

Türkiye sees no energy supply risk

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Minister of Energy
and Natural Resources
Alparslan Bayraktar

Turkish President
Recep Tayyip Erdogan

Türkiye's golden age in oil production

Türkiye has reached the most remarkable figures in the history of the Republic through its "National Energy" initiative launched to ensure energy supply security. Türkiye's crude oil production increased by more than 35 percent compared to the same period last year. [p 4](#)

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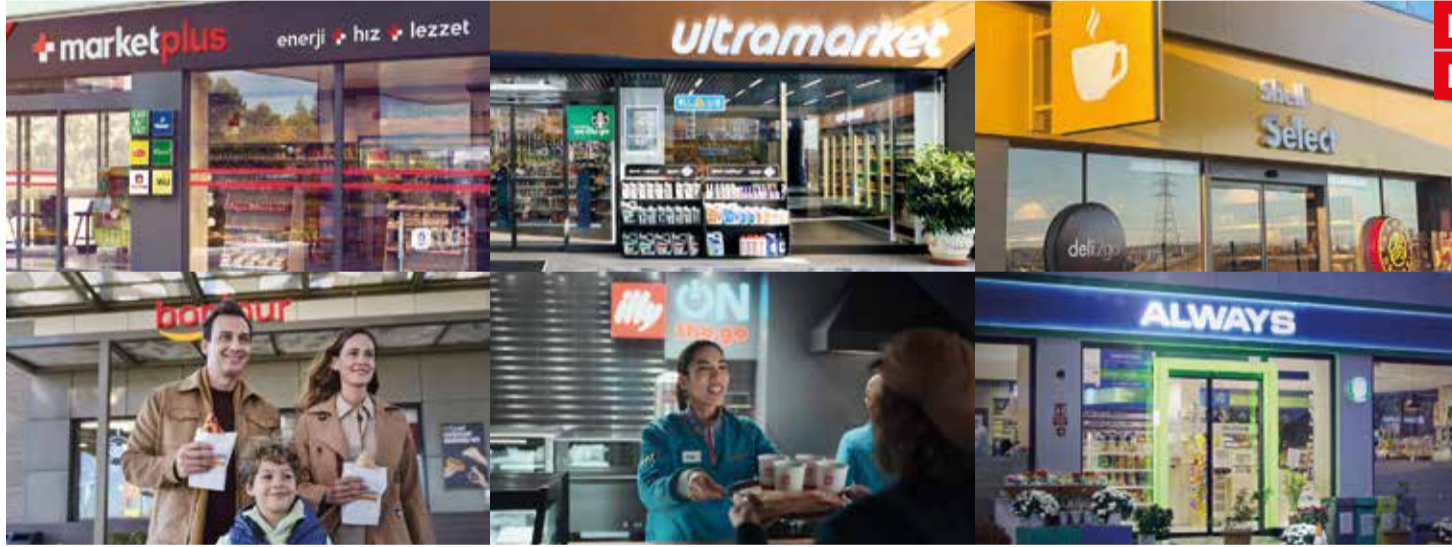
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THE MOST APPEALING FUEL STATIONS

IN THE WORLD

Shrinking distribution margins and changing consumer expectations are pushing major fuel distributors and dealers toward new revenue models. Fuel stations are no longer limited to selling fuel;

they are now competing through non-fuel products and services ranging from market concepts and vehicle and motorcycle washing services to cargo delivery points and outlet stores.



MARKETS BECOME THE FIRST
FRONT OF COMPETITION

Türkiye's fuel retail sector has entered a transformation process in recent years. Shrinking distribution margins, increasing cost pressures, and changing consumer expectations have directed both major distribution companies and dealers toward non-fuel revenue sources. Convenience stores remain the most visible face of non-fuel revenues at stations. [page 6](#)

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Türkiye's major rise in electric vehicles

Türkiye is leading one of the greatest industrial shifts in history at the very heart of the global energy and automotive transformation. Beginning with one out of every five vehicles on the roads being electric as of 2026, this surge is evolving into a global vision powered by Togg's domestic strength and massive infrastructure investments. [page 14](#)

Türkiye's jet fuel market grew by more than 40 percent over the last 5 years

Türkiye's aviation fuel market has become a strategic component not only of the aviation industry but also of the country's energy and economic policies, thanks to the strong growth performance it has demonstrated over the last five years. [p 10](#)



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Türkiye emerges stronger from the Hormuz crisis

President Recep Tayyip Erdoğan stated that the closure of the Strait of Hormuz has created a major shock in global energy and trade chains, emphasizing that Türkiye has managed the process with limited impact thanks to its strong supply security. Erdoğan also highlighted Türkiye's goal of becoming an alternative hub in energy transmission routes and an attractive center in global trade.

Speaking after the Cabinet Meeting held at the Presidential Complex, President Recep Tayyip Erdoğan drew attention to the fact that the de facto closure of the Strait of Hormuz following attacks on Iran has affected not only the energy sector but also many critical areas.

Reminding that approximately 20 percent of the world's oil passes through this route, Erdoğan noted that, in addition to natural gas, strategic products such as petrochemicals, fertilizers, pharmaceutical raw materials, and helium used in semiconductor production are also dependent on this corridor.

Referring to the global impact of the shock, Erdoğan stated that Europe's fossil fuel bill has increased by 17 billion dollars in the last 30 days, while natural gas prices have doubled and oil prices have risen by 60 percent.

"TÜRKİYE IS OUTSIDE THIS PESSIMISTIC PICTURE IN ENERGY"

Erdoğan stated that in some countries, fuel quotas, restrictions on public services, and temporary measures in education have come into effect due to the crisis, adding that Türkiye has been relatively less affected by this process.



Emphasizing that Türkiye has a strong infrastructure in terms of energy supply security, procurement, and storage capacity, Erdoğan said, "Türkiye is outside this pessimistic picture."

He also noted that Türkiye does not procure LNG via Basra or Hormuz and that only around 10 percent of its oil imports come from this region, a level he described as manageable.

SEARCH FOR SAFER ALTERNATIVES IN ENERGY TRANSPORT ROUTES

President Erdoğan stated that safer alternatives in energy transmission routes are now being discussed more strongly, noting that Türkiye is preparing to take on a strategic role in this new period.

"Safer alternatives in energy transmission routes have begun to be discussed. We are closely monitoring this process and preparing

our country in the strongest possible way for this new era. In line with our instructions, our economic management team is working intensively to turn Türkiye into a regional management center for multinational companies," Erdoğan said.

Emphasizing that Türkiye aims to become a global hub in transit trade, Erdoğan noted

that the Istanbul Finance Center project is one of the key pillars of this vision.

"We are determined to make our Istanbul Finance Center one of the world's leading financial hubs. Just as during the pandemic, we strongly believe that this global crisis will also open new opportunities for our country," Erdoğan said.



50 BILLION LIRA SUPPORT THROUGH THE EŞEL MOBİL SYSTEM

Erdoğan stated that proactive steps were taken to limit the impact of the sharp rise in global oil prices on the domestic market. He announced that shortly after the outbreak of the conflict, the eşel mobil system was activated, ensuring that fuel price increases were largely not reflected to citizens.

Within this framework, Erdoğan said that approximately 17 lira per liter in diesel and nearly 12 lira per liter in gasoline price increases were not passed on to the pump. He added that the total cost, which has reached 50 billion lira so far, has been subsidized by the state.

Emphasizing that it is not possible to be completely insulated from all the effects of the global crisis, Erdoğan noted that the impact of the conflict on global trade has been felt particularly in exports. However, he stated that the government has taken steps to support the production, export, and tourism sectors to help businesses navigate this challenging period.

Türkiye sees no energy supply risk

Alparslan Bayraktar evaluated the impact of developments in the Middle East on energy markets and stated that Türkiye currently faces no risk in terms of energy supply security. He also announced that 11 million barrels from petroleum reserves would be released and that Iraqi oil flows had resumed.

Minister of Energy and Natural Resources Alparslan Bayraktar answered questions regarding the agenda during a live television broadcast.

Assessing the tensions in the Middle East, Bayraktar stated that the energy crisis experienced during the pandemic period had been a demand crisis, whereas the current situation had evolved into a supply crisis. Commenting on the effects of developments in the Strait of Hormuz on Türkiye, Bayraktar said:

“For us, in terms of supply security, this region currently poses no risk regarding oil supply. There is also the natural gas dimension of the issue. Again, we do not have a dependency on Hormuz. As Türkiye, we procure LNG from approximately 12 different countries. We also receive natural gas via pipelines from four different countries. We have not caused any supply security problems for our country in either natural gas



or oil up to this point. At the moment, there is no problem regarding energy supply security in our country.”

Bayraktar emphasized that it is critically important for both Türkiye and the world that this process remains short-lived.

“WE WILL RELEASE 11 MILLION BARRELS”

Recalling that the International Energy Agency requested member countries, including Türkiye, to contribute part of their oil reserves, Bayraktar stated:

“As a country, we announced that we would release approximately 11 million barrels from our own reserves over a 90-day period. This is one of the significant elements that may help suppress further abnormal increases in prices, which have already risen substantially.”

“WE WILL MAKE AN ASSESSMENT”

Evaluating whether the developments in the Middle East would affect energy prices, Bayraktar said:

“Especially with these latest developments, we need to reassess the new period. We will make an evaluation in April.”

“2.4 MILLION TONS OF OIL ARRIVED LAST YEAR”

Bayraktar also made statements regarding the flow of Iraqi oil to Türkiye. He noted:

“In 2025, approximately 2.4 million tons of oil flowed

through this pipeline to refineries in Türkiye.

“THE FLOW HAS STARTED”

Speaking about the section of Iraqi oil reaching Ceyhan, Bayraktar said:

“As of now, the flow has started. There will be a daily flow of approximately 170,000 to 250,000 barrels.”

“ITS CAPACITY IS 1.5 MILLION BARRELS”

Bayraktar also stated that the pipeline has a capacity of 1.5 million barrels and added:

“We proposed the following: let us extend this pipeline from Kirkuk down to Basra. Today, Iraq exports approximately 3 million barrels of crude oil per day. Nearly 1.5 million barrels of this — almost 50 percent — could potentially be transported through this line to new customers, especially in the Mediterranean basin. We have been saying this for years, but perhaps now our counterparts understand our proposal better.”

Having once imported nearly all of its oil needs and faced heavy current account pressure due to annual energy bills worth tens of billions of dollars, Türkiye is now carrying out one of the most strategic transformations in its history to ease this major economic burden.

Türkiye continues to raise the bar in oil production year after year. The daily production record of 132,027 barrels announced by Minister of Energy and Natural Resources Alparslan Bayraktar is not merely a statistic, but an economic achievement that directly reduces Türkiye’s energy import bill. In the Gabar region, which stands at the center of this success, the oil extracted from the Şehit Aybüke Yalçın and Şehit Esmâ Çevik wells draws attention with API values that meet global standards. The fact that the Gabar field alone has surpassed a daily production capacity of 50 thousand barrels reinforces its position as Türkiye’s largest oil production center.

A GIANT 35 PERCENT SURGE IN PRODUCTION

Official production data confirms that Türkiye’s crude oil production increased by more than 35 percent

Türkiye’s golden age in oil production

Türkiye has reached the most remarkable figures in the history of the Republic through its “National Energy” initiative launched to ensure energy supply security. Thanks to high productivity in the Gabar Mountain fields and advanced drilling technologies, daily production has exceeded 132 thousand barrels, making Türkiye a stronger player in the global energy league with its growing producer identity.



compared to the same period last year. Monthly total crude oil production surpassing 350 thousand tons demonstrates the operational capabilities reached by domestic exploration and production companies, including TPAO and private sector players. In particular, the active use of deep drilling technologies and seismic research vessels has enabled reserves once considered inaccessible to be brought into the economy. This increase in production also contributes to maintaining stability in the fuel market by

allowing domestic refineries to operate at full capacity and at lower costs.

THE MOST REMARKABLE LEVEL IN THE HISTORY OF THE REPUBLIC

Minister Bayraktar shared his views on the matter as follows:

“Today, we proudly announce to our nation that Türkiye has reached the highest and most remarkable level in the history of our Republic with a daily crude oil

production of 132,027 barrels. This figure is not a coincidence; it is the victory of a strategy we have built over many years with patience, domestic resources, and national engineering expertise. Gabar has now become the heart of Türkiye’s energy. When we began this journey, we said, ‘We will leave no unexplored place and no untouched field in Türkiye’; today, we are seeing the results of that promise on the ground. Our goal is not only to increase production, but to build a fully independent Türkiye. We are

moving confidently toward the target of 150 thousand barrels by the end of the year. This domestic oil will help reduce our current account deficit, ease the burden on our industrial sector, and serve as the greatest guarantee of leaving behind a prosperous Türkiye for our youth.”

FULL ECONOMIC INDEPENDENCE AND THE 2026 VISION

The planned decline in crude oil exports reflects Türkiye’s strategy of processing its own oil in domestic refineries and turning it into value-added products instead of selling it as raw material. Through this approach, the country aims to save billions of dollars in the effort to reduce the foreign trade deficit.

In this period, which Minister Bayraktar describes as the “Century of Energy,” the commissioning of new discovery fields, the rise of oil alongside Black Sea gas as a driving force for the national economy, and Türkiye’s achievement of full energy independence continue to remain key priorities.

Türkiye is becoming a global player in energy

The momentum Türkiye has gained in deep-sea drilling technologies in recent years is now delivering results not only in its own territorial waters but also in international seas. With one of the world's most modern and youngest fleets—comprising the Abdülhamid Han, Fatih, Kanuni, and Yavuz drilling ships, along with the Barbaros Hayreddin Paşa and Oruç Reis seismic research vessels—Türkiye is carrying the strength of its engineering capabilities into the oceans. This major initiative increases Türkiye's strategic weight in energy diplomacy while transforming TPAO into a globally competitive energy company. The technological superiority of the domestic fleet enables even the most challenging deep-sea operations to be carried out without foreign dependence, elevating Türkiye to the position of an "energy hub" and a "production base" with a strong voice in global energy.

FROM AFRICA TO ASIA, TÜRKİYE IS EVERYWHERE

One of the most critical pillars of Türkiye's international hydrocarbon strategy is undoubtedly Somalia. The activities to be carried out by the Oruç Reis seismic research vessel in offshore blocks have become the most concrete indicator of Türkiye's presence in the oceans. In this process, the goal is to transform TPAO into a global actor. Minister of Energy and Natural Resources Alparslan Bayraktar emphasizes that leading oil companies conduct production not only in their home countries but also abroad, stating: "Why shouldn't Turkish Petroleum, which we want to become a national champion, carry out similar operations overseas? Why not in Libya, Syria, Central Asia, or the Middle East? The coming period will be one in which Türkiye will be much more active abroad."

Highlighting the importance of the Somalia mission, Minister Bayraktar states: "TPAO has now become a global company that flies our flag not only in our territorial waters but also across oceans and different continents. For us, every well and every seismic data point is a building block on the path toward the ideal of a greater Türkiye."

Türkiye is launching a large-scale hydrocarbon exploration initiative across the world's oceans with its domestic and national technologies, while taking major steps toward transforming the Turkish Petroleum Corporation (TPAO) into a global "national champion." This strategic move, extending from Somalia to Libya and from Pakistan to Bulgaria, reinforces Ankara's vision of ending foreign dependency in energy and becoming an international energy superpower.



The activities we carry out in Somalia, Libya, or anywhere in the world are among the most decisive steps we have taken to ensure our country's energy supply security.

I believe that this process, which began with Oruç Reis and continues with Çağrı Bey, is opening a new chapter both in Türkiye-Somalia relations and in Turkish oil and natural gas exploration. The Somalia mission stands as a significant indicator that Türkiye has elevated its offshore exploration and production activities, technical capacity, and operational capabilities to a new level. I believe these efforts will increase our visibility internationally and open the door to new opportunities."

President Recep Tayyip Erdoğan also supports this visionary process and summarizes Türkiye's energy future with the following words: "We will not stop or slow down until we achieve our goal of a fully energy-independent Türkiye. With our own ships and our own engineers, we will be present wherever there is an opportunity in the world. Just as the gas we discovered in the Black Sea marked a milestone, our activities in the oceans and friendly regions will be the guarantee of Türkiye's energy future."

THE WESTERN GATE OF THE BLACK SEA AND A TECHNOLOGY-DRIVEN FUTURE VISION

Türkiye's exploration efforts are not limited to Somalia but extend across a wide geography, including Libya, Pakistan, and the western Black Sea toward Bulgaria. These activities are seen not only as economic initiatives but also as key elements for regional stability and peace. Minister Bayraktar notes that these projects will contribute to regional stability and security, stating: "I would like to express my gratitude to our President Recep Tayyip

Erdoğan, who always provides direction, support, and confidence on this challenging journey, and to the President of Somalia, Mr. Hassan Sheikh Mohamud, who has taken decisive strategic steps that will almost change the fate of his country. With the belief that, in a few months, we will share good news and a discovery announcement with both the Somali people and our nation, I extend my respectful greetings to you. "Within the framework of hydrocarbon agreements signed with Libya, Türkiye continues to protect its rights in the Mediterranean on a legal basis while expanding its exploration activities both on

land and at sea. Cooperation with Pakistan, on the other hand, serves as a significant gateway to the Asian market in terms of energy supply security. Thanks to advanced data processing capabilities and high-precision drilling techniques, the Turkish fleet is reaching previously inaccessible depths in the seas, while also reshaping geopolitical balances in favor of energy. With the confidence brought by the national energy initiative, Türkiye continues to move forward with firm steps toward becoming a superpower that sets rules, develops strategies, and delivers the riches of the oceans to the service of its nation.



The most appealing fuel stations in the world

Shrinking distribution margins and changing consumer expectations are pushing major fuel distributors and dealers toward new revenue models. Fuel stations are no longer limited to selling fuel; they are now competing through non-fuel products and services ranging from market concepts and vehicle and motorcycle washing services to cargo delivery points and outlet stores.

Gözde Emlik/İstanbul

Türkiye's fuel retail sector has entered a transformation process in recent years. Shrinking distribution margins, increasing cost pressures, and changing consumer expectations have directed both major distribution companies and dealers toward non-fuel revenue sources. Stations are no longer simply selling fuel; they are competing by offering a wide range of services from convenience stores and vehicle washing to cargo delivery points and outlet stores. For consumers, the

reason to choose a station is no longer just the pump price, but the opportunities offered after fueling.

According to sector representatives, this transformation is not only a strategy for generating additional income, but also a process that is redefining the function of fuel stations. Stations are no longer merely fueling points; depending on their location and physical capacity, they are turning into multi-purpose commercial spaces where different services are offered.



PETROL OFİSİ'S MARKETPLUS CONCEPT

Petrol Ofisi's MarketPlus concept stands out with practical solutions offered to consumers during travel breaks.

MarketPlus offers services such as Tchibo coffee, fresh and practical Kap Bi' Tat sandwiches, bakery products, fruit juices, 24/7 money transfer through Western Union, and Hepsiburada delivery points.



Kap Bi' Tat, which forms the food and beverage side of the concept, stands out with sandwiches and snacks prepared under the motto "practical, fast, satisfying, and delicious." The brand also offers advantageous options to customers through seasonal campaigns.

TOTALENERGIES' BONJOUR AND CAFÉ BONJOUR MARKETS

TotalEnergies operates two market concepts called "Bonjour" and "Café Bonjour" at more than 140 stations across Türkiye, open 24/7. Since 2022, the company has reported a 115 percent increase in non-fuel service revenues, demonstrating the success of the concept. Customer engagement is also strengthened through the "Club TotalEnergies" loyalty program and campaigns.

Through the Bi'Güzel concept launched at TotalEnergies stations, the company aims to offer not only fuel but also an enjoyable break experience. First introduced in 2021, the

Bi'Güzel brand transforms TotalEnergies stations into innovative food and beverage shopping points.

Bi'Güzel was inspired by the Bonjour Market experience previously developed by GüzelEnerji under the TotalEnergies umbrella. The new concept offers a broad range of products from hot and cold beverages to fresh sandwiches, bakery products, and snacks. Bi'Güzel responds not only to travel needs but also to practical and high-quality consumption demands in daily life.



OPET STANDS OUT WITH ULTRAMARKET AND SMART STATIONS

ultramarket

With its "Ultramarket" concept, OPET aims to provide a wide product range and high-quality non-fuel services. In addition, OPET has taken an environmentally friendly step through smart stations; stations in Çekmeköy and Poyrazköy have been equipped with technologies that improve energy and water efficiency. The company also plans widespread distribution of branded vehicle care products such as AdBlue and

windshield washer fluid.

OPET has also added delicious and practical food options ranging from healthy beverages to cold sandwiches to its Ultramarkets under its new brand "Fasty."

The new product group created under the Fasty brand covers a broad range. Offering refreshing breaks with specially developed cold coffees, freshly squeezed and organic fruit juices, Fasty also provides instant,

practical, and satisfying alternatives with its cold sandwich options. OPET attracts attention not only with beverage and sandwich varieties but also with fresh bakery products under "Fasty Bakery." Fasty products, available in specially designed corners at Ultramarkets and selected Fullmarkets, are supplied by carefully selected suppliers and produced according to the highest quality standards.

SHELL & TURCAS – SELECT MARKETS



In Türkiye, station markets and services are offered under the title of "Non-Fuel Products and Services." Through a centralized supply chain structure, the company achieves quality and cost advantages in fast-moving consumer goods and vehicle care products. Globally, there are plans to increase non-fuel revenue targets to 50 percent, and whether this strategy will be adapted to the Turkish market remains a matter of interest.

Shell's Select concept, introduced in Türkiye, stands out as one of the leading brands in the transformation of fuel stations. Launched in 2006, the initiative was designed with the vision of providing a "fast, practical, and high-quality experience."

Select markets offer approximately 1,500 products across 11 different categories. Among the products attracting the greatest consumer attention are Shell's own deli2go

sandwiches, additive-free healthy fruit juices, and freshly ground coffee varieties.

The Select concept is not limited only to market services. Shell has also integrated innovations such as "Wash Me at Shell" water-efficient vehicle washing solutions, ozone-based toilet hygiene systems, accessible service areas, and child-friendly restrooms in order to transform stations into multi-functional lifestyle spaces.

AYTEMİZ'S "ON 7/24 MARKET CONCEPT"



Aytemiz focuses on quality service and customer satisfaction throughout Türkiye. Within the scope of its "ON 7/24 Market Concept," motorcycle-friendly products and self-service applications stand out. In addition, the company gains a competitive advantage through its

strong logistics and supply infrastructure.

At Market ON 7/24 locations, consumers are offered more than 3,000 product options ranging from cold sandwiches and bakery products to beverage alternatives and coffee varieties

such as Illy. In a company statement, it was noted that consumers choosing Market ON 7/24 can purchase fuel through the Vaay application in a contactless and advantageous way while also benefiting from fast payment options for products that make their journeys more enjoyable.



ALWAYS ALPET'S ALWAYS MARKETS

Alpet's Always market concept was designed to meet the needs of both drivers and passengers during travel. The markets combine coffee and seating areas with personal care products, lubricants, vehicle accessories, and various food options.

The new concept aims to meet both vehicle and passenger needs under one roof, offering coffee services, relaxation areas, and vehicle maintenance products at stations.

MARKETS BECOME THE FIRST FRONT OF COMPETITION

Convenience stores remain the most visible face of non-fuel revenues at stations. Many companies are focusing on improving consumer experience by renewing market areas with modern concepts.

Equipped with coffee corners, fresh food sections, hot and cold snack areas, and even small seating sections, these markets aim not only to attract customers for fuel purchases but also for shopping needs.

At this point, some distribution companies have taken competition a step further by placing their own branded products on the shelves.

Creating brands in products such as beverages, coffee, and snacks has become an important strategy in terms of price competition and customer loyalty. However, this is only one part of the bigger picture.

VEHICLE WASHING SERVICES BECOME A NEW REVENUE STREAM

Depending on the size and location of stations, vehicle washing services have become an important source of income in recent years due to rising demand.

While some stations have increased capacity through automatic tunnel systems, others have opened dedicated motorcycle washing areas. This service for motorcycle users creates a strong customer

potential, especially in urban and touristic regions.

STATIONS ARE TURNING INTO DELIVERY POINTS

The growth of e-commerce has opened the way for stations to be used as cargo delivery points. Some distribution companies have partnered with cargo firms to transform stations into package pickup and delivery locations.

This service both increases customer traffic for stations and provides consumers with easier access within cities.

OUTLET AND RETAIL PARTNERSHIPS

Stations with large areas are generating additional revenue through outlet stores and small

retail points. In some regions, small stores selling clothing, shoes, and accessories increase the attractiveness of stations while also creating convenient stops for consumers who want to shop during their journey.

COMPETITION IS INCREASING, SERVICES ARE DIVERSIFYING

These new revenue models have accelerated "non-fuel service competition" within the sector. Consumers now choose stations not only based on price or location, but also according to the market concept, vehicle washing quality, cargo convenience, or outlet opportunities offered.

Sector experts predict that this transformation will accelerate even

further in the coming years and that stations will evolve into "mini lifestyle centers."

Shrinking distribution margins are transforming stations from simple fuel-selling points into commercial centers offering multiple services. Markets, branded products, vehicle and motorcycle washing, cargo services, and outlet stores are becoming the main pillars of next-generation competition.

Competition between stations is no longer taking place at the pump, but after the pump.



TÜRKİYE PETROLLERİ STANDS OUT WITH "FILOTECH" IN NON- FUEL SERVICES

Türkiye Petrolleri aims to differentiate itself in non-fuel products and services by focusing on new technologies beyond traditional market concepts. Within this

framework, the company launched its next-generation vehicle recognition system called "Filotech."

Filotech is defined as a cardless and device-free vehicle recognition technology. The system uses license plate recognition, eliminating the need to install additional devices on vehicles. Users can register their credit

card information once through the Mastercard-compatible system and complete future fuel purchases without re-entering card details.

KADOIL DEVELOPS LOCATION-SPECIFIC SOLUTIONS IN NON- FUEL PRODUCTS AND SERVICES

Kadoil continues increasing dealer revenues through

brand collaborations and has defined its strategy as "developing location-specific solutions in the selection of non-fuel products and services."

LUKOIL AIMS TO BECOME A FAVORITE AMONG CONSUMERS

International oil company LUKOIL, which serves consumers through its fuel

station network across Türkiye, also aims to become a favorite among consumers through its non-fuel products and services.



Türkiye has expanded its national energy fleet onto the global stage as it searches for oil and natural gas across a wide geography stretching from Somalia to Libya, Pakistan to Azerbaijan. The operations led by Turkish Petroleum Corporation (TPAO) aim both to reduce energy imports and to position Türkiye as a strong actor in the international energy arena. Within this framework, with the support of the Ministry of Energy and Natural Resources, TPAO continues to sign major agreements with global energy giants.

Gözde Emlik/İstanbul

Türkiye has expanded its oil and natural gas exploration activities beyond its borders in order to ensure energy supply security and reduce foreign dependency. Within the scope of operations led by the national oil company Turkish Petroleum Corporation (TPAO), Turkish seismic and drilling vessels are now operating across a vast geography extending from Africa to the Middle East and from Asia to the Caspian basin.

FROM AFRICA TO ASIA: AN EXPANDING ENERGY CORRIDOR

Türkiye's overseas hydrocarbon exploration and production activities have expanded significantly in recent years. Through projects carried out in countries such as Somalia, Libya, Pakistan, Azerbaijan, Iraq, and Russia, Ankara aims to diversify energy supply and take on a more influential role in the global energy equation.

A CRITICAL MOVE OFF THE COAST OF SOMALIA

One of Türkiye's most remarkable steps in recent years was the hydrocarbon agreement signed with

Türkiye's national energy fleet goes global



Somalia. While Turkish seismic research vessels continue collecting data in the region, the Turkish energy fleet has also accelerated efforts to move into the drilling phase. The agreements grant Türkiye exploration and production rights off the Somali coast.

A MEDITERRANEAN OPENING IN LIBYA

Türkiye is also taking an active role in Libya, one of the richest hydrocarbon basins in the Mediterranean. Exploration activities continue both offshore and onshore within projects carried out by TPAO and its international partners. Türkiye will also hold a share in production obtained from these fields.

AGREEMENTS WITH ENERGY GIANTS CONTINUE

In addition to all these developments, the agreements signed in the energy sector clearly demonstrate Türkiye's

ambitions in energy exploration and production. Through partnerships with global energy giants, Türkiye will continue exploring for oil and natural gas in different regions. Some recent examples include agreements signed with Chevron, bp, and Shell under the leadership of Minister of Energy and Natural Resources Alparslan Bayraktar.

Earlier this year, Turkish Petroleum and US energy giant Chevron signed a memorandum of understanding to conduct exploration and production activities in potential oil and natural gas fields. Speaking at the signing ceremony, Minister Bayraktar stated, "Through this cooperation agreement, we will carry out joint exploration and production activities."

Following this, Turkish Petroleum (TPAO) and British energy giant BP signed a memorandum of understanding for strategic cooperation in oil and natural gas. Minister Bayraktar said, "Our top priority project is cooperation

in Iraq. We are evaluating cooperation in Iraq, especially in the Kirkuk fields."

Most recently, TPAO and British energy giant Shell signed a partnership agreement. Under the deal, TPAO and Shell became partners in exploration activities at the Khan Tervel Field located within Bulgaria's maritime jurisdiction area. Explaining that the field is close to the Sakarya Gas Field, Minister Bayraktar said, "We will hold a five-year license in Bulgaria's Exclusive Economic Zone."

THE GOAL: ENERGY INDEPENDENCE

The main goals of Türkiye's overseas energy strategy are to reduce the energy import bill, generate direct revenues from oil and gas production, strengthen energy supply security, and expand geopolitical and economic influence. In the long term, Türkiye aims to significantly increase its daily oil production.

Türkiye'nin enerji filosu

SONDAJ GEMİLERİ

 <p>YILDIRIM Uzunluk 228 metre Genişlik 42 metre Azami sondaj derinliği 12.000 metre</p>	 <p>ÇAĞRI BEY Uzunluk 228 metre Genişlik 42 metre Azami sondaj derinliği 12.000 metre</p>	 <p>YAVUZ 2018'de envantere katıldı Sondaj derinliği 12.200 m Uzunluğu 230 m Genişliği 36 m</p>
 <p>KANUNİ 2020 başında filoya dahil oldu Uzunluğu 227 m Genişliği 42 m</p>	 <p>ABDÜLHAMİD HAN 2022'de filoya katıldı Sondaj derinliği 12.200 m Uzunluğu 238 m Genişliği 42 m</p>	 <p>FATİH Fatihli Karad Deniz'de Türkiye tarihinin en büyük doğal gaz keşfi yapıldı Sondaj derinliği 12.200 m</p>

SİSMİK ARAŞTIRMA GEMİLERİ		DOĞAL GAZ ÜRETİM PLATFORMLARI	
 <p>BARBAROS HAYREDDİN PAŞA Deniz 8 km derinlerdeki jeolojik yapıları inceleyebiliyor Brüt 4 bin 700 ton Uzunluğu 84 m Genişliği 23,6 m</p>	 <p>MTA ORUÇ REİS Deniz tabanından itibaren 15 bin m derinlikteki jeolojik yapıları görüntüleyebiliyor Uzunluğu 87 m Genişliği 23 m</p>	 <p>OSMAN GAZI (FPU) Türkiye'nin ilk yüzer doğal gaz üretim platformu Uzunluk 298,5 m Genişlik 56 m</p>	 <p>YENİ YÜZER ÜRETİM PLATFORMU Günlük gaz üretim kapasitesi 25 milyon metreküp 2023'de devreye alınacak</p>

A WIN-WIN MODEL

The agreements Türkiye signs with the countries where it operates are based on a "win-win" model. Under this model, Türkiye provides investment and technology, while the host country provides reserves and fields, and the resulting production and revenues are shared between the parties. In this way,

both Türkiye and the host countries achieve economic gains.

Türkiye is no longer only an energy-consuming country; it is becoming a global energy player searching for oil and gas across a vast geography stretching from Africa to Asia. Today, Turkish-flagged vessels sail across the world's seas with a single goal: energy independence and strategic power.

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Türkiye's jet fuel market grew by more than 40 percent over the last five years

Annual Petroleum Market Sector Reports published by the Energy Market Regulatory Authority (EPDK) reveal the remarkable transformation experienced in Türkiye's aviation fuel production and consumption over the last five years. As Enerji Petrol Gaz Newspaper continues to cover major developments across all areas of the energy sector, this issue focuses on Türkiye's aviation industry. Leading figures from the sector also answered our questions regarding the market.

Gözde Emlik/İstanbul

Türkiye's aviation fuel market, which collapsed during the pandemic and later surged to historic highs, recorded growth of more than 40 percent over the last five years. Data from the Energy Market Regulatory Authority (EPDK) shows that this strategic sector, which has once again taken off, has become one of the most dynamic areas not only for aviation but also for the Turkish economy.

In 2020, the sector experienced one of the lowest points in its history due to the impact of the pandemic, similar to many other industries. Production fell to 4.1 million tons, while domestic sales declined to 4.0 million tons. Exports stood at 4.5 million tons during the same period.

With the normalization process in 2021, the sector entered a rapid recovery phase. Production increased to 4.8 million tons, while domestic sales climbed to 5.3 million tons. As a result, aviation fuel consumption recorded an increase of approximately 32 percent compared to the previous year.

AVIATION FUEL PRODUCTION HIT A RECORD 6.2 MILLION TONS IN 2022

The year 2022 marked the peak of the sector's recovery. Aviation fuel production in Türkiye reached a record level of 6.2 million tons, while



domestic sales rose to 6.6 million tons. Total delivery volume climbed to 11.6 million tons, the highest level recorded in the last five years.

Growth continued in 2023 despite global economic fluctuations. Production was recorded at 5.9 million tons, while domestic sales reached 6.4 million tons. On the export side, the sector also delivered a strong performance with 5.3 million tons.

In 2024, however, a limited slowdown was observed. Production declined by 5.9 percent to 5.5 million tons, while domestic sales posted a slight increase, reaching 6.5 million tons. Although exports fell to 5.1 million tons, the total delivery volume remained stable at 11.6 million tons.

THE POST-PANDEMIC RECOVERY MOMENTUM PEAKED IN 2022

Looking at the overall picture, Türkiye's aviation fuel market grew by more than 40

percent between 2020 and 2024. The post-pandemic recovery momentum reached its peak particularly in 2022, while a more balanced trend has been observed over the last two years.

GREEN TRANSFORMATION WITH SUSTAINABLE AVIATION FUEL (SAF)

Alongside all these developments, one of the most discussed topics in aviation fuels in recent years has been SAF, developed as an alternative to fossil-based jet fuels. With its potential to reduce carbon emissions, SAF is seen as one of the key solutions for the future of the aviation industry. Türkiye is also preparing to adapt to this global transformation through research, development, and production efforts in this field.

SAF, or Sustainable Aviation Fuel, refers to an environmentally friendly fuel alternative developed to

replace fossil-based jet fuels. Produced from biomass, waste oils, agricultural and forestry waste, or synthetic processes, SAF has significant potential to reduce carbon emissions.

Considered one of the most effective tools for reducing the aviation sector's carbon footprint, SAF offers an alternative to traditional fossil-based jet fuels. In line with targets set by international organizations, the share of SAF usage in commercial flights is expected to increase steadily in the coming years. This represents not only an environmental responsibility for countries but also a strategic move in terms of global competitiveness.

The growth momentum achieved by Türkiye's aviation fuel market could evolve into a more sustainable and stronger structure through SAF investments. Refinery and distribution companies in Türkiye have also started to place sustainable aviation fuels on their agendas through R&D and production initiatives. In this respect, SAF will not only help reduce environmental impacts but will also play a critical role in helping Türkiye adapt to the global transformation in the aviation fuel market.

PRODUCTION, DOMESTIC SALES, AND EXPORT FIGURES ARE TURNING TÜRKİYE INTO A REGIONAL HUB

As a result, Türkiye's aviation fuel market has

become a strategic component not only of the aviation industry but also of the country's energy and economic policies, thanks to the strong growth performance it has demonstrated over the last five years. The sector, which quickly recovered from the severe impact of the pandemic, revealed Türkiye's growing role in global aviation by reaching record levels in 2022. The stabilization observed over the last two years also shows that the market has evolved into a structure based not only on recovery from crises but also on sustainable growth.

At the current stage, production, domestic sales, and export figures are positioning Türkiye as a regional hub, while investments by sector players carry critical importance in terms of energy security and international competitiveness. Considering that sustainability, green transformation, and alternative fuel technologies will become increasingly prominent in the coming period, every step Türkiye takes in the aviation fuel market will shape both activity in the skies and the momentum of the national economy.

Within this scope, our questions regarding the aviation fuel sector in both Türkiye and the world were answered by THY (Turkish Airlines) Opet General Manager Serdar Güler, İstanbul Jet Aviation and Fuel Services Inc. General Manager Hüseyin Latifoğlu and Turkish Fuel Services General Manager Muhammed Cahit Şirin.

THY (Turkish Airlines) Opet General Manager Serdar Güler

“THY’S EXTENSIVE FLIGHT NETWORK AND OPET’S EXPERIENCE IN FUEL OPERATIONS HAVE CREATED A STRONG SYNERGY”

How has THY Opet Aviation Fuels Inc. performed in the aviation fuel market over the last five years?

One of the most important factors behind THY Opet’s success is undoubtedly its strategic structure, formed through the partnership between Türkiye’s national flag carrier Turkish Airlines and the country’s strongest domestic fuel company, OPET Petroleum. The combination of Turkish Airlines’ extensive flight network and OPET’s experience in fuel operations has created a powerful synergy.

The financial strength of Turkish Airlines and OPET, their sectoral expertise, capabilities in logistics and storage, and broad customer networks have all supported the company’s rapid positioning in the market. At the same time, the continuous increase in airline destinations, the expanding tourism sector, and the launch of major projects such as Istanbul Airport have contributed to strong growth across the aviation industry. In line with this trend, THY Opet has continued to strengthen its position in the growing aviation fuel market as the only company operating at more than 50 airports across Türkiye.

One of the most important features in the aviation sector is the ability to provide fast and reliable service. THY Opet’s investments and expertise in modern fuel supply technologies, logistics infrastructure, and operational efficiency have been another key factor behind its rise among the country’s largest companies. Providing fast, safe, and reliable fuel services at the highest number of airports in Türkiye has enabled the company to reach a broad customer base and establish a significant presence both in Anatolia and at major airports, greatly contributing to its growth momentum. These factors have played a major role in THY Opet’s rapid expansion and its rise among Türkiye’s leading companies.

Looking at the



last five years, the aviation sector in Türkiye, like the rest of the world, experienced a severe contraction in 2020 due to the pandemic. With the acceleration of recovery in 2022, our sales volumes achieved double-digit growth rates. Growth became more balanced in 2023 and 2024. Passenger traffic in Türkiye reached 230.2 million in 2024, surpassing pre-pandemic levels and creating a strong foundation for fuel supply demand. During this period, THY Opet successfully met rising demand thanks to its extensive airport network and operational flexibility.

Today, we provide timely and safe fuel supply services at more than 50 airports in Türkiye and over 20 airports abroad. Between 2022 and 2024, we accelerated our investments focused on operational excellence, including field safety, fleet renewal of fueling vehicles, development of digital workflows, and quality assurance aligned with JIG/EASA standards. In this way, we maintained uninterrupted service despite increasing flight intensity. Globally, the 10.4 percent increase in passenger kilometers and record load factors in 2024 revealed the sector’s dynamics of high volume and limited capacity. We optimized our planning accordingly.

During the same period, we also implemented major projects as part of our transition toward environmentally friendly processes. Through the emission reduction program we launched in 2022, we began monitoring AdBlue consumption per kilometer in our land transportation operations, improving fuel efficiency while reducing CO₂ emissions. In addition, as of 2023, we obtained the “Green Airport Organization” title and ISO 14064-1 certification at 46 airports, documenting our compliance with international environmental sustainability standards. Furthermore, our LED lighting transition projects generated annual energy savings of 76,734 kWh and prevented the emission of 37 tons of CO₂. Through these efforts, we continued operational growth alongside sustainability principles by increasing our overall efficiency performance.

“THE GLOBAL AVIATION SECTOR IS EXPERIENCING A STRONG RECOVERY”

How do you evaluate the development of aviation fuels in Türkiye and globally? What are the impacts of regulations and the expectations for the sector?

The global aviation sector is experiencing a strong recovery. As of 2024, passenger traffic has surpassed pre-pandemic levels. According to IATA data, Revenue Passenger Kilometers (RPKs) increased by 10.4 percent, reaching record occupancy rates. Jet fuel demand approached 99 billion gallons in 2024. In the coming period, especially in 2025 and 2026, growth is expected to continue at a more stable pace. The picture in Türkiye is similar, with DHMİ data also indicating strong passenger traffic in 2024.

In terms of fuel prices, fluctuations in energy markets during 2022 caused significant volatility in jet crack spreads. Although partial normalization was observed in 2023 and 2024, geopolitical risks and refinery maintenance periods continue to keep prices at sensitive levels. As shown by the IATA fuel monitor, weekly fluctuations remain ongoing.

Carbon and sustainability regulations are among the most critical agenda items for the sector in the coming years. Under the European Union’s ReFuelEU Aviation regulation, sustainable aviation fuel (SAF) blending requirements for all EU-origin flights began in 2025 at relatively low levels of 1–2 percent. This ratio will rise to 6 percent by 2030 and 70 percent by 2050. As a result, a fundamental transformation is expected in both the fuel supply chain and cost structure.

In Türkiye, EPDK and the Directorate General of Civil Aviation (SHGM) have clarified licensing and reporting obligations in the petroleum and aviation fuel markets, as well as SAF definitions and quality standards. These regulations strengthen data consistency and safe fueling processes, providing a more solid operational infrastructure for the sector.

In short, the effects of regulations include both positive outcomes and certain challenges. In the long term, predictable carbon costs, incentives for the SAF ecosystem, and accelerated fleet efficiency investments are among the positive developments. However, in

the short and medium term, limitations in SAF supply, price differences, logistics infrastructure requirements, and varying regulations across jurisdictions can create operational complexities.

Our expectation is that incentives for SAF production will increase, greater clarity will be provided regarding customs and taxation frameworks, and accounting standards such as book-and-claim will gain wider acceptance. A long-term national roadmap would make a significant contribution to the sector’s adaptation to this new environment.

“WE RECORDED A 245 PERCENT VOLUME INCREASE IN INTERNATIONAL OPERATIONS COMPARED TO THE PREVIOUS YEAR”

What are THY Opet’s goals for the near future in aviation fuels?

THY Opet’s near-term goals are shaped around operational excellence and safety. As the company with the broadest supply network in Türkiye, it continuously develops its operations under the principle of “zero error – zero delay” within the framework of JIG and SHGM standards. By optimizing capacity allocation and fueling planning through data-driven methods during critical periods, the company continues to ensure uninterrupted service for airlines even during peak flight seasons.

Over the past two years, we expanded our domestic investments by commissioning new fuel facilities at Rize-Artvin and Çukurova airports. Alongside these investment initiatives, we are also closely monitoring strategic opportunities abroad that will increase operational efficiency and strengthen market share. As a matter of fact, we recorded a 245 percent increase in international operation volumes compared to the previous year, and new investments are being planned to expand this growth into wider geographies.

In the field of sustainable aviation fuels and decarbonization, we aim to scale SAF logistics, blending infrastructure, and traceability capabilities in line with the EU’s ReFuelEU roadmap and CORSIA obligations. Innovative solutions such as book-and-claim are being offered to customers, long-term agreements are being established with supplier ecosystems, and stakeholder



collaborations are being developed for domestic SAF production. We also aim to take a leading role in certification processes. As highlighted in our 2023 Sustainability Report, in addition to JET A1, we aim to introduce innovative and sustainable fuel types to Türkiye’s aviation sector. In this context, with SAF rapidly expanding worldwide, we seek to take a pioneering role in Türkiye by scaling our logistics, blending infrastructure, and traceability capabilities.

From a digitalization and efficiency perspective, end-to-end digitalization of fuel supply processes is increasing operational efficiency while reducing the carbon footprint. In this regard, a broad digital transformation has been implemented, covering everything from order and slot management to vehicle telemetry and quality monitoring.

On the infrastructure and human resources side, investments are being made in storage and supply infrastructure at strategic locations, while advanced training programs are being implemented for fleet modernization, field safety, and quality assurance teams. In this way, service quality is being permanently improved.

In terms of customer experience, flexible service agreements tailored to different airline operational profiles are offered, alongside consultancy support in areas such as customized reporting packages, SAF blends, and emission management. Value-added services such as prioritization during peak hours and slot coordination also strengthen the competitiveness of business partners.

In summary, following the strong recovery experienced in the sector during the 2020–2024 period, THY Opet continues to grow with a focus on safety, quality, digitalization, and sustainable fuels. Türkiye’s 2024 air traffic record and the transformation brought by EU and CORSIA regulations support our goals of increasing operational capacity and scaling sustainable fuel solutions in the coming years.



Istanbul Jet Aviation and Fuel Services Inc. General Manager Hüseyin Latifoğlu

“WE CONTINUE TO CREATE VALUE FOR OUR BUSINESS PARTNERS WITH HIGH QUALITY STANDARDS 24/7”

How has İstanbul Jet performed in the aviation fuel sector over the last five years?

Over the last five years, the world has witnessed many developments that deeply affected institutions at both local and global levels. Both long-established and newly founded organizations faced major tests during this period. In my opinion, these challenges were even more difficult for young companies like ours, which is currently in only its seventh year of operations.

Following our establishment, we faced a global health crisis and the economic fluctuations that followed. In response, we chose not only to remain standing but also to pursue a strategy focused on larger yet steady and confident steps forward. Thanks to this approach, we entered the Fortune 500 list within the top 100 in 2023, and we continue to maintain this position as of 2025. Likewise, we are proud to have maintained a rising presence in the Capital 500 rankings since 2023.

At Dalaman Airport, which

serves as a gateway to some of Türkiye’s most valuable tourism destinations, we commissioned our fuel storage and supply facility worth 5 million euros in 2024. This investment reflects our vision of serving both domestic and international passenger traffic at the intersection of the Aegean and Mediterranean rivieras.

We have also continued to expand our social responsibility projects, which began with modest steps alongside LÖSEV (The Foundation for Children with Leukemia) and the Fenerbahçe Wheelchair Basketball Team, allowing us to contribute to society on a broader scale over the years. These efforts were also recognized with awards during the year. In addition, obtaining the International Sustainability and Carbon Certification (ISCC EU) at the beginning of 2024 and starting SAF imports marked an important milestone in our sustainability journey.

Our fuel supply journey, which began with approximately 490 thousand cubic meters in 2018, reached 1.3 million cubic meters in 2024. As an IATA member, with our fuel supply and

storage facilities at Dalaman and Alanya–Gazipaşa airports, our services provided at nearly 500 airports across more than 100 countries, and our commitment to operational excellence, we continue to create value for our business partners with high quality standards around the clock.

As in the past, we remain firmly committed to contributing to sustainable growth, reliability, and innovative solutions for our sector through our expertise and experience in the future as well.

“THE RENEWABLE ENERGY OPPORTUNITIES IN THE MIDDLE EAST SHOW THAT THIS MARKET WILL GROW RAPIDLY”

How do you evaluate the development of aviation fuels in Türkiye and globally? What kind of impact do the regulations have on the sector, both positively and negatively? What are the expectations of the sector in this regard?

Sustainability will be the

defining factor in the future of aviation fuels. In this context, sustainable aviation fuel (SAF) plays a critical role in the global aviation industry. Although SAF usage rates are still low today, the European Union’s mandatory blending regulations, investments in the United States and Asia-Pacific, and renewable energy opportunities in the Middle East all indicate that this market will grow rapidly.

Türkiye’s geographical advantages and strong renewable energy potential will create significant opportunities for the sector. The industry expects the preparation of a national SAF roadmap, the implementation of incentive mechanisms, and the reduction of costs to competitive levels. Once these steps are taken, Türkiye could become a regional hub for sustainable aviation fuels.

“THE MOST EFFECTIVE TOOL IN AVIATION’S NET-ZERO JOURNEY IS THE EXPANSION OF SAF”

What kind of transformation is taking place in aviation fuels in terms of decarbonization?

In aviation’s journey toward net-zero emissions, the most effective tool in the short and medium term is the widespread adoption of sustainable aviation fuels (SAF). The European Union’s mandatory usage targets, investments by the United States and Asia-Pacific, and the renewable energy resources of the Middle East are rapidly expanding the global SAF market. Türkiye’s renewable energy potential and strategic location provide strong advantages for SAF production.

To fully realize these advantages, incentive policies, the allocation of ETS revenues



to SAF projects, and the creation of a national roadmap are of critical importance. Through these steps, Türkiye can become an important player at both regional and global levels.

“İSTANBUL JET AIMS TO BECOME ONE OF THE LEADING PLAYERS SHAPING THE LOW-CARBON AVIATION ECOSYSTEM OF THE FUTURE”

What are İstanbul Jet’s goals for the near future in aviation fuels?

İstanbul Jet continues its operations with the ambition of rapidly turning its global vision into reality. We are moving forward with confident steps toward becoming a well-established global energy and aviation company. In fuel supply and storage investments, we continue to strengthen our infrastructure by following a “right time–right location” strategy both nationally and internationally.

In parallel with the sector’s growth momentum, our company is placing sustainable aviation fuel (SAF) supply and fueling at the center of its strategic priorities for the coming period. With this vision, İstanbul Jet aims not only to meet today’s needs but also to become one of the key players shaping the low-carbon aviation ecosystem of the future.



Turkish Fuel Services General Manager Muhammed Cahit Şirin

“WE PROVIDE UNINTERRUPTED FUEL SUPPLY TO AN AVERAGE OF 738 AIRCRAFT PER DAY”

How has Turkish Fuel Services performed in the aviation fuel sector over the last five years?

The last five years have been a period of strategic growth and structural transformation both for our sector and for our company. Despite the slowdown caused by the pandemic in global aviation, the uninterrupted growth momentum of Istanbul Airport and the stable and determined operational performance of Turkish Airlines strengthened Türkiye's position in global aviation. As Turkish Fuel Services, we achieved a strong recovery in a very short period thanks to the strategic advantage created by the synergy of these two structures.

During the post-pandemic recovery period, we carried out 1.82 million tons of fuel supply operations through 152,503 operations in 2021. By 2024, this figure reached 3.85 million tons across 269,463 operations. In just three years, we recorded 77 percent growth in operational volume and nearly 110 percent growth in fuel supply volume. Today, the annual fuel supply carried out solely by TFS is equivalent to the total jet fuel consumption of many European countries. We currently provide uninterrupted fuel supply to an average of 738 aircraft per day and nearly match the annual operational volume of many mid-sized

European airports within a single month.

As TFS, we are not only focused on increasing operational efficiency, but also on positioning our country as an effective, sustainable, and competitive player in international fuel logistics and supply operations.

“THE TFS PORT PLAYS A KEY ROLE IN OUR COUNTRY'S FUEL SUPPLY CHAIN”

How do you evaluate the development of aviation fuels in Türkiye and globally? What kind of impact do regulations have on the sector, both positively and negatively? What are the expectations of the sector in this regard?

The aviation sector has regained strong momentum globally in both passenger and cargo transportation. Alongside the increase in tourism and business travel, investments made in airports across Türkiye, especially Istanbul Airport, strongly support this growth. All of these developments are creating significant demand growth in the aviation fuel sector, both in terms of supply and operational capacity.

However, there are also certain structural realities accompanying this growth. Türkiye's aviation fuel production capacity is still not sufficient to fully meet

increasing demand. Therefore, it has become inevitable for fuel suppliers to procure fuel from different parts of the world. As TFS, we focus on managing this process in the most efficient way both geographically and operationally.

Located approximately two kilometers from Istanbul Airport, the TFS Port plays a key role in the country's fuel supply chain. However, factors such as difficult geographical routes and congestion in the Turkish Straits can occasionally create bottlenecks in externally sourced supply processes. In particular, delays in the straits and weather conditions make stock management critically important.

Regarding regulations, we view environmental sustainability-focused regulations very positively. Regulations such as the Sustainable Aviation Fuel (SAF) Directive issued by the Directorate General of Civil Aviation encourage the sector's transformation toward decarbonization. Of course, in this process, supporting domestic producers and sustainably planning raw material supply are of critical importance.

As a result, Türkiye has the potential not only to become a growing player in aviation fuels but also to transform into a regional energy and supply hub by combining its logistics

expertise with infrastructure strength. As TFS, we continue our investments and internationally standardized operations without interruption in order to contribute to this vision.

“WE BELIEVE THIS IS A STRONG INDICATOR OF CONFIDENCE IN THE FUTURE OF THE SECTOR”

What kind of transformation is taking place in aviation fuels in terms of decarbonization?

The aviation sector is undergoing a serious transformation process in order to fulfill its responsibilities in the fight against climate change. This transformation is not limited to flight operations alone; it requires a holistic approach covering the entire ecosystem, from engine technologies and fuel supply to ground services and port infrastructure.

Three main areas stand out in the decarbonization journey.

First, airlines have started renewing their fleets with next-generation, low-emission aircraft. Second, digitalization and energy efficiency are becoming increasingly important in airport ground services and flight optimization. The third, and perhaps most critical issue, is the use of Sustainable Aviation Fuel (SAF).

Türkiye has taken an



important step in this field. With the Sustainable Aviation Fuel Directive (SHT-SAF) published by the Directorate General of Civil Aviation, the use of SAF-blended fuels and the associated emission reductions have become mandatory at certain levels. This development not only contributes to the sector's environmental commitments but also strengthens Türkiye's sustainability vision.

As TFS, we are also an active part of this transformation. We plan our infrastructure investments in line with green transition principles and focus on technologies that will improve energy efficiency in our fuel supply operations. At the same time, we continue all technical and operational preparations related to SAF usage with determination. We believe that decarbonization is not only an environmental necessity, but also a strong indicator of corporate vision, responsible leadership, and confidence in the future of the sector.



“OUR NEAR-TERM GOAL IS TO BECOME A REGIONAL ENERGY LOGISTICS HUB”

What are TFS's goals for the near future in aviation fuels?

Istanbul Airport's strategic target of reaching a capacity of 200 million passengers is also redefining the concept of a global aviation hub. As TFS, we act in full alignment

with this vision and continue strengthening both our infrastructure capacity and operational agility to support this growth.

TFS's growth journey is no longer limited to domestic operations alone; we have

entered a new phase in which we export our expertise, service quality, and operational capabilities internationally. Recently, we successfully completed our first aviation fuel export via maritime transport. At the same time, we provided consultancy services

abroad and delivered aviation fuel operations training to international participants for the first time. These steps clearly demonstrate that TFS creates value globally not only through its operational strength but also through its corporate know-how and service model.

Our near-term goal is to become a regional hub in energy logistics. As TFS, we are taking responsibility for this transformation and continue to make strategic contributions to Türkiye's international aviation vision.

Türkiye's rise in electric vehicles

Türkiye is leading one of the greatest industrial shifts in history at the very heart of the global energy and automotive transformation. Beginning with one out of every five vehicles on the roads being electric as of 2026, this surge is evolving into a global vision powered by Togg's domestic strength and massive infrastructure investments.

As the global automotive industry abandons a century-old internal combustion engine tradition and turns toward electrification, Türkiye is standing out not merely as a market, but as a game-changing hub in this race. The year 2026 is being recorded as a turning point in Türkiye's electric vehicle (EV) transformation. The April 2026 data provides the clearest evidence of how powerfully this silent revolution has arrived: with electric vehicles reaching a 20.5 percent share of the total market, Türkiye has demonstrated that it is not only embracing this technology, but also passionately adopting it. Following sales of 11,842 units in February, a new record was achieved in April with 16,435 units sold.

THE FLAGSHIP OF THE NATIONAL TECHNOLOGY INITIATIVE: TOGG

At the center of Türkiye's success undoubtedly stands Togg. Togg is not merely an automobile, but a brand that set out with the promise of building an entire ecosystem, and it continues to dominate the market in 2026. With its T10X model leading the market, the company widened the gap with competitors through sales of 3,821 units in April, while surpassing the 100,000 milestone by increasing the total number of smart devices on the roads to 101,936.

Togg's grand entry into the German market in September 2025 marked the first concrete step of its vision to become a global player. The T10X also certified the safety of Turkish engineering worldwide by earning a five-star rating from Euro NCAP, Europe's most prestigious safety test. With a localization rate reaching 84 percent, Togg stands as one of

Türkiye's strongest assets on the road toward energy independence.

A NEW CENTER OF ATTRACTION FOR INVESTMENT AND THE BATTERY REVOLUTION

Türkiye's success in electric vehicles has not gone unnoticed by global giants. The billion-dollar investment decisions of world-leading companies such as BYD and Chery to select Türkiye as a production hub once again confirms the country's logistical and strategic importance. In particular, the Siro Battery Campus rising in Gemlik, Bursa, serves as an energy heart not only for Togg but also for many manufacturers across the region.

Supported by tax incentives, motor vehicle tax advantages and a rapidly developing domestic ecosystem, Türkiye ranked fourth in Europe in terms of electric vehicle sales growth in 2026, solidifying its place among the major players. Today, every electric vehicle silently moving along Türkiye's roads represents a cleaner environment, lower external dependency and a stronger technological future.

UNINTERRUPTED ENERGY ACROSS ALL 81 PROVINCES

In the field of charging stations, Türkiye has written a remarkable success story by surpassing many European countries, including giants such as the Netherlands and Germany. As of May 2026, the total number of charging sockets across Türkiye reached 41,938 units. Of these, 17,059 are DC sockets.

More than 175 publicly accessible charging network operators have transformed every corner of Türkiye into an energy point. Istanbul leads the sector with 1,597 stations, followed by Ankara with 1,866 sockets. Thanks



S2C Founding Partner and Executive Board Member
Batuhan Doğan



S2C Founding Partner and Executive Board Member
Uğur Kılıç

to 100 percent highway coverage, an electric vehicle user can now travel from Edirne to Hakkari without experiencing any "range anxiety." Total installed power has reached 2,990 megawatts.

In order to shed light on the future of the sector and define Türkiye's new direction in the charging ecosystem, S2C (Solutions to Charge) Founding Partners and Executive Board Members Batuhan Doğan and Uğur Kılıç answered questions from our newspaper.

S2C Founding Partner and Executive Board Member Batuhan Doğan

Could you provide information about the technology and infrastructure used in the installation of electric vehicle charging stations?

Starting with Türkiye, in the early years of the sector we progressed with internal electrical installations in infrastructure construction. We utilized existing power capacities in residences, shopping malls, hospitals and highways. However, with advancing technology and the increasing power capacity of charging stations, the need has now shifted toward transformer requirements or increasing the capacity of existing transformers. For example, while a DC charging station in the early years of the sector ranged between 50 kW and 120 kW, today we are talking about 300–400 kW capacities for DC charging. Consequently, additional costs have begun to emerge in charging unit installation investments. At the point we have reached, because we cannot obtain the desired high power levels from the distribution grid, we need to strengthen the medium-voltage network by investing more heavily in infrastructure.

Looking at the global landscape, installations below 300–400 kW for DC charging units are no longer being carried out unless there is a very special case, and now multiple 400 kW charging stations are being installed side by side rather than a single charging station. Naturally, this has both advantages and disadvantages.

S2C Founding Partner and Executive Board Member Uğur Kılıç

When comparing charging technologies in Türkiye with global technologies, what differences do you observe?

Compared with Europe, if you are carrying out a transformer-based installation for a charging station and need to establish a transmission line or medium-voltage line, the permitting processes there take longer than in Türkiye. Türkiye's advantage is its ability to manage bureaucratic procedures more quickly. However, this also requires energy investments. Both distribution companies need to invest in infrastructure, and operator companies must make renewable energy investments and properly integrate them into charging stations.

In Türkiye, distribution companies have made timely and accurate infrastructure investments, especially over the last five years. In addition to the distribution sector, charging station operators need to act almost as if they are investing like a distribution company themselves. This includes medium-voltage lines. They need to install their own transformers, establish medium-voltage lines and build their stations accordingly. While making these investments, it is necessary to plan not only for a single charging station but for multiple charging units in the future. Türkiye already has pioneering charging network operators in this field. Except for a few companies, this awareness has now become established throughout the sector.

Charging stations are certainly necessary at fuel stations and rest facilities, but people now also want installations at their residences. They do not want to search for charging stations outside and are becoming frustrated due to low-quality operators, which has increased demand for residential installations. Alongside charging units installed in residential areas, urban fuel stations are also becoming extremely important. Recently, Türkiye's fuel retail sector has even begun to serve as a model for Europe.



Enerji Petrol Gaz

Founder:
M. Zekai Komsuoğlu
May, 1968

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