

## **TURKISH TEXTILE INDUSTRY**

The history of textile production in Turkey goes back to the Ottoman period. In the 16th and 17th centuries, textile production was widespread and at an advanced level. The fact that until the end of the empire the Ottoman industry was heavily relied on textile industry was the clear indication of the importance of the sector. Having rapidly developed in the 20th century, a great textile production capacity was created in Turkey between the years 1923-1962. The extensive growth of the cotton in Turkey, the most important raw material of the textile industry, was further contributed to the development of the textile sector during the following years. Until 1972, the sector gained more strength due to the finalization of first planned development period. The period between 1980 and 1989 was witness to opening to the foreign markets.

The textile sector has made important contribution to the development of clothing industry as well. In the 1990's, the share of textile sector within the total Turkish exports reached to 9,3% by showing a high export performance. The industry, today, has become one of the most important components of the Turkish economy with its export value of 5,4 billion dollars.

As parallel to the expectations of the formation of Customs Union with the European Union (EU), the production capacity of the sector increased in the 1990's. With regards to machinery capacity, Turkey has 3% of short staple spinning capacity of the world, 5% of long staple spinning capacity of the world, 7,3% of OE rotor capacity of the world, 3,5% of shuttleless weaving looms capacity of the world, 1,9% of shuttle weaving looms capacity of the world and 5,1% of wool weaving looms capacity of the world by the year 2008.

As a more capital intensive industry as compared to clothing industry, most of the companies in the sector are medium scale. The industry has also large scale companies having integrated production facilities. There are nearly 7.500 textile manufacturers producing for the textile export of Turkey. The production facilities mainly concentrated in Istanbul, İzmir, Denizli, Bursa, Kahramanmaraş and Gaziantep.

Turkish textile industry uses modern technology. Existence of a well-developed textile finishing industry in Turkey makes also possible production and marketing of highly value added, fashionable and quality products.

Cotton textile products such as cotton, fiber, yarn and woven fabrics constitute about 24% of total textile exports. The main export items are synthetic yarns from monofilaments, cotton woven fabrics, knitted fabrics, synthetic filament yarns, woven pile fabrics like velvet.

Main advantages of Turkish textile industry in production and supply of raw materials

- ◇ Richness in basic raw materials (ranked seventh in the world with the annual cotton production about 375 thousand tons and production of synthetic and artificial fibers in substantial amounts)
- ◇ Geographical proximity to main markets, especially European markets
- ◇ Short logistics period due to geographical proximity
- ◇ Qualified and well-educated labor force
- ◇ Liberal trade policies
- ◇ Well-developed textile finishing industry
- ◇ 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 textile sector was 1,1 million dollar in 1990, it has reached to 5,4 billion dollars by the end of 2009. In other words, total textile exports of Turkey folded five times within the last 20 years.

According to WTO statistics for 2008, Turkey ranked seventh in the world with the share of 3,8% and Eurostat statistics second in the EU market with the share of 17,5%.

As far as country groups are concerned, Turkey exports 49% of textile products to EU countries. The second important country group is former USSR countries including Russian Federation, Ukraine, Azerbaijan, Uzbekistan with the market share of 14%. Advantages of Turkey in using advanced technology, richness in raw materials and geographical proximity to main markets also lead to market diversification for textile exports.

On the country basis, the most important export markets for the Turkish textile industry are Russian Federation, Italy, Germany, Romania and Poland, respectively. In addition, it should be noted that there is a high level of concentration on certain markets. For example, textile exports to top ten countries account for 57% of total textile exports. However, it is shown intense efforts in recent years in order to create diversified export markets.

Turkey, as being one of the most prominent textile and clothing producers in the world, now, has the production capacity to meet almost all the raw material needs of clothing industry. Some part of cotton and artificial and synthetic fibers needed by the industry are met by means of importation.

Turkey has also gained valuable experience in fabric design and it is started to present its special designs with fashion shows in prominent markets. Turkish textile industrialists, most of whom has created their own trademark together with the patent rights, provide the most important foreign home textile and clothing companies with their fabric.

Many pattern design competitions that make important contributions to development of fabric design in Turkey are organized by different institutions leading to emergence of young designers and creation of product diversity

Turkey takes part in many famous international fairs in textile sector, international textile fairs were organized within Turkey and Turkey's potential is shown successfully all over the world.

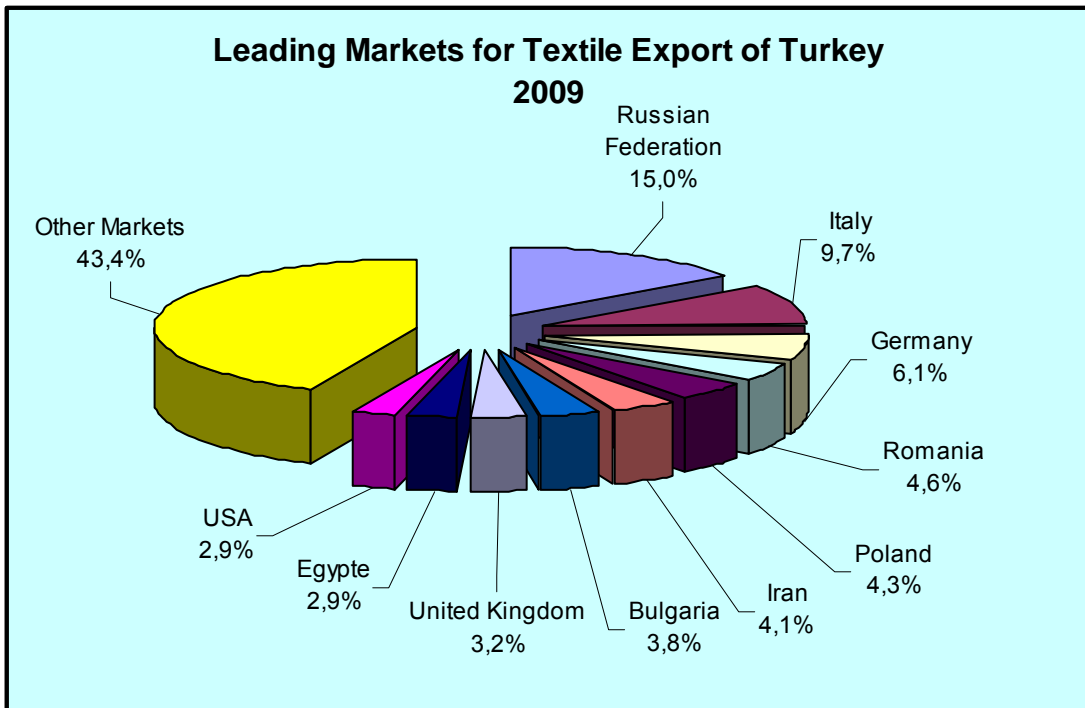
The main goals of the sector under the current world conjuncture are to produce high value added, original and high quality products and to sell them at a reasonable price level. On the other hand, as parallel to the current trends in the world, Turkey has shown great success in the technical textile production in cooperation with the university-industry and governmental institutions and by giving importance to R&D

<b>Annual Textile Export of Turkey</b>			
Years	Total Export (1000 \$)	Textile Export (1000 \$)	Share of Textile in Total export %
1990	12.959.289	1.136.566	8,8
1991	13.593.539	1.043.628	7,7
1992	14.365.414	952.389	6,6
1993	15.345.000	1.030.145	6,7
1994	18.107.000	1.462.592	8,1
1995	21.637.041	1.644.094	7,6
1996	23.224.465	1.762.396	7,6
1997	26.261.072	2.380.707	9,1
1998	26.973.952	2.468.114	9,1
1999	26.588.264	2.463.618	9,3
2000	27.774.906	2.549.929	9,2
2001	31.339.991	2.797.693	8,9
2002	36.059.089	2.917.224	8,1
2003	47.252.836	3.562.462	7,5
2004	62.773.654	4.434.728	7,1
2005	73.415.678	4.807.143	6,5
2006	85.774.644	5.403.521	6,3
2007	107.271.750	6.363.918	5,9
2008	132.027.196	6.640.492	5,0
2009	102.164.809	5.374.208	5,3

Source: Undersecretariat of Foreign Trade / February 2010

Leading Markets for Textile Export of Turkey					
	2008 1000 \$	Share in Total %	2009 1000 \$	Share in Total %	08 / 07 Change %
Russian Federation	804.943	12,1	805.147	15,0	0,03
Italy	619.893	9,3	519.888	9,7	-16,1
Germany	374.526	5,6	328.299	6,1	-12,3
Romania	317.594	4,8	247.579	4,6	-22,0
Poland	299.295	4,5	231.967	4,3	-22,5
Iran	214.340	3,2	222.694	4,1	3,9
Bulgaria	270.416	4,1	203.937	3,8	-24,6
United Kingdom	220.813	3,3	174.402	3,2	-21,0
Egypte	159.915	2,4	155.686	2,9	-2,6
USA	214.547	3,2	154.165	2,9	-28,1
<i>10 Countries Total</i>	<i>3.496.283</i>	<i>52,7</i>	<i>3.043.765</i>	<i>56,6</i>	<i>-12,9</i>
Other Markets	3.144.209	47,3	2.330.442	43,4	-25,9
Total Textile Exports	6.640.492	100,0	5.374.208	100,0	-19,1

Source: Undersecretariat of Foreign Trade / February 2010



## **Textile Institutions in Turkey**

### **İstanbul Textile and Apparel Exporters' Associations (ITKIB)**

Tel:0 – 212 – 454 02 00 pbx

E-mail: info@itkib.org.tr

Fax:0 – 212 – 454 02 01 / 454 04 10

Internet:http://www.itkib.org.tr

### **Aegean Exporters' Associations (EİB)**

Tel:0 – 232 – 488 60 00

E-mail:eib@egebirlik.org.tr

Fax:0 – 232 – 488 61 00

Internet:http://www.egebirlik.org.tr

### **Uludağ Exporter Unions (UIB)**

Tel:0 – 224 – 219 10 00 pbx

E-mail:uludag@uib.org.tr

Fax:0 – 224 – 219 10 90

Internet:http://www.uib.org.tr

### **Denizli Textile and Apparel Exporters' Union (DETKIB)**

Tel:0 – 258 – 274 66 88 pbx

E-mail:detkib@detkib.org.tr

Fax:0 – 258 – 274 72 22 / 274 72 62

Internet:http://www.detkib.org.tr

### **Akdeniz Exporters' Union (AKIB)**

Tel:0 – 324 – 237 68 00 pbx

E-mail:arge@akib.org.tr

Fax:0 – 324 – 237 71 17

Internet:http://www.akib.org.tr

### **Antalya Exporters' Union (AIB)**

Tel:0 – 242 – 244 01 20

E-mail:aib@aib.org.tr

Fax:0 – 242 – 244 01 27/28

Internet:http://www.aib.org.tr

### **Güneydoğu Anadolu Exporters' Union (GAIB)**

Tel:0 – 342 – 220 00 10

E-mail:gaib@gaib.org.tr

Fax:0 – 342 – 220 00 15/16

Internet:http://www.gaib.org.tr

### **Export Promotion Center (IGEME)**

Tel:0 – 312 – 417 22 23 (8 lines)

E-mail:igeme@igeme.org.tr

Fax:0 – 312 – 417 22 33

Internet:http://www.igeme.org.tr

### **Turkish Textile Dying and Finishing Industrialists' Association**

Tel:0 – 212 – 227 06 86

E-mail: info@tttsd.org.tr

Fax:0 – 212 – 260 11 57

Internet: http://www.tttsd.org.tr

### **Merter Manufacturers and Businessmen Association (MESIAD)**

Tel:0 – 212 – 643 47 22 (3 hat)

E-mail: mesiad@mesiad.org.tr

Fax:0 – 212 – 553 80 80

Internet:http://www.mesiad.org.tr

### **Laleli Manufacturers and Businessmen Association (LASIAD)**

Tel:0 – 212 – 458 12 49

E-mail: lasiad@lasiad.net

Fax:0 – 212 – 458 12 50

Internet:http://www.lasiad.net

### **Osmanbey Textiles Businessmen Association (OTIAD)**

Tel:0 – 212 – 231 92 85

E-mail:info@otiad.org.tr

Fax:0 – 212 – 231 89 46

Internet:http://www.otiad.org.tr