"Silk Road" Institutional-Grade Multi-Modal Fulfilment & Logistics Infrastructure

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Project Silk Gateway addresses a structural supply-demand dislocation across the China–Eurasian Economic Union (EAEU) trade corridor. By establishing a modern, technology-enabled logistics and fulfilment platform within the Khorgos Special Economic Zone (SEZ), the project captures high-margin cross-border e-commerce velocity while operating at the only tri-modal border artery (rail, road, and multimodal transit) bridging China directly to Central Asia and the broader EAEU market. Supported by an ultra-tight domestic logistics market characterized by near-zero vacancy, the platform transitions traditional cross-border transit into a consolidated, high-yield bonded fulfilment ecosystem.

TARGET PRICE
$74,000,000

GROSS REVENUE
$125,000,000

EBITDA
$3,120,000

BUSINESS TYPE
Logistics Company

COUNTRY
Kazakhstan

BUSINESS ID
L#20261173

Key Financial & Transaction Parameters

Financial & Strategic Metric	Benchmark Value	Target Profile
Capital Expenditure Commitment	**US$74.07M**	Institutional-grade multi-modal development
Project Net Present Value (NPV)	**US$8.24M**	Risk-adjusted baseline valuation
Internal Rate of Return (IRR)	**20.24%**	Unlevered project IRR
Capital Recovery Horizon	**5.2 Years**	Simple payback period
Core Operating Model	**3PL / 4PL Hybrid**	Integrated warehousing, fulfilment & bonded clearing
Geographic Footprint	**Khorgos, Kazakhstan**	Primary border gateway (direct China–EAEU transit)
Core Addressable Market	**EAEU Cross-Border**	Cross-border trade, B2B consolidation & marketplace sellers

Core Market Dislocation & Opportunity

- **Constrained Physical Supply:** Kazakhstan's institutional warehouse footprint remains critically underdeveloped at roughly 1.4 million m², operating at a structural vacancy rate of just **0.5%**.
- **Transit Velocity Arbitrage:** Current parcel flows from China suffer from fragmented, point-to-point transit times averaging 3 to 6 weeks. Silk Gateway's bonded infrastructure compresses final-mile and regional delivery down to **2 to 5 days**, unlocking significant consumer adoption and inventory turn velocity.
- **Working Capital Optimization:** Operating within the Khorgos SEZ framework enables Chinese exporters to deploy inventory near consumer catchments under a bonded regime, completely deferring import VAT and customs tariffs until downstream commercial settlement.
- **Under-penetrated 3PL/4PL Capacity:** Freight volumes crossing Khorgos, Dostyk, and Altynkol increasingly outstrip localized value-add handling capacity, forcing reliance on basic transit rather than domestic value capture.

Value Creation & Revenue Monetization Ladder

The enterprise is engineered to scale unit economics by progressively transitioning client exposure from raw storage into fully managed supply-chain orchestration:

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[Basic 3PL Warehousing: US$7 / m²]
            ?
            ?
[Value-Added Fulfilment (Sorting/Pick-Pack/Multi-Temp): US$12 / m²]  (+71% Revenue Expansion)
            ?
            ?
[Integrated 4PL Solutions (Customs, Cross-Docking & Tech Integration): US$18 / m²]  (+157% Reven
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- **Core Storage & Cross-Docking:** High-turnover pallet movements and rapid freight transshipment across standard and multi-temperature footprints.
- **End-to-End E-Commerce Fulfilment:** Automated sorting, piece-picking, kitting, labeling, and native marketplace integration.
- **Regulatory & Customs Intermediation:** On-site bonded warehousing, regulatory compliance, and rapid clearance mechanisms.
- **4PL Orchestration:** Enterprise-grade end-to-end freight visibility and distributed inventory optimization across EAEU supply chains.

Strategic Moat

1. **Infrastructural Monopoly of Location:** Khorgos represents the singular point of entry along the Chinese frontier integrating synchronized road, broad/standard-gauge rail transshipment, and air-adjacent corridor routing directly into the common customs territory of the EAEU.
2. **Defensible Cash Flows:** Long-term contractual commitments across cross-docking, temperature-controlled assets, and enterprise 4PL services provide resilient base yields paired with e-commerce volume upside.
3. **First-Mover Scale Advantage:** Modernizing sorting and fulfillment at the border creates a defensible network effect, locking in tier-one Chinese marketplaces seeking aggregated logistics solutions.

Metric	Year 1	Year 2	Year 3	Year 4	Year 5
Total Gross Revenue	**12.50**	**18.80**	**26.40**	**34.50**	**42.00**
– Basic 3PL Warehousing	4.50	5.60	6.80	7.90	8.80
– Value-Added Fulfilment	5.00	8.20	11.50	14.80	17.50
– Integrated 4PL Solutions	3.00	5.00	8.10	11.80	15.70
Cost of Goods Sold (COGS) / Direct Operating Costs	**(5.63)**	**(8.08)**	**(10.82)**	**(13.80)**	**(16.38)**
Gross Profit	**6.87**	**10.72**	**15.58**	**20.70**	**25.62**
Gross Margin (%)	55.0%	57.0%	59.0%	60.0%	61.0%
Operating Expenses (SG&A)	**(3.75)**	**(4.70)**	**(5.81)**	**(6.90)**	**(7.77)**
– General & Administrative (G&A)	(2.25)	(2.82)	(3.49)	(4.14)	(4.66)
– Sales, Marketing & Technology	(1.50)	(1.88)	(2.32)	(2.76)	(3.11)
EBITDA	**3.12**	**6.02**	**9.77**	**13.80**	**17.85**
EBITDA Margin (%)	25.0%	32.0%	37.0%	40.0%	42.5%

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