

Turkey Freight And Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

Turkey Freight And Logistics Market Analysis

The Turkey freight and logistics market is expected to grow from USD 65.19 billion in 2025 to USD 67.82 billion in 2026 and is forecast to reach USD 82.6 billion by 2031 at 4.03% CAGR over 2026-2031. Favorable government infrastructure funding, rapid e-commerce growth, and the country's location on the Middle Corridor connecting Europe and Asia underpin this expansion. The Turkey freight and logistics market benefits from rising rail connectivity that reduces reliance on Red Sea routes, while acquisitions by global players accelerate technology transfer and service upgrades. Road freight remains dominant, yet air cargo and rail volumes are growing as manufacturers demand speed and reliability. Currency volatility and driver shortages temper margins, but multimodal operators that combine digital tools with scale continue to capture share.

Turkey Freight And Logistics Market Trends and Insights

Explosive B2C E-commerce Growth

Domestic online retail volumes surged in 2024 and 2025, pushing last-mile operators to expand networks and invest in automated hubs. Domestic CEP services already hold three-quarters of total volumes, while cross-border parcels gain momentum as the government promotes an e-export strategy that simplifies customs clearance. DHL's purchase of MNG Kargo highlights the appeal of scale and local know-how for international integrators. Growing demand for fresh food and pharmaceuticals lifts temperature-controlled movements, and same-day delivery expectations spur urban micro-fulfillment centers.

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Government-Led Multimodal Infrastructure Investments

The 2025 transport budget assigns TRY 329.9 billion (USD 11.15 billion) to roads and TRY 305.2 billion (USD 10.31 billion) to rail, signaling sustained public support for capacity expansion. Mersin Port's USD 455 million Phase I expansion boosts container throughput and reinforces the Middle Corridor. Rail freight volumes doubled between 2003 and 2024, and a USD 660 million World Bank loan backs the Eastern Turkey Middle Corridor Railway project, expanding access to Central Asia. Direct rail links to Azerbaijan launched in 2025 further diversify routing options and reduce transit times.

Lira Volatility and High Fuel-Linked Operating Costs

Depreciation against major currencies raises diesel prices that already represent roughly one-third of road haulage expenses. Academic research shows diesel demand remains inelastic, underscoring fleet dependence despite price spikes. Presidential Decision 85 requiring Lira-based domestic contracts complicates budgeting for operators with multi-currency exposure. Larger carriers hedge fuel costs, but small haulers with limited financial tools face squeezed margins and defer fleet renewal, delaying efficiency gains.

Other drivers and restraints analyzed in the detailed report include:

Turkey's Hub Position on Europe-Asia Trade Corridors
Manufacturing Export Diversification Toward EU and MENA
Complex, Shifting Customs and Cabotage Regulations

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Manufacturing represented 45.15% of Turkey freight and logistics market revenue in 2025, driven by automotive, textile, and machinery clusters. Turkey freight and logistics market size for Wholesale and Retail Trade is set to outpace other sectors at 4.31% CAGR (2026-2031), thanks to omnichannel order fulfillment that requires dense last-mile coverage. Agriculture, Fishing, and Forestry exports intensify cold-chain requirements, whereas Construction logistics benefits from equipment haulage tied to megaprojects like the Development Road.

Export-oriented manufacturers turn to multimodal options that blend rail with road to mitigate currency-linked fuel costs. Retailers adopt distributed fulfillment networks to support next-day delivery, shifting demand toward urban micro-warehouses and reverse logistics. Renewable-energy component imports and data-center hardware relocations broaden the "Other" industry category, pulling specialized carriers into high-margin niches.

Freight Transport generated 63.58% of Turkey freight and logistics market revenue in 2025, reflecting continued reliance on bulk and container movements across multiple modes. Turkey freight and logistics market share for Courier, Express, and Parcel is set to climb on a 4.62% CAGR (2026-2031) trajectory as e-commerce impulses reshape service expectations. Integrated forwarders leverage sea and inland waterway advantages, accounting for 45.50% of forwarding receipts, yet air forwarding grows 4.05% annually to serve high-value exports. Warehousing demand stays firm, with non-temperature facilities supporting mainstream commodities while temperature-controlled space expands at a 3.86% CAGR (2026-2031) to accommodate pharmaceuticals and fresh produce.

Value-added services such as track-and-trace, automated sortation, and predictive maintenance distinguish premium providers. Turkish Cargo's alliances with Avianca Cargo and Hong Kong Air Cargo diversify belly capacity and extend reach for exporters. The

government's overseas logistics distribution network program encourages local firms to co-locate warehouses near target markets, compressing delivery cycles and anchoring client loyalty.

The Turkey Freight and Logistics Market Report is Segmented by Logistics Function (Courier Express, and Parcel (CEP), Freight Forwarding, Freight Transport, Warehousing and Storage, and Other Services), by End User Industry (Agriculture, Fishing, and Forestry, Construction, Manufacturing, Oil and Gas, Mining and Quarrying, Wholesale and Retail Trade, and Others). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

A.P. Moller-Maersk Alisan Group Arikanli Holding (including Yurtici Kargo) Arkas Holding ATA Freight BARSAN Global Logistics (BGL) Bati Innovative Logistics Bayraktar Shipping Borusan Holdings (including Borusan Logistics) Cagri Logistics CMA CGM Group (including CEVA Logistics) DHL Group (including MNG Cargo AS) DSV A/S (Including DB Schenker) Ekol Logistics FedEx Fevzi Gandur Lojistik AS Genel Transport Gokbora Gulf Agency Company (GAC) Havi Logistics Hellmann Worldwide Logistics Horoz Lojistik AS Istanbul Ekspres KARINCA Logistics KITA Logistics Magdenli Transport Manuport Logistics- MPL (including Mira International Logistics And Trade) MARS Logistics Netlog Logistics (including Bleckmann) NYK (Nippon Yusen Kaisha) Line OBB-Holding AG (including Rail Cargo Group) Orkun Group (including Orkun Logistics) Osterreichische Post AG (including Aras Kargo) OYAK PTT Reyasas Logistics Rhenus Group Saglik Logistics SB International Logistics Sertrans Logistics Skynet Worldwide Express Solmaz Gumruk Turkish Airlines, Inc. (Turkish Cargo) Turkon Holding United Parcel Service of America, Inc. (UPS) Yedaiah International Logistic Group Ltd. ZIM Integrated Shipping Services Ltd.

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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