

TURKISH CARPET INDUSTRY

Rugs and carpets were firstly used as a “ground covering” by the Turks living in Western and Central Asia, then, it expanded to the rest of the world. Carpet making as an important handicraft remained alive in the successor Turkish states also. In the 19th century, high quality hand-made carpets were produced in the workshops opened in Hereke. During the Republican period, under the pioneering of Sumerbank, hand-made carpets were produced by workshops, foundations and private sector companies. Hand-made carpets are still being produced widely in the private workshops in Western and Central Anotolia.

On the other hand, 18th century can be considered as a turning point for carpet industry in that industrialization process gained momentum all over the world as having serious effects on Turkish carpet industry as well. Towards the end of the Ottoman period, hand-made carpet production began to be replaced by machine-made carpets. Machine-made carpet production has developed rapidly in the 21st century. Currently, Turkey has considerable machine-made and tufted carpet production capacity

By the end of 2009, Turkey exported 124,7 million dollar hand-made carpets and 961,6 million dollar machine-made carpets. While, hand-made carpet exports constitute 11,5 % of total Turkish carpet exports, the rest of the exports are machine made carpet exports. Currently, the share of carpet industry in total Turkish exports is 1,07 %.

Starting from the 1990's machine-made carpet exports have gradually increased and this increasing trend is likely to continue in the years ahead. Having used the advanced technology, the machine-made carpet capacity has been increasing with the new investments in the sector.

Turkish carpet industry has the following advantages in terms of production and raw material supply.

- Turkey is a textile producing country so that it has the opportunity to meet the wool yarn and synthetic yarn needs from the domestic sources.
- Geographical proximity to the main markets such as Middle East, Europe and ex-USSR Republics
- Well qualified labor force in hand-made carpet industry and know-how in machine-made carpet industry
- Liberal trade policies
- Elasticity in production

- Giving importance to quality, environment and human health, sensitivity on working conditions of workers
- Customs Union agreement with the European Union and free trade agreements with many other countries

While the export value of the carpet industry was 202,4 million dollars in the beginning of 1990's, it has reached to 1 billion and 75 million dollars by the end of 2009. In other words, Turkish carpet exports increased more than five fold in the last 19 years. There are more than 900 carpet producer-exporter companies in Turkey.

According to United Nations statistics of 2008, Turkey is 5th biggest machine-made carpet supplier in the world with the share of 8,5 %. Turkey is also the 7th biggest hand-made carpet exporter country in the world with the share of 6,5%.

Leading markets for machine made carpets of Turkey are listed as Saudi Arabia with the share of 15,3 %, Iraq with 10,5 %, Germany with 7 %, the USA with 5,4 % and finally Poland, with the share of 3,6 %. Other important markets for machine-made carpet are the United Kingdom, Romania, United Arab Emirates, Kazakhstan and Azerbaijan.

Turkey's leading hand-made carpet markets are; the USA (21,3 %), Japan (10,1 %), Belgium (4,9 %), Austria (2,9 %) and France (2,7 %).

Advantages of Turkey in using advanced technology and geographical proximity to main markets contributes positively to the development of export performance of the industry.

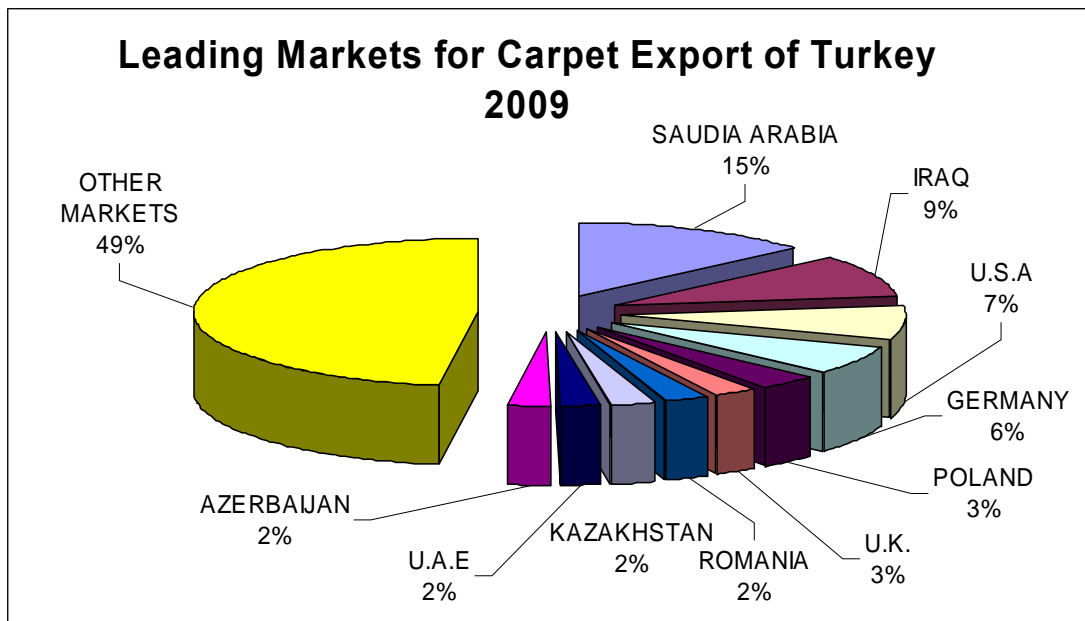
Turkish Carpet industry will retain its powerful position or even go further as long as it achieves improvements in design.

Although hand-made carpet production falls behind of machine-made carpets in recent years, it should be considered as a normal process that every developing country is experienced due to the technological advances in favor of machine-made carpet industry.

But, above all, the most important advantage of the Turkish carpet sector is that Turkey has successfully created the label of "Turkish carpet" and it has gained worldwide reputation. With the realization of market oriented strategy and improvements in design, Turkish carpet industry will obviously increase its share in the world markets.

Annual Exports of Machine and Hand Made Carpets (1000 \$)							
Year	Total Exports	Hand Made Carpet Exports	Share of Hand Made Carpets %	Machine Made Carpet Exports	Share of Machine Made Carpets %	Total Carpet Exports	Share of Carpet Exports in Total %
1996	23.224.465	152.240	0,66	155.002	0,67	307.242	1,32
1997	26.261.072	163.517	0,62	186.204	0,71	349.720	1,33
1998	26.973.952	148.434	0,55	195.252	0,72	343.686	1,27
1999	26.588.264	114.086	0,43	156.014	0,59	270.100	1,02
2000	27.774.906	106.857	0,38	188.595	0,68	295.452	1,06
2001	31.339.991	103.969	0,33	159.321	0,51	263.290	0,84
2002	36.059.089	84.936	0,24	202.250	0,56	287.186	0,80
2003	47.252.836	79.540	0,17	301.525	0,64	381.065	0,81
2004	62.773.654	112.144	0,18	404.908	0,65	517.051	0,82
2005	73.415.678	122.802	0,17	547.535	0,75	670.337	0,91
2006	85.774.644	110.681	0,13	634.290	0,74	744.971	0,87
2007	107.271.750	140.681	0,13	851.314	0,79	991.995	0,92
2008	132.027.196	139.233	0,11	1.019.219	0,77	1.158.452	0,83
2009*	101.629.000	124.710	0,12	961.585	0,95	1.086.295	1,07

Source: Undersecretariat of Foreign Trade
2009 Source - Exporters' Associations Data



Leading Markets for Carpet Export of Turkey					
	2008	Share in total	2009	Share in total	09/08
	\$	%	\$	%	Change %
SAUDIA ARABIA	115.089.776	9,9	145.898.645	13,6	26,8
IRAQ	70.236.364	6,1	101.467.231	9,4	44,5
U.S.A	83.903.807	7,2	77.631.847	7,2	-7,5
GERMANY	60.244.572	5,2	69.642.963	6,5	15,6
POLAND	43.340.505	3,7	34.460.401	3,2	-20,5
UNITED KINGDOM	14.992.277	1,3	27.788.470	2,6	85,4
ROMANIA	55.676.735	4,8	26.852.102	2,5	-51,8
KAZAKHSTAN	15.783.830	1,4	25.986.579	2,4	64,6
UNITED ARAB EMIRATES	31.383.058	2,7	25.299.219	2,4	-19,4
AZERBAIJAN	27.196.212	2,3	25.279.175	2,3	-7,0
10 COUNTRIES' SUB TOTAL	517.847.136	44,7	560.306.632	52,1	8,2
OTHER MARKETS	640.605.219	55,3	515.433.793	47,9	-19,5
TOTAL CARPET EXPORTS	1.158.452.355	100,0	1.075.740.425	100,0	-7,1

Source: Undersecretariat of Foreign Trade / February 2010

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