

TURKISH CLOTHING INDUSTRY

The root of textile production in Turkey goes centuries back to the Ottoman period. The textile production was quite widespread and advanced in the 16th century in Turkey, while it had developed more when we come to the 20th century. Production capacity had developed in the country considerably between the years of 1923-1962. Being a major cotton-producing country, Turkey had accelerated the progress of the textile industry in the following years. Clothing industry had shown a parallel development to the one of the textile sector and the industrialization efforts of the 1970s gave birth to the modern apparel industry in Turkey. In the 1980s clothing industry entered an accelerated transitory period of major advancement including the export. With a high export performance in 1990s, share of the clothing industry had exceeded 20% of Turkey's total export.

Clothing industry, today, is one of the locomotive sectors of the Turkish economy in terms of industrial production, employment and export earnings.

Turkish clothing industry exported a total value of 12,9 billion US\$ in 2009. Besides integrated textile and clothing producing facilities, there is thousands of clothing producer/exporter small and medium enterprises (SMEs) in Turkey. There are more than 11.000 clothing manufacturers producing for the clothing export of Turkey. Clothing production has been intensified, particularly, in Marmara and the Aegean regions. İstanbul, Bursa, Tekirdağ, Çorlu, İzmir and Gaziantep are the major provinces in terms of the physical capacity and export value.

The industry has been equipped with the high technology in general. Having such a feature, Turkey ahead many clothing producer countries.

At the moment, knitted apparel products account for 54% of Turkey's total clothing export, while woven clothing for 33% and the rest 13% is met by other ready-made products. Cotton-knitted t-shirts, knitted pullovers, cardigans and vests and socks are considered to be the major knitted export items. Yet, ladies woven outerwear, men' outerwear and ladies shirts and blouses are the major woven products.

The primary advantages of the Turkish clothing industry in terms of raw materials and production are considered to be;

- ◇ Sufficient raw materials sources (Turkey is ranked as the 7th biggest cotton producer of the world with its capacity of 375 thousand tons of annual production. It has also a considerable production of man-made fibers),
- ◇ Close to the main markets, particularly the European countries,
- ◇ Short time of delivery due to geographic proximity,
- ◇ Capability of quick-response,
- ◇ Qualified and educated human resources,
- ◇ Liberal trade regime including compliance with the EU's technical regulations,
- ◇ The existence of an advanced sub- industry for the clothing sector,
- ◇ The capacity to create fashion, design and innovation for any market,
- ◇ Elasticity in production,
- ◇ Sensitivity about workers social conditions as well as environment and health,
- ◇ Customs union with the EU and free trade agreements with numerous countries.

At the beginning of 1990s the total value of Turkish clothing export was merely equaled to 2,9 billion US \$. Within the period of 20 years, it increased more than four fold to hit a level of 12,9 billion US \$ in 2009.

With this export performance, the Turkish clothing industry has taken an important share in the world trade. According to the WTO statistics of 2008, the Turkish clothing industry, with a share of 3,8% standing at the 4th place in the world trade, while, with the share of 12,1%, it is ranked as the second biggest supplier of the European Union market.

The geographical proximity, qualified human sources and the priority given to quality, fashion, design and branding has made the EU countries (EU-27) as the biggest market, which has been accounting for nearly 80% of the country's export.

Germany, the UK, France, Spain and Italy are the leading export destinations for the clothing industry. The first 10 markets correspond for 75% of the total export of Turkey's clothing industry. A great majority of products are exported to the rich OECD countries.

Worldwide famous branded clothes are produced by the Turkish factories under the permission of the patent owners. These branded goods are being sold in the boutiques and department stores throughout the world. Many Turkish clothing companies, on the other hand, have created their own brands and acquired their patents. Hence, they have opened up to the world markets through effective distribution policy by franchising and opening offices abroad. While some of them have emerged as world famous brand names, some others have gained considerable reputation in the emerging markets.

A noteworthy success has been achieved in the field of design in both clothing and fabric industry. New and young talents are being attracted to the fashion world through stylist and designer competitions organized by various institutions such as İTKİB.

Participation of Turkish companies in international fairs has been given a great importance İTKİB and other institutions organize these participations under the national umbrella.

The head goals of the industry in the present conjuncture is to produce quality products with a high value added and to offer quality and fashion products that reflect the innovations and trends at the acceptable prices to the world markets.

In order to increase competitiveness of the industry in world market, İTKİB performs a lot of activities:

Coordinating the national participation to international fairs, arranging fashion shows in distinguished platforms, organizing designer contests are examples of these activities.

In the same time, there are educational and training activities of İTKİB. İTKİB has been organizing seminars and educational programs to improve human resources of the industry.

For this aim, with the mission of "education on the job, life-long learning on the job", more than 4.400 participants have been provided with about 360 training programmes shaped according to the needs of the sector.

Additionally, for training professional intermediary technicians, 7 separate professional high schools were established under the name of İTKİB.

Research and development activities and representation of the industry within the country and also in foreign countries are other responsibilities of İTKİB.

For example, İTKİB has been representing Turkish textile and apparel industry in EURATEX-European Textile and Apparel Organization.

With these activities and also its high potential in production, exporting and marketing of textile and apparel products Turkish textile and apparel industry will be standing in leading position in World trade.

Annual Clothing Export of Turkey			
Years	Total Export (1000 \$)	Clothing export (1000 \$)	Share of Clothing in Total export %
1990	12.959.289	2.898.349	22,4
1991	13.593.539	3.219.350	23,7
1992	14.365.414	4.009.615	27,9
1993	15.345.000	4.157.997	27,1
1994	18.107.000	4.490.043	24,8
1995	21.637.041	6.188.502	28,6
1996	23.224.465	6.344.252	27,3
1997	26.261.072	7.088.669	27,0
1998	26.973.952	7.644.051	28,3
1999	26.588.264	7.145.053	26,9
2000	27.774.906	7.194.609	25,9
2001	31.339.991	7.335.856	23,4
2002	36.059.089	8.951.802	24,8
2003	47.252.836	11.178.370	23,7
2004	62.773.654	12.649.982	20,2
2005	73.415.678	13.411.464	18,3
2006	85.774.644	13.551.637	15,8
2007	107.271.750	15.563.492	14,5
2008	132.027.258	15.234.931	11,5
2009	102.164.809	12.859.824	12,6

Source: Undersecretariat of Foreign Trade / February 2010

Leading Markets for Clothing Export of Turkey					
	2008 1000 \$	Share in Total %	2009 1000 \$	Share in Total %	09 / 08 Change %
Germany	3.716.706	24,4	3.225.183	25,1	-13,2
United Kingdom	2.082.150	13,7	1.793.372	13,9	-13,9
France	1.120.028	7,4	1.022.055	7,9	-8,7
Spain	966.209	6,3	955.323	7,4	-1,1
Italy	829.456	5,4	675.508	5,3	-18,6
Holland	1.023.470	6,7	642.263	5,0	-37,2
Denmark	477.427	3,1	401.398	3,1	-15,9
USA	548.045	3,6	351.248	2,7	-35,9
Belgium	289.637	1,9	318.026	2,5	9,8
Sweden	297.854	2,0	264.714	2,1	-11,1
<i>10 Countries Total</i>	<i>11.350.980</i>	<i>74,5</i>	<i>9.649.089</i>	<i>75,0</i>	<i>-15,0</i>
Other Markets	3.883.888	25,5	3.210.735	25,0	-17,3
Total Clothing Exports	15.234.868	100,0	12.859.824	100,0	-15,6

Source: Undersecretariat of Foreign Trade / February 2010



Sectoral Institutions in Turkey

İstanbul Textile and Apparel Exporters' Associations (ITKIB)

Tel:90 – 212 – 454 02 00 pbx

E-mail: info@itkib.org.tr

Fax:90 – 212 – 454 02 01 / 454 04 10

Web-site: <http://www.itkib.org.tr>

Aegean Exporters' Associations (EIB)

Tel:90 – 232 – 488 60 00

E-mail: eib@egebirlik.org.tr

Fax:90 – 232 – 488 61 00

Web-site: <http://www.egebirlik.org.tr>

Uludağ Exporters Associations (UIB)

Tel:90 – 224 – 219 10 00 pbx

E-mail: uludag@uib.org.tr

Fax:90 – 224 – 219 10 90

Web-site: <http://www.uib.org.tr>

Denizli Textile and Apparel Exporters' Union (DETKIB)

Tel:90 – 258 – 274 66 88 pbx

E-mail: detkib@detkib.org.tr

Fax:90 – 258 – 274 72 22

Web-site: <http://www.detkib.org.tr>

Mediterranean Exporter Unions (AKIB)

Tel:90 – 324 – 237 68 00 pbx

E-mail: arge@akib.org.tr

Fax:90 – 324 – 237 71 17

Web-site: <http://www.akib.org.tr>

Export Promotion Center (IGEME)

Tel:90 – 312 – 417 22 23 (8hat)

E-mail: igeme@igeme.org.tr

Fax:90 – 312 – 417 22 33

Web-site: <http://www.igeme.org.tr>

Turkish Clothing Manufacturer' Association (TGSD)

Tel:90 – 212 – 639 76 56 pbx

E-mail: tgسد@tgسد.org.tr

Fax:90 – 212 – 451 61 13 / 451 61 03

Web-site: <http://www.tgسد.org>

United Brands Association

Tel:90 – 212 – 320 82 00

E-mail: info@birlesmismarkalar.org.tr

Fax:90 – 212 – 320 82 03

Turkish Knitwear Industrialists Association (TRISAD)

Tel:90 – 212 – 438 06 60

E-mail: info@trisad.org

Fax:90 – 212 – 438 00 98

Web-site: <http://www.trisad.org>

Associations of Knitting Industrialists (ORSAD)

Tel: 90 – 212 – 637 68 05-06

E-mail: orsad@orsad.org.tr

Fax: 90 – 212 – 637 68 07

Web-site: <http://www.orsad.org.tr>

Denim Industrial Association (DENIMDER)

Tel:90 – 212 – 465 69 70 / 71

E-mail: info@denimder.com

Fax:90 – 212 – 465 69 72

Web-site: <http://www.denimder.org.tr>

Merter Manufacturers and Businessmen Association (MESIAD)

Tel:90 – 212 – 643 47 22 (3 hat)

E-mail: mesiad@mesiad.org.tr

Fax:90 – 212 – 553 80 80

Web-site: <http://www.mesiad.org.tr>

Laleli Manufacturers and Businessmen Association (LASIAD)

Tel:90 – 212 – 458 12 49

Fax:90 – 212 – 458 12 50

E-mail: lasiad@lasiad.net

Web-site: <http://www.lasiad.net>

Osmanbey Textile Businessmen Association (OTIAD)

Tel:90 – 212 –231 92 85

Fax:90 – 212 – 231 89 46

E-mail: otiad@otiad.org.tr

Web-site: <http://www.otiad.org.tr>

Clothing Findings and Trimmings Industrialists' Association

Tel:90 – 212 – 438 12 96 / 97

Fax:90 – 212 – 438 12 97

E-mail: kysder@superonline.com

Association of Hosiery Industrialists (CSD)

Tel:90 – 212 - 438 32 08

Fax:90 – 212 – 438 32 09

E-mail: csd@csd.org.tr

Web-site: <http://www.csd.org.tr>