

September, 2013

# Presentation Overview

 **Turkish Airlines' Rankings**

 **Turkish Airlines' Figures**

 **Brand Value**

 **Products & Advantages**

 **Subsidiaries of TK**



# Global Rankings (Traffic & Operation)

## Number of Country

1

1<sup>st</sup> in World  
In terms of destination country

## Number of Destination

4

4<sup>th</sup> in World  
In terms of destinations

1

1<sup>st</sup> in Europe  
In terms of destinations

## Number of Destination (From Single Hub)

2

2<sup>nd</sup> in World  
In terms of destinations

1

1<sup>st</sup> in Europe  
In terms of destinations

## Passenger Number

1

1<sup>st</sup> in Turkey

3

3<sup>rd</sup> in Europe Rankings  
(among legacy carriers)

10

10<sup>th</sup> in World Rankings  
(international pax)

15

15<sup>th</sup> in World Rankings  
(Domestic + International pax)\*

## Operating Fleet

14

14<sup>th</sup> in World Rankings

## ASK Ranking

15

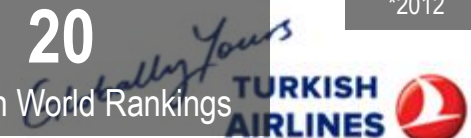
15<sup>th</sup> in World Rankings

## RPK Ranking

20

20<sup>nd</sup> in World Rankings

\*2012



# Quality Achievements – Europe's Best Airline

*Globally Yours*

**TURKISH  
AIRLINES** 



**This is what we call a hat trick!**

**SKYTRAX – BEST AIRLINE OF EUROPE  
THREE YEARS IN A ROW**



*Globally Yours*

**TURKISH  
AIRLINES** 



# Quality Achievements – Global Rankings

## Service Quality

1

Europe's and  
South Europe's Best Airlines  
(2011-2012-2013)

## Catering

2

World's 2<sup>nd</sup> Catering in  
Economy Class  
(2013)

## Seat

2

World's 2<sup>nd</sup> Premium  
Economy Class Seats  
(2013)

## Market Leader

1

Air Transport World  
Market Leader Prize in  
2010



Turkish Airlines the **only airline** which has 4 star service  
quality in all service class in Europe



**The World's Best**  
Business Class Catering - 2013



# Quality Achievements – Global Awards

## Turkish Airlines Takes Top Honors at 2012 Freddie Awards

Program  
of the Year\*  
(Miles&Smiles)

Best Loyalty Credit  
Card\*  
(Miles&Smiles)

\*Europe and Africa



## Best website



[turkishairlines.com](http://turkishairlines.com)

has won «the best website in class»

award by Interactive Media Council Inc (IMC)

The Interactive Media Awards™ recognize the highest standards of excellence in website design and development and honor individuals and organizations for their outstanding achievement.

# Presentation Overview

Turkish Airlines' Rankings

**Turkish Airlines' Figures**

Brand Value

Products & Advantages

Subsidiaries of TK





7



# Network Development – Network Size (As of Aug'13)

World's

#1

Airline

In terms of destination country

Turkish Airlines flying to  
**239 destinations**  
in **104 countries**  
all around the world. (Sep'13)

World's

#4

Airline

In terms of destinations

Europe's

#1

Airline

In terms of destinations

World's

#2

Airline

In terms of number of  
destinations from **single hub**

Europe's

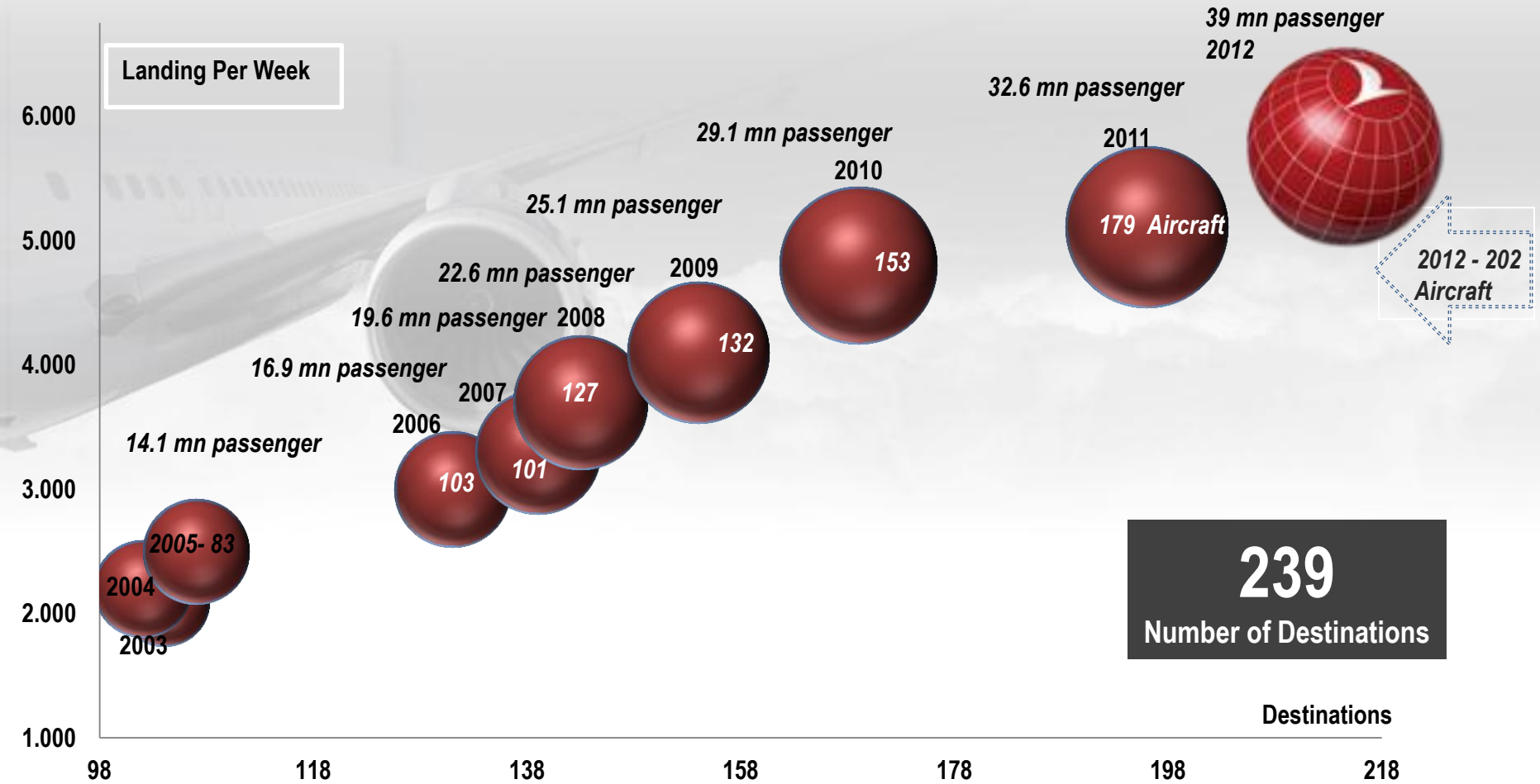
#1

Airline

In terms of number of  
destinations from **single hub**

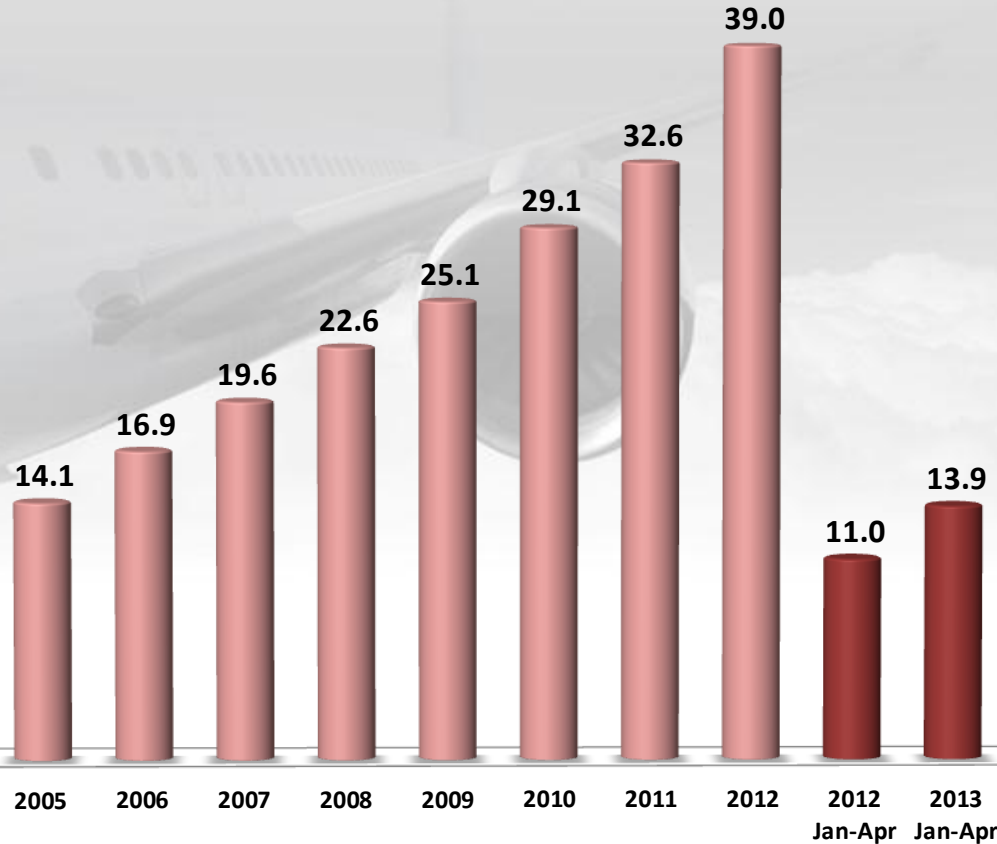


# Network Development

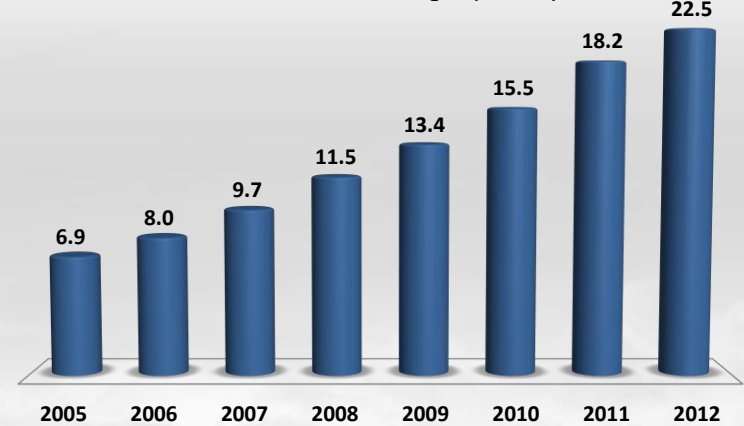


# Figures / Passenger Number

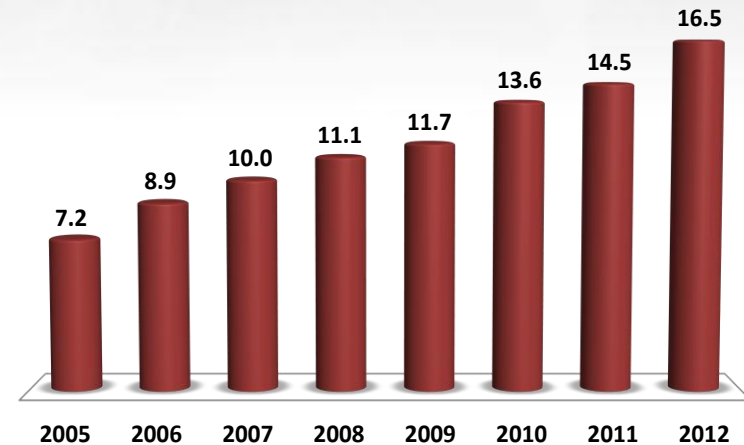
## Total Passenger (Million)



## International Passenger (Million)

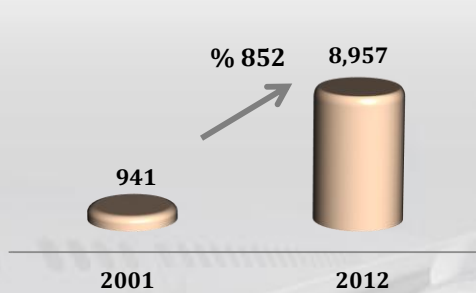


## Domestic Passenger (Million)



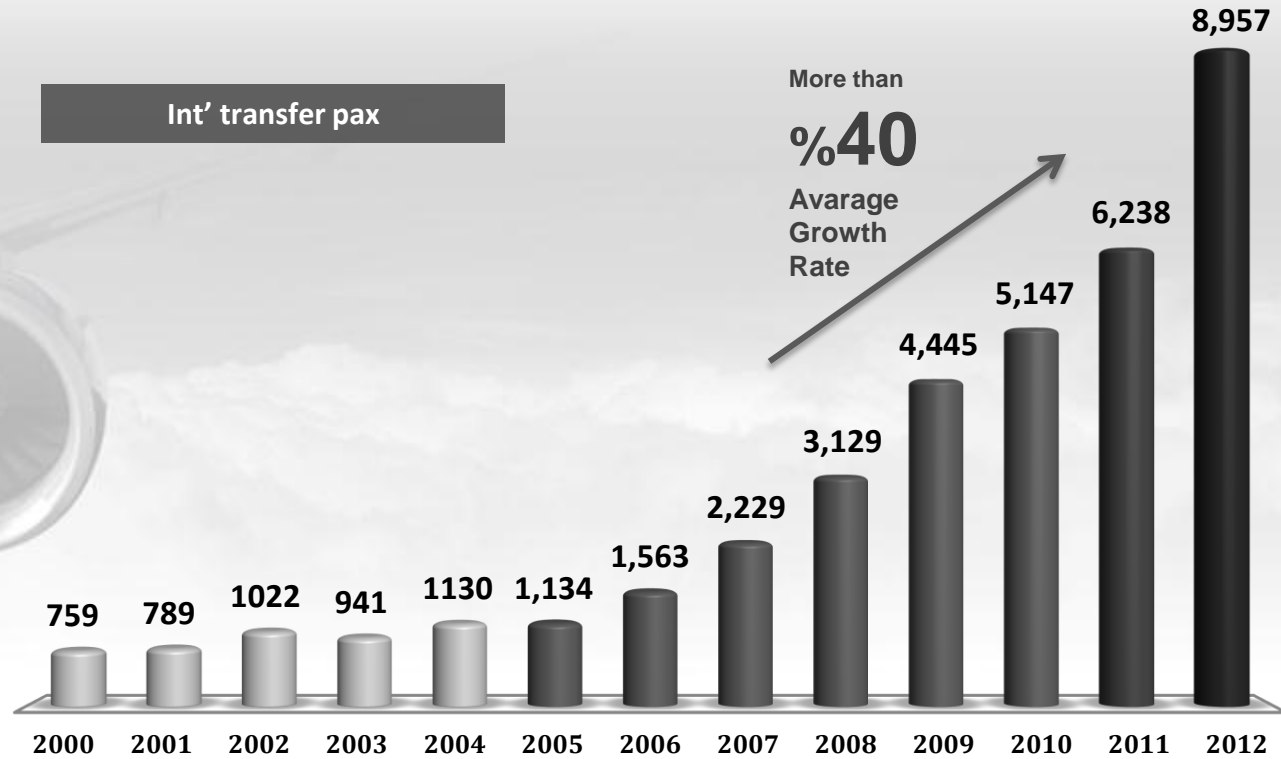
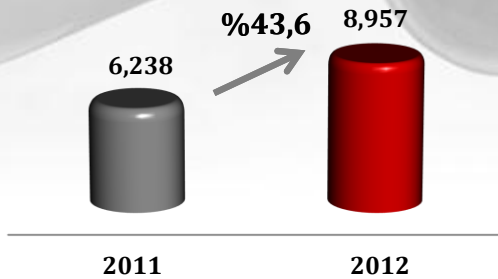
# Figures / Passenger Number

Transfer Passengers (Int-Int) (Million)



Int' transfer pax

Transfer Passengers (Int-Int) (Million)



International Transfer Passenger had an average growth rate more than 40 % between 2003 – 2012

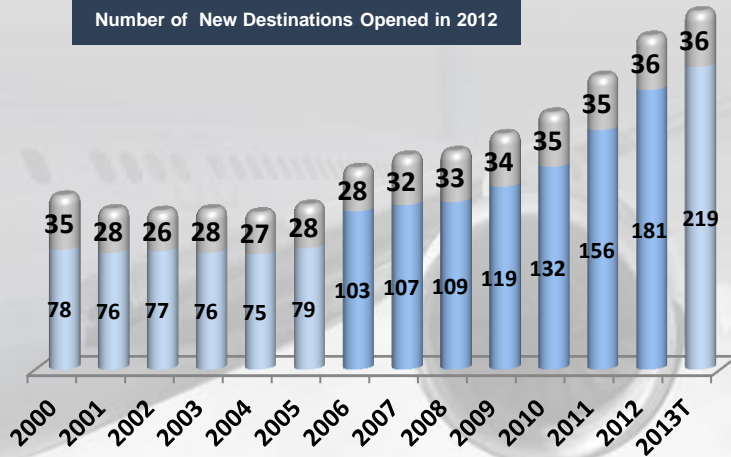




# Figures / Number of Destinations (As of Sep'13)

# 34

Number of New Destinations Opened in 2012



## New Destinations Pending to be Launched

2013

Asmara	Eritrea	Nov'13	Boston	USA		Oran	Algers	
Luxor	Egypt	Nov'13	Caracas	Venezuela		Rotterdam	Netherlands	
Aswan	Egypt	Nov'13	Havana	Cuba		San Francisco	USA	
Ahwaz	Iran	Dec'13	Juba	South Sudan		Urmieh	Iran	
Kano	Nigeria	Dec'13	Lankaran	Azerbaijan		Kharkiv	Ukrain	
Ndjamena	Chad	Dec'13	Luanda	Angola		Abha	S.Arabia	
Atlanta	USA		Manila	Philippines		Abuja	Nigeria	
Bamako	Mali		Mexico City	Mexico		Mazar-i Sharif	Afghanistan	
Bogota	Colombia		Montreal	Canada		Nantes	France	

## New Destinations Opened in 2013

Libreville	Gabon	Jan'13	Friedrichshafen	Germany	May'13	Vilnius	Lithuania	Jun'13
Colombo	Sri Lanka	Feb'13	Tekirdag	Turkey	May'13	Constanta	Romania	Jun'13
Houston	USA	Apr'13	Salzburg	Austria	May'13	Luxembourg	Luxembourg	Jun'13
Kuala Lumpur	Malaysia	Apr'13	Malta	Malta	May'13	Kastamonu	Turkey	Jul'13
Aqaba	Jordan	Apr'13	Gassim	S.Arabia	Jun'13	Bingol	Turkey	Jul'13
Santiago De	Spain	May'13	Tallinn	Estonia	Jun'13	Sirnak	Turkey	Jul'13
Isparta	Turkey	May'13	Marseille	France	Jun'13	Kathmandu	Nepal	Sep'13

## New Destinations Opened in 2012

Kermanshah	Iran	Dec'12	Sharm El-Sheikh	Egypt	Oct' 12	Abidjan	Ivory Coast	Jul' 12
Douala	Cameroon	Dec'12	Hurghada	Egypt	Oct' 12	Ulan Bator	Mongolia	Jul' 12
Yaounde	Cameroon	Dec'12	Aden	Yemen	Oct' 12	Taif	S.Arabia	Jun' 12
Isfahan	Iran	Dec'12	Nouakchott	Mauritania	Sep' 12	Yanbu	S.Arabia	Jun' 12
Niamey	Niger	Dec'12	Djibouti	Djibouti	Sep' 12	Leipzig	Germany	May' 12
Ouagadougou	Burkina Faso	Dec'12	Kinshasa	D.Republic of	Aug'12	Bilbao	Spain	May'12
Sebha	Libya	Dec'12	Ganja	Azerbaijan	Jul'12	Kigali	Rwanda	May'12
Buenos Aires	Argentina	Dec'12	Igdir	Turkey	Jul' 12	Bremen	Germany	Apr'12
Kilimanjaro	Tanzania	Dec'12	Edinburgh	UK	Jul' 12	Novosibirsk	Russia	Mar'12
Mombasa	Kenya	Dec'12	Osh	Kyrgyzstan	Jul' 12	Mogadishu	Somalia	Mar'12
Kutahya	Turkey	Nov'12	Aalborg	Denmark	Jul' 12			
Male	Maldives	Nov'12	Billund	Denmark	Jul' 12			

\*2013 destinations are planned to be based on aircraft availability and upon obtaining the authorizations

# Europe (Part 1/2)

72 Airports

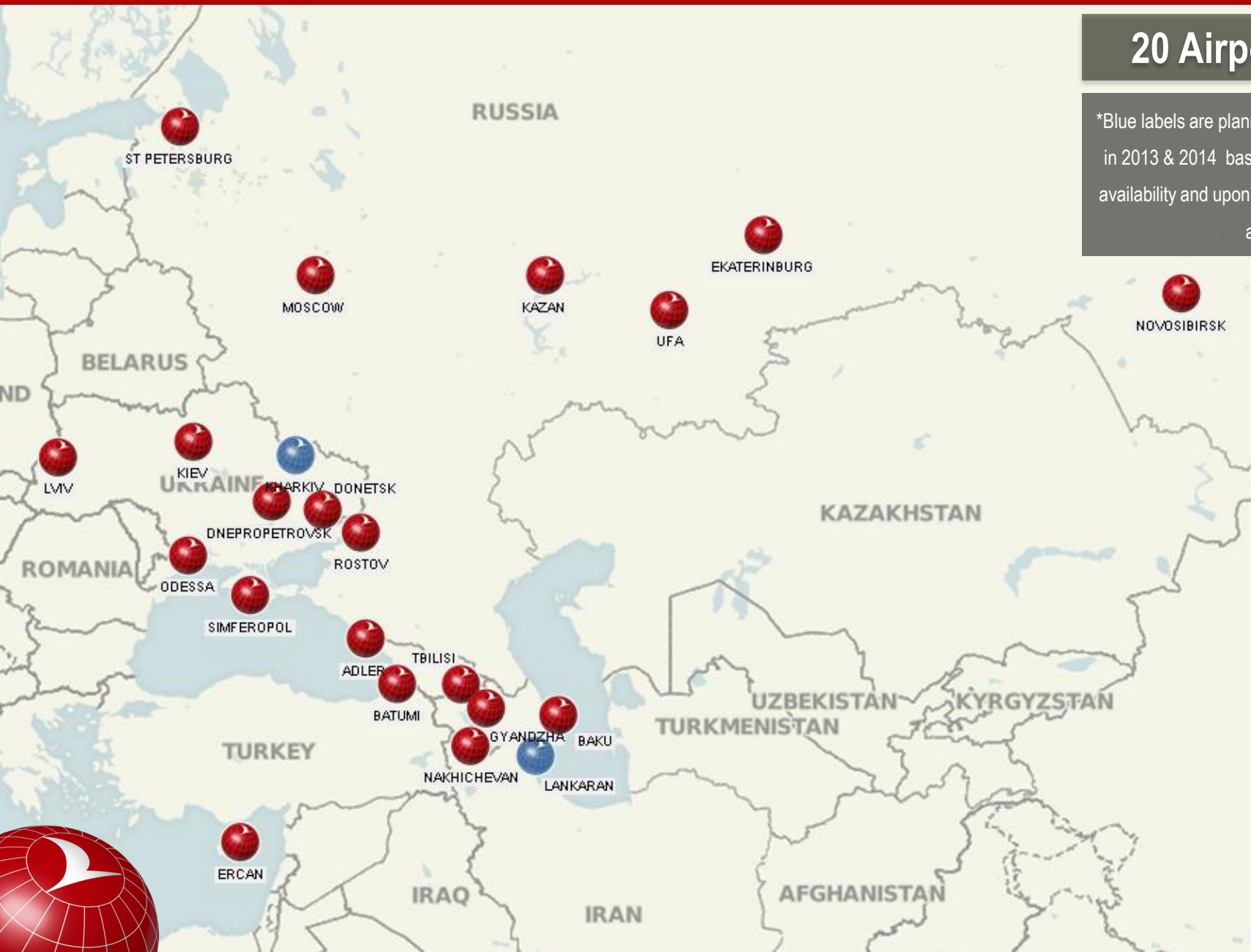
\*Blue labels are planned to launch in 2013 & 2014 based on aircraft availability and upon obtaining the authorizations



# Europe (Part 2/2)

## 20 Airports

\*Blue labels are planned to launch in 2013 & 2014 based on aircraft availability and upon obtaining the authorizations





# Africa



## 34 Airports

\*Blue labels are planned to launch in 2013 & 2014 based on aircraft availability and upon obtaining the authorizations





# Middle East

## 33 Airports

\*Blue labels are planned to launch in 2013 & 2014 based on aircraft availability and upon obtaining the authorizations



# Far East

29 Airports

\*Blue labels are planned to launch in 2013 & 2014 based on aircraft availability and upon obtaining the authorizations



# America



## 8 Airports

\*Blue labels are planned to launch in 2013 & 2014 based on aircraft availability and upon obtaining the authorizations



# Domestic

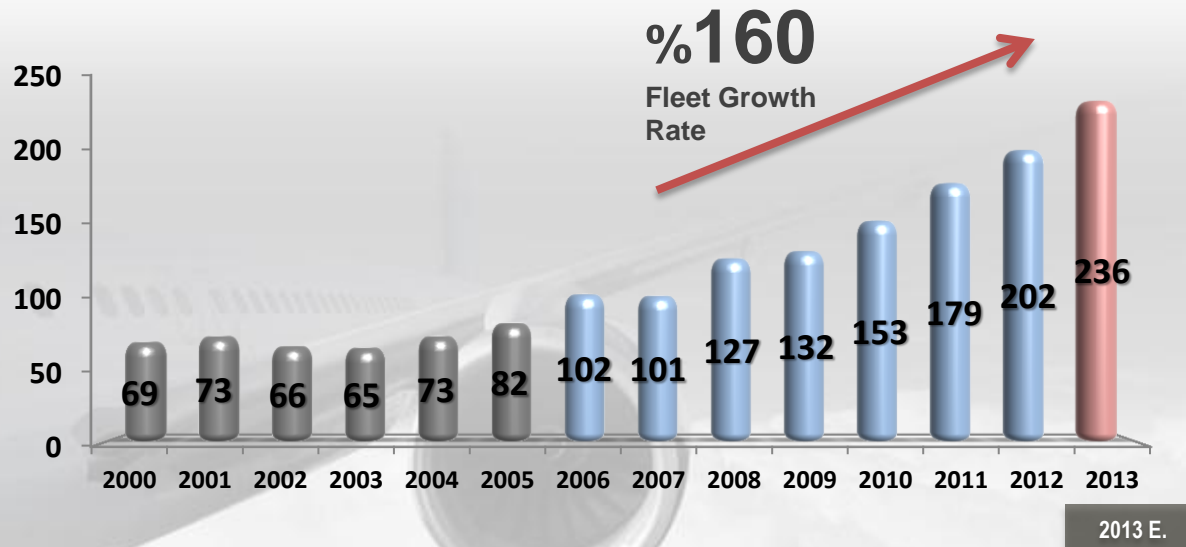


43 Airports





# Figures / Fleet



## Youngest Fleet\*

6

TK's Average  
Fleet Age



\*in Europe

	Type	2012 Fleet	Fleet Age
Wide Body	A330-200	8	5,5
	A330-300	10	
	A340-300	7	
	B777-3ER	15	
17%	Total	40	
Narrow Body	B737-900ER	10	6,1
	B737-800	69	
	B737-700	14	
	B737-400	0	
	A320-200	32	
	A321-200	41	
	A319-100	14	
	Total	180	
Cargo	A310-300	4	16,8
	A330-200F	6	
	Total	10	
TOTAL		230	6,4

# Figures / Anadolujet



## Fleet

**27**

There are 27 aircrafts on  
AJET's fleet

## Passenger

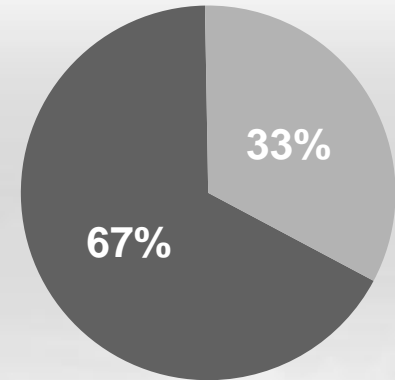
**5,3 million**

Number of passengers  
carried in 2012

## Load Factor Rate

**81,5%**

Passenger Load Factor  
for 2012



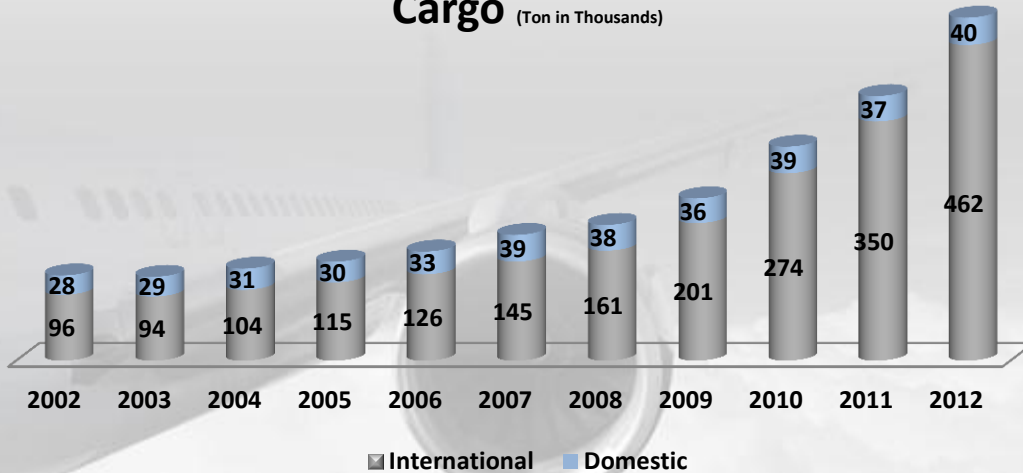
■ TK ■ AJET

Share of Domestic Passengers by  
Operating Carriers 2012



# Figures / Cargo

Cargo (Ton in Thousands)



**% 24,6**

yoy Increase in carried  
cargo in 2012

**% 22,8**

yoy Increase in revenue in  
9M'12

**9th**

Largest cargo carrier of  
Europe in terms of TFTK

- ✓ Cargo market leader in Turkey.
- Operations;
- ✓ To 46 destinations by 11 cargo aircraft
- ✓ To 239 destinations in 104 countries  
by 222 passanger aircrafts

# Overview Presentation

Turkish Airlines' Rankings

Turkish Airlines' Figures

**Brand Value**

Products & Advantages

Subsidiaries of TK





# Brand Value – Sponsorships



**BORUSSIA DORTMUND 2013-2016**



**OLYMPIQUE DE MARSEILLE 2013-2014**



# Brand Value – Sponsorships



A STAR ALLIANCE MEMBER 

*Globally Yours* | **TURKISH AIRLINES** 

## Europe's Best Airline sponsors Europe's Best League



**TURKISH AIRLINES**  
EUROLEAGUE

*Globally Yours*  
**TURKISH AIRLINES** 



# Brand Value – Commercials



A STAR ALLIANCE MEMBER 

 **FLY WITH THE BEST** 

The world's best players enjoy our Business Class with the comfort of 180° flatbed seats, culinary delights prepared by flying chefs,\* and our signature Turkish hospitality. If you feel you deserve the best, fly aboard Europe's best airline, Turkish Airlines.

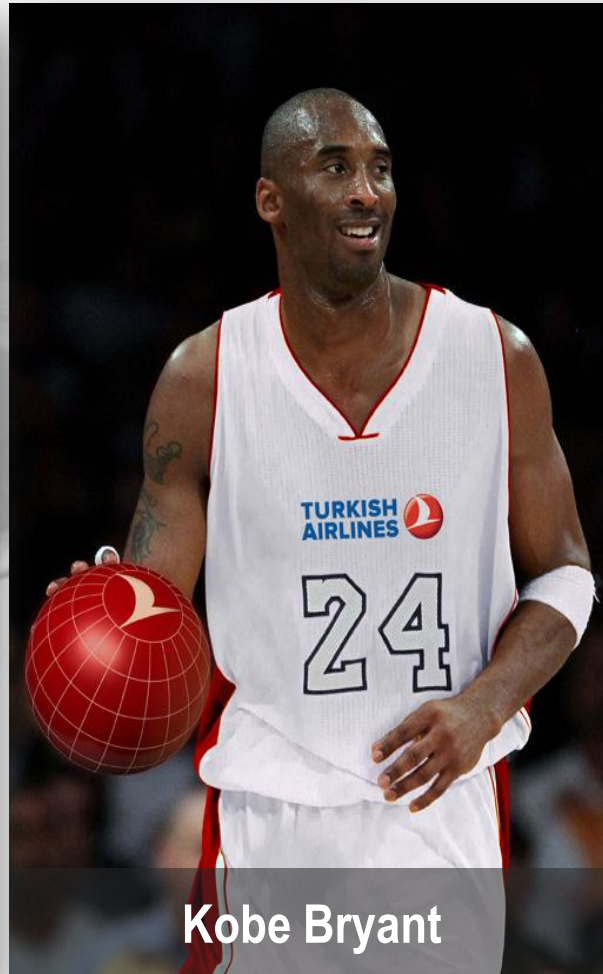
*Globally Yours* | **TURKISH AIRLINES** 



# Brand Value – Brand Faces



Lionel Messi



Kobe Bryant



Caroline Wozniacki





# Brand Value – Sponsorships



# Overview Presentation

Turkish Airlines' Rankings

Turkish Airlines' Figures

Brand Value

**Products & Advantages**

Subsidiaries of TK





# Cabin Features



Business Class



Comfort Class



Economy Class



# New Premium Economy Cabin Class: Comfort Class



Comfort class is the new cabin class in addition to business and economy options.



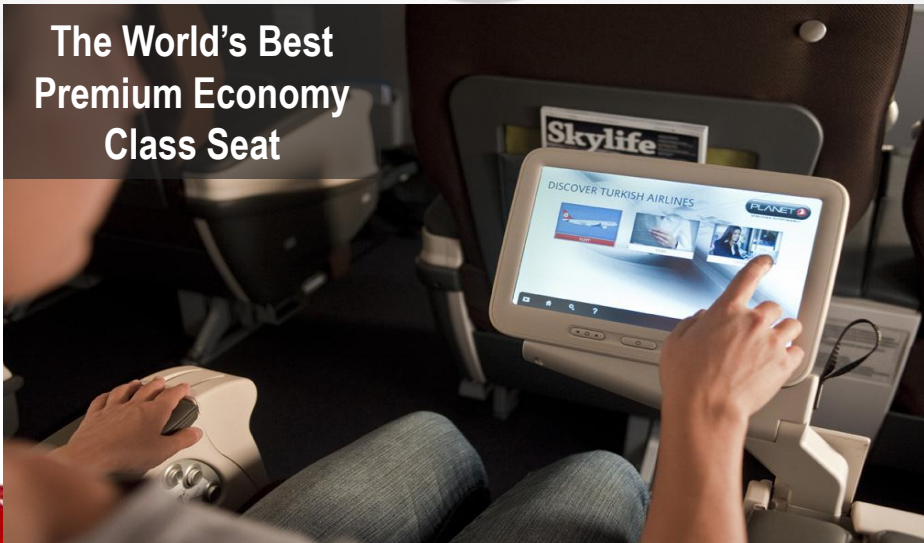
Turkish Airlines wins the award for Best Premium Economy Class airline seat at the 2012 and Best Business Class Catering at 2013 World Airline Awards



Comfort Class service is now available on;  
Beijing, Shanghai, Sao Paulo, Buenos Aires, Tokyo, Los Angeles, Hong Kong, New York, Houston and Toronto flights.



The World's Best  
Premium Economy  
Class Seat





# Catering



Turkish Airlines, which serves the best catering service for business class, is offering **Flying Chef** concept in flights.



# TURKISH CORPORATE CLUB



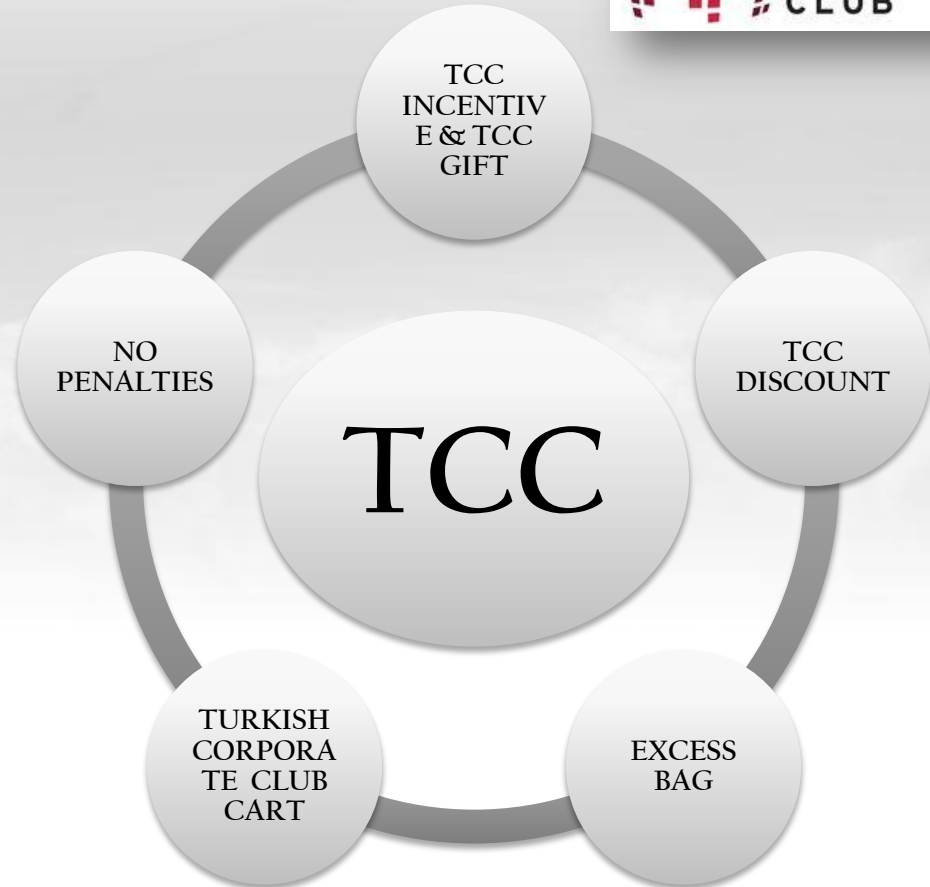
**TURKISH CORPORATE CLUB**  
A STAR ALLIANCE MEMBER

## WHERE BUSINESS MEETS BENEFITS

- Free tickets
- Turkish Corporate Club Cards
- Free luggage allowances
- More flexibility
- Corporate discounts

turkishairlines.com

*GlobalFlyer* **TURKISH AIRLINES**



# TURKISH CONVENTIONS



**Europe's best airline brings the world to Congress City  
İstanbul.**


**Exclusive offers on all Turkish Airlines flights**

**Opportunity to obtain organizers' incentives**

**Easy application and management process  
for  
meetings/seminar/conference/congress/exhibitions**


[conventions@thy.com](mailto:conventions@thy.com)



*Globally Yours* | **TURKISH AIRLINES** 

**FROM  
OUR  
NETWORK  
TO YOURS.**

We fly you from 220 cities  
around the world to Istanbul.

A STAR ALLIANCE MEMBER 








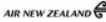











conventions@thy.com  
turkishairlines.com | +90 212 444 0 849



# Miles&Smiles



Miles&Smiles is Turkish Airlines' advantageous Frequent Flyer Program. .

 Turkish Airlines	 Adria Airways	 Aegean Airlines	 Ethiopian Airlines	 EgyptAir	 LOT Polish Airlines
 Air Canada	 Air China	 Air New Zealand	 Lufthansa	 Scandinavian Airlines	 Singapore Airlines
 All Nippon Airways	 Asiana Airlines	 Austrian Airlines	 South African Airways	 Swiss International Air Lines	 TAP Portugal
 U.S. Airways	 Brussels Airlines	 Croatia Airlines	 Tam Airlines	 Thai Airways	 United Airlines

  
深圳航空  
Shenzhen Airlines





# Lounge Istanbul

**3.000 m<sup>2</sup>**

Area of Lounge Istanbul



**650**

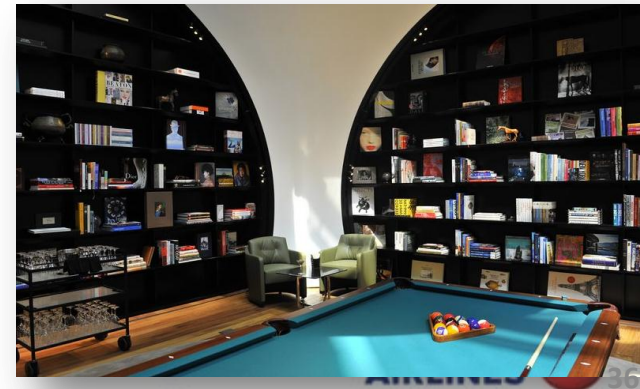
Seat capacity of Lounge Istanbul



Our Business Class travelers, Miles&Smiles Elite card members with one guest, Miles&Smiles Elite Plus members with their family and Star Alliance Gold card members can take advantage of Lounge Istanbul



In our lounge, you will have a good time comfortably before flight and enjoy the free catering service (hot and cold soft drinks, fresh queezed orange juice, andwiches, roissants, pastries, tarts, tartlets, sweet and salted biscuits, nuts, and hot soup.)





# Lounge Istanbul Arrival



In the Arrival Lounge our guests can enjoy a variety of complimentary breakfast foods and sweet and savory snacks as well as fruit juices, teas and coffees. In addition, there are showers, changing and ironing rooms available free of charge.



Our international incoming Business Class passengers and Miles&Smiles Elite Plus members travelling in Economy and Comfort Class can take advantage of Lounge Istanbul Arrival





# Istanbul Tour For Transfer Passangers

Istanbul Tour : Free Istanbul sightseeing tour for all our transit passengers.



6 HOURS  
IN ISTANBUL



1 DAY  
IN ISTANBUL



360°  
ISTANBUL



BASILICA CISTERN



TURKISH COFFEE



GALLERY



**touristanbul**

Istanbul sightseeing tour  
for all transit passengers.

[www.istanbulinhours.com](http://www.istanbulinhours.com)

I photographed the Dolmabahçe Palace  
while I was flying to Dubai.



After you arrive at Istanbul Atatürk Airport, you will be picked up by a private guide and you will spend fantastic hours filled with historical beauties of our city.

*Globally Yours*

**TURKISH  
AIRLINES**



# Overview Presentation

Turkish Airlines' Rankings

Turkish Airlines' Figures

Brand Value

Products & Advantages

Subsidiaries of TK



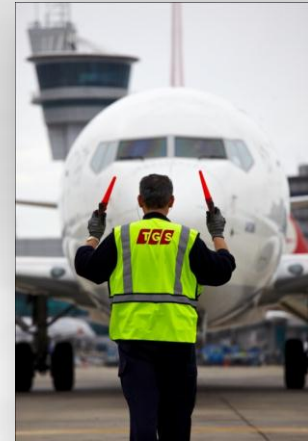


# Subsidiaries

Turkish Airlines has 13 subsidiaries in different areas of aviation industry.



Subsidiary	Share	Establishment
Sun Express	50%	1989
THY Technic	100%	2006
THY Do&Co	50%	2007
THY Technic – Pratt & Whitney (United Technologies)	49%	2008
THY Opet	50%	2009
TGS (Turkish Ground Services)	50%	2009
Goodrich-THY Service Centre	40%	2010
TCI Cabin Systems Inc.	51%	2011
Aircraft Seat Productions Inc.	100%	2011
HABOM Inc.	100%	2011
Turbine Technical Gas Turbines Maintenance Inc.	50%	2011
THY Aydın Çıldır Airport Inc.	100%	2012
MNG Technic Aircraft Maintenance Services Inc.	100%	2002





# Thank You

*Globally Yours*

