

We Carry



To The Future

Borusan Holding General

While continuing to create added value for the Turkish economy, the Borusan Group pursues a vision that focuses on developing innovative products and services and has an open horizon to world markets.

more than

75 years

of industry and
service
experience

7 main sectors

14 sub-sectors

11 international
business partners

A Global Player

2020-2022 Planned
Investments

\$500 Million

Consolidated Turnover

\$4,016 Million

Total Assets

\$4,065 Million

Overseas Turn Over

\$1,412 Million

EBITDA

\$331 Million

Total Investments in the last 5 years

\$1,065 Million

4 R&D Centers

130 R&D Professionals

50+

Digitalization Projects

Working Capital

\$1,148 Million

Digitalization investments

\$25,5 Million R&D

Borusan Holding General

\$4 Consolidated
Turnover
billion



**BORUSAN
LOJİSTİK**

Production

\$2 billion

**BORUSAN
MANNESMANN**



BORÇELİK



SUPSAN
Otomotiv Parçaları



Automotive

\$793 million

Borusan Otomotiv



**BORUSAN
ARAÇ İHALE**



Machinery and power systems

\$834 million

BORUSAN CAT



Logistics

\$445 million

**BORUSAN
LOJİSTİK**



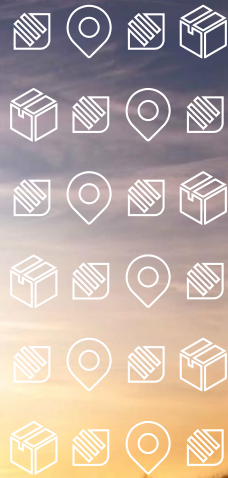
Energy

\$98 million

BORUSAN EnBW
Enerji Ortaklığı



One-stop-shop for all your logistics needs



Domestic Transportation

FTL
Partial
Private Distribution
Milkrun



Warehousing and Automotive



Customs



International Transportation

Air
Sea
Intermodal



Project Logistics



Borusan Port

Agenda



1. Borusan Logistics Summary

2. Quality Figures

3. Domestic Transportation

- a. FTL & eTA
- b. Domestic Partial
- c. Storage Warehousing
- d. Bukoli
- e. Automotive

4. International Transportation

- a. Air
- b. Sea
- c. Land
- d. AEO Certificate
- e. Intermodal

5. Customs

6. Port

- a. Ship Charter
- b. Project

7. Sustainability

8. Social Responsibility



Borusan Lojistik Summary



eTA & FTL

420k trips per year
end-to-end digital execution

LTL

8k
points of distribution

STORAGE

450k m²
warehousing capacity

AUTOMOTIVE

10million m³
handling capacity

LAND TRANSPORT

80k
annual export handling

AIR FREIGHT

7.4million kilos
chargeable weight

SEA FREIGHT

26.900TEU

CUSTOMS

80k
annual number of declarations processed

PORT

\$46,7million
end-to-end port logistics

PROJECT

3k
ship charters

Quality Figures

National Quality Achievement Award

The first logistics company to receive a Certificate of Competency in Excellence with 5 stars

National Quality Grand Prize

The first logistics company to receive the Hall of Fame for Strategic Management Competency

The first Turkish logistics company to receive ISO 50001 Energy Management System IIP (Investors in People) certificate

ISO 45001 Occupational Health and Safety Management System

One of the first ports to have the **"Green Port" certificate**

ISO 14001 Environmental Management System

ISO 14064 Carbon Footprint Verification Certificate

ISO 9001 Quality Management System

ISO 10002 Customer Satisfaction and Complaints Handling Standard Certificate

ISO 27001 Information Security Management System

Our Services:

 - FTL*



Across Turkey

160 K
registered truckers

440K

FTL trips per year

50 ground offices in **18** cities

*Full Truck Load



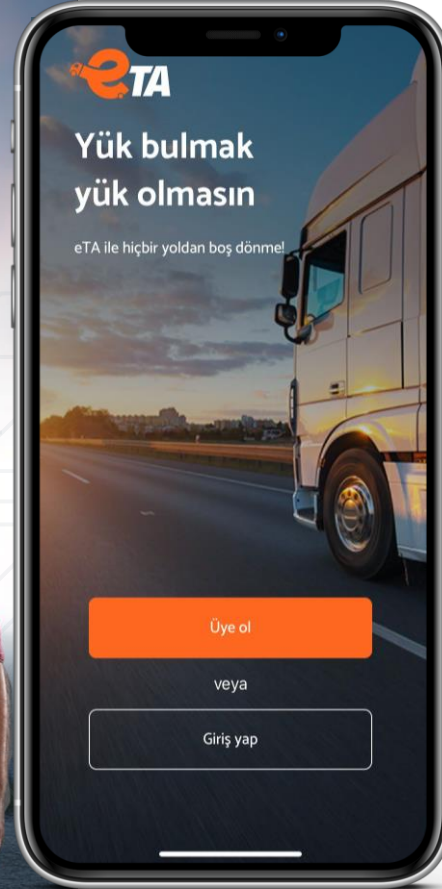


Mobile App

End-to-end Digital System



BORUSAN
LOJİSTİK



Mobile application
for truckers

2k

Daily load options
for truckers

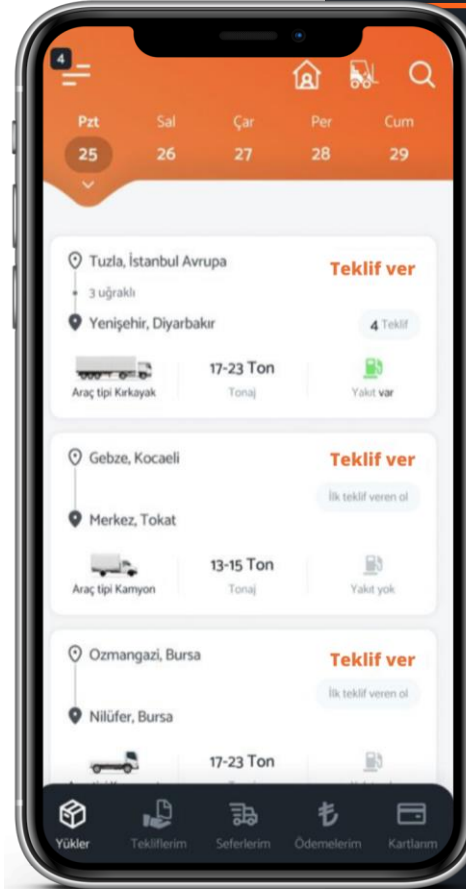
Truckers can execute the entire
trip process via mobile app

eTA card to receive and track
payments



Mobile App

End-to-end Digital System



Target Users

Truck Drivers

Brokers

Logistics Companies

Truckers Cooperatives

Shippers

References



ETA & FTL

Coca-Cola

Henkel

TÜRK TUBORG

modern
KARTON

KÖKSAN
PET PACKAGING INDUSTRY CO.

pepsi

P&G

europap
tezol

Unilever

ŞİŞECAM

BETEK

TOROS
TOROS TARIM

doğan
ay

Ontex

Y

Yaşar

IPEK
YEM

DOLUCA

DyDo

LUKOIL

PRYSMIAN
CABLES & SYSTEMS

MOPAK

BAMESA

AGCO
Your Agriculture Company

Koramic

OXE
INSULATED THE FUTURE

ANADOLU
EFES

BORUSAN
MANNESMANN

BORÇELİK

aroma

arçelik

Eczacıbaşı

Polisan

PHILIP MORRIS
INTERNATIONAL

BORUSAN
LOJİSTİK

Sınıflandırma: Genel

Classification: Public



Domestic Services



81

cities

B2B and B2C purchase-
distribution organization



28

transfer centers



500+

m deci/kg
volume per year



Effective monitoring and reporting
with Atlas technology

Domestic Services



Private Distribution



Distribution capacity to unlimited points in the country



Vehicle supply that can be configured according to shipping needs



Integration system compatible with all modules



1500+ Daily home delivery

Domestic Storage Services

Across Turkey

30 warehouses

450k m² indoor and outdoor storage space

15k m² warehouse

Tailor made warehouse operations design

Warehouse consultancy activities supported by the engineering team



16 points customer facility
Manufacturing Logistics in different industries

Fast planning and takeover processes

Management of inbound processes

Management of outbound processes

VAS

Annually **20Million** product handling

- Product assembly, labeling and POP preparation at customer facilities and at Tuzla Operations Center with the machinery park invested in
- Ready machine park

Automotive Logistics



PDI
140 k m² compound facility

Milk Run
Annually

10 Million m³ appliance and
automotive
transport value

- BOSS (Borusan Operations Support System) internal software
- 3D vehicle loading simulation
- EMC (Empty Pallet Compound)

4 k
m² PDI areas

PDI and Storage Services

- Vehicle Acceptance
- Bonded & Duty Free Stocking
- Additional refueling and test drives
- Vehicle cleaning and de-waxing
- Value – Added Services

Auto Transportation

- Guaranteed auto transport - Port-Customs transport
- Domestic dealer distribution network – Partial and Complete
- Private transfer and towing services
- Heavy vehicle and tractor transport services
- Vehicle transport services by driving

Bukoli

We have the widest delivery network in Turkey.

As of 2021

54 cities
4000 marchants

25.000+ packages
Delivered per day

Where are we heading up?

- Working with new e-commerce and shipping companies
- Agreement with local and national chain delivery points
- Implementation of innovative technology solutions
- Implementation of Drop off for vendor drop off and customer returns



Bukoli Advantages

For E-commerce companies

- Flexible Delivery Model
- Happy Customer
- Shipment Privacy
- No Waiting At Home/Work
- Cost Optimization

For delivery points

- Additional revenue
- Possibility of cross selling
- New customer acquisition
- Shop awareness
- Purchasing advantage

References



MilkRun



LTL



Private Distribution



Storage



Customer Facilities



Automotive



International Transportation



Customer and partner oriented service approach



Expert staff in the field



Storage, dispatch, 4PL, customs clearance and service possibilities globally

Strong Agency Network

As a reliable solution partner with our customer-oriented approach in international transportation, fast service and tracking systems, with our wide agency and partner network in Continental Europe, Iraq, Scandinavia and overseas countries; We also provide international transportation services in the Middle East and Central Asia through our own structuring.



Air Freight

Top 10 IATA ranking



Own IST and ADB
airport offices



Blockspace and
chartering
agreements



1 in top 3 carriers
for US export
shipping



Service capabilities
in all TR airports



Prioritized
shipment



Air + Sea / Air + Train /
Land + Air multimodal
services



Strong global
agency network



Import & export
console services



4PL logistics



Cross trade
services



High capacity in
peak season



Expert staff on the
ground



 **BORUSAN
LOJISTİK**



Sea Freight



Annual slot and service agreements



Air + Sea / Air + Train / Land + Air multimodal services



Shipping liner segmentation



Risk and cost advantages



Cross trade services



Weekly import & export LCL services



Own warehouse operation facilities



Certified dangerous goods transportation



Competitive freight rate



High capacity in peak season



Borusan Port

Air & Sea Offices

Germany
Düsseldorf
Berlin
Hamburg
Bremen
Frankfurt
Stuttgart

Turkey
Istanbul
Bursa
Izmir
Mersin
Ankara
Antalya

China
Shanghai
Gaungzhou
Ningbo
Qingdao
Ningbo
Shenzhen
Dalian
Tianjin
Beijing
Xi'an
Zhengzhou
Nanjing
Fuzhou
Xiamen
Chengdu
Chongqing
Jiangmen
Changsha

References



Air & Sea Freight

KOTON

URBAN OUTFITTERS

MARC JACOBS

ANADOLU
EFES

Levi's

eren

Torku

P&G

dalin


Paşabahçe


ŞİŞECAM

 Eczacıbaşı


PORLAND

RALPH  LAUREN

watsons



Land Transportation

80K

orders

500M_{kg}

chargeable weight

20K

annual vehicle moves

25_{countries}

LTL services

200

owned vehicles

500

dedicated subcontractor
vehicles

Agency Network

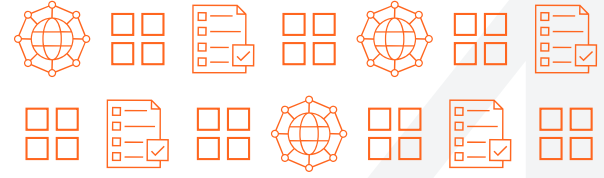


- 20,000 moves annually (50% LTL - 50% FTL)
- Çatalca X-Dock: **6,500 m²**
- Bonded warehouse-Çatalca : **5,000 m²**
- Bonded warehouse-Tuzla: **10,000 m²**
- **6k** automobiles handled annually on export
- Expedited deliveries to&from all EU countries



AEO*

Certificate



Authorized shipper/consignee
with international validity



Safety and security conditions approved
by the Ministry of Commerce



Ability to ship to its own facility without
being inspected by the customs
administration



Priority to pass through border gates



Time and cost savings

Intermodal Transportation

We provide the right equipment and infrastructure at the right time, in the right place. We provide end-to-end, door-to-door service by meeting all your logistics needs with our modular and ecofriendly Intermodal transportation service.

The Advantages We Offer

- Transparent time window for stable freight cotation
- Eco-friendly / green logistics
- Regular scheduled departures and arrivals
- Up to 24 tons carriage capacity
- Fast and convenient cross-border shipments
- Low accident & damage rates

Main Intermodal Routes



Digital Customer and Operations Processes

Our proprietary software, Atlas, allows our customers to track their shipment directly via digital portal.



Data sharing with customers, agencies and suppliers, allowing for process monitoring.



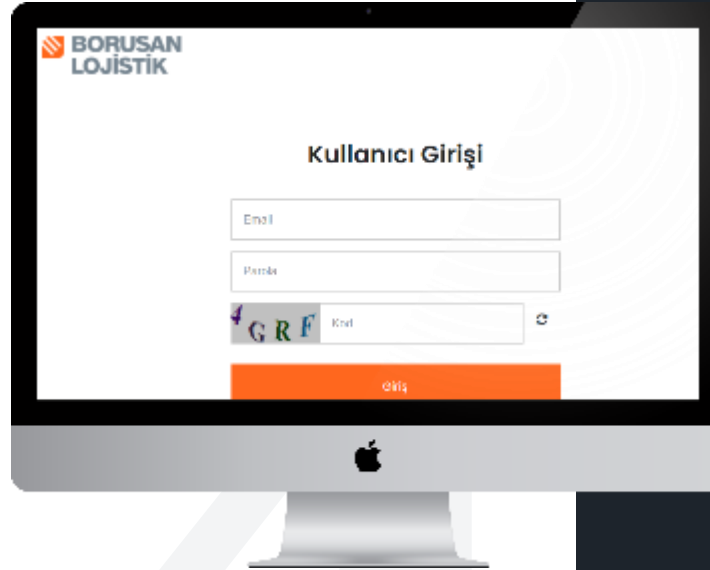
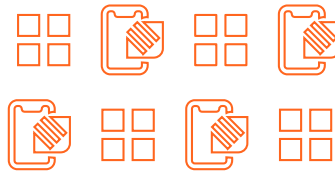
Handling of the entire operational process digitally.



Digital notification of customs for departures in 6 hours.



online.borusanlojistik.com customer digital portal for visibility.



What to track?

- Load Status
- Loading date
- Estimated Departure Date
- Estimated Time of Arrival
- Arrival Terminal
- Live Location Info
- Load Documents
- Delivery Info
- Contact Info of Operations Staff

References



Land Transportation



Sainsbury's



Stradivarius

MANGO



PIONEER®



Customs

38 years of industry experience

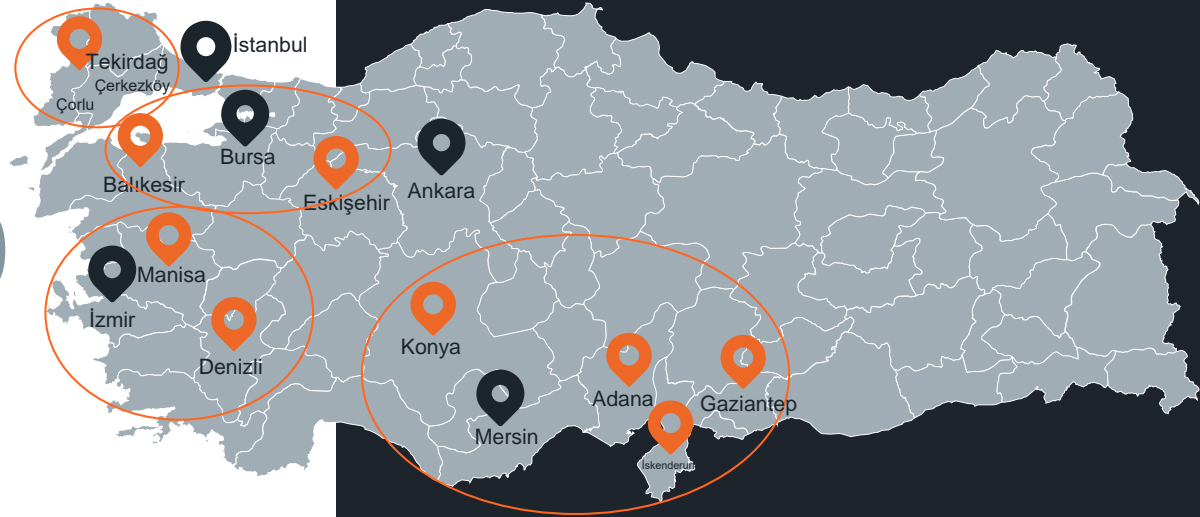
Large
experienced
consultant
team

Average profession
experience of
employees

9 years

170
employees

NPS (Net Promoter Score) 80



Customs



Customer Focused Professional Management

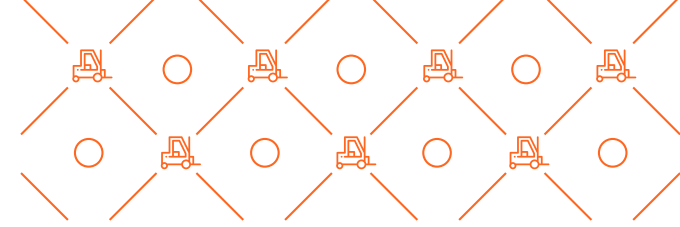
Focus on establishing long term relationships.

High Quality Service

Experienced team providing fast solutions.

Tailor made services for TSE / TAREKS / AGRICULTURE etc. permission processes.

Strong Financial Structure



In House Foreign Trade Risks and Compliance Expertise

Customer support for managing compliance risks in all industries with expert in house compliance team.

Consulting services to support the application process Post Control and Authorized Economic Operator Certificate.

Proactive approach to take Actions for minimizing penalties.

Customs

Customer Portal



Real time tracking of declaration status

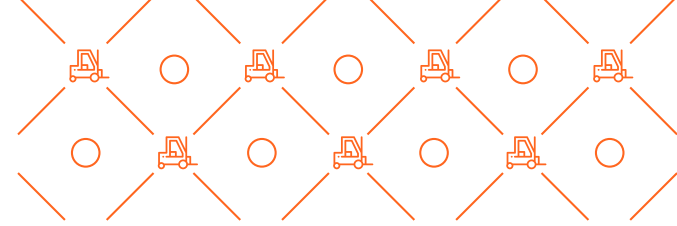
Digital access to related files

Access to all reports and financial information of the declaration

Interactive dashboards for performance tracking and analytics



Customs



e-Customs



Declaration

Digital creation of declaration document.

- Tariff generation before loading



Status Tracking

Real time notification of declaration status and regular update reporting.

- Bonded warehouse import declaration
- Permission processes



Invoicing and Receipt

Notification of receipt and invoice information.

- Receipt transactions
- Billing

References



Customs



Port

5,0^{million}
tons/year

general cargo
capacity

450^k
TEU/year

container
capacity

350^k
units/year

vehicle capacity

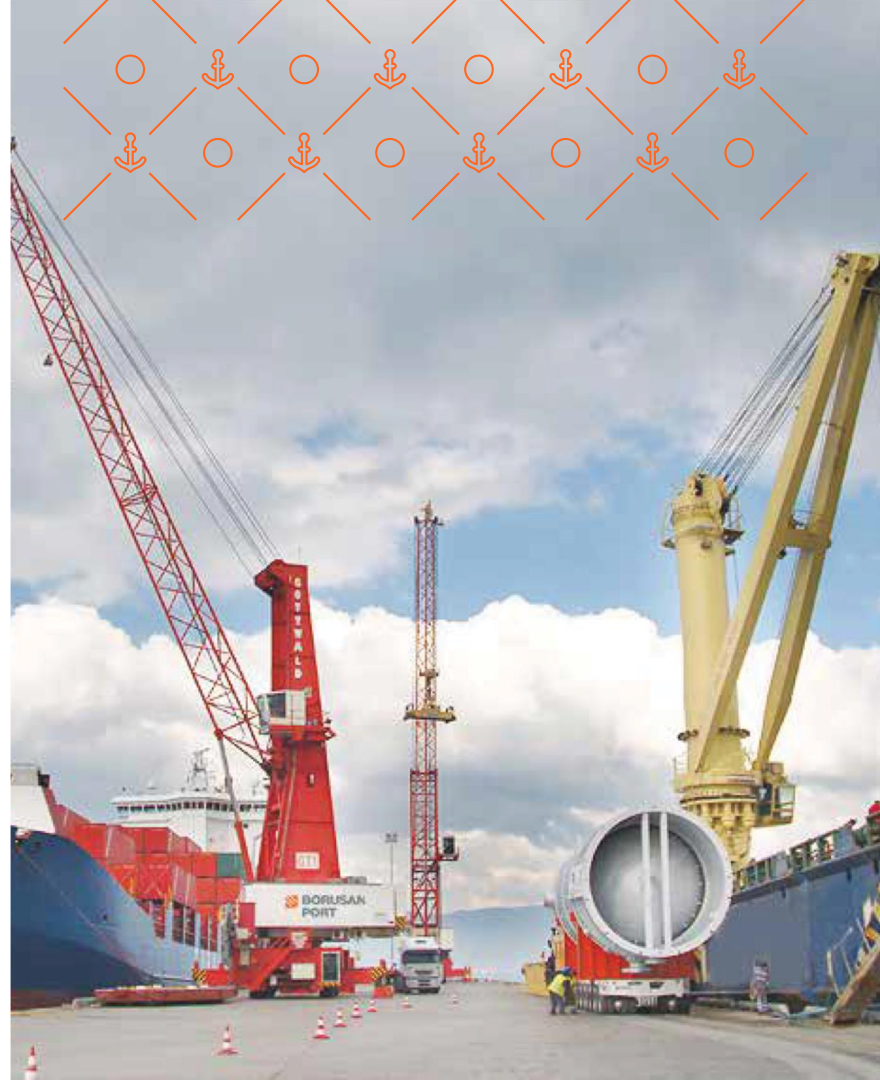
1,800^m

berth

450^k
m² open

15^k
m² closed

465^k
m² of total bonded/duty-free
terminal area





Annually

2m

tonnes of
shipment

300

ship charters

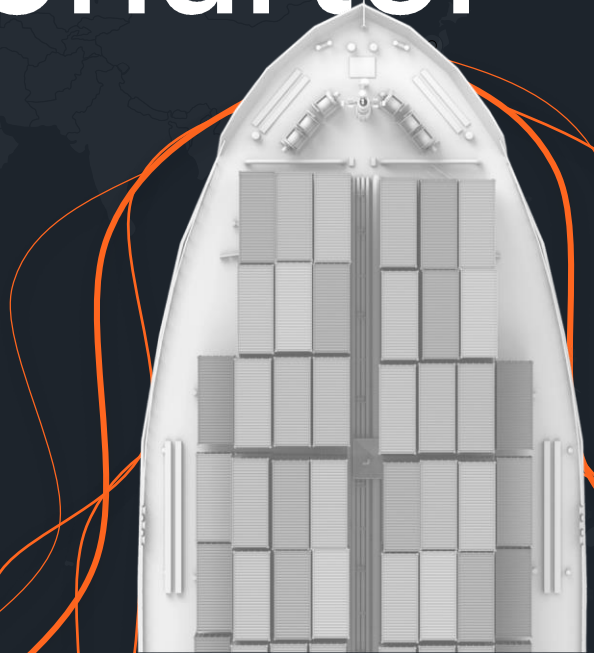
25

countries

55

port operations

Ship Charter



Project and Heavy Transportation



Over 3,000 trips
annually



Ability to carry heavy
tonnage oversized loads,
wind powered equipment
and machinery



Door-to-door
domestic and
international project
transportation



Environment friendly and
efficiency focused project
management with load and
process analysis



Content management of projects thanks to expert staff,
priority equipment and strong supply culture



References



General Cargo



Project Cargo



Container



Vehicle



Sustainability

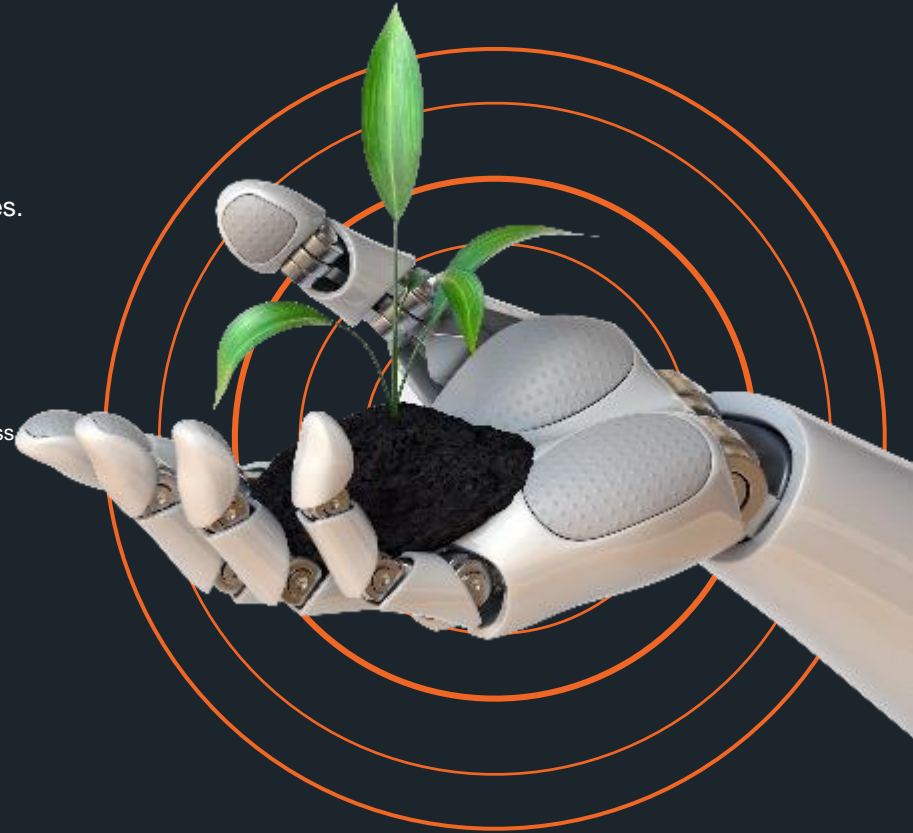


Decarbonisation, social benefits and digital transformation of processes.



Enable emission reduction in the logistics industry through innovation.
Provide environmental and socioeconomic benefits for employees, customers and suppliers.

- Carbon emission reduction
- Afforestation
- Activities for raising awareness
- Resources for stakeholders for sustainability-literacy
- Supporting younger females who are relatively excluded with technological means
- Create digital integration solutions for business sustainability with customers
- Provide e-commerce solutions to SMEs for accessing export markets
- Create more environmentally-sustainable alternative delivery solutions with Bukoli
- Explore usage of renewable-energy in truck operations (2030)



Social Responsibility

14,3 mTL

Of digital transformation-oriented R&D investment in the 2020 operating period

- 26.261 labor-hours of Occupational Health and Safety training in 2020.
- "Twin Social Responsibility Project"; artificial intelligence, robotics and coding training with the children of all stakeholders and employees via our Youtube Channel.
- Awareness training for 1.000 students and 50 teachers in the 2019-2020 academic year with the "If you like, come protect Project"
- Donation and need campaign to the Foundation for the Education and Protection of Mentally Handicapped Children (ZİÇEV).





Thank You