



**NETLOG**  
LOGISTICS

# GROUP PROFILE

**MINI PRESENTATION 2023**

NETLOG is the largest integrated logistics company in Türkiye for the last 13 years consecutively.

**And there is a reason for it...**

FORTUNE 500 2022			
Industry		Turkey Rank	Revenue TL
WAREHOUSING, TRANSPORT AND LOGISTICS			
1	NETLOG LOJİSTİK HİZMETLERİ A.Ş.	70	20.123.275.910
2	EKO LOJİSTİK A.Ş.	109	12.055.140.003
3	DEVLET HAVA MEYDANLARI İŞLETMESİ GENEL MÜD.	115	11.556.519.657
4	BORUSAN LOJİSTİK A.Ş.	121	11.331.600.132
5	MARS LOJİSTİK A.Ş.	156	8.574.368.833
6	DSV HAVA VE DENİZ TAŞIMACILIĞI A.Ş.	174	7.448.916.056
7	NOATUM LOJİSTİK A.Ş.	195	6.571.478.913
8	ÇELEBİ HAVA SERVİSİ A.Ş.	208	6.072.008.541
9	FASDAT GIDA DAĞITIM SANAYİ VE TİCARET A.Ş.	223	5.717.335.612
10	BDP INTERNATIONAL LOJİSTİK LTD. ŞTİ	256	4.928.325.497
11	HAVA ALANLARI YER HİZMETLERİ A.Ş.	395	2.958.521.414
12	HOROZ LOJİSTİK KARGO HİZMETLERİ VE TİCARET A.Ş.	409	2.845.548.572
13	ISS GLOBAL FORWARDING TAŞIMACILIK A.Ş.	431	2.684.439.600
14	SARP İNTERMODAL HİZMETLERİ İÇ VE DIŞ TİCARET A.Ş.	438	2.599.517.944
	TOPLAM		105.466.996.684
	MEDYAN		6.321.743.727

# We do not base our success on our revenue, company size or industry ranks.

It is a commitment to establish processes in logistics business partnerships, to create mutual chemistry, to implement and develop systems that will make a difference and contribute to the customer. This is why Netlog should be your companion. The reason why our relationships with our customers continue for many years.

We have **%85**  
**Customer retention**  
rate.

Netlog continues to work  
with **%70 of the customers**  
from its inception in 2003.  
  
20 years consecutively.

We score **+%85**  
**customer**  
**satisfaction** rate

## Our motto is: «OUR CUSTOMERS GROW, WE GROW.»



### Confidence

We keep all the information you give us and the strategies you tell us as our own. We share it within our company only with the necessary people in a limited way.

### Harmony

Netlog is made of people with the same enthusiasm and values as you. We embrace your business as our own and work together with your teams as one.

### Transparency

We have no hidden agendas. We are always transparent to our customers. We accept and correct our mistakes. We share our creative ideas with you and reduce your costs.

### Vision

As Netlog, we are a real logistics innovation factory. We continuously build, implement and control the solutions that will carry you forward.



- innovate and implement logistics solutions throughout supply chain cycles
- manage the global shipping of products on behalf of our customers, from door-to-door with every international transport mode available
- manage product return processes and recycles on behalf of our customers
- manage inventories and product planning, so our customers do not spend their valuable equity on excess inventory
- transport and distribute products through our unmatched omni-channel distribution network

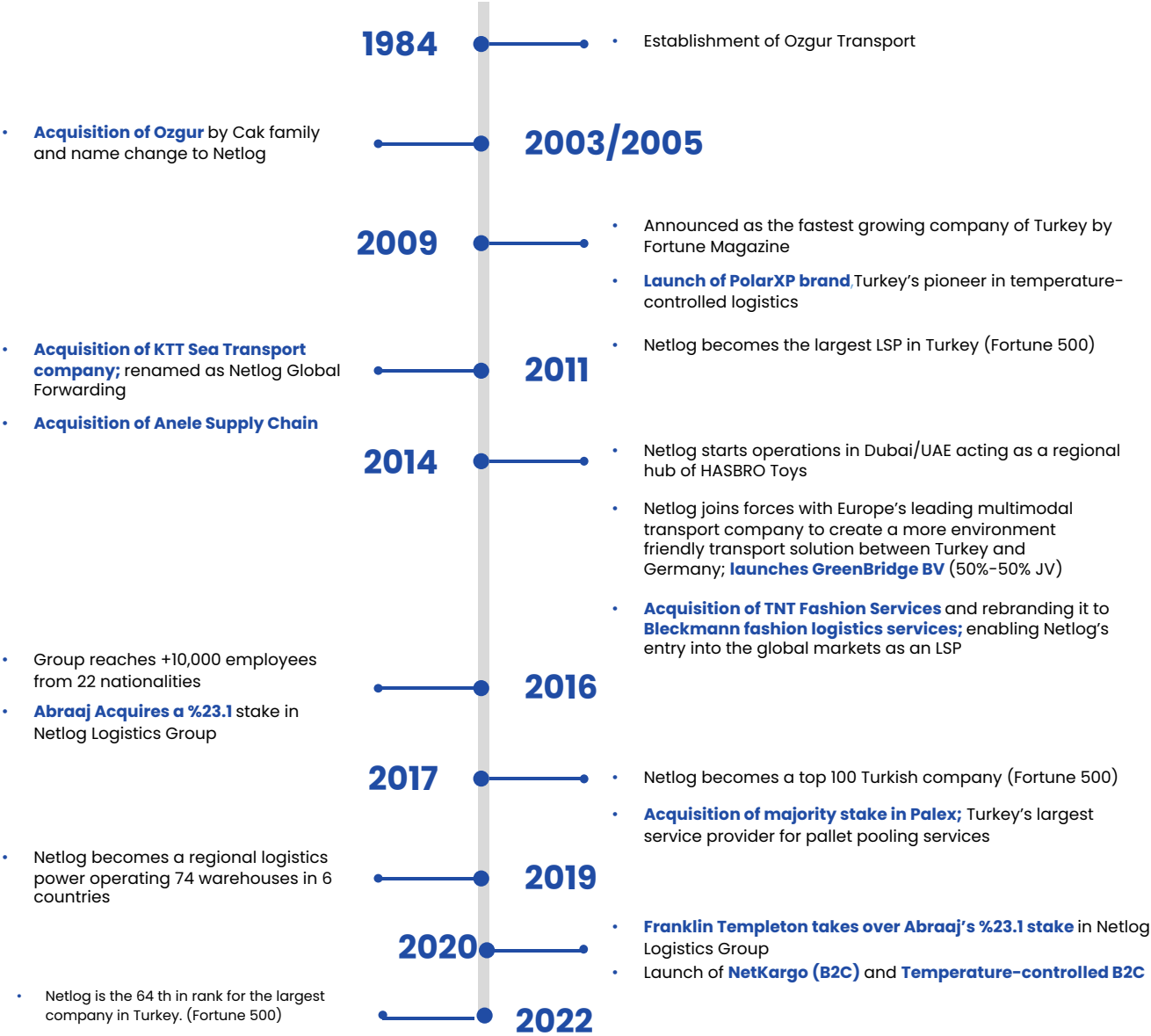


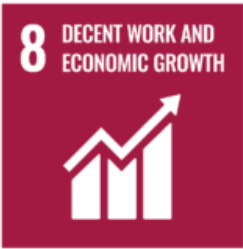
## Group Strategy

- Focus on value added and integrated logistics services
- Service customers that understand the value that a proper logistics set up would bring to them
- Focus on upscale complex services with high barriers of entry
- Investing on the logistics strategies and systems of the future.
- Become a regionally recognized LSP, offer customers package deals for services in multiple countries, deal with larger accounts which leads to larger revenues and loyal customers
- Create hard to replicate solutions, which would require know-how, money and time to mature
- Continue investing in people, develop the logisticians for the future of our industry



# OUR STORY





## UN's Sustainable Development Goals at NETLOG

The United Nations' Sustainable Development Goals (SDGs) aim to make the world a better place by 2030. The 17 interlinked SDGs have been agreed upon by the countries affiliated with the United Nations. They are a call to action to promote prosperity while protecting the planet. Netlog is part of this vital journey.

The SDGs pay great attention to peace and security, economic development and environmental issues. The idea behind the SDGs is that no one is left behind and that everyone should be able to build a better future.

Not all goals are, however, applicable to Netlog. Therefore we mainly focus on the goals where we can directly contribute and make a difference, ensuring a better environment, fair wages for all employees and good workplaces.

**+ 100 MW**  
Solar Energy Generation

Euro-6 Engine Fleet With  
a **Median Age of 3**

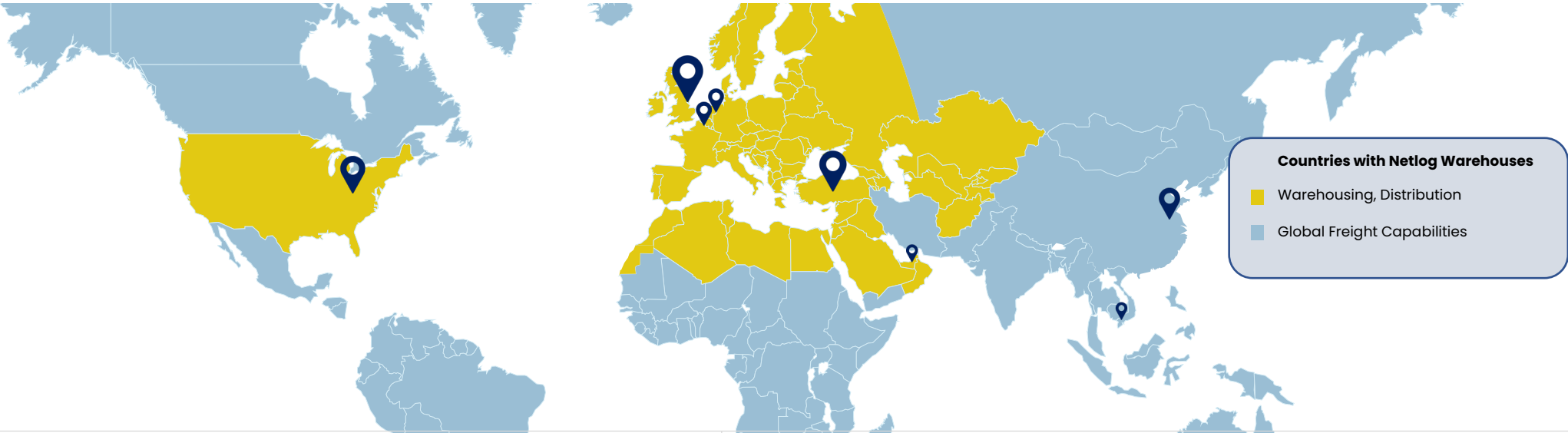
**30 Million**  
**kilometers** Moved  
from Road to  
Intermodal /  
Multimodal Options

**+85% Vehicle**  
**Battery** Recycling







**+80% of the Fleet**  
**Wheels** Recycled or  
Re-processed for Use

**85% of the**  
**Warehouse and**  
**Office Lighting**  
Systems Moved to  
Automated Led Lighting





## Our Staff Footprint

	Turkey	7,500
	Belgium	2,500
	Netherlands	3,000
	UAE	35
	UK	650
	USA	240



13,925

\*Temps are not included on the list.

## Our Warehouses

	Turkey	64	750,000m2
	Belgium	7	250,000m2
	Netherlands	28	650,000m2
	UAE,China,Singapore	4	40,000m2
	UK	5	160,000m2
	USA	1	26,000m2



110

1,866,000m2



## Solutions & Brands

### Integrated Logistics

NLG, together with its sub brands, is one of the largest LSP in the MENA Region. It is known for its extensive know-how on supply chain management services in 4 major sector clusters. To develop and create sector specific niche solutions, Netlog consolidated resources and gathered industry experts under specific logistics brands. Each of these brands focus deeply on their respective industry verticals.

#### 1 General Goods Logistics



Netlog, together with its sub-brands serves general goods logistics. Netlog has three main service lines:

- a) Warehousing & Distribution
- b) Domestic Transport
- c) International Transport

#### 2 Fashion & Lifestyle Logistics



Bleckmann is EMEA Region's largest «fashion and lifestyle» focused logistics service provider. Managing **29 e-fulfillment centers** in UK, BENELUX and USA.

#### 3 Temp. Controlled Food Logistics



PolarXP is a pioneer in Turkey for temperature-controlled logistics services. It controls **over 35%** of the Turkish temperature-controlled logistics market.

#### 4 Pharma & Healthcare Logistics



NHL is the largest pharma logistics company in Turkey. The company is the LSP of **over 75 pharma customers** in Turkey, logistically managing **close to %40** of the Turkish pharma market.

### Logistic Support Services

NLG provides logistic support services to third-parties such as warehousing equipment leasing and pallet pooling.

#### 5 Pallet Pooling



Palex is Turkey's largest pallet pooling services company. It is also a market maker for its unique service offering on renting one way non colorized pallets.

#### 6 Warehousing Equip. Leasing



Netistif is one of the largest operational equipment leasing companies in Turkey. The company mainly focuses on operational leasing of forklifts and other types of warehouse lifting equipment

### Supply & Procurement Solutions

NLG is a major turn key solution provider for product procurement and supply chain management of food and FMCG products. It is also offers discounted fuel sales under a separate brand name.

#### 7 Procurement and Supply Chain Management



Kuresel is a leading integrated procurement, sales and logistics services provider in Turkey focused mainly on food, FMCG and hygiene products.

#### 8 Discounted Fuel Sales



Netlog Energy markets the groups discounted fuel purchasing price to 3rd parties for a premium over its lower than market rate and makes a premium over it.

# INTEGRATED LOGISTICS SEGMENT

In logistics, one-solution-fits-all mentality does not work. NLG is known for its innovative logistics solutions developed across the supply chain cycles of specific industry verticals. To better focus on these sectors, not only it has created tailor-made solutions for all the players within these sector verticals, it has also created logistics brands that focuses on these industries all of which are leaders in their categories.

1



NETLOG  
LOGISTICS

2



3



POLARXP

4



NET  
HEALTHCARE  
LOGISTICS



A woman wearing a blue cap and a high-visibility vest is smiling and interacting with a customer in a store. The customer is holding a small object, possibly a product, and the woman is holding a clipboard. The background shows shelves with various items, including a sign that reads "I ALANA I BEDAVAI".

1

# NETLOG LOGISTICS

## Logistics Solutions for;

- FMCG
- E-Commerce
- Retailers
- Industrial Goods
- Household Goods & Technology



# 1. NETLOG LOGISTICS / Overview



## Netlog

Netlog is an integrated logistics service provider that offers innovative logistics solutions across the entire supply chain cycle

### Serves

- Dry/Packed foods
- Retailers
- FMCG
- Industrial goods
- Household products
- Automotive
- Hi-tech sectors

### Key Facts

- **25 Warehouses** in 19 cities of Turkey, 2 warehouses in Dubai/UAE
- **+2,400** transport vehicles
- **+6,000** Staff
- Owns **the largest distribution network** in Turkey with its Netkargo Brand
- **+3,000 truck** movements **daily** in Turkey
- **c. 20,000 B2B/LTL** deliveries made every day in Turkey
- One of Turkey's largest international transport companies with over **100,000 international shipments** managed a year
- **4,000 active** customers

# How does Netlog Logistics play a role in Turkish economic growth?

...Netlog Logistics services are designed to provide solutions to every day challenges in trade, so businesses can grow faster, while growing their business ecosystem.

1

Netlog Logistics designs and impliments supply chain logistics solutions many can not envision.

2

Its financial strength attracts customers which require a sustainable business partner as well as vendors which wish to work with a customer like Netlog.

3

Netlog Logistics attracts the best talent in the market. In a service business a best in class team approach to all challenges makes a real difference in service quality.

4

Netlog Logistics has the most developed logistics infrastructure in Turkey with warehouses around the country and the largest fleet network enabling customers to have a cost effective reach to their clients.

5

Netlog is a gateway for its customers to reach EMEA and Central Asia region as well as the rest of the world. Netlog customers have direct access to these regions and can use the same Netlog services in these countries as well.



# 1. NETLOG LOGISTICS / Warehousing and Distribution

## Segment Overview

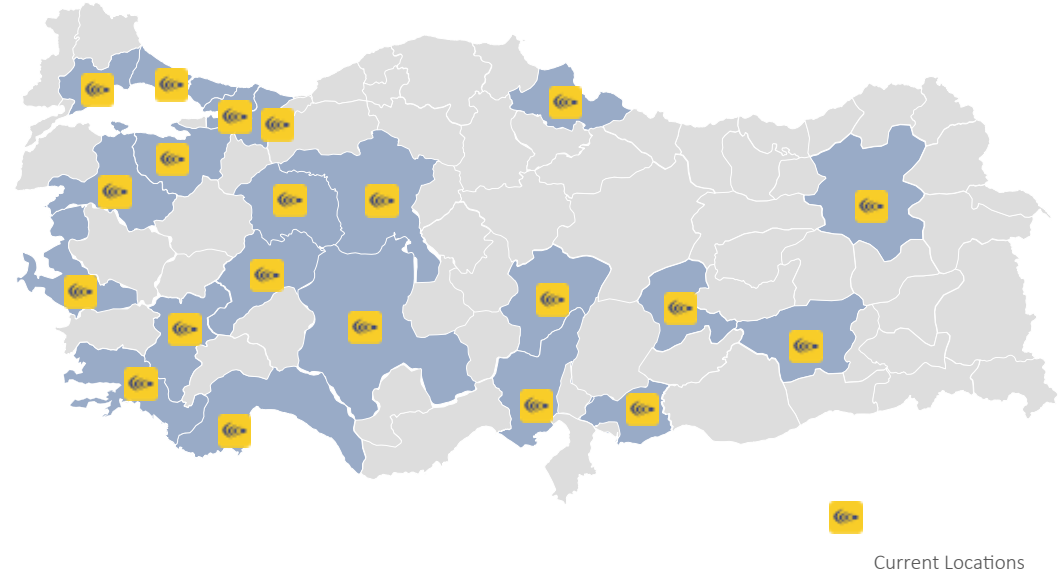
### Key Services

- General cargo warehousing
- Customs bonded warehousing
- Complex value-added services
- E-fulfilment and pick & pack operations
- White household goods storage
- High-value good storage

### Core Competencies

- Dedicated and multi-user warehousing services
- Market-leading infrastructure with 26 general warehouses
- Value-added services like handling, labelling, co-packing, reconditioning, shrink wrapping, and assembling during the warehousing stages
- Customs bonded warehousing solutions to complete its global freight management offering for imported cargo
- Warehouses strategically located in 19 of Turkey's economically and densely populated cities
- Capability to reach 99% of the country within the same day
- State-of-the-art WMS platform consisting of multiple warehousing technologies. Customized and upgraded in-house over the past 15 years

## Locations



## Select Key Customers





## **Netlog is the largest domestic transport services company in Turkey, offering services across all segments of transport**

Netlog is the largest domestic transport services company in Turkey, offering services across all segments of transport. It is also the only company in Turkey that can offer omni-channel distribution services with its own transport fleet and network.

FTL



LTL / B2B



Liquid Bulk



B2C Cargo



## Segment Overview

### Key Services

- Netlog is the largest full truck load broker in Turkey with an annual number of c. 500,000 trucks
- Apart from spot FTL transport services, Netlog also offers to its customers dedicated fleet allocation
- 60 transport offices across 20 cities
- 1.250 Truckloads / day
- Vehicle options as Double deck loading transportation

### Core Competencies

- Netlog operates over +1000 owned fleet vehicles in the FTL brokerage division to ensure service reliability as well as an insurance policy against its sub-contractors
- Netlog handles only 15% of the total loads with its own fleet
- Netlog is the price-setter in Turkish trucking market
- Thanks to its local set-up and key personnel in the largest trucking parks across the country, Netlog is capable of directly sourcing from the truck owners.
- **Netlog will launch Nettruck app platform in 2021 Q1 to capture the online truck brokerage market.**



### Select Key Customers



## Segment Overview

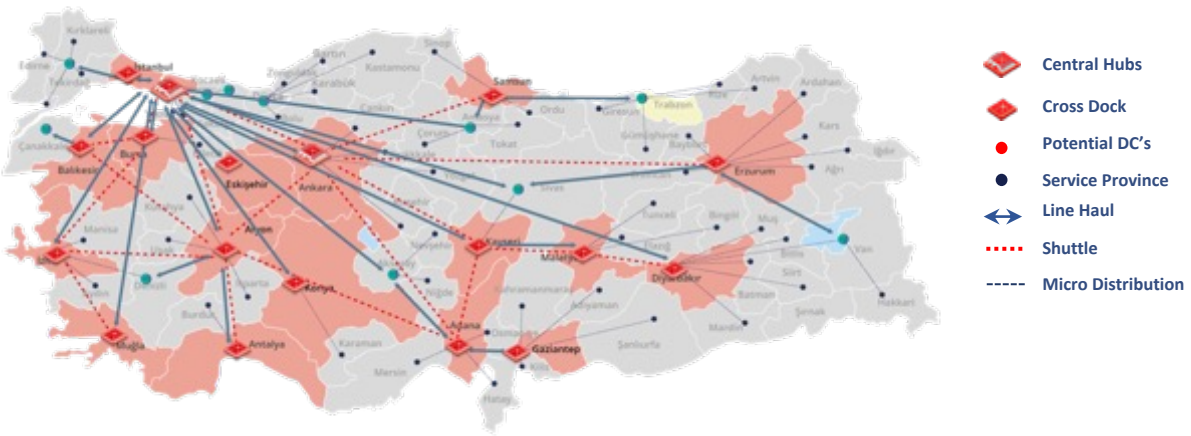
### Key Services

- Netlog owns and operates the largest B2B distribution network in Turkey
- Netlog offers this service to both its warehousing and non-warehousing customers who wish to only use this specific Netlog service.
- Netlog daily delivers over 11,000 B2B shipments to 81 cities across Turkey

### Core Competencies

- Operating 23 distribution and cross-docking hubs across Turkey with 690 linehaul and micro distribution vehicles dedicated to this service, Netlog is the only service provider that could cover the entire the country in a 3-day distribution span from a specific site to the rest of the country.
- Just like an airline company, Netlog operates its distribution system under strict time schedules, enabling customers to foresee delivery times so they can plan their order cycles.
- Customers can track their shipment status through out the transit.
- Dedicated fleet, trained drivers and own warehouse staff ensures the cargo delivery quality and eliminate damage as well as pilferage on the cargo.
- A very good Service price / quality ratio as well as the high investment requirement to match Netlogs B2B delivery set up in Turkey

## Distribution Network



## Select Key Customers





## Segment Overview

- Netlog has been developing to start-up B2C delivery services for over a year
- Netlog's existing Turkey-wide distribution network, even in its scale today, is bigger than any of the existing cargo companies in Turkey
- Netlog was only missing the final mile delivery to home setup and as well as the B2C Cargo routing IT software
- Netlog, during, the COVID-19 crisis had to respond to its customers' increasing requests thus started home deliveries for its existing customer portfolio for Istanbul city limits even though it was still missing the delivery software
- Netlog will continue limited B2C deliveries in the first quarter of 2021 after which the software and the final mile delivery staff will be ready to go in a bigger scale and start B2C deliveries in the densest 13 cities of Turkey which also represent 85% of the overall e-commerce orders.
- In a year time Netlog will cover the entire country with its B2C delivery services
- In the next 2 years, Netlog is looking to capture upto 20% of the e-commerce delivery volume in the country
- Netlog's existing B2B platform already supports the major part of B2C delivery system which is why to build a B2C delivery company for Netlog is a natural extension of its business line
- Netlog B2C service will be operating under **NETKARGO** branding.

**NETKARGO will be the first B2C delivery company offering more than %50 of deliveries with electric vehicles manufactured by under one of Netlog's parent companies subsidies MUSOSHI Brand.**

## Turkish E-Commerce Market

Türkiye'de E-Ticaret Pazar Büyüklüğü (milyar USD)



TÜBİSAD

2015 - 2019  
Yıllık Büyüme



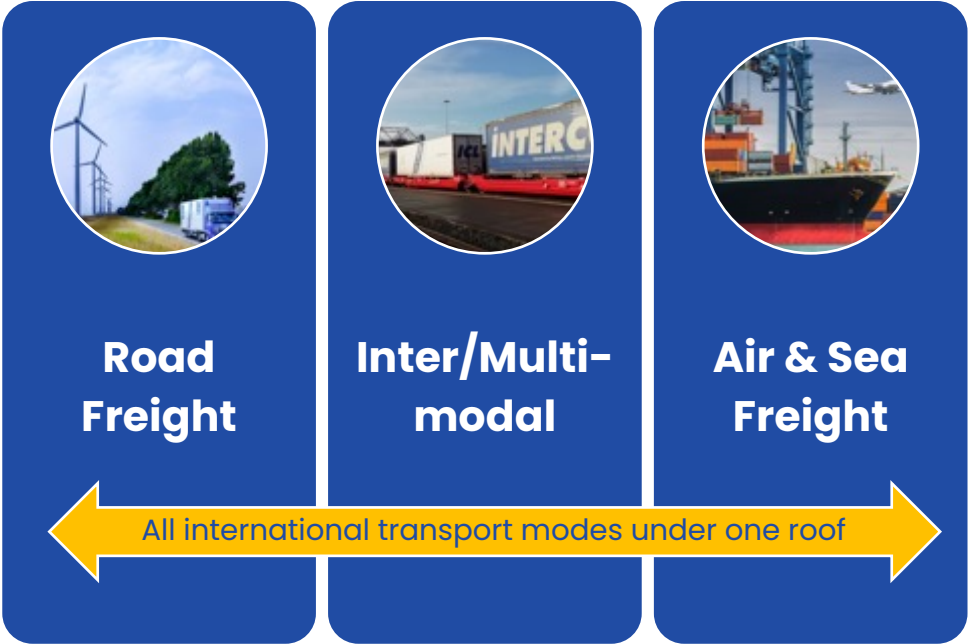
Seyirci: İstatistiksel Kuvveti Yayıncıları

Deloitte



**Netlog, together with its sub-brands Intercombi, Greenbridge and NGF, acts as the international transport division of the NLG.**

When it comes to offering a one-stop-shop for international trade, Netlog is one of the very few service providers in Turkey with capabilities to offer all transport modes under the same roof.



– Netlog’s end-to-end integrated transport solutions include consolidation services in major production countries, customs clearance in origin and arrival, cargo collection in origin, customs document management, quality control services, product certification and testing, customs bonded warehousing and cargo insurance

– Netlog offers in-transit visibility throughout the shipping process, making tracking information available to customers and customers’ customers

## Key Services

- Building upon 35+ years of experience in road transportation, Netlog connects over 40 countries with its own fleet of 780 trailers and 350 truckheads
- Together with its local and regional transport company partners in the countries served, Netlog offers all type of services needed in these countries.
- Netlog offers different service types (i.e. FTL, Less than Truckload -LTL) and transit time (i.e. Flexible, Standard, Express) options to best fit customer's operational requirements, using advanced shipment planning tools to maximize efficiency and save cost while always meeting transit time expectations
- Netlog offers trucking services to a wide range of customer segment regardless of product type or transport requirement, ranging from hazardous cargo to hanging garment transport, bulk boxed cargo to temp controlled products to heavy project cargo.

## Core Competencies

- Netlog provides international trucking services across the EMEA Region with a dedicated fleet of 780 Mega and Temp controlled trailers and a truck fleet of 350 units.
- Apart from its dedicated trucking fleet, Netlog also works with other Netlog certified haulage vendors when in need of additional trucks. Currently Netlog has a reach of over 2.000 additional trucks when needed.
- Service reach to anywhere that could be reached by road.





## Key Services

- Netlog has a long history on combining road movements with rail solutions. It was the first Turkish company to operate its own block trains between Turkey and Germany for its European operations.
- Netlog's intermodal and multimodal services span in a wide area covering both Central Asia and Europe.
- By Moving trailer units via rail connections Netlog can move more trailer units with a lot less truck heads, thus require less truck investments and increase profit margins.
- Netlog operates its own Central Asia multimodal system via vendors in the transit countries.
- Netlog's multimodal operations between Turkey and Europe are handled by Greenbridge BV, a 50/50 JV between Samskip (Europe's leading multimodal company and Intercombi (Netlog's International Trucking Company), combining Netlog's industry experience and reach in the Turkish market with Samskip's European multimodal network
- A true multimodal carrier, Netlog uses a fully integrated combination of road, rail, and sea transport solutions to provide its customers with more efficient, cost effective and environmentally friendly transport solutions



## Core Competencies

- Own rail connections offer customers guaranteed space on the system with guaranteed transit times.
- Over 500 dedicated block trains managed/yr (36 trailers in each block) with many more slot loadings from existing rail operators.

# 1. NETLOG LOGISTICS / International Transport / Air & Sea

## Key Services

- Netlog provides a global reach using air and ocean freight forwarding services to provide door-to-door solutions on moving goods into and out of Turkey, the Middle East, Central Asia, and Europe in over 60 countries with more than 200 office locations
- Being an IATA certified service provider, Netlog offers air freight transport solutions in combination with its unmatched logistic service set-up
- Netlog offers full container load (FCL) and less than container load (LCL) sea freight forwarding services, in an efficient, environmentally friendly and cost-effective way
- By using NGF Dubai Hub, Netlog offers customers an ocean freight solution in combination with air freight service, decreasing door-to-door Asia to Europe transit time to 18 days on average

## Core Competencies

- The combination of owned offices in key economic centers, as well as working in partnerships with best in class agencies, supports a full-line of transport service to customers looking to source products from and ship to global markets
- Netlog is able to offer customers guaranteed space allocation in the busiest trade lanes thanks to its historical partnerships with all major container and airlines







2

**BLECKMANN**

Since 1862

**Logistics  
Solutions For;**

- Fashion and Lifestyle



## 2. BLECKMANN / Overview



### Bleckmann

Founded in 1862 and acquired by Netlog in 2014, Bleckmann is Europe's most recognized and largest Fashion Industry related logistics company, with services that solves the problems of traditional trade as well as the new online era

### Serves

- Fashion brands
- Fashion retailers (on-line & offline)
- Lifestyle goods
- Bijouterie, accessories and luxury players

### Key Facts

- **36 warehouses in 6 Countries** (Netherlands, Belgium, UK, China, Singapore and USA)
- A total of over **700,000** sqm of indoor warehousing area
- **3,000 to 4,000** staff in high season
- Full-service agreements with over **170 global brands** in Europe
- **65%** of the revenue comes from **e-fulfilment** operations
- Manages the B2C deliveries on behalf of its customers



# What makes Bleckmann unique

...brings direct advantage to Your business

1

The leading logistics service provider for the fashion and lifestyle industry

2

Over 150 years of history combined with strong entrepreneurial spirit and ownership

3

Scalable and portable solutions through standardised working methodology and In house IT development capability

4

Very strong Omni-channel capability combining retail, wholesale and e-commerce capabilities in a single IT and operational platform

5

Unique "Local Hero" distribution and reverse logistics program

## 2. BLECKMANN / Service Scope

### Segment Overview

- Founded in 1862, Bleckmann offers specialist supply chain services for the for the fashion and lifestyle industry throughout Europe, with worldwide freight forwarding capabilities
- Acquired by Netlog in 2014, the Company was transitioned from being a solely retail service provider to an e-commerce concentrated omnichannel distribution full scale fashion and lifestyle service provider
- Since acquisition by Netlog, the Company started investing in overseas operations and made its move to UK and USA to become a global player in fashion and lifestyle logistics
- Bleckmann is now considered as Europe's largest fashion focused service provider
- Bleckmann operates through two divisions: transport - inbound and outbound, and logistics (warehousing) services and employs 4,000 people
- Bleckmann provides warehousing, pick and pack, pre-retailing services as well as distributions services including inter-store transfers, product launch/recall, and standard store replenishment
- **On Blackfriday weekend of 2020, Bleckmann picked and packed over 11.000.000 pieces of on-line orders from its sites across the world**

### Selected Highlights

- Leading player in European fashion and lifestyle logistics
- Partners with well-established with blue-chip customers
- Expertise in running high volume/ high frequency warehouses
- State-of-the-art asset base and operational set-up
- Best-in-class management team with track record of innovation and excellence in customer service

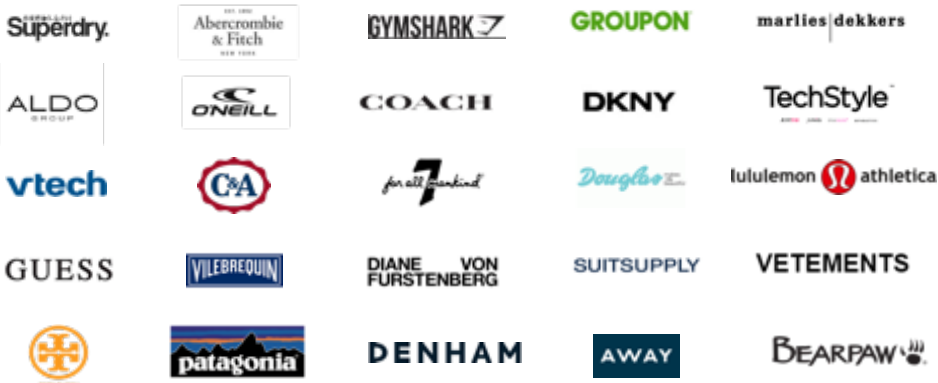
### Locations

Clusters of dedicated and multi-user sites in the logistic hotspots



600k	m2 warehousing & fulfilment facilities
+300m	pieces of fashion & lifestyle products
20m	packages distributed worldwide
1.6m	return shipments processed for resale
+50	carriers in addition to own linehaul network and x-dock
x10	volume surge during peak seasons (selected e-commerce clients)

### Select Key Customers







**3**

# POLARXP

## Logistics Solutions For;

- Temperature  
Controlled Food

### 3. POLARXP



## PolarExpress Logistics (PolarXP)

PolarXP is the pioneer in Turkish temperature-controlled food logistics industry. It is not only the largest temperature-controlled storage company in Turkey, it is also the only company capable of delivering every dimension cargo under cold, cool or frozen temp. levels across the entire country through its scheduled delivery network

### Serves

- Food manufacturers
- Food retailers
- Food traders (Importer/Exporters)
- HORECA

### Key Facts

- **22 warehouses** in 19 cities in Turkey
- **+1,200** temperature controlled, dual temp, double deck transport **vehicles**
- **1,200** staff
- Owns **the largest** and **the only** temperature-controlled distribution network in Turkey
- **+1,000 vehicle movements** daily
- 35,000 deliveries made every day
- **1,400 active** customers



# What makes PolarXP unique

...brings direct advantage to Your business

1

PolarXP is the connector of Turkish food industry. It is a platform where manufacturers, HORECA \* and Food retailers meet.

\* Hotel, Restaurant, Cafe

2

PolarXP is not just another logistics player in this segment. It is the pioneer which created it.

3

The one and only scheduled temperature controlled distribution network in Turkey.

4

The largest refrigerated fleet park with over 1.200 vehicles.

5

22 Temperature controlled warehousing locations across the country with over 150.000 pallet spaces.



# 3. POLARXP / Distribution Network



## Segment Overview

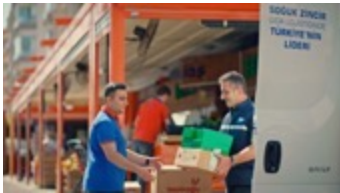
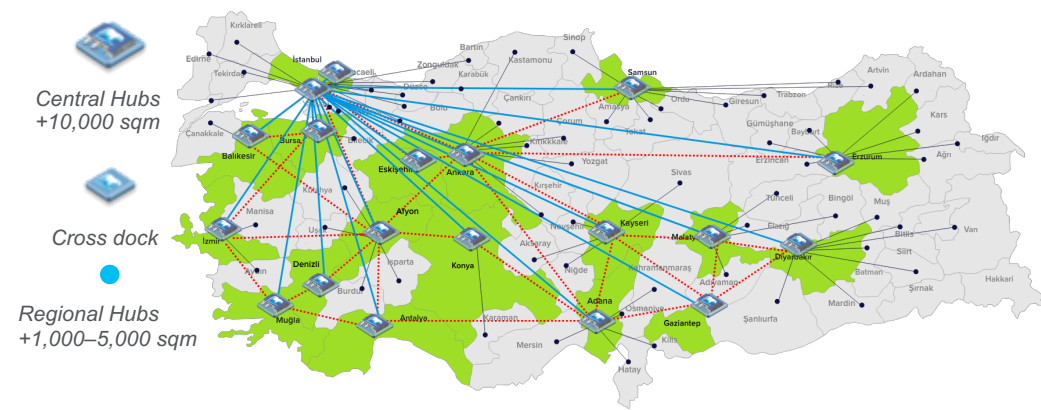
### Key Services

- PolarXP is the pioneer in Turkish temperature-controlled logistics industry. Since its inception in 2009, NLG has invested over USD100mn in W/H and transportation equipment to establish and grow its network to assist and accelerate the growth of the temperature-controlled food sector in Turkey
- PolarXP owns the only distribution network in Turkey; comprised of 1,200 dedicated temperature-controlled distribution vehicles operating within 22 regional temperature-controlled hubs and warehouses (235,734 sqm area)
- Besides temperature-controlled warehousing services, PolarXP also offers value-added services such as handling, labelling, repacking, co-packaging and 2D barcoding in a temperature-controlled environment
- PolarXP also runs a fleet of temperature-controlled transport units which can provide multiple temperature levels within different segments of the trailer to be able to consolidate and deliver products with different temperature requirements
- PolarXP offers in-transit visibility for temperature tracking in all of its small to mid-size and larger temperature-controlled transport units

### Core Competencies

- Combining its warehouse network and temperature-controlled fleet, Polar XP offers full supply chain management solution with a scheduled cold chain parcel delivery system, creating an attractive “one-stop-shop” for its customers
- Being the only provider of fully integrated temperature-controlled logistics services in Turkey gives PolarXP a unique position and a competitive advantage when offering services in the food, beverage and healthcare sectors

## The Only Nationwide Temperature Controlled Distribution Network



### 3. POLARXP / Temperature Controlled B2C Distribution

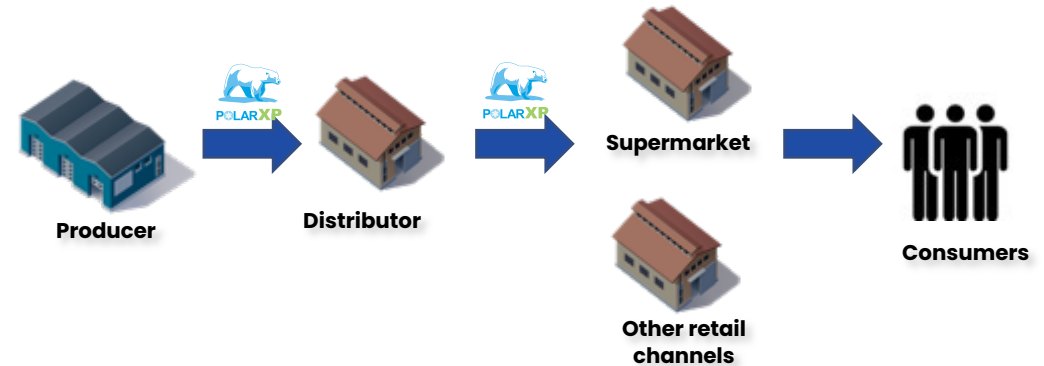


## New Initiative Under Temperature Controlled B2C Distribution & Marketplace

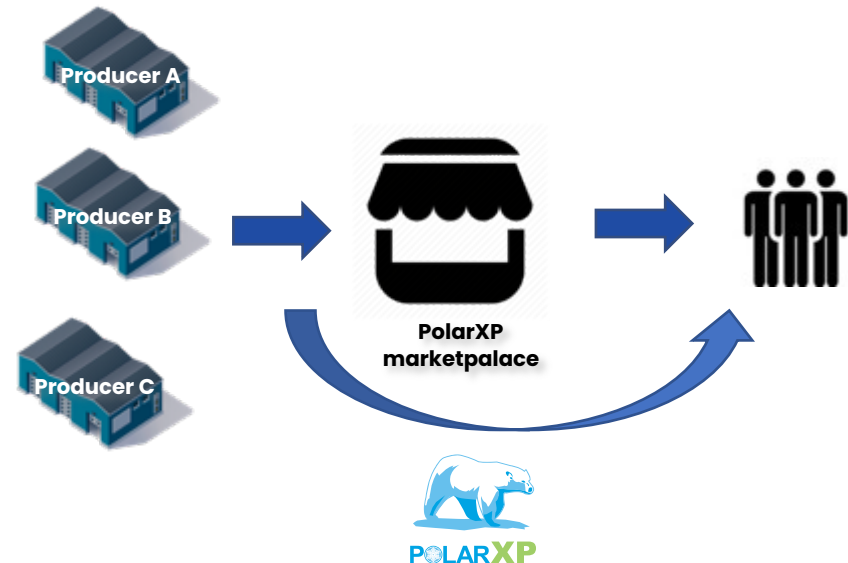
#### Segment Overview

- In 2020, PolarXP launched a new temperature-controlled B2C delivery operation
- With PolarXP's new temperature-controlled B2C delivery setup, the entire PolarXP customer portfolio / other temperature-controlled food producers will be able to reach directly to end customers
- PolarXP will be using Netlog's B2C Cargo's IT software for its final mile delivery
- In a years time PolarXP is expected to cover the entire country with its B2C delivery services
- PolarXP's existing B2B platform already supports the major part of B2C delivery system which is why to build a B2C delivery company for Netlog is a natural extension of its business line
- This initiative will be operating under PolarExpress Brand

#### Existing Temperature Controlled Food Ecosystem



#### New Envisaged Ecosystem



A blue-tinted photograph of an industrial robotic arm in a factory setting, packaging white cylindrical containers. The arm is yellow and green with blue cables. In the background, a worker in a white lab coat is visible. The entire image is overlaid with a blue gradient.

**4**

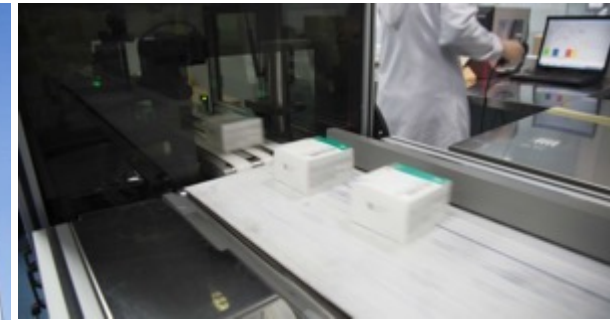
**NHL**

## **Logistics Solutions for;**

- Pharmaceuticals  
and Healthcare



## 4. NET HEALTHCARE LOGISTICS (NHL)



### Net Healthcare Logistics (NHL)

NHL is the only logistics company dedicated to pharma industry in Turkey that meets the high standard requirements of pharma companies. NHL offers its customers end-to-end transport, storage and value-added services

#### Serves

- Pharma companies
- Beautycare companies
- Hospitals
- Healthcare equipment manufacturers
- Pharmacies

#### Key Facts

- **2 warehouses** in Istanbul with over **60,000 PLs** under storage
- **700** staff
- **Stores 35% of the medicine** used in Turkey
- **+6 million boxes** of medicine handled and 2d barcoded monthly
- **+50** local and global players under portfolio

## 4. NHL / Segment Overview

# Why is it so hard for someone new to enter in to healthcare and pharma logistics segment?

1

NHL is the only pharma logistics company in Turkey which can deliver both warehousing and country wide temperature controlled delivery services.

2

%70 of the NHL workforce handles the value added services of the company. NHL 2D barcodes and processes over 4 million units of medicine boxes every month.

3

NHL is the LSP of 53 pharma brands in Turkey which represents %40 of the pharma consumption of the country. NHL manages 2 major GDP certified logistics centers in Istanbul with over 60.000 medicine pallets at stock at all times.

4

It takes an average of 3 to 6 months for a pharma customer to get government approval to enter into a new logistics warehouse. Which is why the customers are signed with long term unbreakable service contracts. NHL has never lost a customer since its foundation.

5

NHL is one of the leaders in 2D end-to-end product tracking design systems integrated with the Turkish health ministry.



# LOGISTICS SUPPORT SERVICES

5

**palex**  
pooling services

6

**ni**  
NETİSTİF



## 5. PALEX



### Palex

Palex is the largest pallet pooling company in Turkey. Palex has redefined the existing pooling services structure offered by colored pallet pooling companies and replaced it with easier to manage and track non-colored all use common market pallets

### Serves

- Retailers and supermarket chains
- Food manufacturers (Packed / Temp-Controlled / Dairy)
- FMCG manufacturers
- Automotive factories

### Key Facts

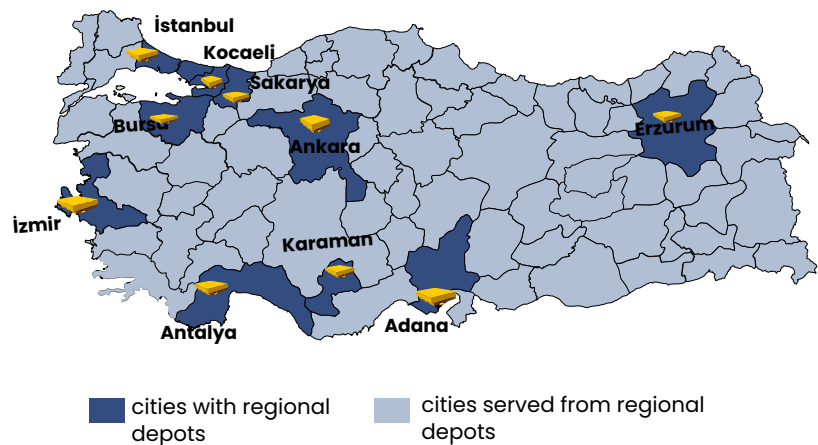
- Palex operates 14 pallet storage facilities across Turkey
- Manages the delivery and collection of over 4 million pallets from customers and collection points every month
- One of the fastest growing Turkish Company in rank of revenue
- Operates dedicated sub-contractors for collection and deliveries as well as utilizes Netlog's network, benefitting from this unique competitive advantage
- Over 360 manufacturing customers under contract as well as the nominated service provider by 4 of the top 5 Turkish Food retailers
- Recently started pooling of Reverse Logistics Cases

# 5. PALEX / Pallet Pooling

## Palex Overview

- Palex was founded in 2013 to offer an open pallet pooling model
- In 2019, Palex launched TURPAL pallet «a 40,6dm3 pallet almost identical to the EPAL pallet, open pool» in cooperation with BIM, the largest food retailer in Turkey
- Palex has become the largest pallet pooling company in Turkey, redefined the existing pooling services structure replacing color code pallet pooling system with non-colored, all-use common market pallets
- Out of its 16 regional depots with combined space of 70,000+ sqm, the Company provides roughly 4 M pallets per month to its customers, via its dedicated fleet of 170 trucks

## Palex Footprint



## The Palex Model



### 1 PALLET SALES

- Customers purchase the number of pallets they need, the pallets are delivered to their plants

### 2 PALLET SHIPMENTS

- Customers ship the pallets to the collection warehouses

### 3 PALLET COLLECTION:

- Shipped pallets data are shared with PALEX via EDI or bulk excel uploaded to the PALEX PTS system
- PALEX pallet collection teams use this data both in the field and in the office to manage the relevant accounts and collect the pallets

### BY WORKING WITH PALEX, CUSTOMERS

- Don't allocate resources to manage pallet collections and accounts
- Don't have to manage the type of pallet collected
- Don't deal with pallet repairing in their plants
- Avoid unnecessary long-distance transportation of pallets
- Deal with one single service provider for all
- Aren't affected by wood price fluctuations in the market



### Netistif

Netistif was initially founded to service Netlog companies with forklift maintenance needs across Turkey. After a period, the group realized that there were many more in need of such a turnkey service. Netistif was then spanned into a warehousing equipment leasing company which not only leases equipment but also offers the maintenance as a package deal

### Serves

- Retailers and supermarket chains
- Food manufacturers
- FMCG Manufacturers
- Automotive Factories
- All other industries

### Key Facts

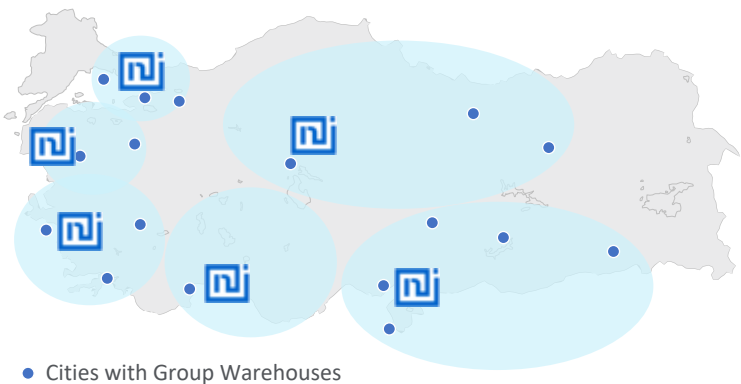
- Netistif currently holds an equipment inventory of over 4,000 units
- Has a Turkey wide set up, capable of maintenance activities across the country
- With a portfolio of over 100 customers and their combined volume, the Netlog Group companies benefit from reduced equipment maintenance fees



## Segment Overview

- Netistif is a leading warehouse equipment operational leasing company, offering long-term rental services together with equipment servicing across Turkey
- Netistif’s main customer base comprises companies managing their own warehouses or companies in need for equipment in their factories
- The rationale for the establishment of Netistif was based on the requirement for a critical mass of equipment in order to sustain an in-house maintenance team able to immediately and regularly provide assistance to the Group in relation to its equipment
  - Enlarging the asset base through the creation of a rental business to third-parties enabled the critical mass to be achieved
  - The existence of its proprietary nationwide maintenance team enabled the Group to effectively roll-out an operating leasing network

## Extensive National Footprint



## Operational Fleet Leasing Solutions

### Forklifts



### Warehouse Equipments



### Platforms



### Attachments



### Cleaning Equipment



# SUPPLY & PROCUREMENT SOLUTIONS

7



8





## 7. KÜRESEL SUPPLY CHAIN



### Küresel Supply Chain

Küresel is a full supply procurement, order management and distribution services company. While offering these services to its customers, Küresel utilizes the logistics infrastructure of Netlog, making it a uniquely positioned and well advantaged solution provider to offer such services

### Serves

- Gas Stations & Convenience Stores
- Remote site catering companies
- HORECA
- Brands in need of local representation (Distributorship)

### Key Facts

- Küresel is the Turkish distributor of several global brands in Turkey including but not limited to Starbucks Ready-to-Drink products
- Küresel was the first company in Turkey to develop a procurement and distribution system specifically dedicated to Gas Station Convenience stores
- Küresel in Turkey supplies over 1,200 gas stations with FMCG products
- Küresel is the exclusive partner of Shell in Turkey. It has also spanned its operations to other major fuel station brands



## Segment Overview

### Domestic Sales and Distribution Services

- Established to provide customers turn-key procurement logistics solutions including custom services to import and export of goods
- Operates under the Küresel brand to perform procurement logistics, which commenced in 2014
- Two main lines of business:
  - **Procurement logistics for convenience stores:** Provides product sourcing, consolidation and delivery services to convenience stores, eliminating the need for individual distributors
  - **Procurement and import solutions for major retailers:** Imports the products, undertakes all custom procedures and sells the imported products back to its customers

### International Sales and Distribution Services

- Conducts supply chain services
- The Company provides full product sourcing from procurement to delivery and unique logistics capabilities to countries in the CIS and MENA regions offering a solid and reliable infrastructure in these regions
- Küresel has comprehensive experience within the food procurement and logistics industry as well as involvement in long-term supply chain projects. Also operates 2 of the 3 VETCOM approved warehouses in Turkey

## Küresel Solutions

### HORECA Solutions Convenience Retailing



- Procurement
- Warehousing
- Demand Planning
- Demand Replenishment
- Inventory Management
- Sales Forecasting
- Sales and Distribution
- Return and Refusal Collection
- Merchandising

### Retail Sales and Distribution Solutions



- Procurement
- Sales Forecasting
- Sales and Distribution
- Return and Refusal Collection
- Merchandising

### Import Services



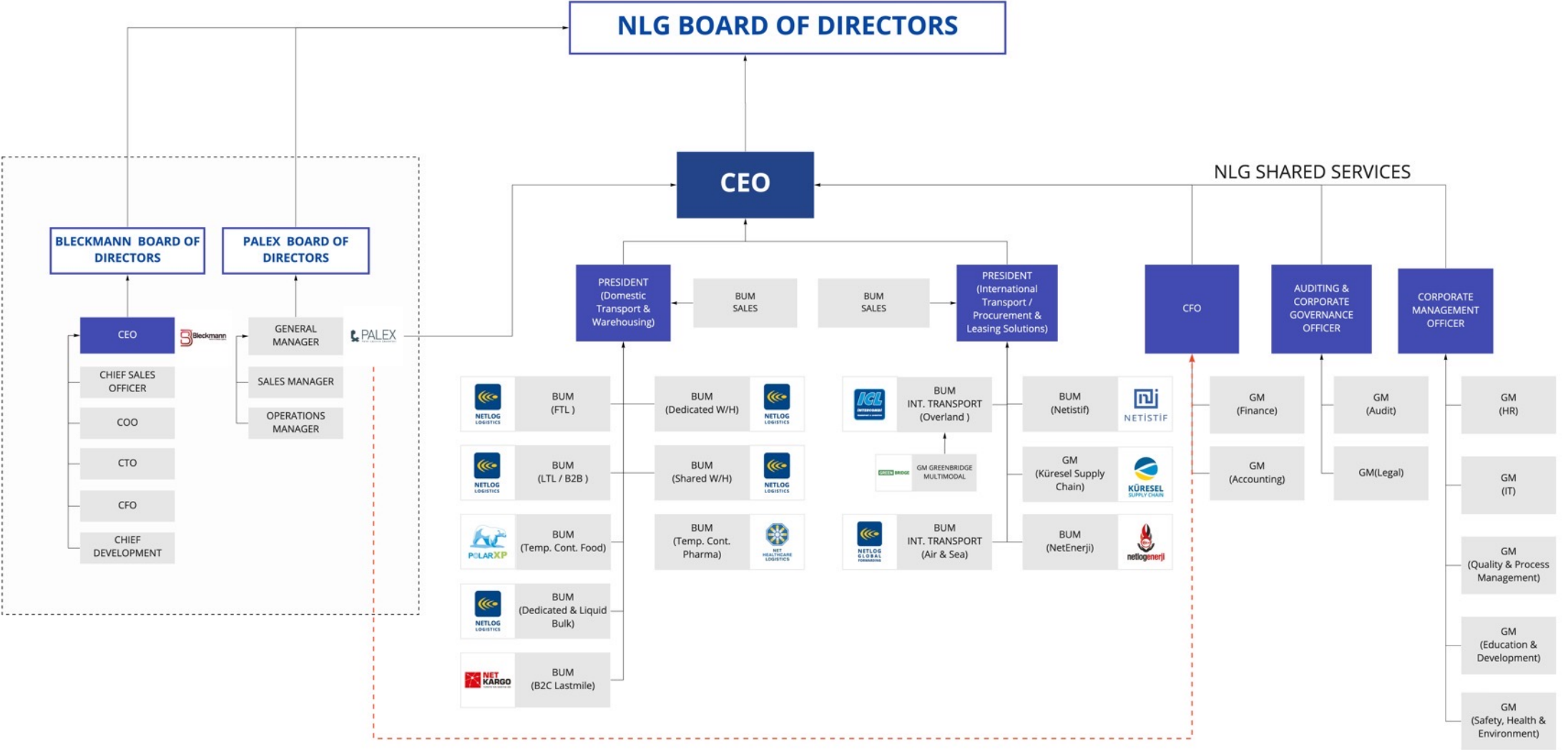
- Management of all Import and customs services
- Procurement
- Sales advertising and campaigns
- Sales and Distribution
- Return and Refusal Collection
- Merchandising



# How are we doing as a company?



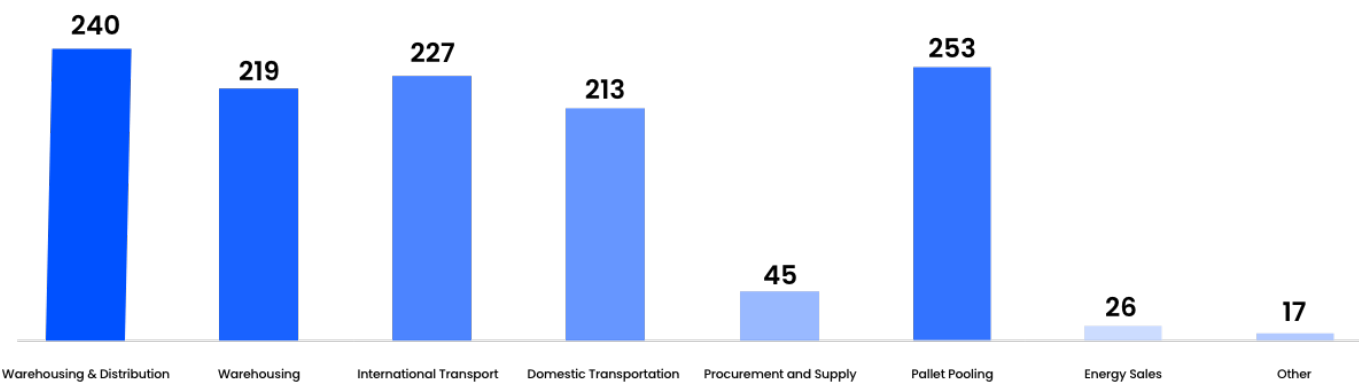
In the past 15 years, Şahap Çak transformed Netlog into the most innovative company within the very traditional logistics industry. Now, with his global investments and investments in fleet electrification, he is targeting to reach 2 billion dollars.



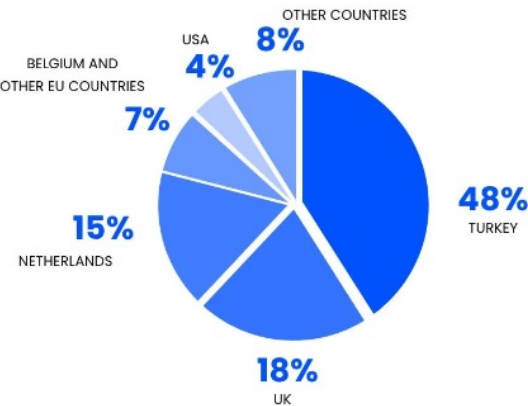


**USD 1,24  
Billion**  
Annual Turnover

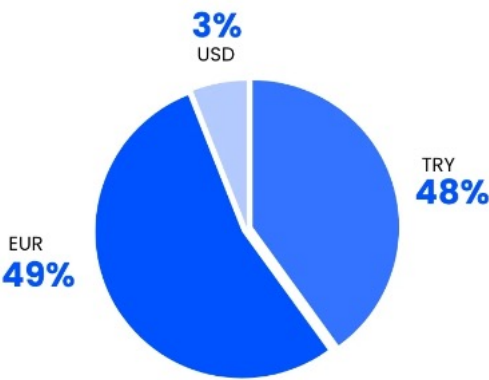
Revenue by Service (2022A, Euro mn)



Revenue by Country (2022A)



Revenue by Currency (2022A)













**Logistics Solutions of the New World Order.**

*Thanks.*