TİCARET A.Ş.
- YUDA YURTİÇİ DAĞITIM VE TAŞIMA