

# LOGISTICS IN TRAKYA REGION APRIL 2011





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**TRAKYA REGION**  
APRIL 2011





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A close-up photograph of a human hand held palm-up, with a vibrant, multi-colored flame (red, yellow, green, blue) rising from the center. The background is dark, making the hand and flame stand out. The flame has a wispy, ethereal quality.

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## 1. TRAKYA REGION

Trakya (Thrace) region is located in Northwest of Turkey and consists of three provinces, Tekirdağ, Edirne and Kırklareli. The region has coastlines with three seas, Black Sea, Marmara Sea and Aegean Sea. Total area of the region is 18.665 square meters and has a total population of 1.521.328 people.

Figure 1: Location of Trakya Region In Turke



Source: SPO (State Planning Organization)

The Trakya Region covers most of the Turkish Lands in the Continental Europe which makes the region the gate opening to Europe for Turkey. This characteristic grants the region an appropriate base to develop socioeconomic relations and interactions with the EU. Possessing the entire highway network between Turkey and Europe and the powerlines in the region with a rapid development in the recent times, gives a strategic

importance to Trakya. For domestic and foreign investors, the region provides opportunities in logistics industry with its geographical location, powerful energy, transportation, communication and logistic infrastructure and closeness to a global trade center and metropolitan area Istanbul.

In a globalizing world, speed in transactions has become preeminent, logistic activities become more important while the economies are getting more and more integrated everyday. Intermodal transport systems combining different transport modes play an important role for logistics recently.

Trakya region has the necessary qualities to become a developed logistics base with its existing transportation network: airport, highways, railway and ports. The geographical location gives privileges to the region in terms of qualities required to be a logistics base. The region takes advantages of these attributes such as closeness to Istanbul and being a bridge between the Continental Europe and Asia Continent. Furthermore, the fact of the large share of Turkey's foreign trade belongs to the European Countries strengths geo-economical position of the region. Another characteristic to be able to be a logistics base is to have a strong transport infrastructure and the compatibility of this infrastructure to intermodal transportation systems which are already gathered in the region.



According to the data of Undersecretariat of Foreign Trade, Turkey's total export in 2009 is USD 102.129 million. 46% of the Turkey's total export is to the 27 member countries of the EU and 11% to the other European countries. The import statistics exhibits the similar figures with the exports. 40% of the total import of Turkey is made from the 27 member countries of the EU and 19% from other the European countries. Because of Europe's large share in Turkey's foreign trade, the Trakya region's geo-economic position becomes crucial.

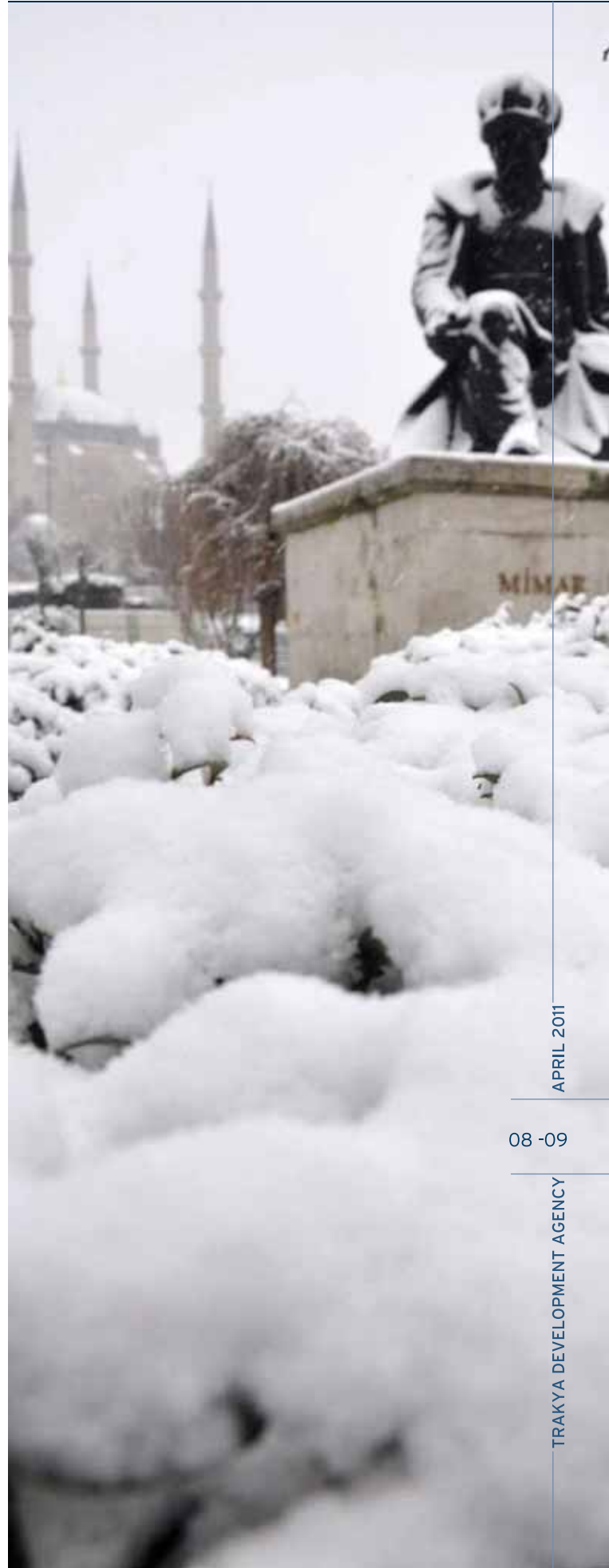
Sea and road transports are the ones more preferred relative to other modes of transportation in foreign trade. According to the data of Undersecretariat of

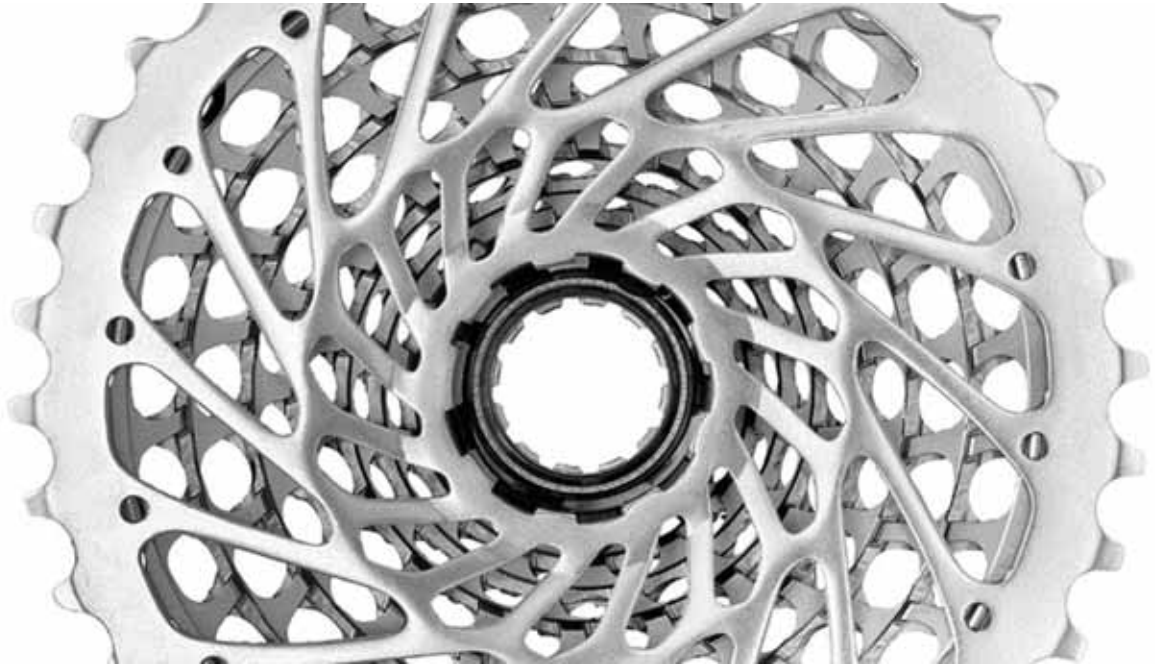
Figure 2: Location of Trakya in Marmara Region



Source: SPO (State Planning Organization)

Foreign Trade, 46% of Turkey's total export in 2009 has been transferred by sea transport and 42% by highways. Import figures demonstrates that sea transport has a larger share with 59% while road transport has 24%. Up to today, road transport has been the main way for Turkey's domestic cargo and passenger transportation. Total share of road transport in domestic cargo and passenger transportation is over 90 % currently. Trakya region with its powerful highway and railway networks, ports and an airport has a strong transportation infrastructure and high accessibility.





## 2. INDUSTRIAL STRUCTURE

Trakya region occupies a key position in Turkey's economy with 1.809 Industrial Establishments, 6 Organized Industrial Zones, European Free Zone, a technopark and leading foreign-owned companies such as BSH (Bosch und Siemens Hausgeraete), Danone, Unilever, Coca Cola, Bunge, Zentiva (sanofi-aventis group), Foxconn (HP).

Turkey is called among a few leading countries with its established capacity in textile industry. Textile and leather industries are considered as traditional and pioneering industrial activities in Turkey. Trakya region has a considerable share in Turkey's textile industry

Table 1: Sectoral Distribution of Registered Enterprises (2010)

Sectors	Tekirdağ	Edirne	Kirklareli	TRAKYA
Textile, Wearing Apparel and Leather Industries	511	23	66	600
Manufacture of Food, Beverages and Tobacco	162	152	93	407
Manufacture of Non-Metallic Mineral Products, except Products of Petroleum and Coal	115	55	37	207
Manufacture of Paper and Paper Products, Printing and Publishing	28	0	2	30
Manufacture of Chemicals and Chemical, Petroleum, Coal, Rubber and Plastic Products	169	0	15	184
Manufacture of Fabricated Metal Products, Machinery and Equipment	157	0	23	180
Manufacture of Wood and Wood Products, Including Furniture	21	0	17	38
Other Manufacturing Industries	114	35	14	163
Total	1.277	265	267	1.809

Source: Provincial Directorates of Industry and Trade

A considerable amount of Turkey's textile establishments are located in Tekirdağ. Total amount of 600 establishments in textile, confection and leather industry operates in the region.

## 2.1. Organized Industrial Zones

The Trakya region has 6 Organized Industrial Zones where 4 of them are located in Tekirdağ, 1 in Edirne and 1 in Kırklareli. 271 establishments operate in the industrial zones. Keşan Organized Industrial Zone and Kırklareli Aslan Private Organized Zone are the other organized industrial zones which are under construction.

Figure 3: Organized Industrial Areas

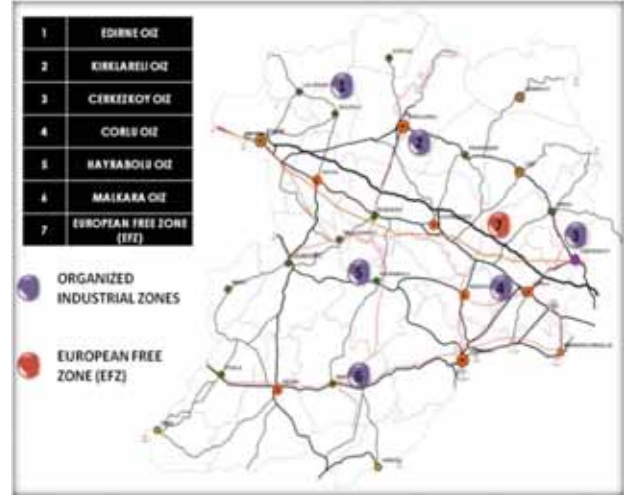


Figure 4: Location of the European Free Zone



## 2.2. European Free Zone

European Free Zone (EFZ), one of Turkey's largest private free zones, is established on a 2.000.000 square meters area in Çorlu-Tekirdağ and operates with 127 establishments. European Free Zone plays an important role in Turkey's foreign trade with its strategic location. It is a modern technocity and an industrial area. Upon reaching trade volume of USD 2 billion in the beginning of 2008, EFZ has settled its importance in Turkish economy.





### 3. TRANSPORTATION INFRASTRUCTURE AND LOGISTICS

Trakya is an easily reachable region with its strategic location and has a strong transportation infrastructure with its existing airport, ports, highway and railway networks. Upon the finalization of other

transportation infrastructures such as Akport's connection to railway network, cargo flow between Asia and Europe will be established with the train ferry system between Tekirdağ and Kocaeli.

Figure 5: Existing Highway Network of Trakya



Source: Ministry of Transport and Communications



Figure 6: Main Transportation Routes



Source: Ministry of Transport and Communications

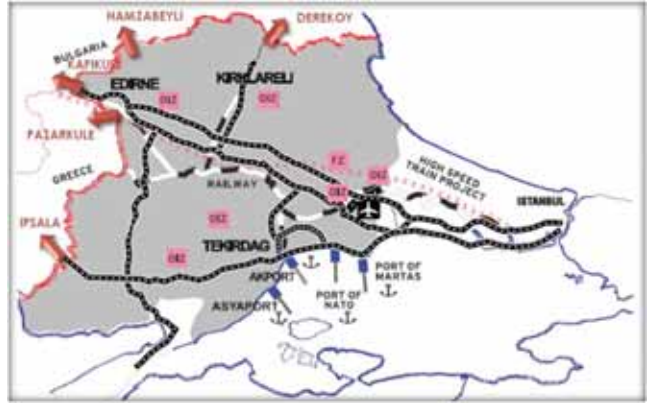
### 3.1. Highways

Existing highway network of Trakya region entails main routes between East-West and North-South and secondary roads connecting the main routes. İstanbul-Edirne motorway has an international importance of forming the main route for the transportation network in the region.

Other important highways connecting East and West are D-100 highway between İstanbul and Kapıkule and D110 highway between Kınalı-Tekirdağ-İpsala.



Figure 7: Border Gates



### 3.2. Border Gates

Trakya region has 5 border gates which provide connections with Greece and Bulgaria. These are as listed below:

1. Dereköy (Bulgaria - Highway)
2. Hamzabeyli (Bulgaria - Highway)
3. İpsala (Greece - Highway)
4. Kapıkule (Bulgaria - Highway and Railway)
5. Pazarkule (Greece - Highway)





Dereköy, Hamzabeyli and Kapıkule border gates open to Bulgaria, İpsala and Pazarkule border gates to Greece.

Besides, railway connections exist with Bulgaria over Kapıkule and with Greece over Uzunköprü.

Table 2: Number of Vehicles Entered and Exited from Border Gates (2009)

Border Gates	Car	Minibus	Small Truck	Bus	Truck	Truck+Trailer Tractor+Semi Trailer	Total
Dereköy (Bulgaria)	29.928	12	365	3.609	0	31	33.945
Hamzabeyli (Bulgaria)	86.390	55	2.086	993	1.560	141.263	232.347
İpsala (Greece)	270.953	35	1.301	13.461	3.922	131.382	421.054
Kapıkule (Bulgaria)	715.617	239	12.314	39.114	6.734	382.169	1.156.187
Pazarkule (Greece)	75.121	0	954	684	0	12	76.771
<b>Total</b>	<b>1.178.009</b>	<b>341</b>	<b>17.020</b>	<b>57.861</b>	<b>12.216</b>	<b>654.857</b>	<b>1.920.304</b>
Share (%)	61,34	0,02	0,89	3,01	0,64	34,1	
<b>Turkey Total</b>	<b>2.269.912</b>	<b>1.951</b>	<b>317.204</b>	<b>172.291</b>	<b>493.617</b>	<b>1.755.355</b>	<b>5.010.330</b>
Trakya/Turkey Total (%)	51,9	17,48	5,37	33,58	2,47	37,31	38,33

Source: General Directorate of Highways, 2009 Highways Traffic and Transportation Data

Total amount of 1.920.304 vehicles enter and exit through 5 border gates in the region annually. This

figure is 38% of Turkey's border traffic.



### 3.3. Railways

Figure 8: Tekirdag-Muratli Railway Project



Source: Ministry of Transport and Communications

The railway network of Trakya region, which's initial point is İstanbul and crosses to Bulgaria through Kapıkule border gate over Edirne and to Greece through Eskiköy border gate, is a part of Turkey's international railway network. This network establishes an alternative transport opportunity to connect European countries.

International passenger transportation are organized in a way with a start from Villach, from Villach to Austria and finally to Edirne with Bosfor and Thessaloniki Optima railway lines where 6 trains with regular tariffs operate on the route. Bosfor Express operates on İstanbul-Bucharest-Istanbul route and on İstanbul-Thessaloniki-Istanbul route.

Istanbul-Sofia, İstanbul-Belgrade, İstanbul-Budapest and İstanbul-Chisinau connections are provided with carriages attached to Bosfor Express.

Domestic passenger transportation between İstanbul and Trakya region are provided with 12 trains on existing routes. Passenger and cargo transportation works on a line of 45 km long that connects İstanbul-Edirne railway line to Tekirdağ Akport.

Cargo transportation through railway shows an uptick figure in the region. In 2000, 192.000 tons cargo transport was carried all around the region by railway, whereas this figure tripled itself reaching nearly 564.000 tons in 2009.



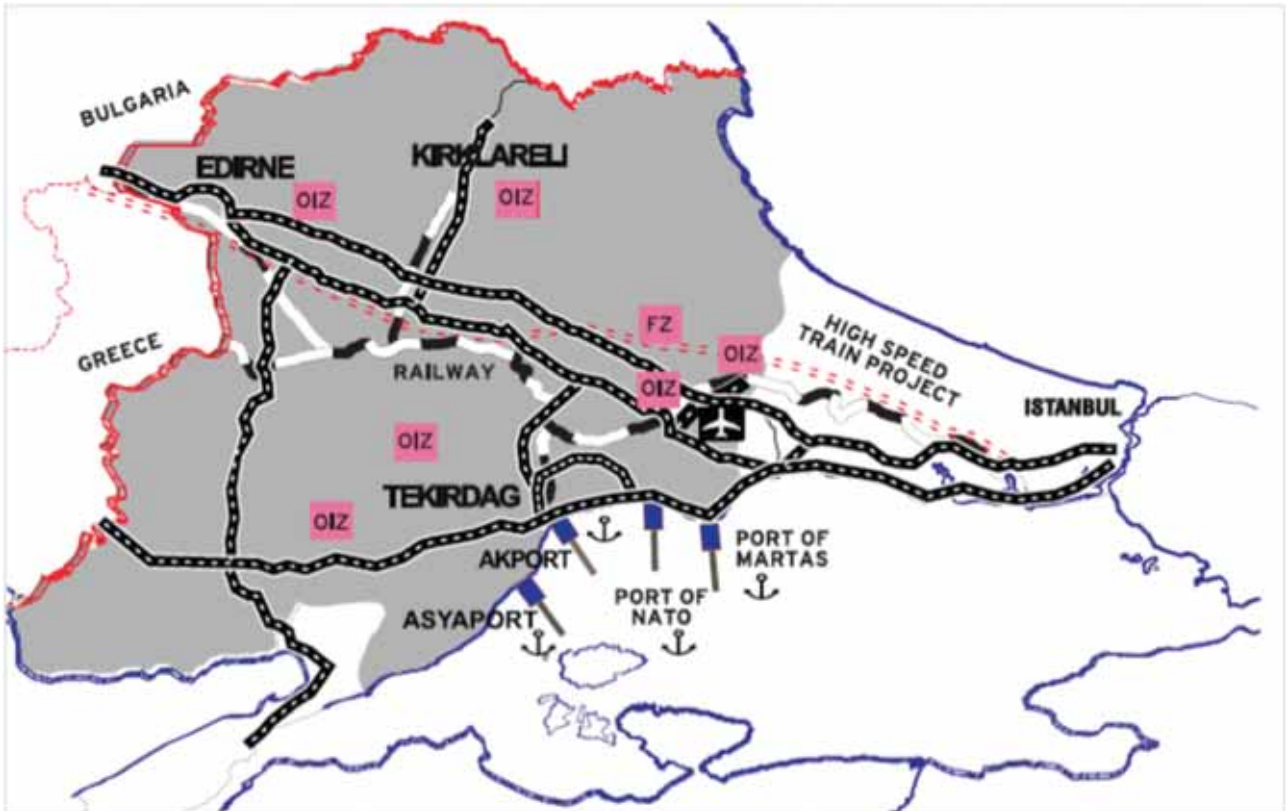


Figure 9: Location of Ports in Trakya Region

### 3.4. Ports

Trakya region has coastlines with the Marmara Sea, the Aegean Sea and the Black Sea. It is the only region in Turkey that has coastlines with three

seas including the Bosphorus connecting the Black Sea and the Aegean Sea in Turkey. Sea transportation is a developing sector in recent





Table 3: Technical Specifications of ports in Trakya

Port Name	Location	Berth Length (m)	Depth (m)
Akport Pier 1	Tekirdağ	346	4.00-7.50
Akport Pier 2	Tekirdağ	686	4.00-9.50
TMO	Tekirdağ	300	11.00-11.00
Martaş	M.Ereğlisi	220	6.00-18.00

Source: Tekirdağ Port Authority

Table 4: Loading and Unloading Capacities of ports in Trakya

Ports	Akport	Martaş
Container (Teu/Year)	250.000	
Bulk Cargo (Ton/Year)	3.000.000	1.500.000
General Cargo (Ton/Year)	3.000.000	2.500.000
Liquid Bulk Cargo (Ton/Year)	1.000.000	500.000
Ro-Ro	40.000	
Storage Capacity (Ton/Year)	1.020.000	100.000 mT/Year

Source: Transportation Master Plan-Coastal Buildings, 2010

The cargo transport is mainly carried by railways using Tekirdağ-Bandırma, Trans-Asia and Trans-Europe lines. Tekirdağ-Muratlı railway line will contribute to cargo transport soon.

Ports of Tekirdağ are under the impact area of future activity scenarios of the ports in Istanbul. In a storyline assuming that Istanbul Haydarpaşa Port is closed and Istanbul Ambarlı Port could not meet the capacity for the growing demand in medium term, the cargo traffic in these ports might be transferred to the ports of Tekirdağ. Tekirdağ and

Marmara Ereğlisi region has a large potential with container, general and bulk cargo transportation and liquid cargo handling capacities. The region was emphasized as development zone for all types of cargo: liquid, container, general and bulk cargo in the "Transportation Master Plan-Coastal Buildings" prepared by Ministry of Transport and Communications. In 2009, 1.185.848 tons of import and 2.477.303 tons of export and total amount of 3.663.151 tons of cargo has been handled in the ports of Trakya region.



Figure 10: General View of Akport

### 3.4.1. Akport

Akport is located in Tekirdağ by the Coast of Marmara Sea. After the finalization of Tekirdağ-Muratlı and Tekirdağ-Kınalı highways, a better Tekirdağ-Istanbul highway transportation has been enabled for the port. Akport is in 53 km away from the TEM Highway, 44 km away from the Tekirdağ-Çorlu Airport, 135 km away from the Istanbul Atatürk Airport and 200 km away from the Istanbul Sabiha Gökçen Airport.

Akport is a model that provides domestic and international Ro-Ro services with its 130.000 square meters of storage area, 2.000 meters long piers, 3.000.000 tons of bulk cargo and 200.000 TEU of container capacity, modern equipments and experienced staff. It is the third biggest port on the Marmara Sea with its 6 million tons of general cargo and bulk cargo capacity, and the seventh with its 1 million tons of liquid cargo handling capacity.

Akport has railway connections to Balkans and Europe

after Tekirdağ-Muratlı railway line began running.



Figure 11: Akport's Connections Overseas



Source: Ministry of Transport and Communications

Regular Ro-Ro services are in service with the lines from Akport to Gemlik, Bandırma, Karabiga and Biga

in Marmara Sea. Besides, there are regular international Ro-Ro services to Trieste-Italy, Toulon-France and Illychevsk-Ukraine. The Ro-Ro services between Bandırma-Gemlik, Gemlik-Tekirdağ and Derince-Tekirdağ shorten the distance between Tekirdağ-Bandırma around 600 kilometers.



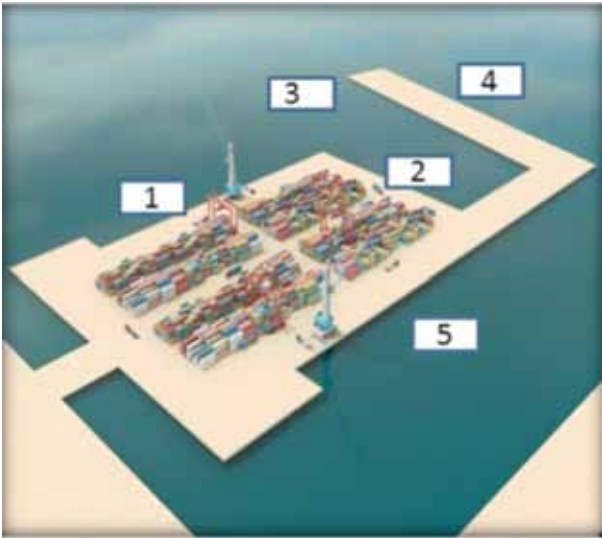
Figure 12: Domestic Ro-Ro Lines of Akport



Developed industrial areas in Istanbul and in Trakya region, particularly Çorlu Industrial Zone, Çerkezköy Industrial zone and European Free Zone in Çorlu has a significant share on import and export volumes of Trakya region. Because Akport is the closest port to

Bulgaria and Greece, which is 150 km distance away from Bulgaria border and 125 km away from Greece, it is going to become an essential port in terms of transit trade with these countries when its capacity is increased.

Figure 13: Berths in Akport



Source: www.akport.com.tr

Table 5: Technical Specifications of Berths in Akport

Berth No	Length	Draught	Berthing Condition	Berthing capacity / Vessel type
1	255 m	8-10,30 m	Protected by container terminal	1 feeder ship / small main line ship up to 1,400 TEU or 1 Ro-Ro ship (according to draught)
2	180 m	11 m	Very well protected against waves and wind	1 feeder ship up to 160 m. long
3	328 m	14 m	Very well protected against waves and wind	2 feeder ships / 2 nd generation container ship
4	356 m	12,5 m	Berth to open sea	2 feeder ships / 2 nd generation container ship*
5	249 m	8-10,30 m	Protected by existing finger pier	2 feeder ships / up to 1.400 TEU long Main Line ship (according to draught)

Source: www.akport.com.tr

### 3.4.2. Martaş Port

Located by the Marmara Sea, Martaş Port is in 35 km distance away from Çorlu Airport and 70 km distance away from İstanbul Atatürk Airport. Main transportation lines and proximity to industrial areas

are among main advantages of the port. Total port area is 100.000 square meters and it has 3.5 million tons of annual loading and unloading capacity.

Table 6: Port Facilities

Berth No	Length	Width	Depth	Notes
1	140m	25m	7-15m	Bulk / General Cargo / Container / Ro-Ro
2	155m	25m	15-25m	Bulk / Mixed Cargo / Container / Liquid
3	150m	25m	18-25m	Bulk / Mixed Cargo / Container /Liquid
4	216m	25m	7-15m	Bulk / General Cargo / Container / Ro-Ro
5	175m	25m	6-7m	Bulk / General Cargo / Container

Source: Ministry of Transport and Communications

Figure 14: Martaş Port



Source: Ministry of Transport and Communications

Martaş Port has 5 berths that have different widths and depths. It is capable of serving ships under

100.000 dwt. Port has two tugboats, and also able to serve NATO military ships.

Table 7: Loading and Unloading Capacity of Akport

<b>Total Port Area</b>	<b>100.000 m<sup>2</sup></b>
<b>Annual Handling Capacity</b>	<b>3.5 million tons annual bulk-mixed cargo handling 20.000 TEU Container</b>
<b>Storage</b>	<b>5.000 m<sup>2</sup> Close Warehouse</b>
<b>Equipment</b>	<b>5 forklifts (7-7-14-15 tons) 4 cranes (15-40-120-180 tons) 9 excavators 2 Container Handling Equipment</b>

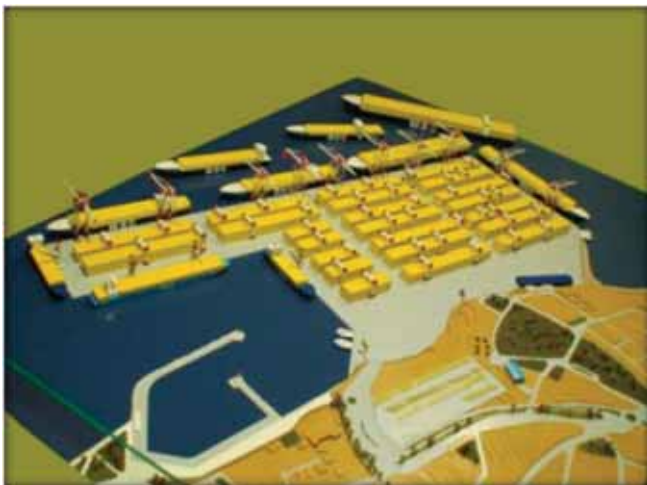
Source: Ministry of Transport and Communications

### 3.4.3. Asyaport

According to its installation planning, Asyaport is being constructed as an international transit port (Main Port - Hub Port) and is planned to be in service in 2012.

The planned annual capacity of Asyaport project is 2.5 million containers. An agreement was signed with MSC (Mediterranean Shipping Company) for the handling of 500.000 TEU annually. Planned as a "Deep Sea Container Terminal", Asyaport will have berths that have a total length of 2010 meters and depth ranging from -10 to -20 meters. Asyaport has 5 million square meters of industrial and warehouse area behind it.

Asyaport container terminal, with its well chosen



Source: [www.asyaport.com](http://www.asyaport.com)

location and cranes that is going to be used, is organized to accommodate large container carrier ships (Super Post Panamax, i.e. 13.000 TEU capacity) which recently appeared at global seas.

In addition to existing motorway connections from Asyaport to industrial zones in Trakya region and Istanbul, and expected connections to Central and East Europe through Tekirdağ-Muratlı railroad link, fast and economical maritime service to Körfez, South Marmara coastline and all Blacksea ports will be possible by feeder vessels.





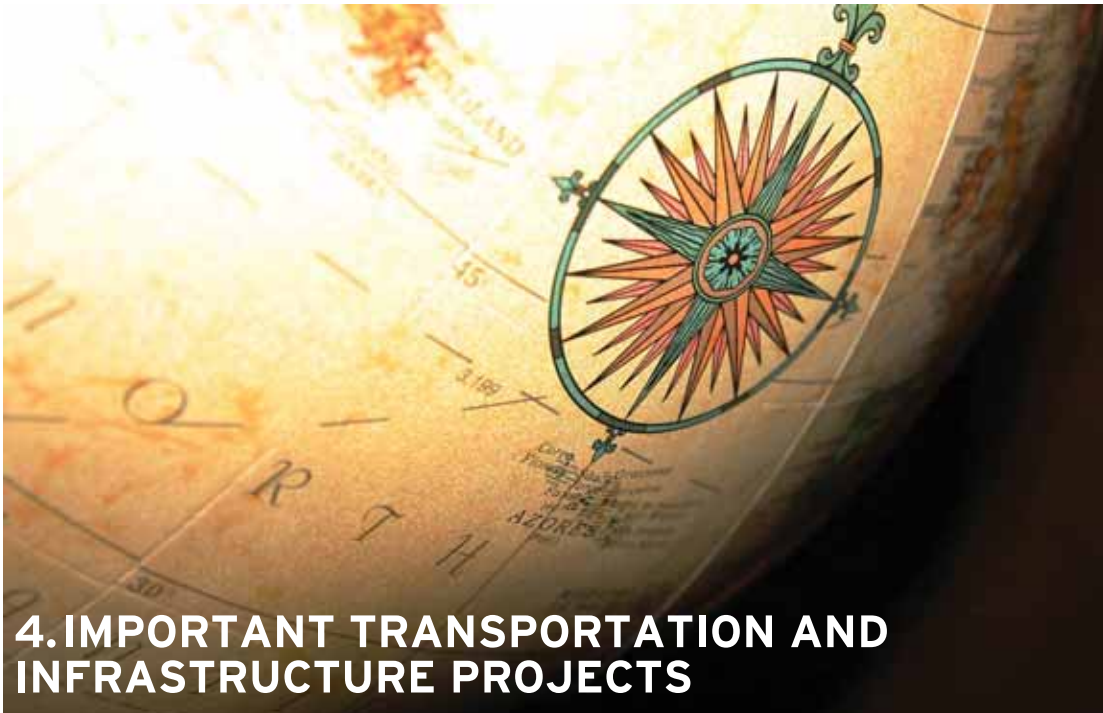
### 3.5. Airports

The only airport in Çorlu / Tekirdağ serves surrounding areas and is open to international air traffic 7/24. Airport has annual capacity of 600.000 passengers. It has 2145 m<sup>2</sup> open space for passengers and car parking area that has 297 cars capacity. The runway is 3000x45 meters, and concrete cover.

Most of the air traffic in Çorlu Airport consists of commercial planes. These planes come mostly from Ukraine, Turkmenistan, Azerbaijan, Kazakhstan and Uzbekistan. While Istanbul Atatürk and Istanbul Sabiha Gökçen Airport is responsible for 55 % of Turkey's total cargo traffic in 2009, Çorlu Airport's share in the same year is 7.3 %.







## 4. IMPORTANT TRANSPORTATION AND INFRASTRUCTURE PROJECTS

### 4.1. Transport Corridor Europe-Caucasus-Asia Project

TRACECA (Transport Corridor Europe-Caucasus-Asia) which connects Turkey to East Europe and Caucasus is a transport corridor that is developed not only by EU and neighbouring countries of Turkey but also with the support of Caucasus and Far East

countries. Project includes development of ports, highway connections, railways and undertakes related legislations. Turkey's highway connection with Europe is provided through Trakya region as a part of this project.

Figure 16: Specified Routes of TRACECA in Turkey and Their Connections With Surrounding Countries



Source: [www.traceca.org.tr](http://www.traceca.org.tr)





## 4.2. TEN Projects

Trans European Motorway and Trans-European Railway Projects which have been initiated in 1977 as a part of United Nations Economic Commission For Europe (UN-ECE) and Trans-European North-South Road Network Program, are important transportation projects for Trakya region. TEM (Trans European Motorway) has been built as a part of this project. The aim of the development of Trans-European Networks that includes motorway, energy and communication projects is enhancement of transportation, economic, social and cultural integration by developing international transportation infrastructure. In this context, 7th leg of Trans-Europe Networks (TENs) Project which is in progress will reach to Ipsala border gate. Motorways in between EU and its border with Turkey are being redeveloped. This project not only enhances Turkey's access to Europe but also strengthens the communication between regional settlements and surrounding countries. Project includes two important routes that affects Trakya region. First one goes through Kapıkule as a part of UN/ECE North-South Motorway network (Trans-European Motorway Project). This route

includes TEM (Trans European Motorway) and connects important industrial and service centers and urban areas such as Istanbul-Kocaeli-Bursa, Ankara-Kırıkkale, Izmir-Denizli-Aydın and Adana-Gaziantep-Icel to Europe. Second route connects Turkey to Europe through Greece. Greece-Turkey section of this motorway has been developed and the section to Ipsala border gate has been finished.

Figure 17: Trans-European Transportation Network



Source: [www.ec.europa.eu](http://www.ec.europa.eu)



Roadworks between North West of Greece and Italy and Turkish side of the road are underway. Development of these two connections is expected to expedite passenger and cargo flows from Istanbul and Trakya region to South Europe.

Egnatia Motorway is included in TENs program and occupies an important place in Trakya-Europe relations. Egnatia passes through Greece, and reaches the Turkish border and connects Albania, Macedonia, Bulgaria and Turkey borders with 9 vertical routes. On national level, Egnatia motorway will be the main line of the transportation system of North Greece and will provide opportunities for new investments in transportation, tourism and industrial sectors, and

will be serving as a development line for North Greece. On European level, Egnatia motorway connects industrial areas of East and West. For that reason EU makes heavy investments in Egnatia motorway. Motorway will also be a feeder route for the transportation system of Balkans and South East Europe. Pan-Europe Corridor IV (Berlin-Sofia-Thessaloniki), IX (Helsinki, Alexandroupolis) and X (Vienna, Belgrade, Thessaloniki) ends with Egnatia Motorway. This motorway carries a big geostrategic importance for the whole region. Black Sea Region, Aegean (South Mediterranean) Region and Adriatic/Ionian Sea Region will be attached together with a quadrangle developed by Egnatia motorway.

### 4.3. European High-Speed Train Network



Edirne-Istanbul High-Speed Train Project is one of the important railway infrastructure investments in Trakya. When the section between Istanbul and Bulgaria is finished, new alternatives for tourism and transportation sectors for the region will be created and competitive capacity will be improved. Project reduces the distance between Istanbul Halkalı and Bulgaria to 230 km, and also it is planned that a vehicle can reach a 250 km/per hour speed on this railway line. This project includes 8 stations in Halkalı-Çatalca-Çerkezköy-Büyükkarıştıran-Lüleburgaz-Babaeski-Edirne and Kapıkule and 2 logistics villages in Karaağaç, Edirne and Büyükkarıştıran, Kırklareli.



Figure 18: European High-Speed Train Network



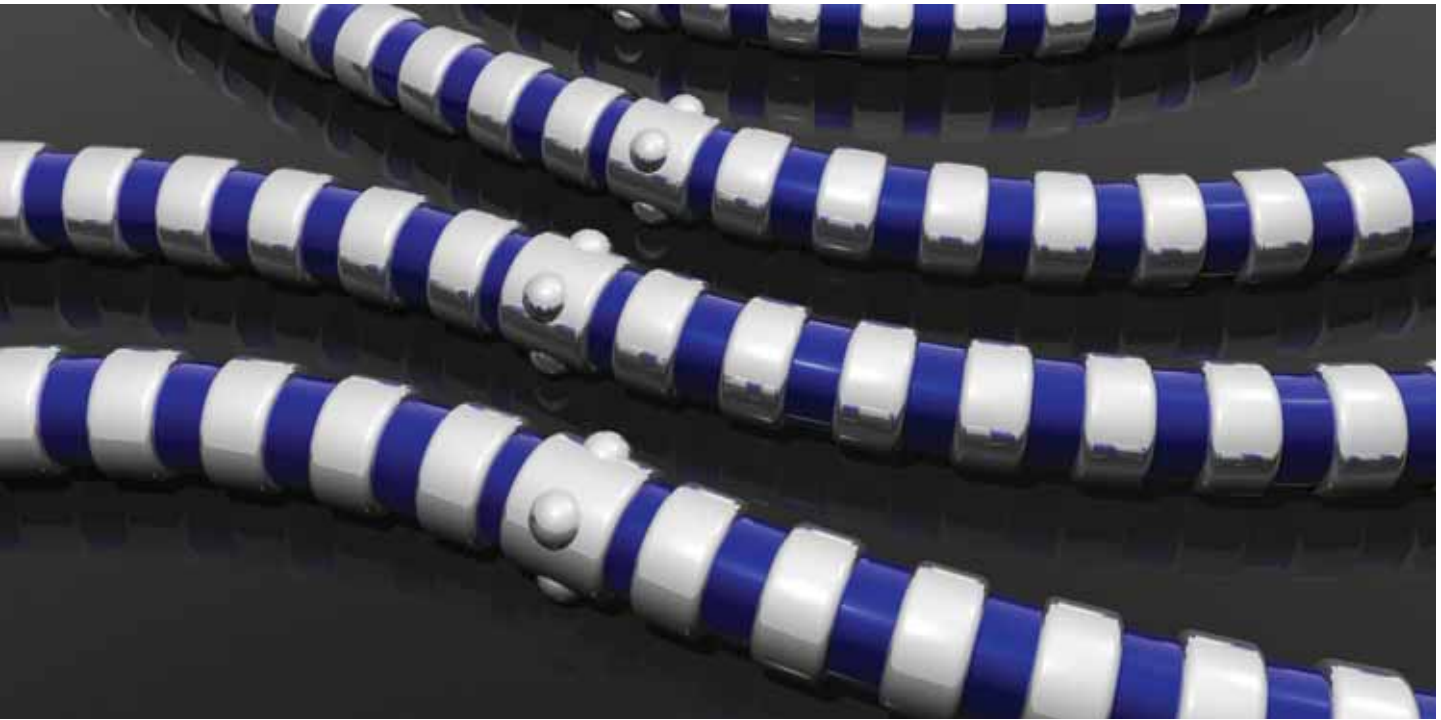
#### 4.4. Nabucco Project - Turkey- Austria Natural Gas Pipeline Project

With petroleum and natural gas pipelines passing throughout the country, Turkey's importance in terms of energy transfer gradually increases. According to projections by various international enterprises, growing amount of Caspian and Middle Eastern gas will be carried to Europe over Turkey. New line alternatives to Greece line is being proposed to meet the demand. One of the projects developed as alternative aims carrying natural gas, starting from Bulgaria, passing through Romania and Hungary and

transferring the gas to Austria. Half of the feasibility studies of the project were done by EU TEN program. Joint studies are being conducted by Turkey's BOTAŞ, Bulgaria's BULGARGAZ, Romania's TRANSGAZ, Hungary's MOL and Austria's OMV gas companies. Nabucco Company Pipeline Study GmGH established to conduct the project finance and the marketing of the carrying capacity of the pipeline. Studies concerning Turkish side have started to be conducted in July 2004.

Figure 19: Nabucco Pipeline





#### 4.5. Turkey-Greece Natural Gas Pipeline Project

Project has been initiated in 2002 and finished in 2007. It is one of the primary projects of EU's TENS programs. 209 km of this 300 km long pipeline is in Turkey and it will be extended to Italy after Greece. Trakya region increases its importance thanks to being an important transit zone for transporting industrial goods and Turkey's connecting point with energy markets. It is important to use this flow for development of domestic sectors and build up

developing industrial clusters with necessary foundations and infrastructure to make them able to take advantage of these flows.

Figure 20: Natural Gas Pipeline





## 5.EVALUATION

Turkey is the central zone for the flows of goods and service between Europe, Balkans, Blacksea, Caucasus, MiddleAsia, North Africa and MiddleEast. Turkey has advantages such as having 3 surrounding seas, airports and distribution centers, being in the center of Eurasia trade and a crossing point for 600 billion dollars of goods transport between East and West in trade.

The volume of Turkey's foreign trade with Europe will play an important role for Trakya to become the most important and valuable logistics base between Turkey and Europe. Trakya region has highways and railways connected to Europe, Asia and Middle East and an advantageous location in sea transport. This contributes to the competitiveness of the region in logistics. Trakya is expected to be a distribution center for the whole region with its existing powerful transportation infrastructure and ongoing transportation projects.

Trakya region with its current situation, future projects and the potential to be the regional logistics base offers auspicious opportunities to enterprises operating in the industry.











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