

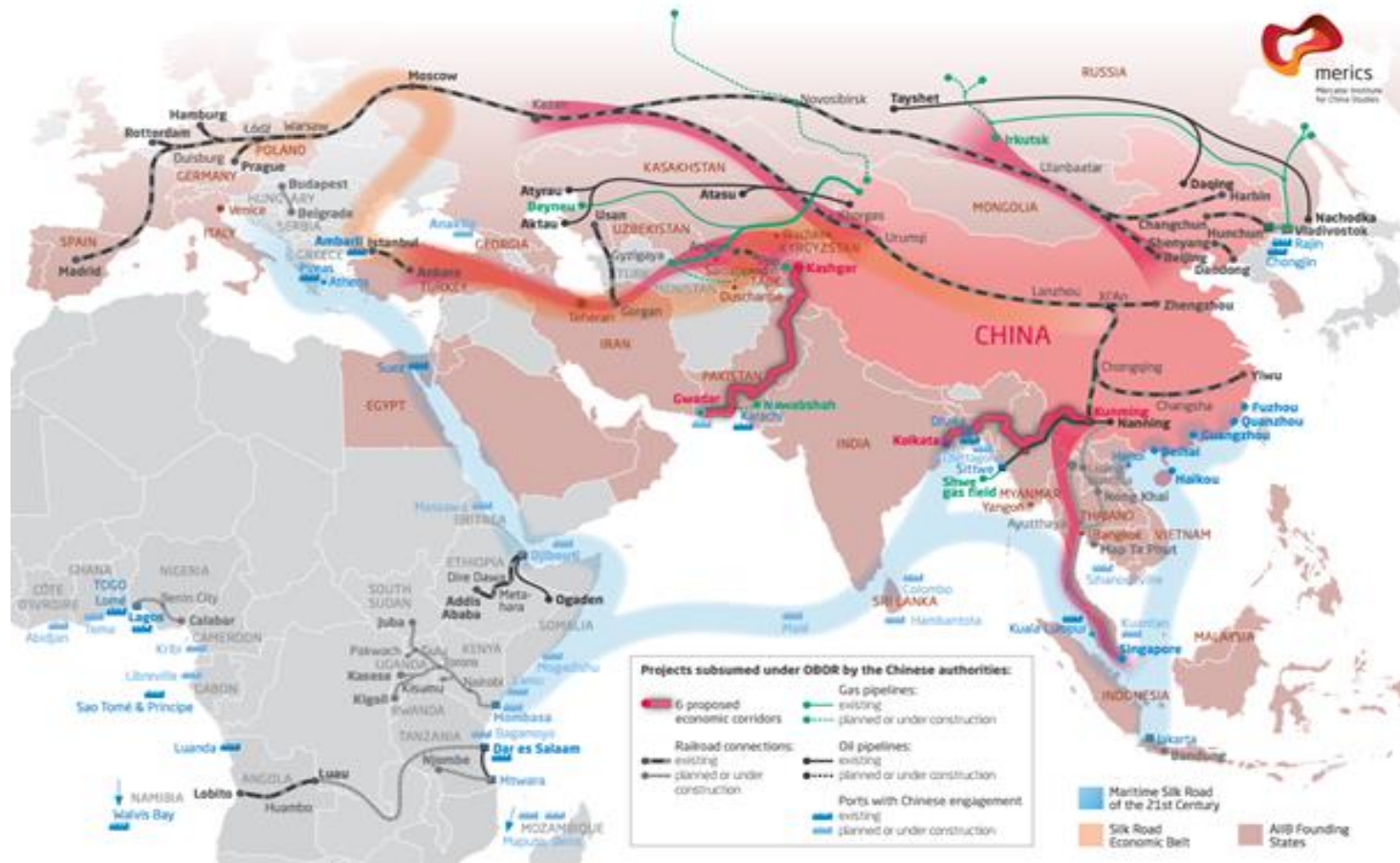


HONG KONG

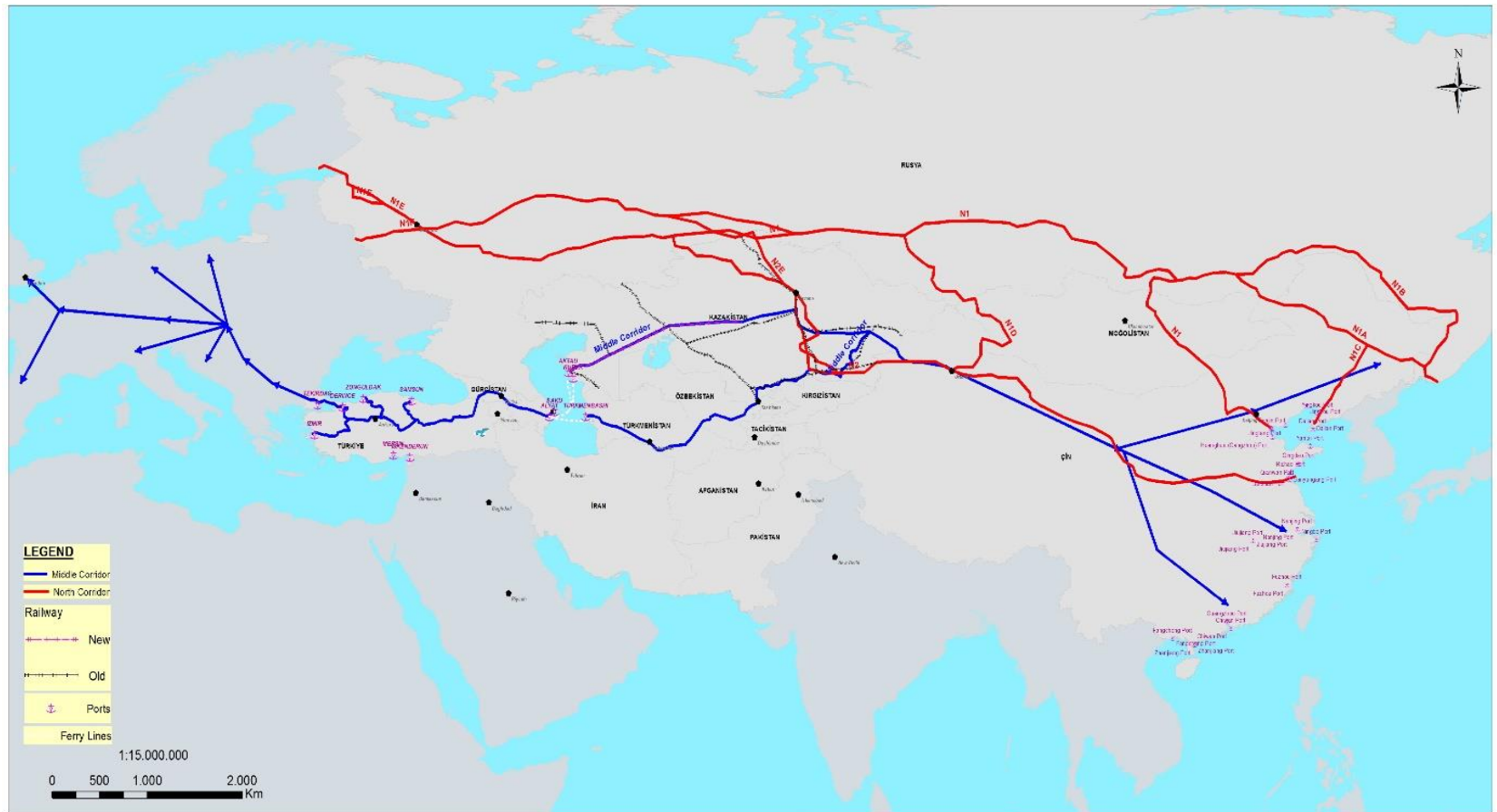
**CHINA'S
BELT AND ROAD INITIATIVE
&
TURKEY'S MIDDLE CORRIDOR**

2018 MAY

CHINA'S BELT AND ROAD INITIATIVE



TURKEY'S MIDDLE CORRIDOR INITIATIVE



BAKU-TBILISI-KARS RAILWAY



The Baku-Tbilisi-Kars railway is a regional rail link that connects Kars in Northeast Turkey to the Georgian capital of Tbilisi and Baku, Azerbaijan's capital. The railway is an important link in the MODERN SILK ROAD.

BAKU-TBILISI-KARS RAILWAY



3rd Bridge in Bosphorus



The Yavuz Sultan Selim Bridge is a bridge for rail and motor vehicle transit over the Bosphorus strait, to the north of two existing suspension bridges in Istanbul.

OPENED IN AUGUST 2016

EURASIA TUNNEL



The Eurasia Tunnel connects the Asian and European sides of Istanbul via a 14.6 kilometer undersea highway.

OPENED IN DECEMBER 2016

THE NEW AIRPORT (3rd)



Istanbul New Airport is an international airport under construction on the European side of Istanbul. The airport will have 150 million annual passenger capacity.

MARMARAY



The rail tube tunnel beneath the Istanbul Strait
OPENED IN OCTOBER 2013
ON THE 90TH ANNIVERSARY OF THE TURKISH REPUBLIC

ÇANDARLI PORT



Upon completion of this giant investment, Çandarlı Port will be among the 10 biggest ports in the world.

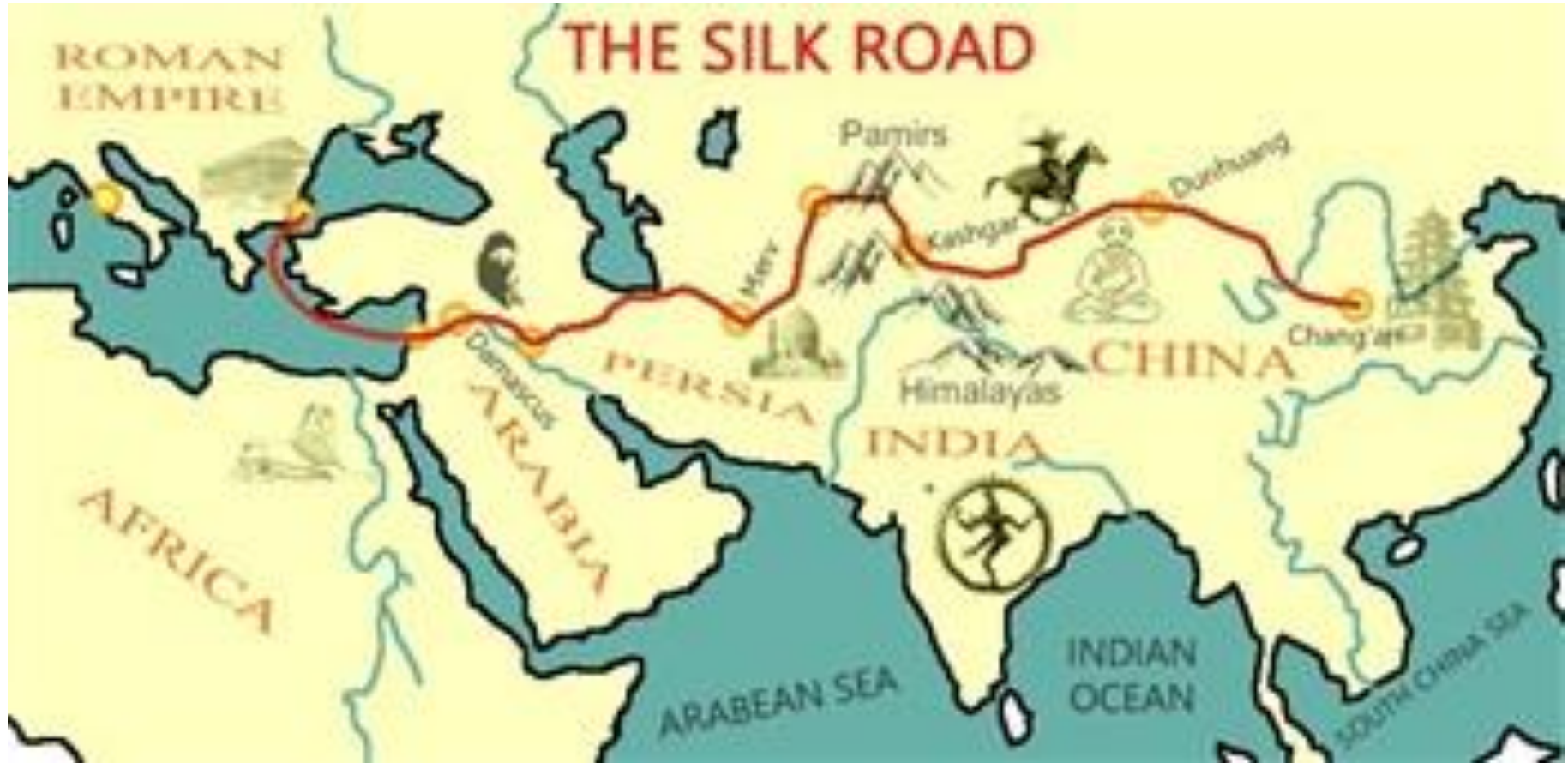
EDIRNE-KARS HIGH SPEED RAILWAY



High Speed Rail Line project between Edirne and Kars in Turkey.

CARAVANSERAI PROJECT

Silk Road Customs Initiative



Taking into account the need for improving the customs practices for the trade facilitation in the Silk Road geography, Turkish Customs Administration launched Silk Road Customs Initiative among the Silk Road Customs Administrations.



Robust Economy

Track record growth and bright future with proven resilience..



13TH LARGEST ECONOMY

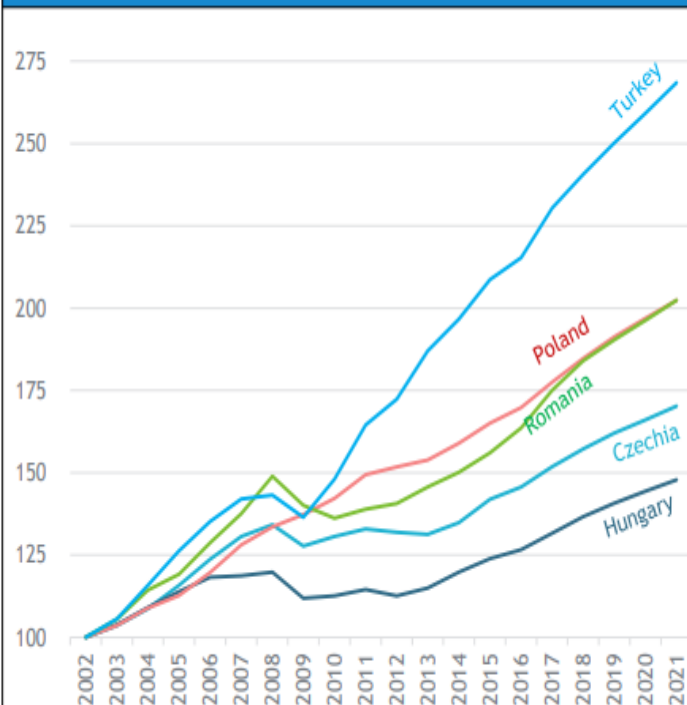
Average Annual GDP Growth (%), 2003-2017



Ranking of Economies by GDP at PPP

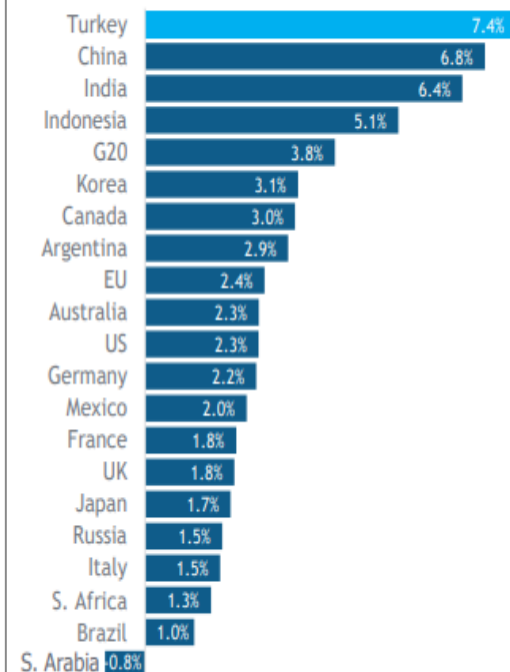
2003	2017	2021
1 USA	1 CHINA	1 CHINA
2 CHINA	2 USA	2 USA
3 JAPAN	3 INDIA	3 INDIA
4 GERMANY	4 JAPAN	4 JAPAN
5 INDIA	5 GERMANY	5 GERMANY
6 RUSSIA	6 RUSSIA	6 RUSSIA
7 FRANCE	7	7 INDONESIA
8 UK	8	8 BRAZIL
9 BRAZIL	9 UK	9 UK
10 ITALY	10 FRANCE	10 FRANCE
11 MEXICO	11 MEXICO	11 MEXICO
12 INDONESIA	12 ITALY	12 TURKEY
13 SPAIN	13 TURKEY	13 ITALY
14 CANADA	14 S. KOREA	14 S. KOREA
15 S. KOREA	15 SPAIN	15 IRAN
16 S. ARABIA	16 S. ARABIA	16 SPAIN
17 IRAN	17 CANADA	17 S. ARABIA
18 TURKEY	18 IRAN	18 CANADA

Real GDP Growth (Index: 2002=100)



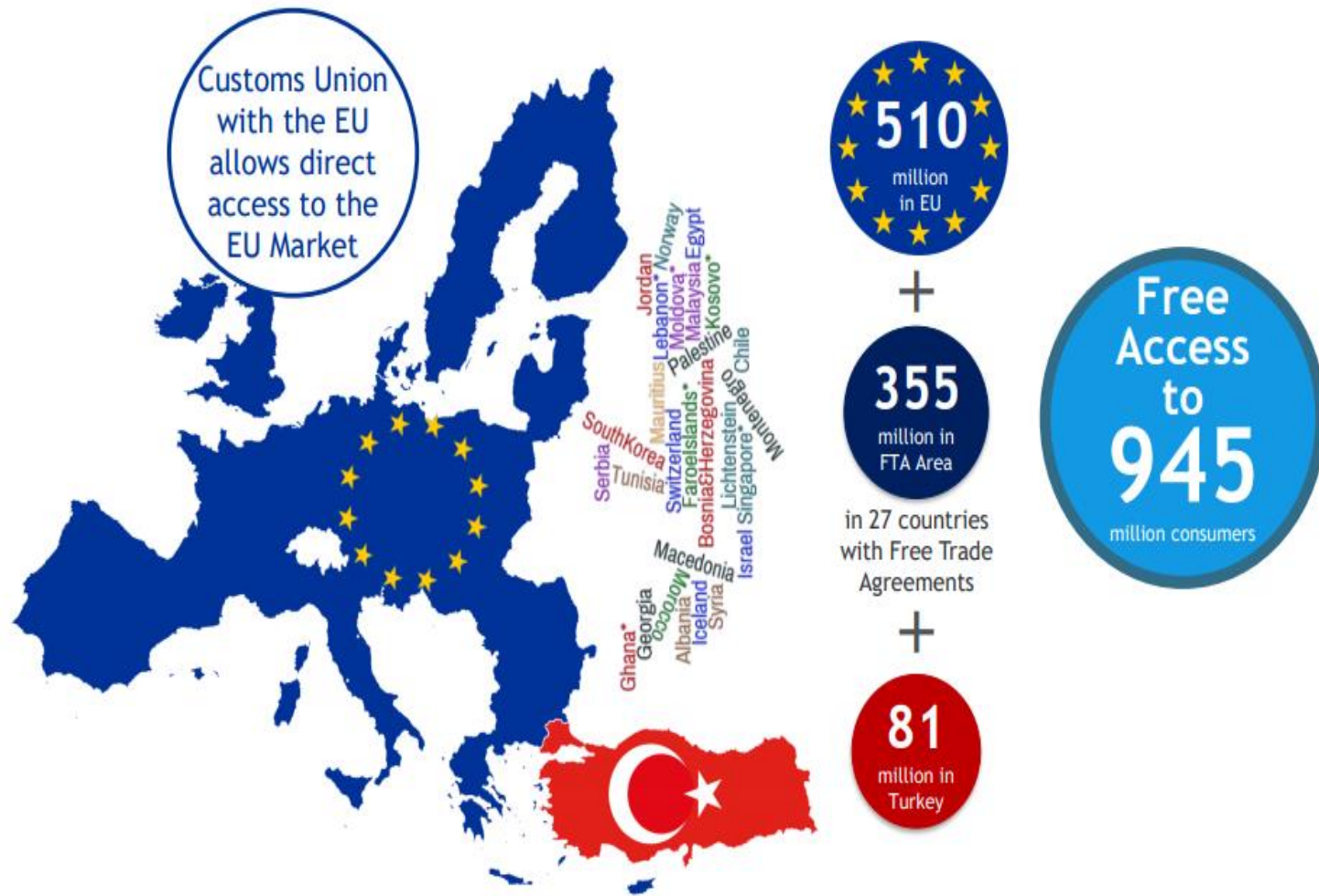
Fastest growing economy in G20

2017 Real GDP Growth in G20



Domestic Market + EU

Domestic market + EU market + Free Trade Area



Strategic Location

to manufacture, export and manage...



PROXIMITY TO MAJOR MARKETS

1.5 billion people and \$24T GDP in Europe, MENA and Central Asia at 4 hour flight-distance



CONNECTIVITY

Turkish Airlines connects you to 246 destinations in 120 countries

MANUFACTURING & EXPORT HUB FOR MULTINATIONALS

 **TOYOTA** Exporting 85% of its production



Exporting 77% of its production



Production base for MENA



Largest production facility worldwide

AS WELL AS MANAGEMENT HUB FOR MULTINATIONALS



GE Healthcare



thyssenkrupp



Verifone



B/S/H/ 89 countries

80 countries

72 countries

67 countries

60 countries

30 countries

Opportunities

Turkey offers abundant opportunities in a variety of sectors..



AUTOMOTIVE

14th largest manufacturer
1 million vehicle production
Market: \$24 billion
Export: \$24 billion



MACHINERY & ELECTRICAL EQP.

- Largest TV & white goods producer in Europe
- Market: \$38 billion
- Export: \$22 billion



AEROSPACE & DEFENCE

- \$15 billion defense spending
- Market: \$6 billion (industry)
- Export: \$2 billion
- Air passengers: 193 million



ENERGY

- Market: \$70 billion
- Growing demand
- Energy corridor
- Untapped renewables



AGROFOOD & BEVERAGE

- Market: \$74 billion
Export: \$17 billion
- Exports 1,781 products to 190 countries



INFRASTRUCTURE

- \$123 billion PPP investment (2003-2016)
- More opportunities in transport, energy, health



FINANCE

- Robust growth with double digits
- Islamic finance to grow
- Istanbul Financial Center

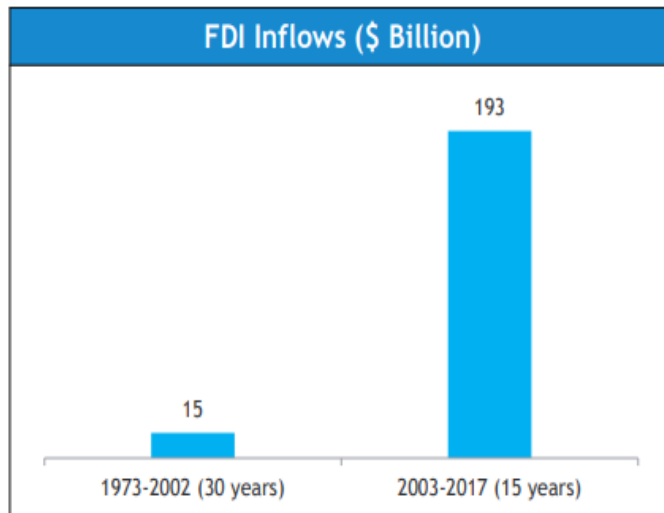
OPPORTUNITIES

Foreign Direct Investment (FDI)

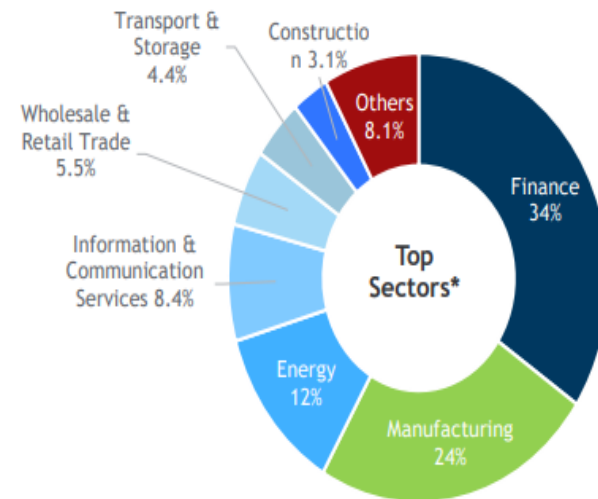
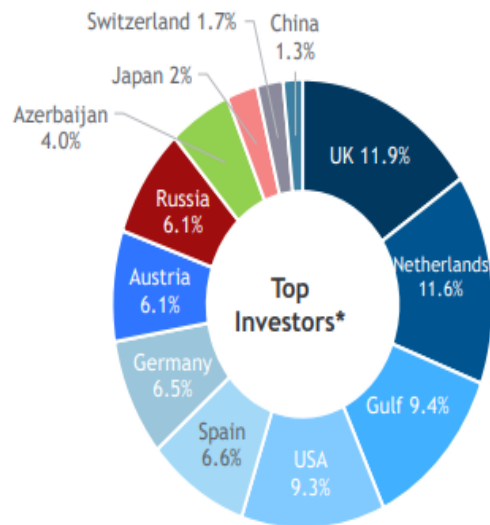
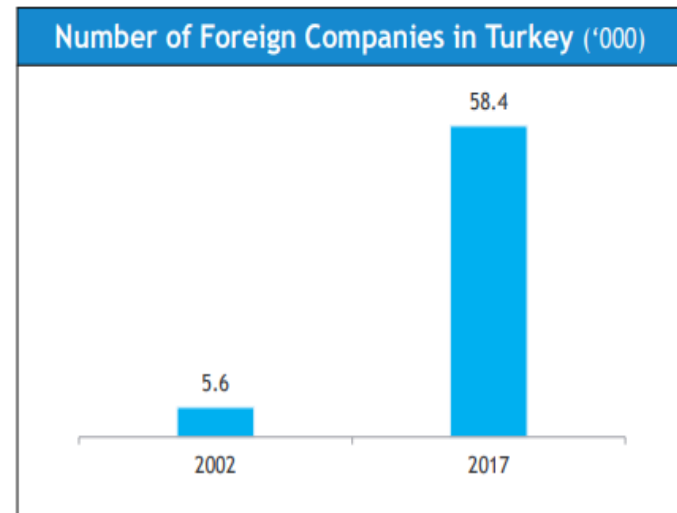
Turkey's value has been appreciated by foreign investors with increasing FDI inflow to Turkey...



FDI Inflows (\$ Billion)



Number of Foreign Companies in Turkey ('000)



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