

A STAR ALLIANCE MEMBER 

**TURKISH
AIRLINES** 

WIDEN YOUR WORLD

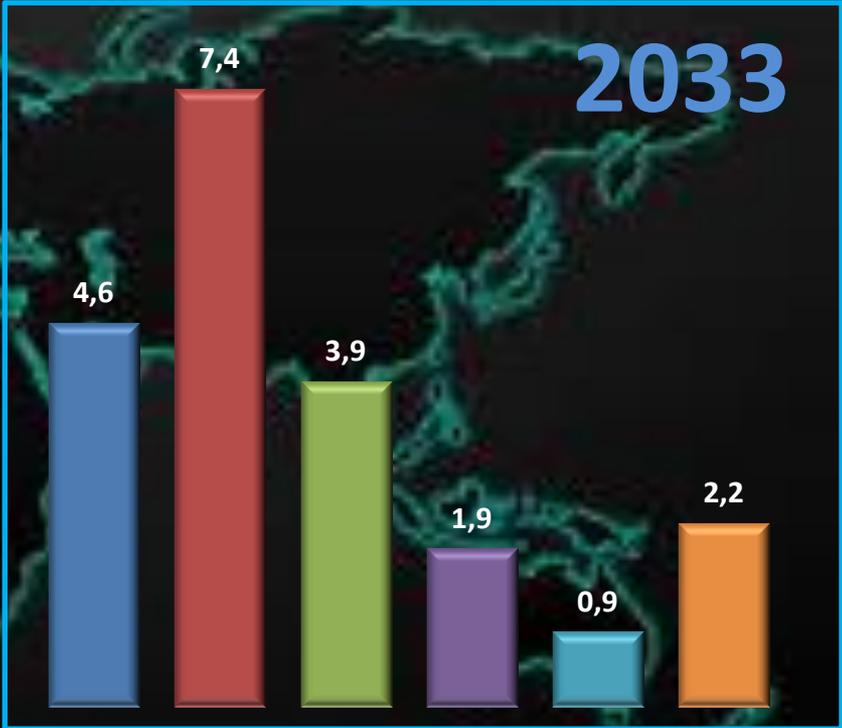
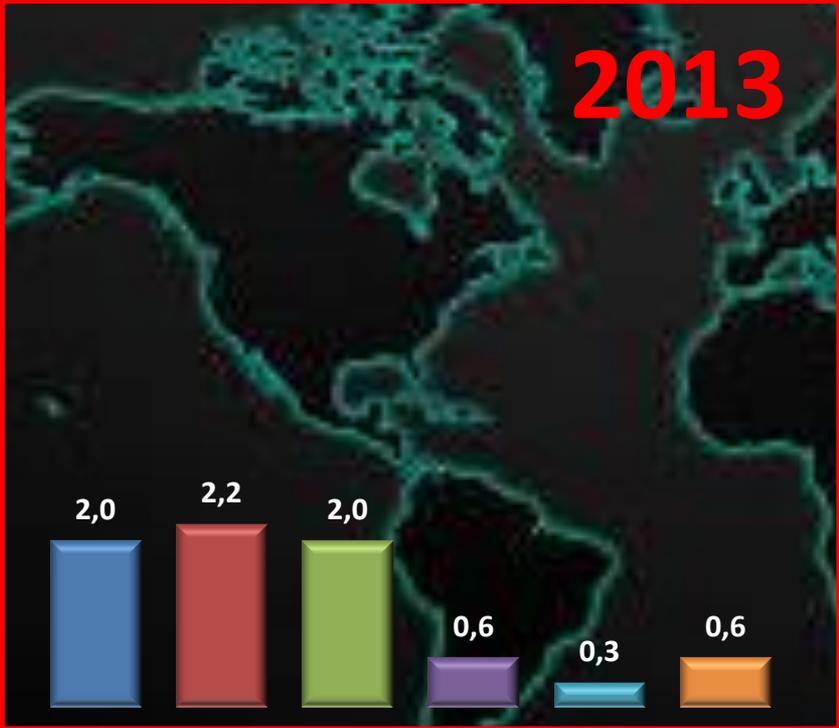
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September 2014

Passenger Traffic Flow Development

Total Scheduled Revenue Passenger-Kilometers To/From and Intra Regions (trillions)

RPK (2014F)	Schd. Passenger (2014F)	Total Revenue (2014F)
6.1 Trillion (2013 -2014 5.8% growth)	3.3 Billion (2013 -2014 5.6% growth)	745 Billion USD (2013 -2014 5.3% growth)



■ Europe
■ Asia Pacific
■ North America
■ Latin America
■ Africa
■ Middle East

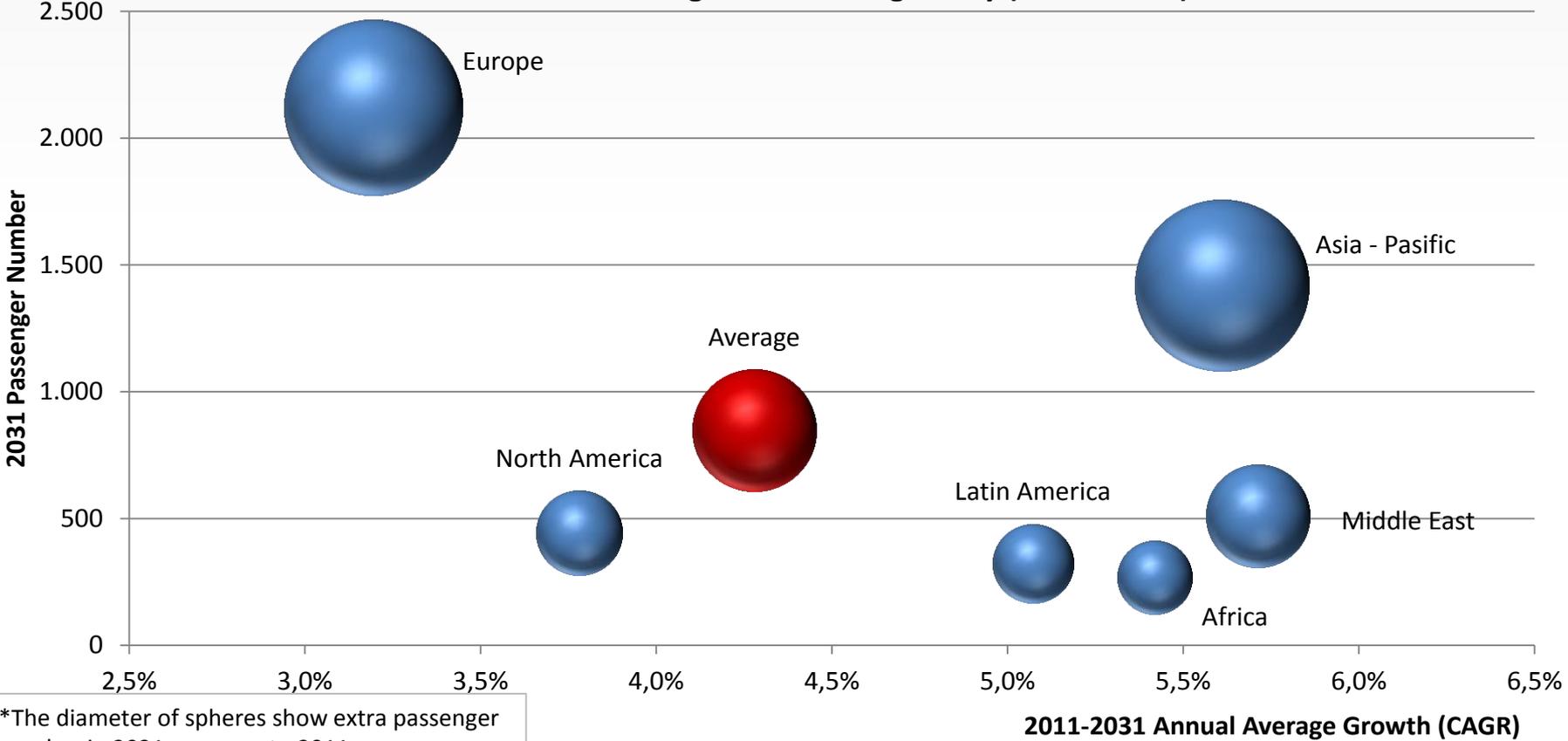
Source: Boeing Current Market Outlook 2013-2033, IATA Industry Financial Forecast March 2014

International Passenger Growth

- Europe will still be the driver of international traffic.**

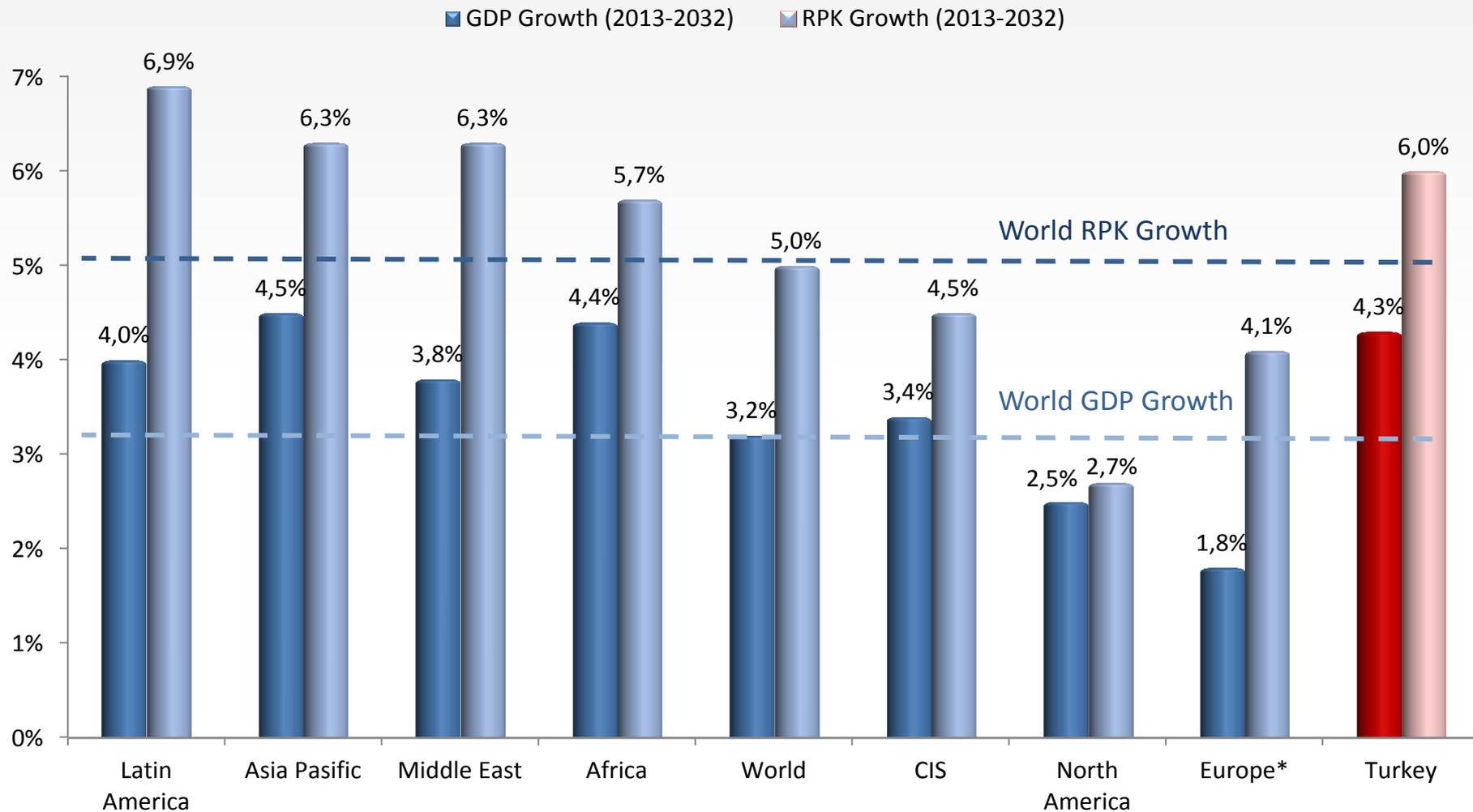
- Although growth rate of international passengers at European airports will be lower than the rest of the world, Europe will still have the biggest international passenger share.

International Passenger Growth Regionally (2011 - 2031)



*The diameter of spheres show extra passenger number in 2031 compare to 2011

Regional Aviation Market & Economic Growth



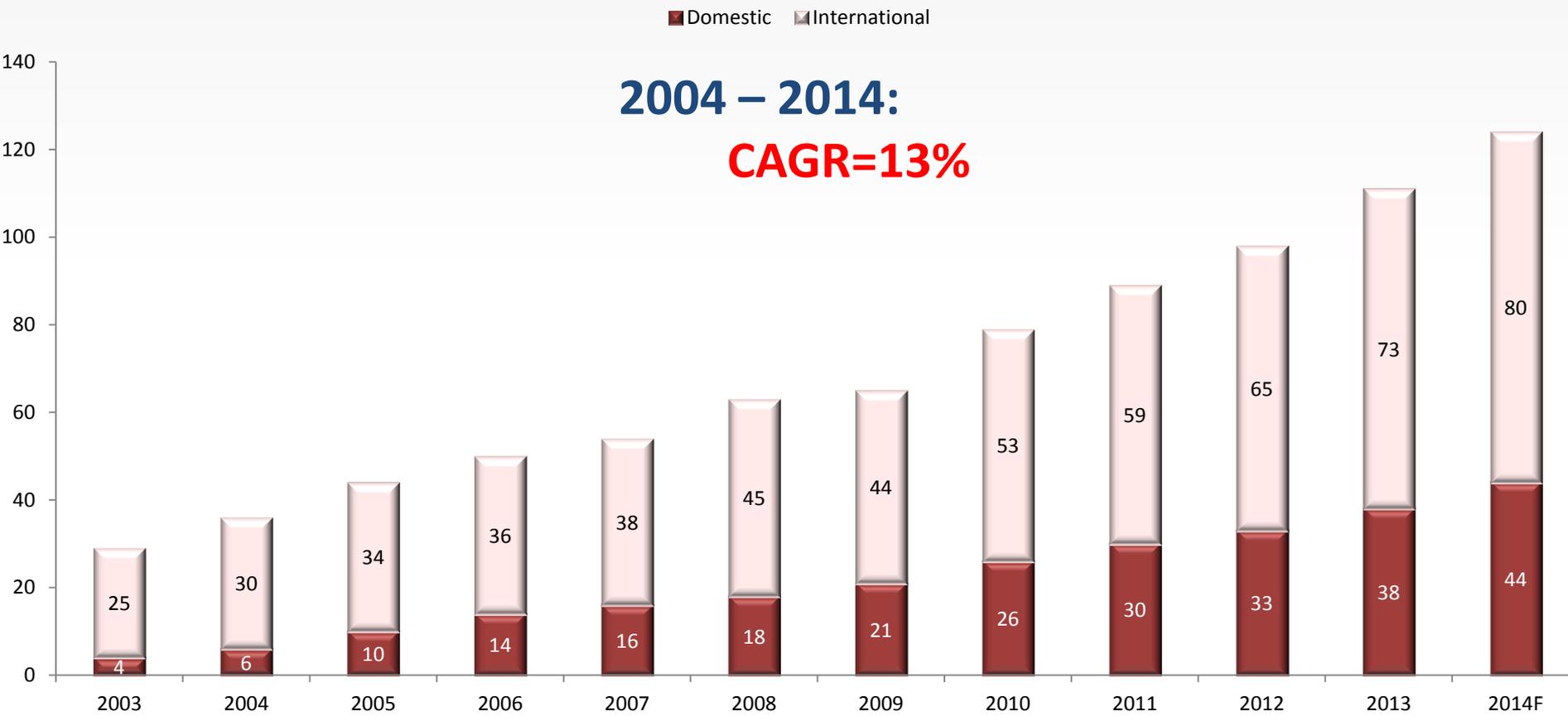
Source: Boeing Current Outlook 2013-2032

RPK: Revenue Passenger Km

* Europe except Turkey (a forecast value)

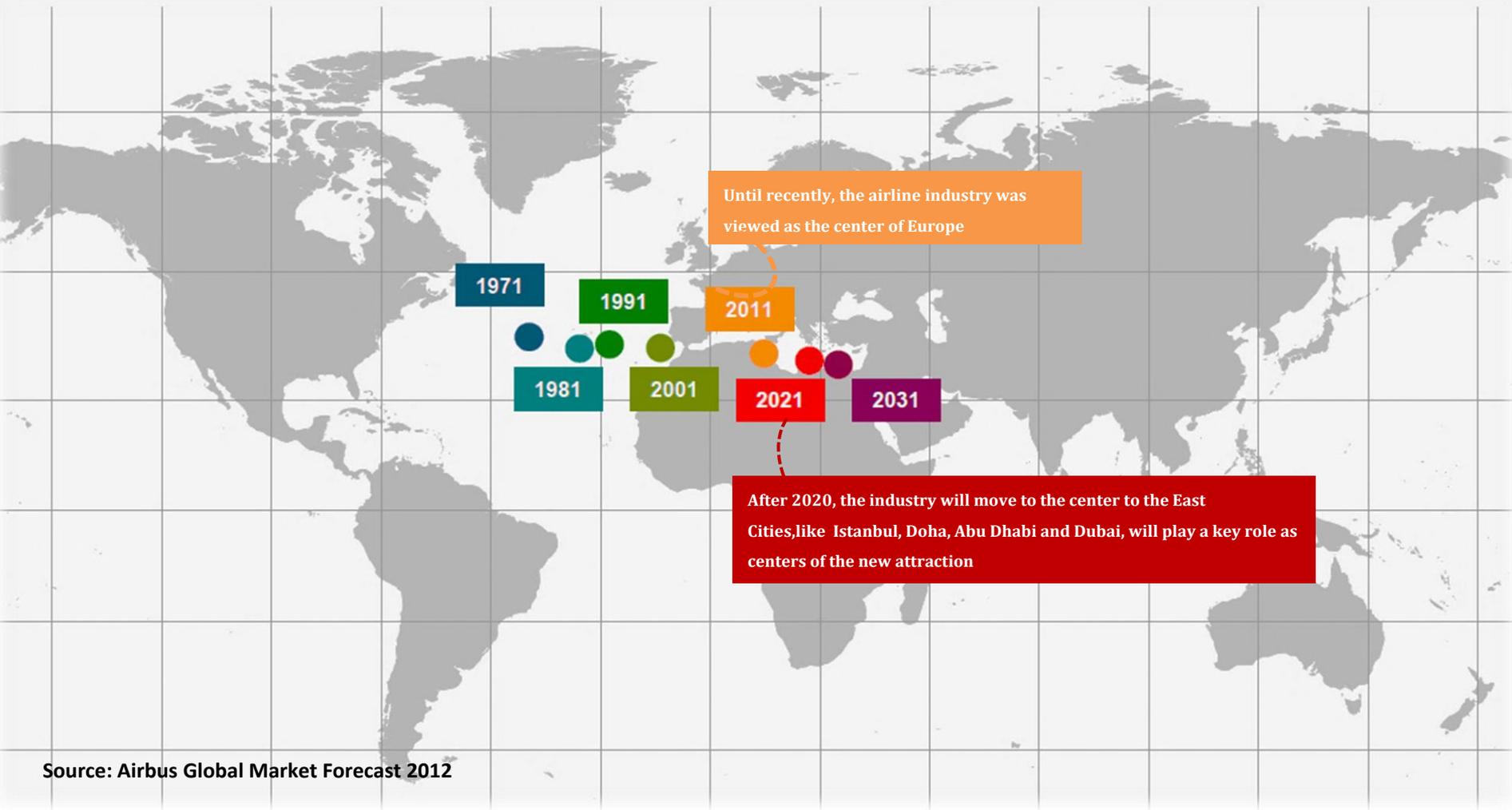
Turkish Aviation Market Growth

Total Passengers (million)											
2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014F
29	36	44	50	54	63	65	79	89	98	111	124



Source: General Directorate of State Airports Authority (DHMI).

Driving The Center Of Gravity Of Traffic To The South And East

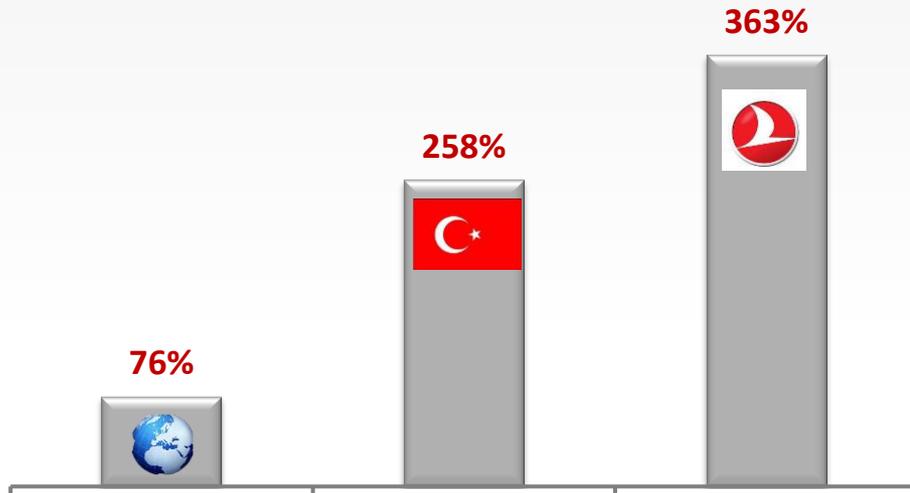


Source: Airbus Global Market Forecast 2012

Geographic centre of gravity of departing/arriving/connecting passengers per city

Traffic as month of September; estimates for historic passenger derived from offered seats; respective centres of gravity as median of city coordinates weighted by passenger traffic

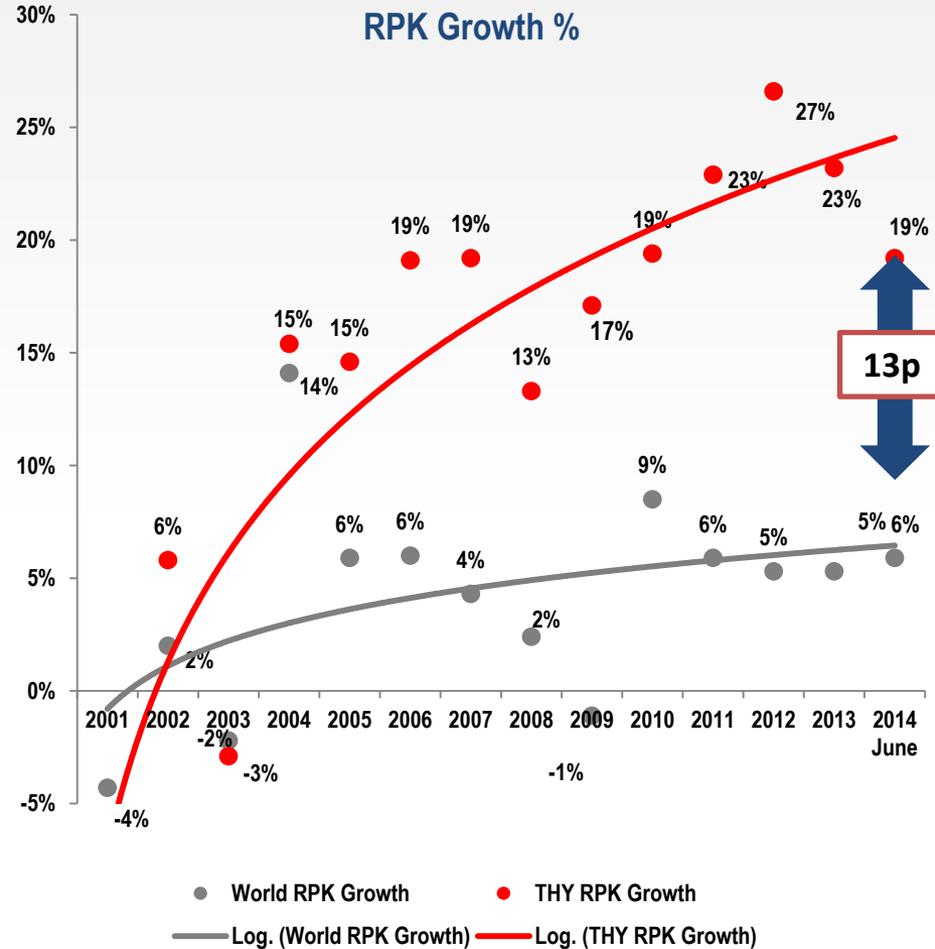
2003 – 2013 Passenger Growth Rates



Next 20 years,

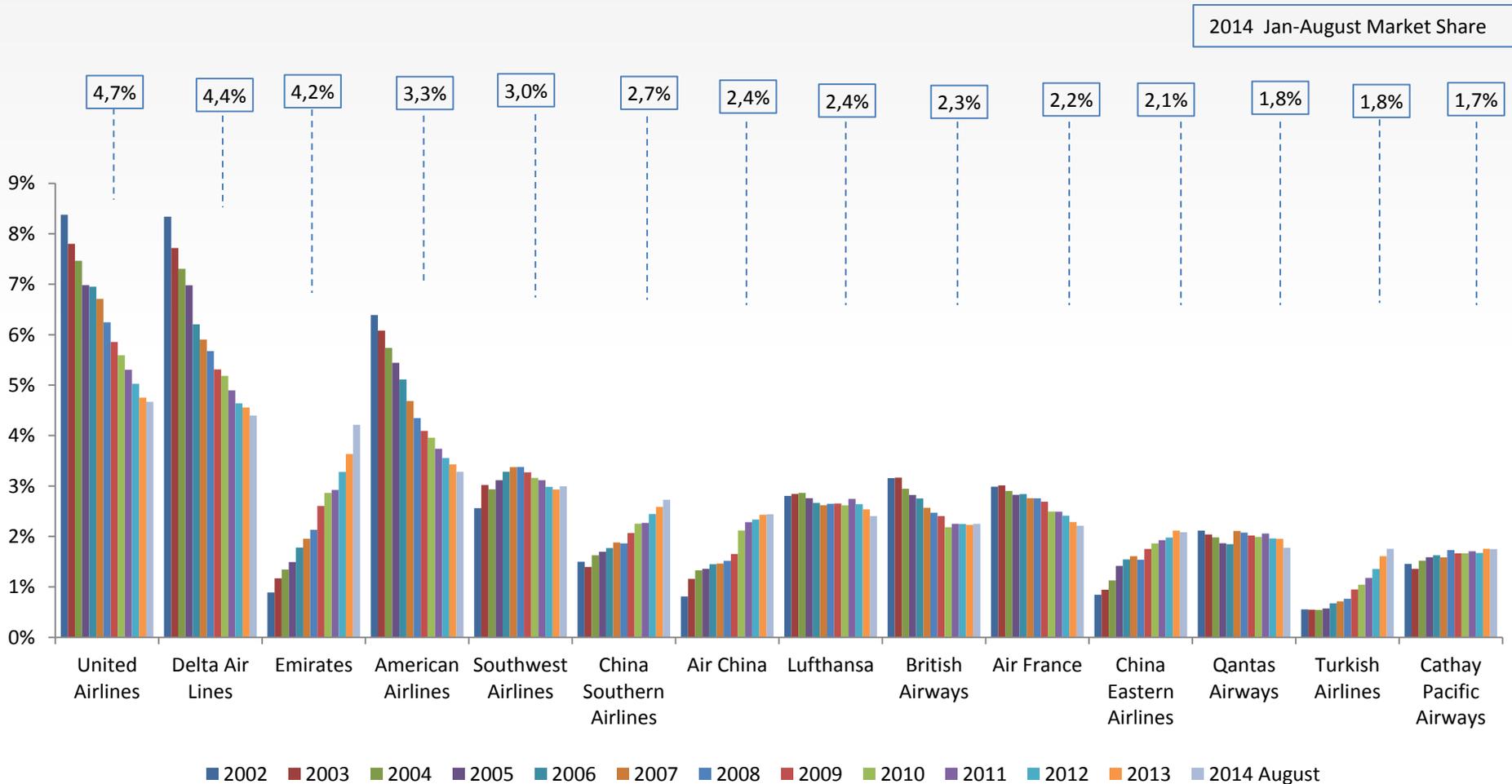
- World passenger traffic (RPK) growth rate **%4.7**
- Population growth rate **%0.9**

Source: IATA, Airbus GMF 2013



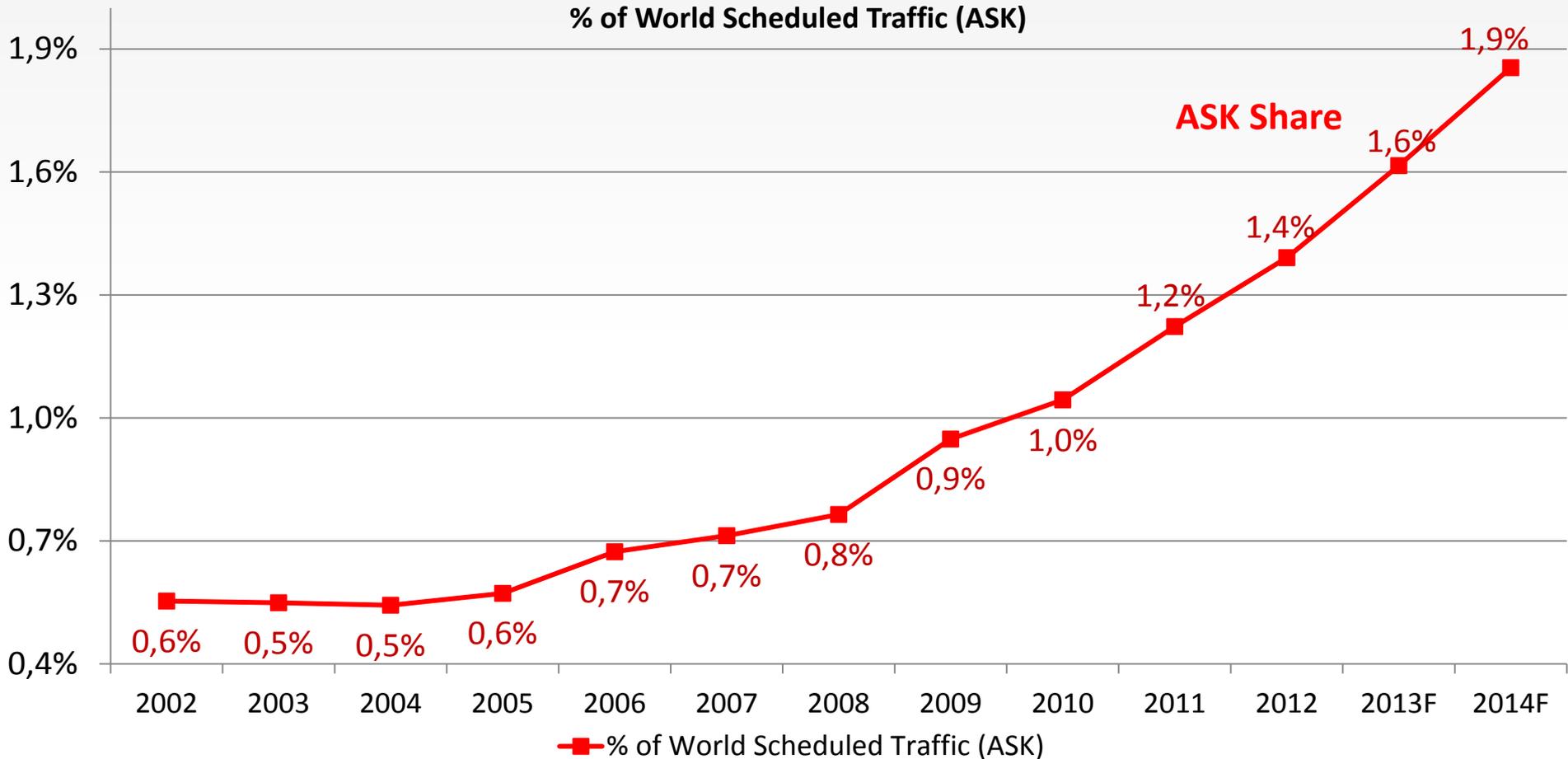
World Passenger Market Share Development – ASK

World Largest Airlines' Market Share in terms of ASK



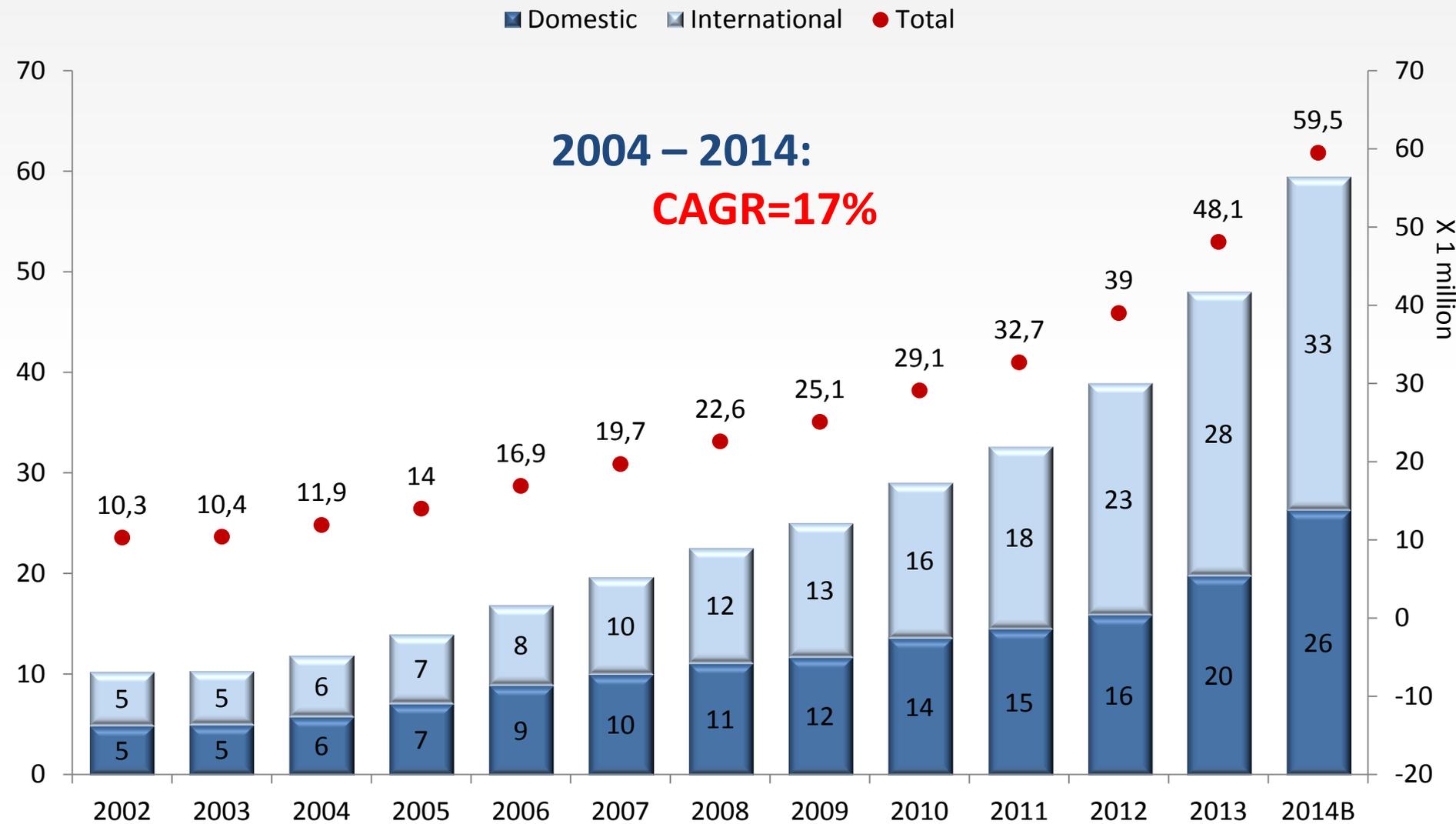
Source: World AKK from 2002-2013 is from IATA data. Airline AKK values from 2002-2012 are from IATA Wats reports. Airline AKK for 2013 are from official websites of airlines and 2014 data are forecasted based on innovata data for August 2014 given in Air Transport News.

Turkish Airlines Global Passenger Market Share Development



Source: World traffic values are from IATA reports.

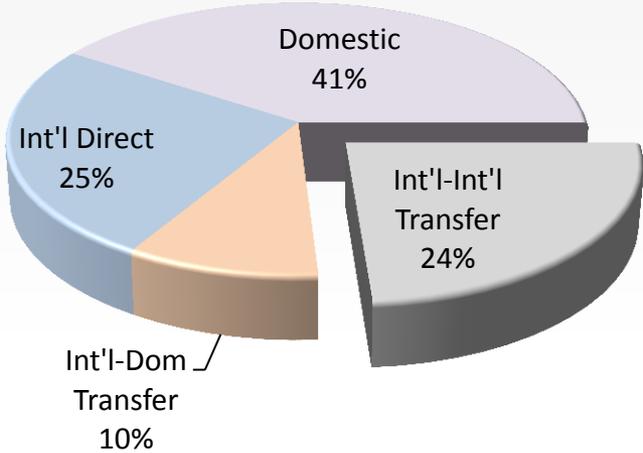
Turkish Airlines Passenger Numbers



Transfer Passengers

International to international transfer passengers accounted for 41% of international passengers (2013).

Split of Total Passenger

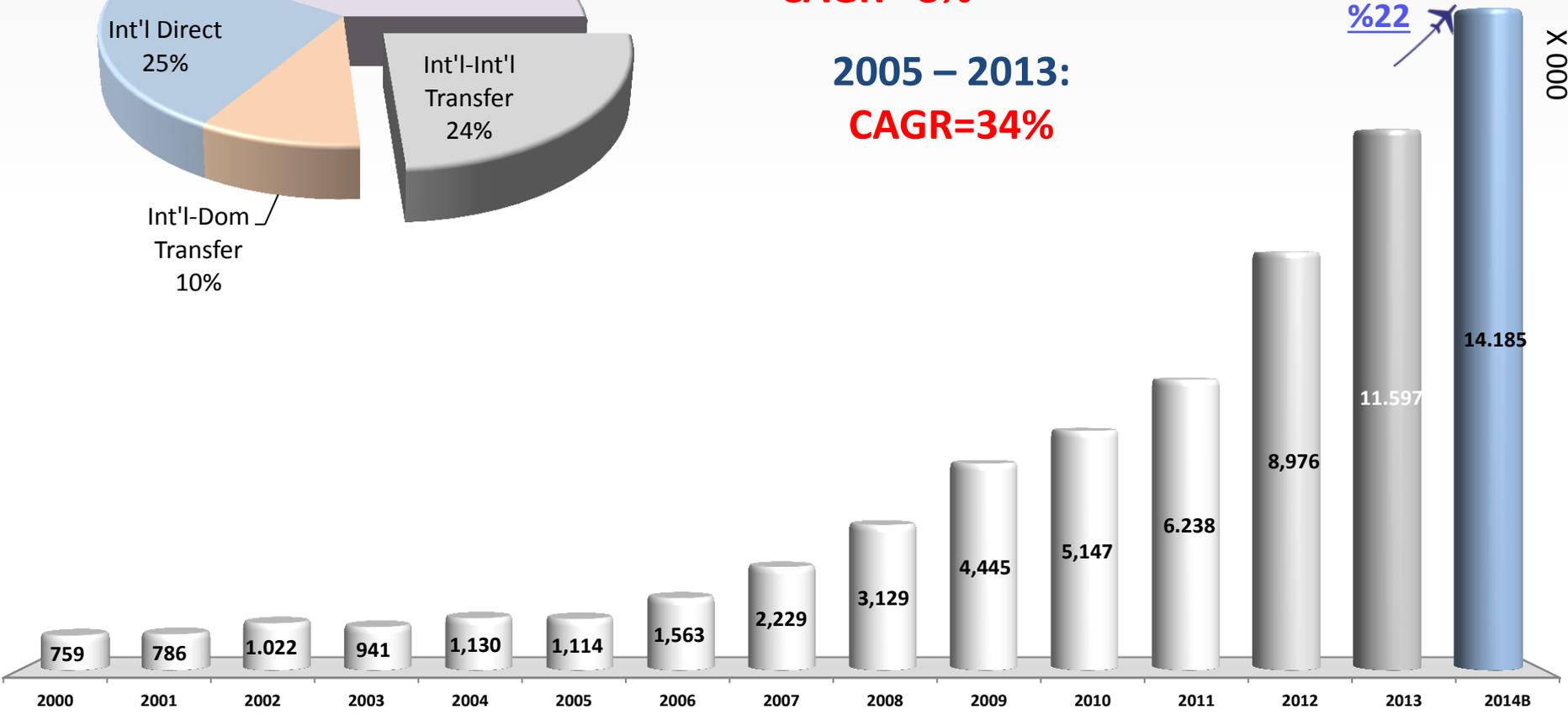


2000 – 2005:

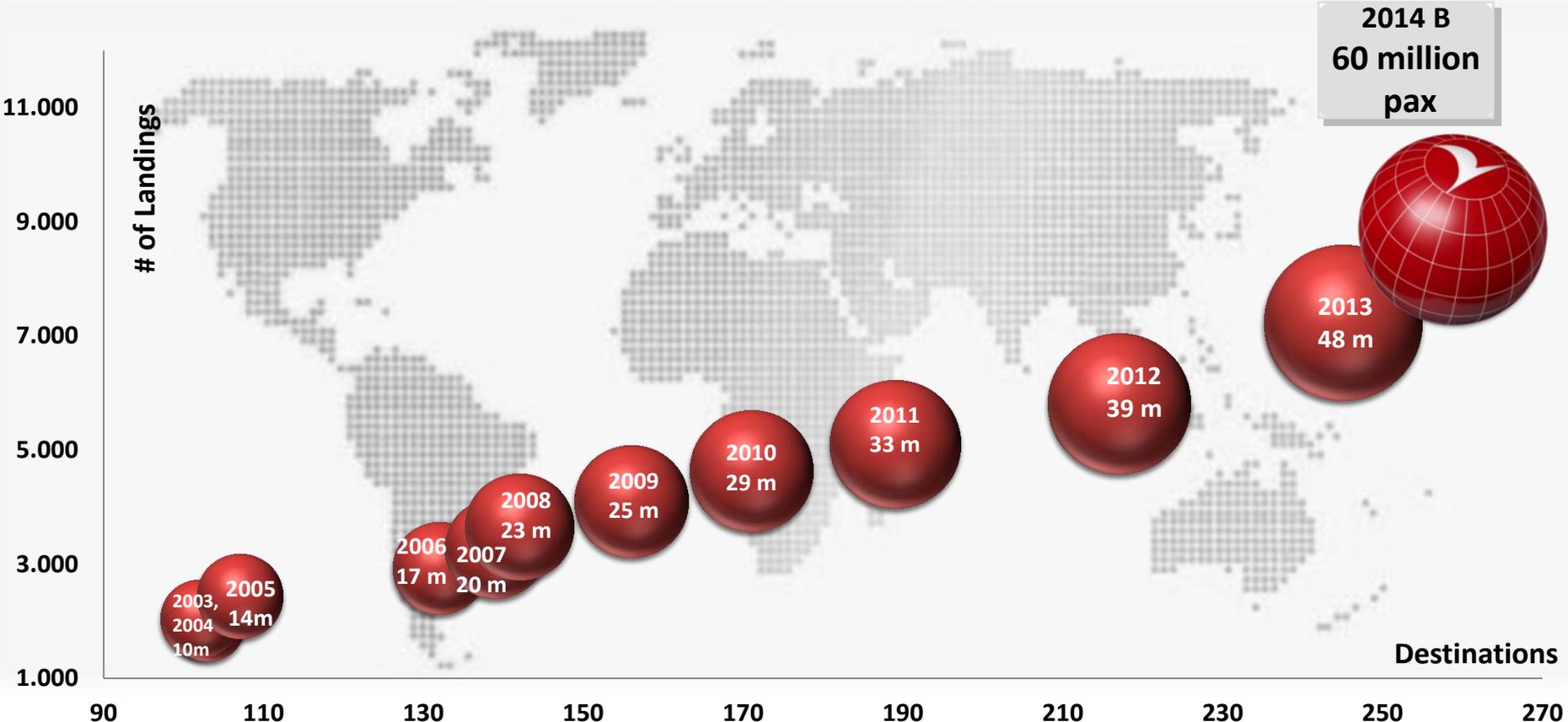
CAGR= 8%

2005 – 2013:

CAGR=34%



Network Development



* The diameter of the sphere illustrates total annual passenger number

Global Rankings (Network Size)



TK is flying to more countries than any other airline in the world

108
Country



TK is flying to more international destination than any other airline in the world

218
International Destinations



TK is the 4 th largest airline in terms of network size

263
Destinations in the World



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**KOBE & MESSI
FLY WITH
EUROPE'S
BEST AIRLINE**

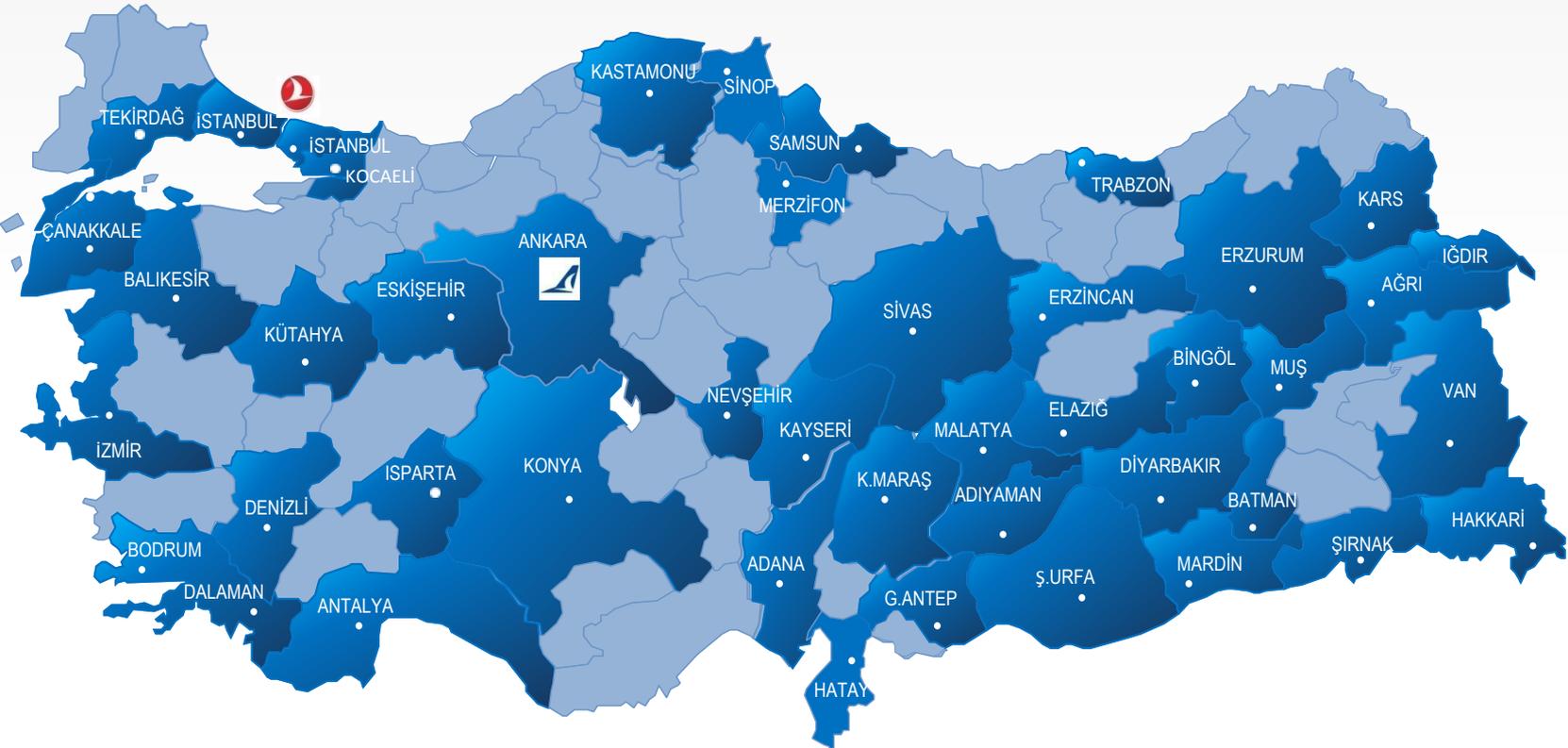
Globally Yours **TURKISH AIRLINES**

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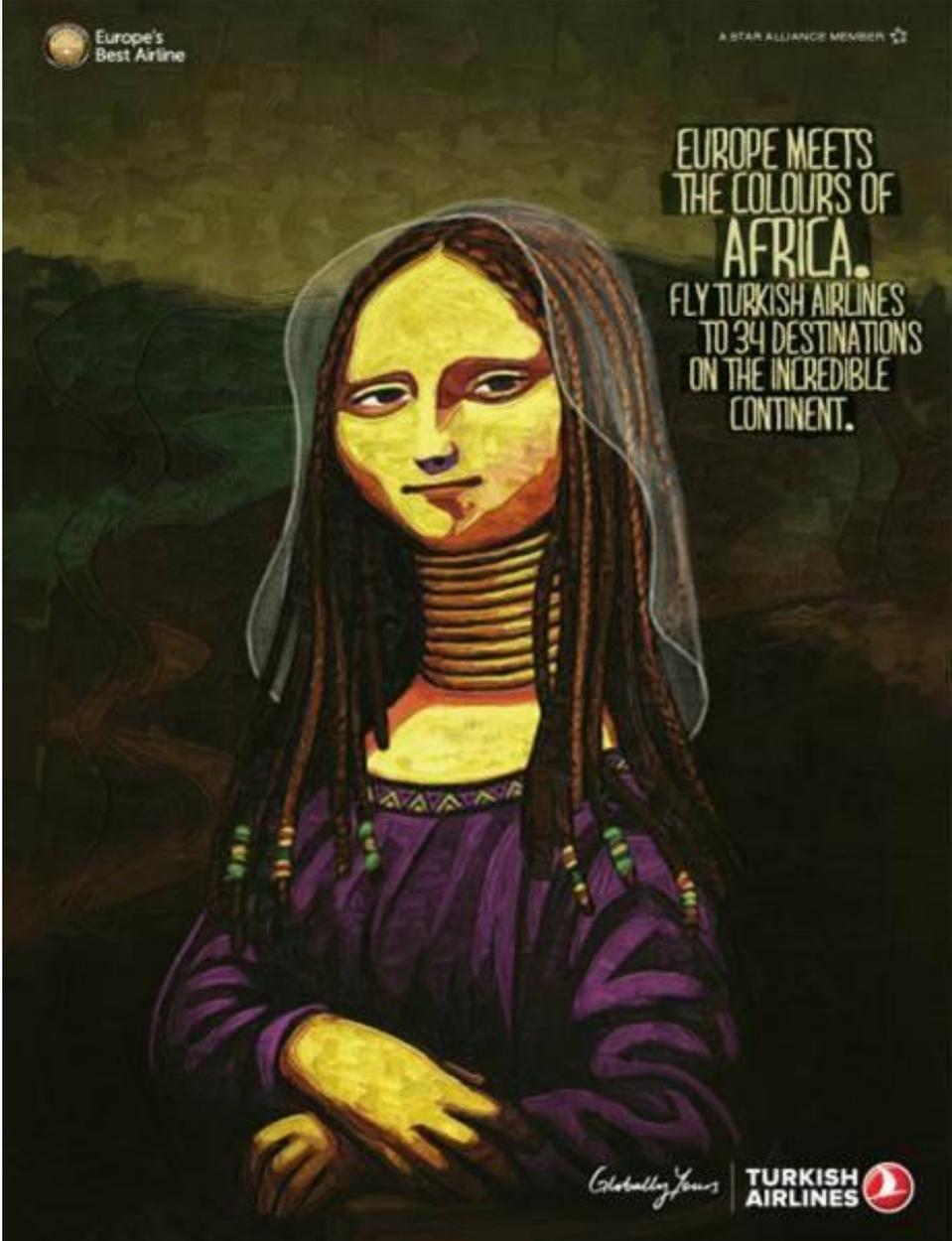


* Rankings are based on OAG data from April 2014

Destinations in Turkey



Africa



Europe's Best Airline

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EUROPE MEETS
THE COLOURS OF
AFRICA.
FLY TURKISH AIRLINES
TO 34 DESTINATIONS
ON THE INCREDIBLE
CONTINENT.

GlobalFlyer

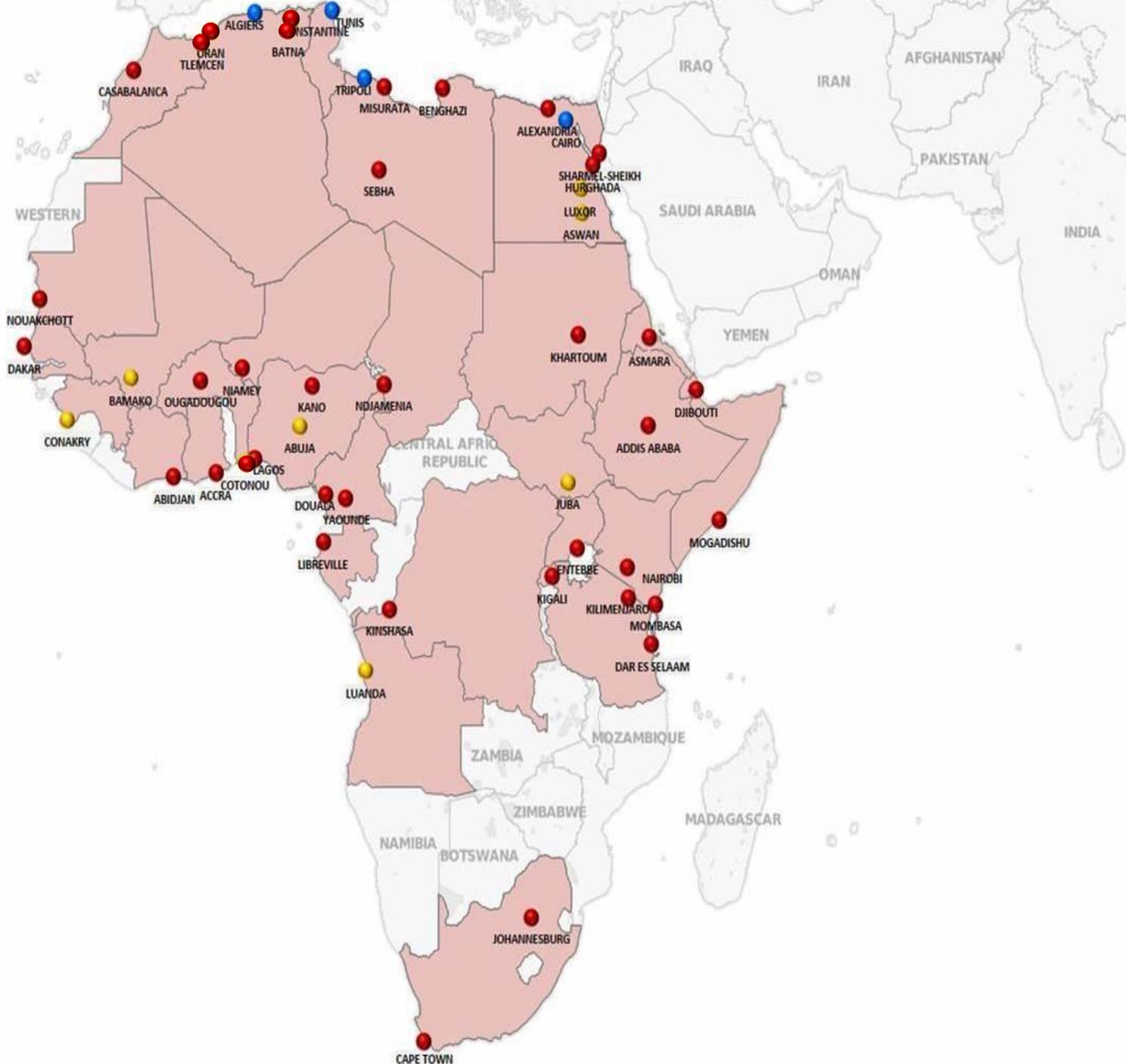
TURKISH AIRLINES



WIDEN YOUR WORLD

2013/14

AFRICA



- 2002 THY Network (4 Destinations)
- 2003 - 2014 (38 New Destinations)
- Planned (7 Destinations)

Europe

Europe awaits you
Be part of hundreds of cultures, stories and memories
with the airline that flies to all corners of Europe!

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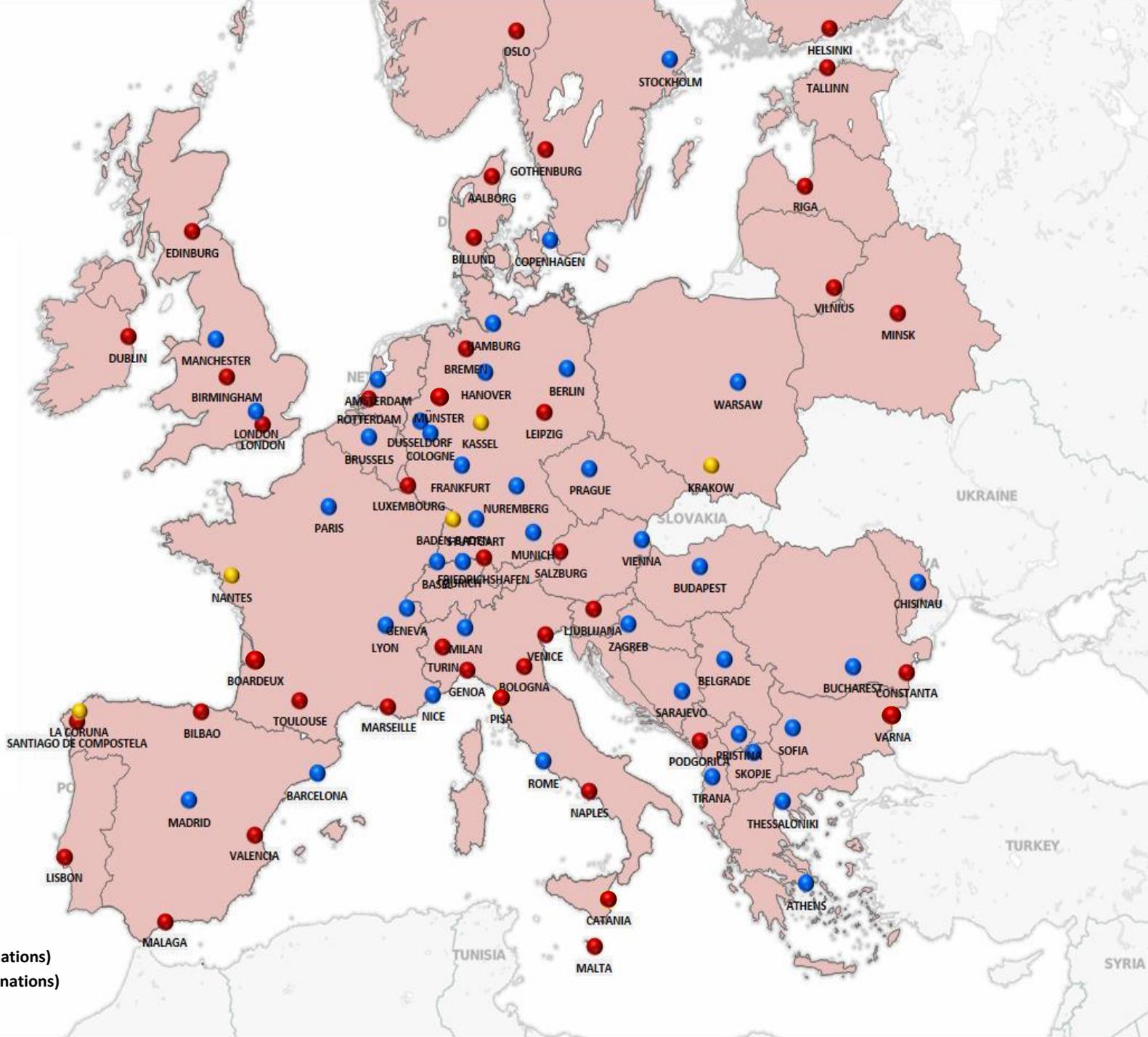
EUROPE'S BEST AIRLINE **TURKISH AIRLINES** 
2022 Skytrax World Airline Awards



WIDEN YOUR WORLD

2013/14

EUROPE



- 2002 THY Network (40 Destinations)
- 2013 - Current (40 New Destinations)
- Planned (5 Destinations)

America

America awaits you
Be part of hundreds of cultures, stories and memories
with the airline that flies to all corners of America!

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EUROPE'S BEST AIRLINE | **TURKISH AIRLINES**

2012 Skytrax World Airline Awards

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2013/14

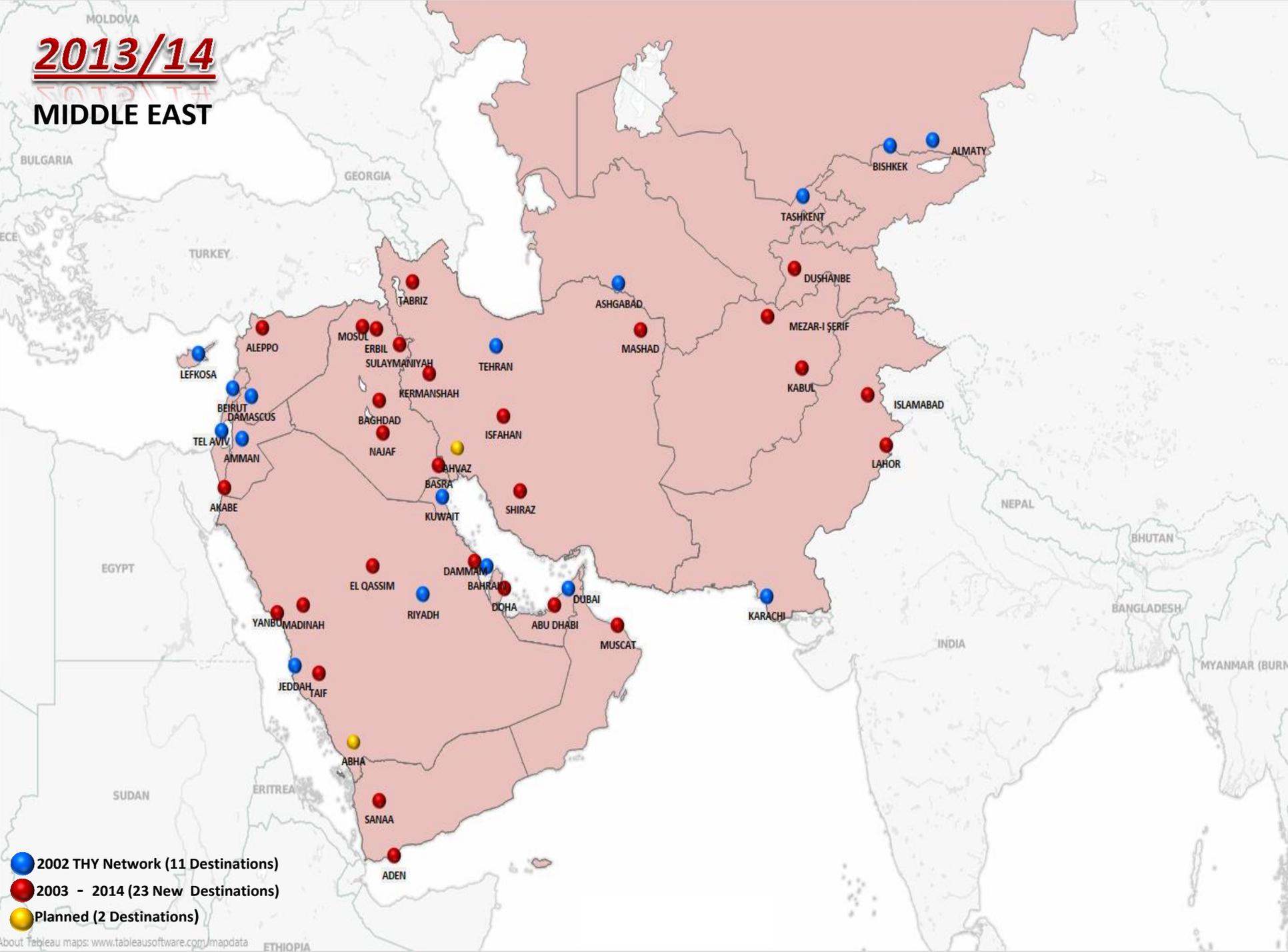
AMERICA



- 2002 THY Network (2 Destinations)
- 2003 - 2014 (8 New Destinations)
- Planned (6 Destinations)

2013/14

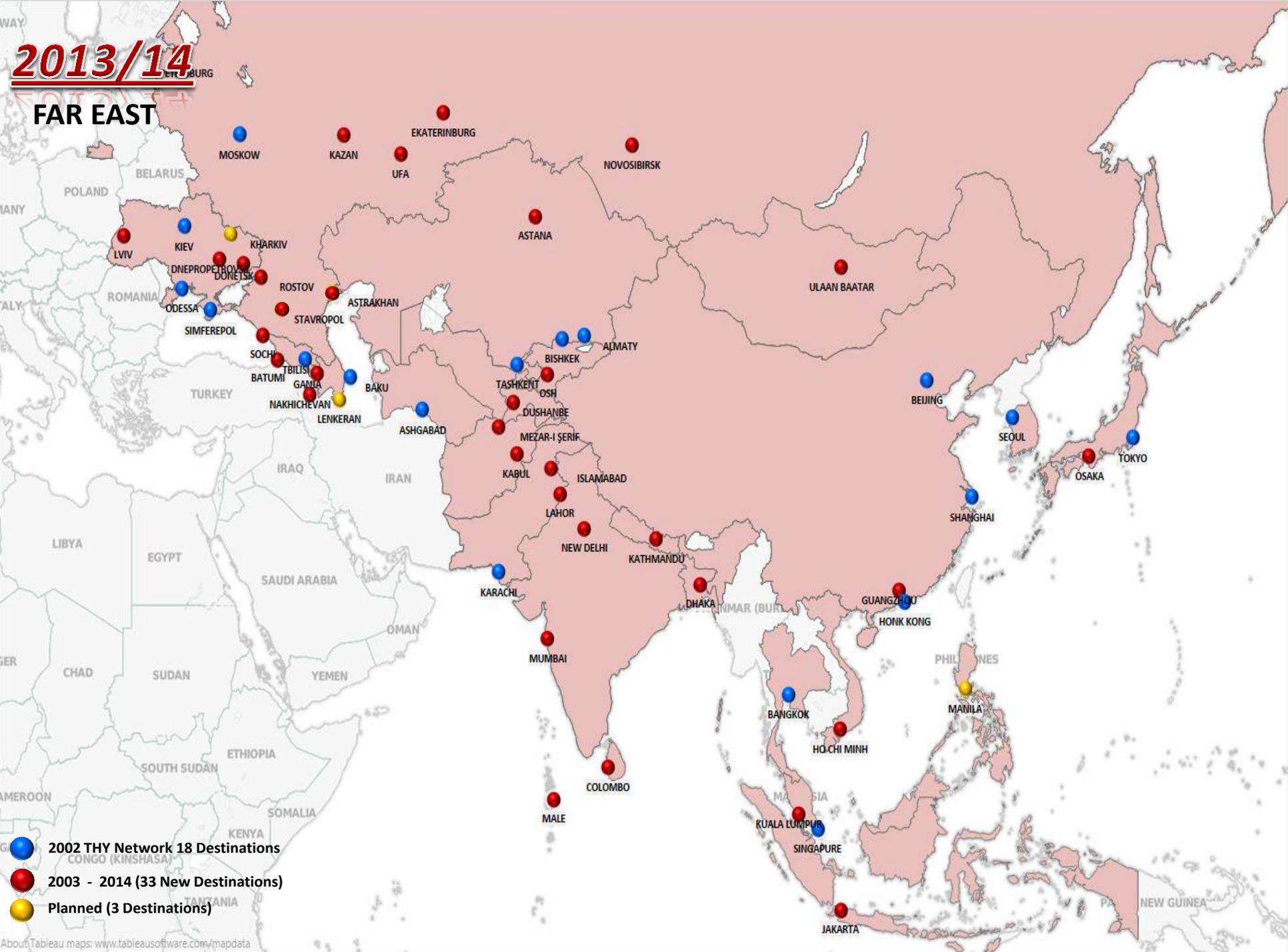
MIDDLE EAST



- 2012 THY Network (11 Destinations)
- 2013 - 2014 (23 New Destinations)
- Planned (2 Destinations)

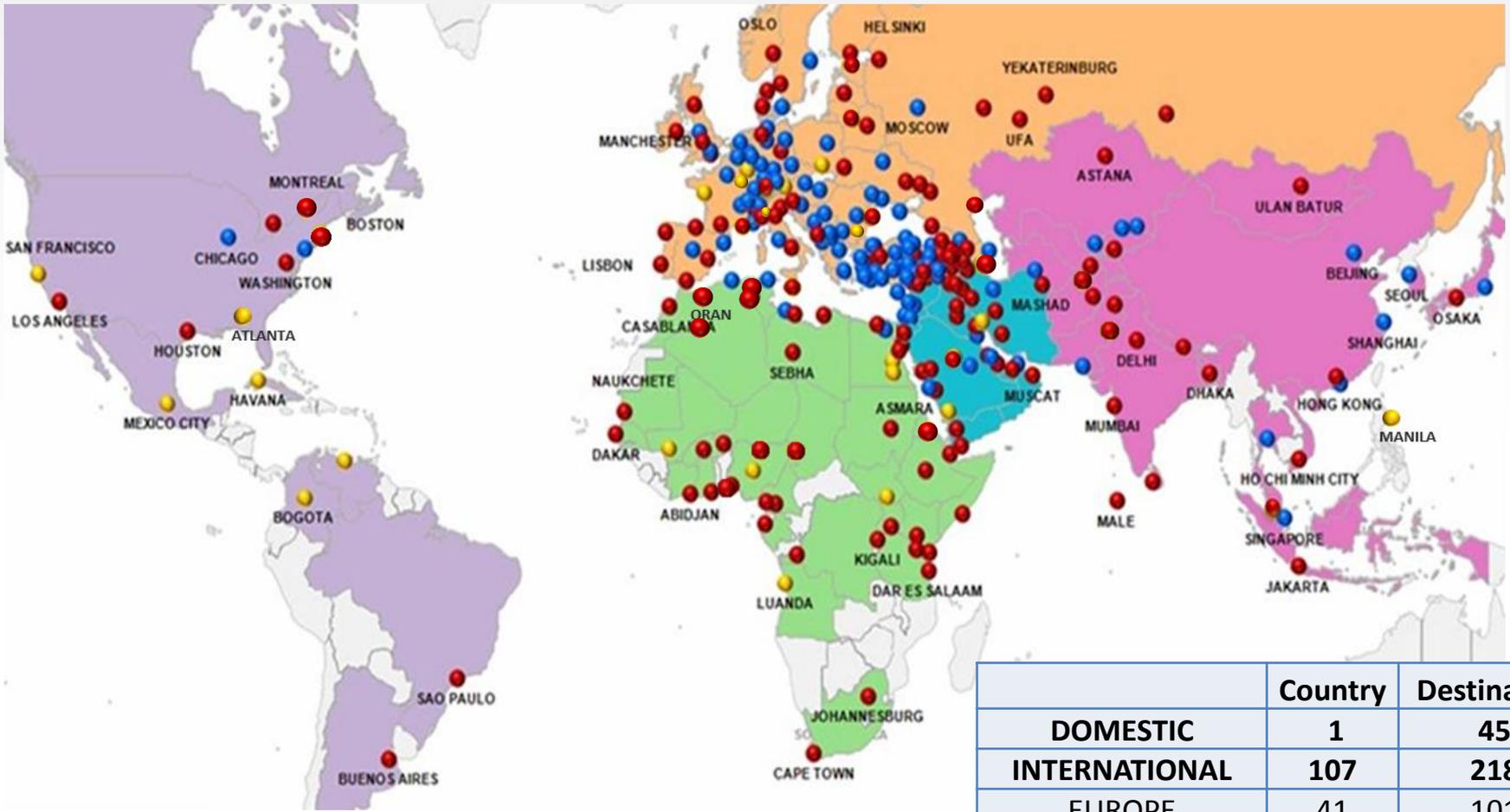
2013/14

FAR EAST



- 2002 THY Network 18 Destinations
- 2003 - 2014 (33 New Destinations)
- Planned (3 Destinations)

Turkish Airlines' World



108
COUNTRY

263
DESTINATION

	Country	Destination
DOMESTIC	1	45
INTERNATIONAL	107	218
EUROPE	41	101
FAR EAST	21	31
MIDDLE EAST	14	34
AFRICA	27	42
NORTH AMERICA	2	8
SOUTH AMERICA	2	2

O&D Opportunities

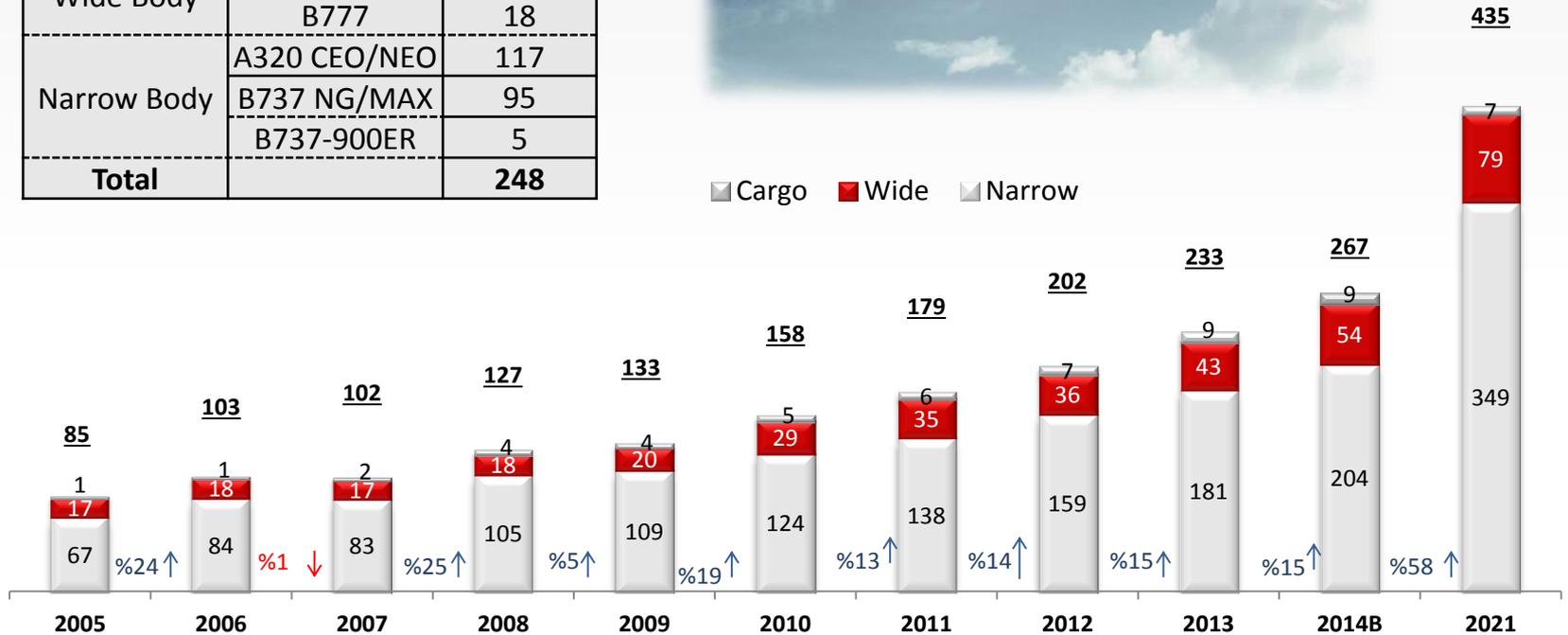


Africa	O&D Pair	Middle East	O&D Pair	Far East	O&D Pair
Africa – Europe	4242	Middle East – Europe	3434	Far East – Europe	3131
Africa – Domestic	1932	Middle East – Domestic	1564	Far East – Domestic	1426
Africa – Middle East	1428	Middle East – Africa	1428	Far East – Africa	1302
Africa – Far East	1302	Middle East – Far East	1054	Far East – Middle East	1054
Africa – America	420	Middle East- America	340	Far East – America	310
Africa – Total	9324	Middle East – Total	7820	Far East - Total	7223

Fleet Development

248 A/C Orders

Fleet Group	A/C	Orders
Wide Body	A330	13
	B777	18
Narrow Body	A320 CEO/NEO	117
	B737 NG/MAX	95
	B737-900ER	5
Total		248



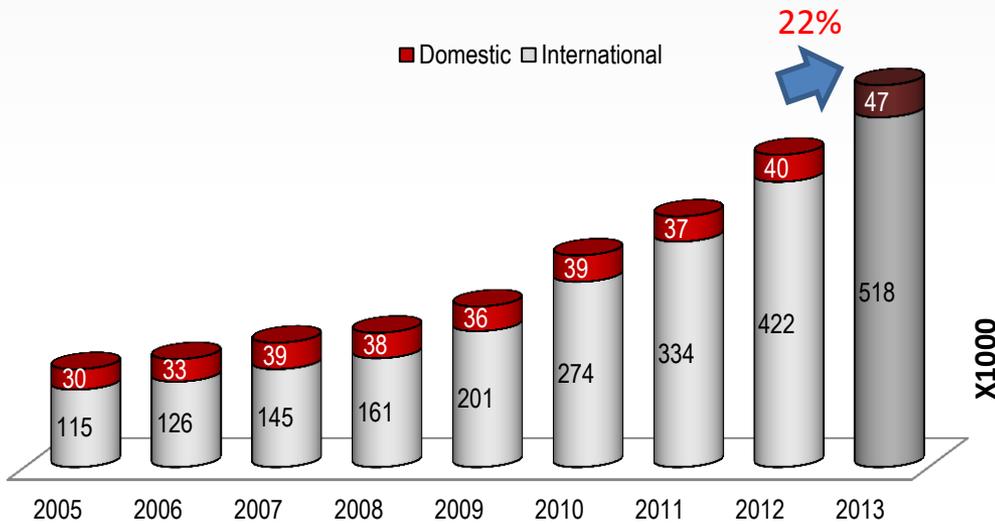
Seat Capacity

2000	2005	2010	2015	2020	CAGR
12k	15k	28k	51k	79k	14 %

Cargo Development

Cargo (ton)

■ Domestic □ International



Cargo(ton)	2013 July	2014 July
Domestic	27,099	29,809
International	284,973	349,164

10%

22%

6

6th largest cargo carrier of Europe in total carried cargo ton km



- ✓ Leading cargo carrier in total export and import cargo in Turkey.
- ✓ As from April 2014, operates 49 destinations with its 3 A310-300 and 6 A330-200F freighters.
- ✓ In 2013, 565,000 ton cargo were carried.

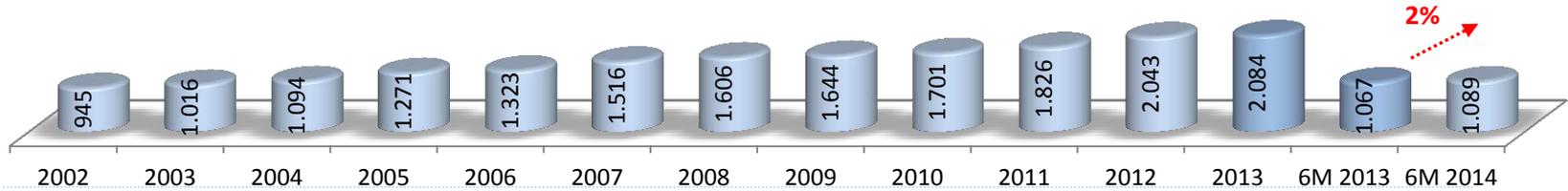
Operating Efficiency

Number of Personnel*

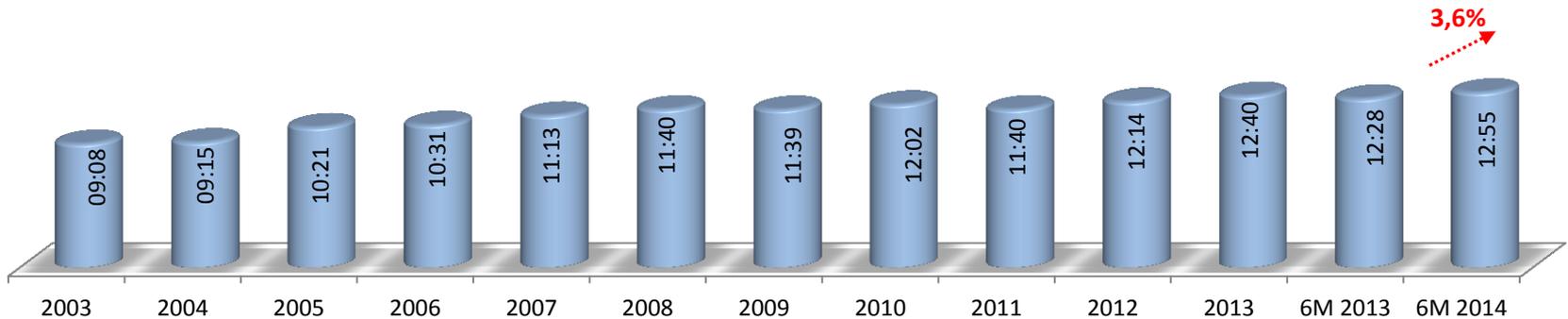


* Technic A.S., HABOM ve MNG Technic are included.

Passenger per Employee



Average Daily Flight Utilization (hrs)



Global Rankings (Quality)



Global Rankings (Quality)

Catering

The best airline for in-flight food (according to Skyscanner)

Airline of the Year Award (CAPA ,2013)

Market Leader

Winner of Air Transport World-Market Leadership Award'11

4 year in a row BEST AIRLINE IN EUROPE (2014)

For the fourth year in a row, we are chosen the best airline in Europe.

Voted Europe's Best Airline at the 2014 Skytrax Passengers Choice Awards



Best Business Class Catering in the World

Best Business Class Catering in Lounge in the World



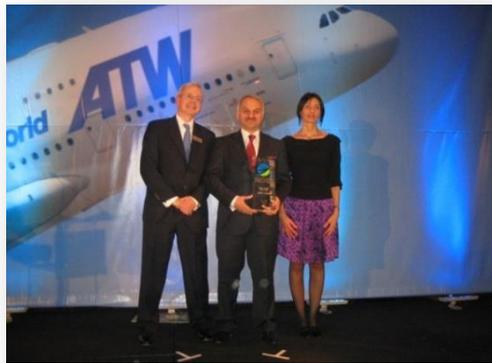
Your table awaits in Business Class

Are you flying, or sitting down to dinner at a luxury restaurant - or both? Enjoy a broad selection of unique flavours from Turkish and international cuisines, prepared with a passionate eye for our master chefs.

1

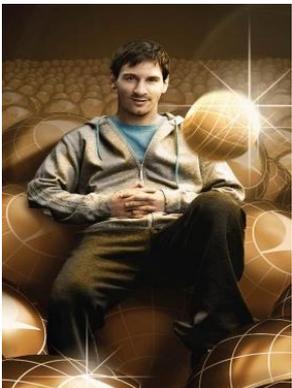
Best Airline in Europe

4 star airline in all services



WIDEN YOUR WORLD

Sponsorships and Commercials



CIP Lounge







**TURKISH
CORPORATE
CLUB**

Where business meets benefits

A STAR ALLIANCE MEMBER

GIVE YOUR BUSINESS WINGS

Turkish Corporate Club provides exclusive benefits to businesses and their employees all around the world. Every business, big or small, can access special fares and can rebook or change routes on any flight without incurring any penalties. Employees can collect miles on every flight and enjoy a generous baggage allowance, even in Economy Class. Turkish Corporate Club, the custom tailored benefit program from Turkish Airlines, offers you nothing but the best for your needs.



Turkish Corporate Club benefits may differ according to the membership country and the volume of the corporate travel spend. Some of the benefits may not be applied in some countries. Please send an e-mail to tcc@thy.com for more information.

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Miles & Smiles

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You're flying with
Miles & Smiles.

Gülümseyin.
Miles & Smiles ile
ucuyorsunuz.

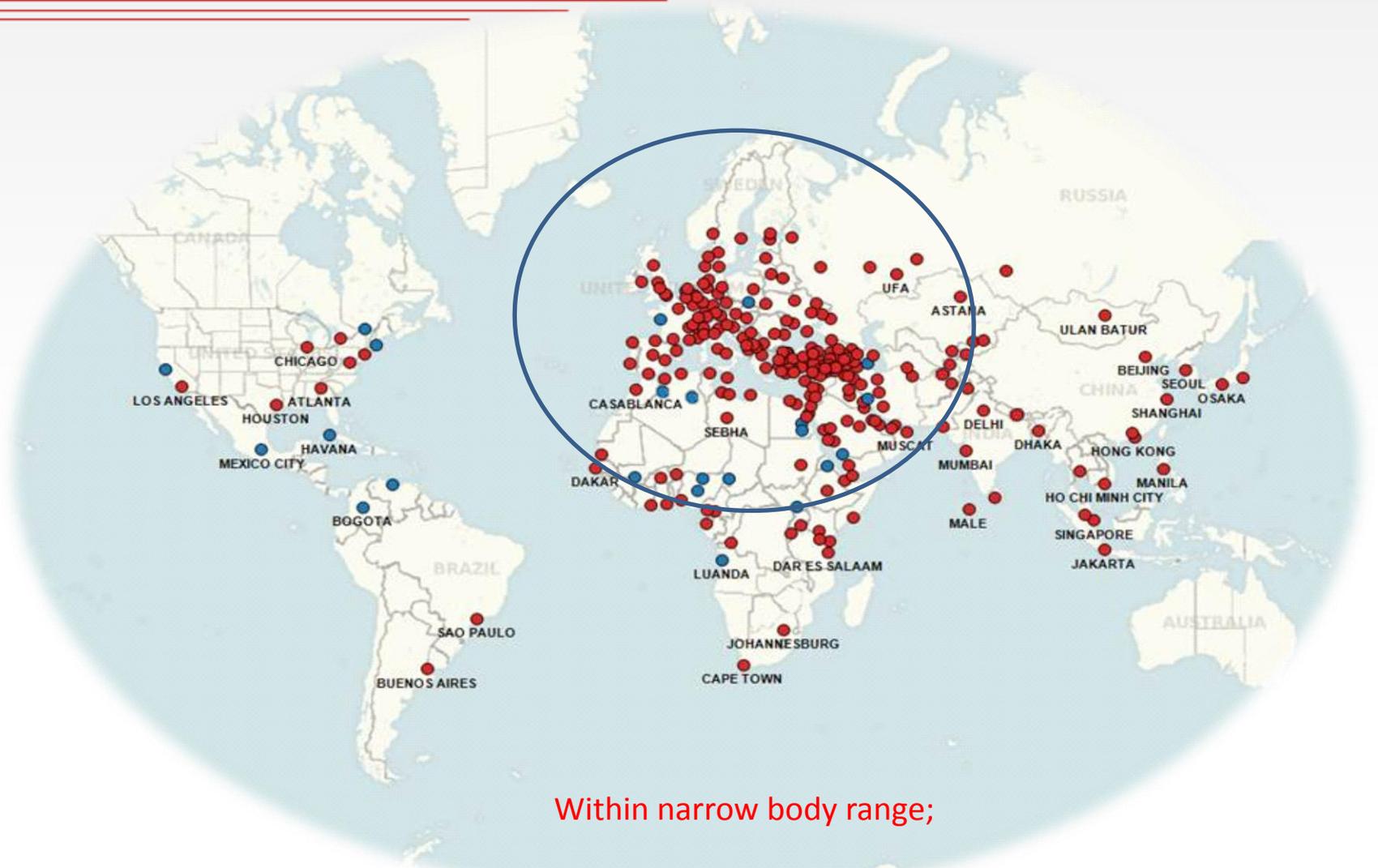


Turkish Airlines Advantageous Frequent Flyer Program
Türk Hava Yollarının avantajlı/parla dolu Özel Yolcu Programı
milesandsmiles.com | 444 0 849



WIDEN YOUR WORLD

Geographical Advantage



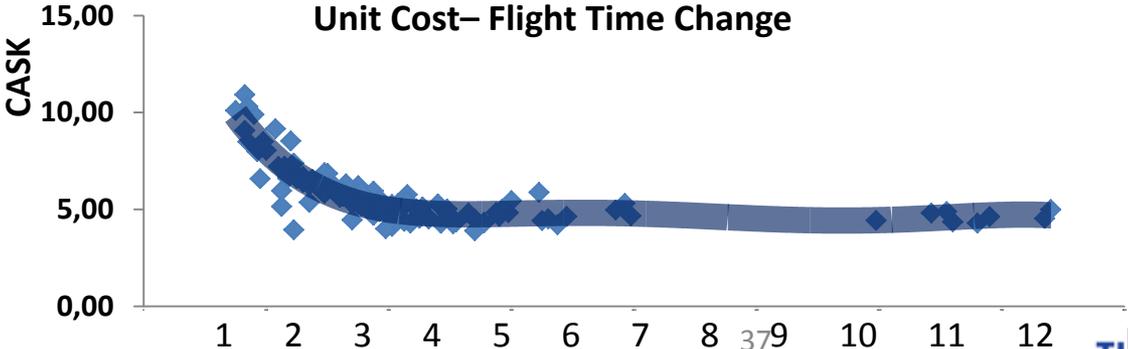
Within narrow body range;
70% of international destinations,
More than 55 countries

Advantages / Geographical Location



The advantage is to become a global hub of Istanbul

Istanbul is in the middle of Europe, Middle East and Asia regions with high volume of traffic and growth rate.



* Size of bubbles shows the traffic volume



WIDEN YOUR WORLD

Istanbul

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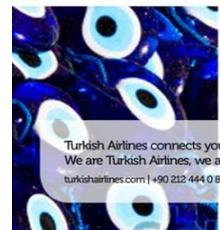
The delights of Istanbul

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Istanbul:
Delightfully
Turkish,
delightfully
yours.

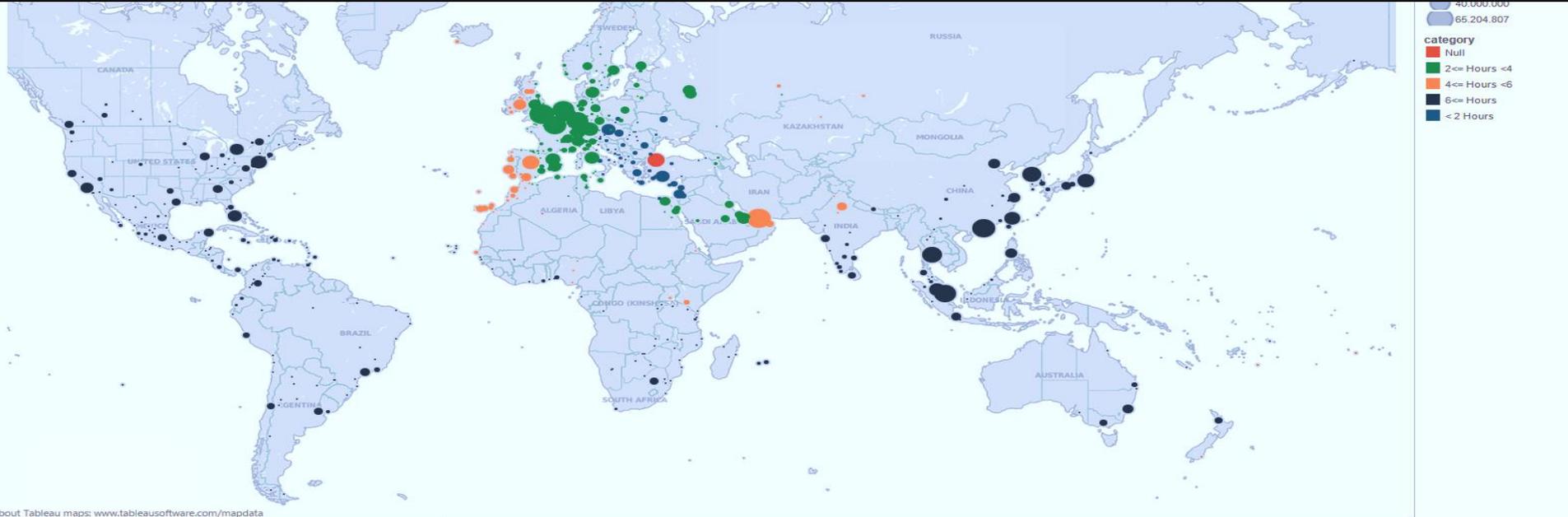


3rd Airport In Istanbul

76.5 km² Area
 500 Aircraft Park Positions
 6 Runways
 4 Terminals
 150 million
 PASSENGERS CAPACITY (Phase4)



A candidate for **3rd** Biggest (After Phase 1) & Biggest (After All Phases) in the World



Barriers in Member States & Recommendations

Taking Out Non-physical Barriers

- Maximizing the operations, services and limited recourses in member countries
- Economies of Scale : The more the supplies - The less Costs
- Increasing propensity to travel within the member states

Reduce Non-infrastructural Barriers

- Remove frequency and capacity restrictions

Visa Requirements

- Transit travel via Turkey: **NO VISA** required for available Schengen, UK and/or USA visa.
- E-visa is ready within 2 hours after application
- NO VISA required for stop-overs up to 72 hours.
- Ministry of Foreign Affairs of Turkey has been striving in principle, for reciprocally exemption of visas between Turkey and other countries.

Increasing Trade and Travel between OIC Countries

THANKS...

