



International Transporters'
Association, Türkiye

Making Multimodality Work in Practice

Private-Sector Lessons from Türkiye's
International Road Transport Sector

Road · Ro-Ro · Rail / Ro-La · Operational interfaces · Resilience

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Designing Integrated Multimodal Transport Systems in OIC Member Countries





International Transporters'
Association, Türkiye

UND at a Glance

Representing Türkiye's international
road freight community.

1974

Established

1,000+

Member companies*

50+

Years of sector
representation

Headquartered in Istanbul, Türkiye

A sector organisation shaped by its members.

Sector-led

Founded by road transport companies
to address shared national and
international needs.

Member participation

Working groups give members
a direct role in the association's
work and priorities.

International cooperation

Dialogue with national authorities,
foreign associations and
international transport organisations.



From the Field to Policy Solutions

Turning members' operational experience into a shared agenda for action.



The sector's voice
in institutional dialogue

Borders & permits · Customs & transit · Ports & corridors
EU transport rules · Digitalisation · Sustainability



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Türkiye: The Scale Behind Multimodal Freight Operations



2025 · National road export figures



OPERATIONS

2,145,000

road export trips



GOODS VALUE

≈USD 111bn

export goods carried by road

Goods value, not freight revenue.

National sector figures — not UND-member totals.

Source: UND, 14 March 2026.

ROAD'S ECONOMIC WEIGHT

≈41%



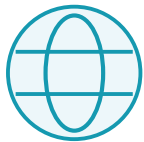
of Türkiye's merchandise
exports by value
moved by road

**Road connectivity has
system-wide importance**

At this scale, the links between
road, ports, Ro-Ro and rail
matter for trade performance.



Türkiye’s Road Export Network Spans Multiple Regions



2025 · National figures reported by UND

DESTINATION REGION	 Road export trips	 Goods value USD billion
Europe 		992,54672.298
Middle East & North Africa 		≈870,00021.597
Caucasus & Central Asia 		≈271,00016.960

One transport sector – multiple operating environments

Different border, transit and permit systems make interoperability an operational priority.

Source: UND, 14 March 2026. Regional figures as reported; not an exhaustive allocation.
National data, not UND-member totals. Goods value is not freight revenue.



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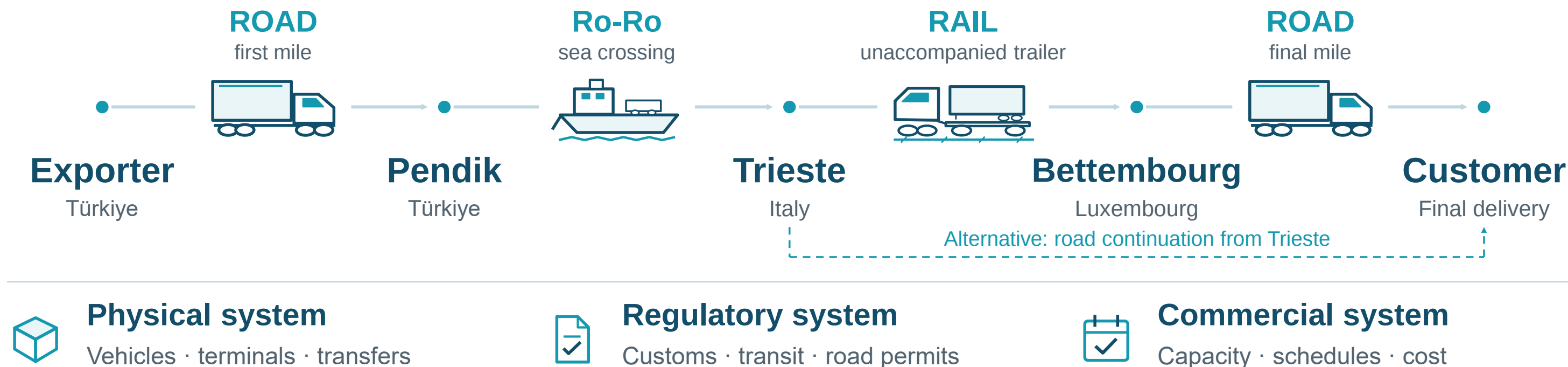
MULTIMODAL OPERATIONS

The haulier's perspective

One Shipment – Several Transport Systems



A Türkiye–Europe example built around published sea and rail connections



Several transport systems. One delivery commitment.

For the haulier, each handover must leave the shipment ready for the next leg.



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Ro-Ro AT SCALE

Türkiye’s road–sea connections

Ro-Ro: Türkiye’s Multimodal Interface at Scale



2025 · Official Ministry statistics · International scheduled services

NATIONAL Ro-Ro TOTAL

724,726

vehicle movements

Arrivals and departures combined



Trailers

70.4%

510,119 movements

Other vehicle categories: 3.5% · Ministry classification



Trucks

26.1%

189,107 movements

SELECTED ROUTES

Vehicle movements · both directions

Pendik–Trieste

167,350

Yalova–Sète

125,675

Çeşme–Trieste

66,691

Selected route totals; not a full allocation of the national count.

Road–sea integration is already operating at scale.

UND perspective: reliable terminal handovers underpin the onward journey.

Ro-Ro Routes in Practice

Türkiye's international Ro-Ro network · 2025

Selected operational connections and published route structure



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Pins locate port areas; shared sea passages are bundled. Lines are schematic.

EUROPEAN PORT ↔ TÜRKİYE

Letters refer to Turkish port pins.

• Trieste	A · B · C · G · H · I
• Bari	H
• Vasto	C
• Monfalcone	C
• Sète	E · I · J
• Marseille	C · D
• Patras	A · C · H
• Chios	B
• Piraeus	F
• Valencia	C · F
• Barcelona	F
• Koper	F
• Antwerp	F

268,376

Ro-Ro movements · UND, 2025

202,048

on Western Ro-Ro routes

≈75.3%
of UND's reported total

Map: published route network and schematic sea connections; figures shown separately.



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ROAD MEETS RAIL

Accompanied combined transport

Ro-La in Practice: Maribor–Wels



A separate road–rail option used by Turkish international hauliers

HOW THE Ro-La OPTION WORKS

Maribor

Slovenia

Ro-La

Wels

Austria



Tractor + semitrailer stay together

Driver in coach · road haulage resumes after unloading

UND FIELD EXPERIENCE

Slovenia visit · 21–23 May 2023

250

Turkish-plated trucks

4 days

waiting for a train

Constraints raised

Rail capacity · cancellations

Transit permit shortages

**UND reported permits issued
for road continuation.**

Modal shift needs capacity, frequency and reliability.

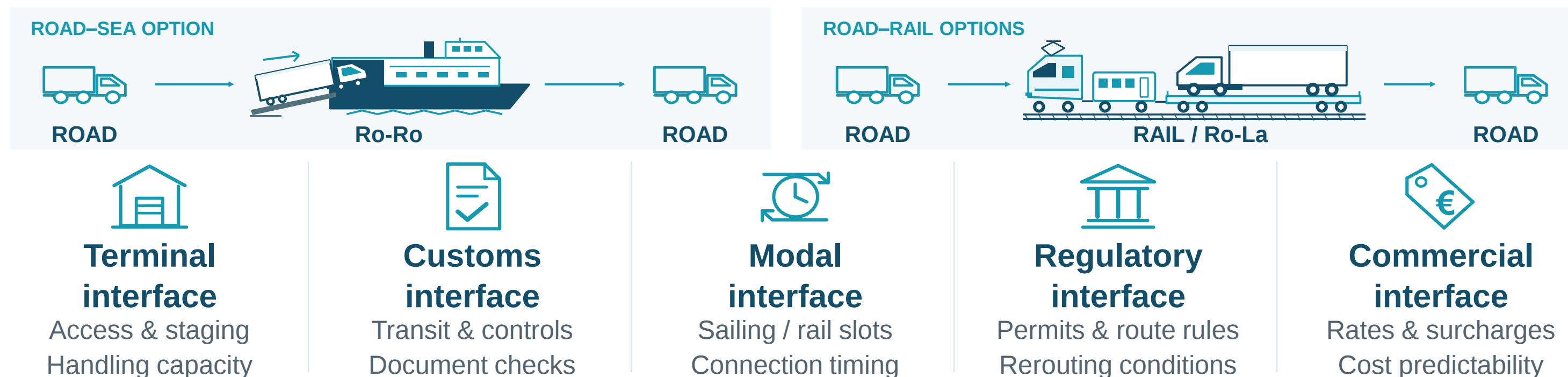
UND's lesson: train availability and workable road alternatives must be considered together.



The Interfaces Matter as Much as the Modes



Different modal combinations. Shared handover challenges.



A corridor may be physically connected but operationally fragmented.

UND's focus: identify what prevents the shipment from continuing to its next leg.



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UND FIELD EXPERIENCE

Joint reviews at customs and ports

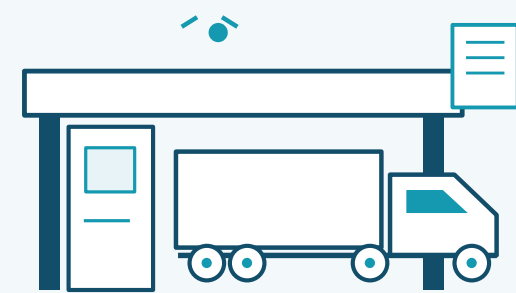
Solving Interface Problems on the Ground



UND + General Directorate of Customs · Field reports published 11 February 2026

Erenköy Customs & Pendik Ro-Ro

Transit practices · TASIŞ also visited



Customs–port connection

- Vehicle tracking (ATS)
- Mandatory route requirements
- Consistent customs practice

Coordination agenda with relevant units

Gemlik & Yalova ports

Ro-Ro operations and port-crossing processes



Ro-Ro port interface

- Ro-Ro operational flow
- Effects of administrative practices
- Port-crossing procedures

On-site assessment of practices and flows

Field problems require field-based diagnosis.

UND brings operators and authorities together around the same process.



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REGULATORY ADAPTATION

Transit time and modal change

When Regulation Recognises Multimodal Reality



Türkiye-bound Common Transit · UND case reported on 24 October 2024



UND raised the issue

Delays beyond hauliers' control



Ministry of Trade · General Directorate of Customs

Border queues and modal transfers addressed in an instruction



+48

HOURS

Added to the departure-office limit
for transit-time penalty assessment

Article 241 · Customs Law No. 4458

Ro-Ro / Ro-La waiting



Beyond the operator's control
and supported by valid evidence

Evidence: ferry / train ticket

Waiting time must also be taken into account.

Regulation should recognise the reality of changing modes.

UND's contribution: bring documented operating problems to the competent authority.



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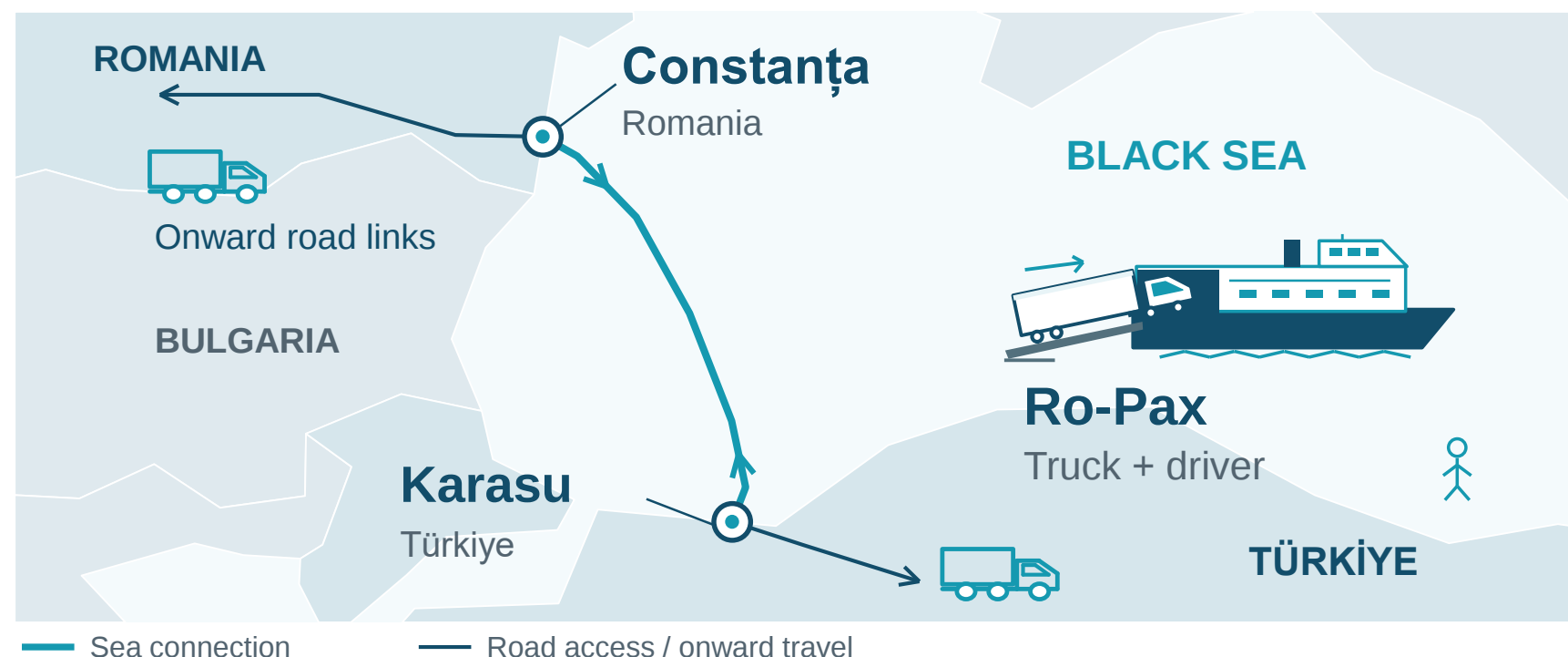
ALTERNATIVE GATEWAYS

A Black Sea link to Romania

Karasu–Constanța: Building Another Multimodal Option



A documented sea connection and a wider agenda for inland links



2025 ROUTE ACTIVITY

8,307

vehicles

Karasu–Constanța · both directions combined

111,527

tonnes of cargo



125

complete trucks

Vessel capacity · UND notice, 10 Jun 2025



UND + HİB · 10 July 2025

Potential Danube links discussed

Alternative gateways need workable inland connections.

UND brings hauliers' needs into dialogue on road, sea and inland-waterway links.



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CORRIDOR RESILIENCE

Route options and permit flexibility

When One Mode Suddenly Becomes Unavailable



Türkiye–Russia Ro-Ro / Ro-Pax disruption · UND notice, 21 August 2026

SEA LINK DISRUPTED



Ro-Ro / Ro-Pax suspended

Turkish vehicles waiting in port

ROAD ALTERNATIVE NEEDED



Need to change route

Return to Türkiye or complete transport

UND member support

19 Aug: legal information
21 Aug: permit notice

TEMPORARY RESPONSE [1]

Ministry of Transport and Infrastructure



15 SEP 2026

Announced end date

Eligible permit requests:



Original Russia permit type
OR transit permit allocation

No warning sanction for these requests

An alternative route must also be legally usable.

UND's lesson: physical alternatives and permit arrangements need to work together.



Integration Also Needs Cost Predictability



Ro-Ro fuel surcharges · March–May 2026 · Figures reported by UND



SEMITRAILER BAF · € / ONE-WAY CROSSING

■ March 2026

■ May 2026

Pendik–Trieste



Mersin–Trieste



Yalova–Sète



Fuel surcharge only — not the total freight price.

THREE PLANNING QUESTIONS



Operational

Will the connection work?



Regulatory

Can the shipment legally continue?



Commercial

Can the service be sustainably priced?

Connectivity must also be commercially viable.

UND's role: raise cost concerns and seek transparent, predictable pricing.



What the UND Experience Suggests



Six practical lessons for integrated multimodal transport in OIC member countries



01 Plan the end-to-end freight chain

Align road, sea and rail around the whole journey.

[Journey example · slide 6](#)



02 Treat interfaces as infrastructure

Link terminal processes, customs and road permits.

[Port–customs reviews · slide 11](#)



03 Make regulation multimodal

Recognise evidenced waiting and the reality of modal change.

[Transit-time example · slide 12](#)



04 Match modal shift with capacity

Capacity, frequency, reliability and predictable costs.

[Ro-La / BAF cases · slides 9 & 15](#)



05 Build usable alternative gateways

Physical options need workable permit and customs arrangements.

[Gateway / rerouting · slides 13–14](#)



06 Institutionalise operator feedback

Keep hauliers involved in joint reviews and follow-up.

[UND dialogue · slides 3, 11 & 15](#)



Next frontier: data interoperability · Authorities, terminals and transport operators

Changing mode should not mean losing continuity.

UND's perspective: preserve time, predictability and legal continuity across the journey.



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Thank You

Connecting modes.
Keeping freight moving.

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