

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 11% 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 6,1 billion dollar.

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 3,4% of short staple spinning capacity, 5,3% of long staple spinning capacity, 6,7% of OE rotor capacity, 2,4% of shuttleless weaving looms capacity, 1,9% of shuttle weaving looms capacity and 5% of wool weaving looms capacity by the year 2005.

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, Izmir, Denizli, Bursa, Kahramanmaras 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 21,8% of total textile exports. The main export items are knitted fabrics, cotton woven fabrics, woven fabrics of synthetic filament yarns, bed sheets and bags - sacks for packaging.

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

- Richness in basic raw materials (ranked sixth in the world with the annual cotton production about 900.000 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 1,42 million dollar in 1990, it has reached to 6 billion dollar by the end of 2006. In other words, total textile exports of Turkey over quadruple within the last 16 years.

According to UN statistics for 2005, Turkey ranked eleventh in the world with the share of 3% and second in the EU market with the share of 13,6%.

In 2006, as far as country groups are concerned, Turkey exports 44,5% of textile products to EU countries. The second important country group is the Former Soviet Republics including Russian Federation, Azerbaijan, Uzbekistan with the market share of 11,4%. 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 Italy, Russian Federation, Germany and Romania, 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 54% 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.

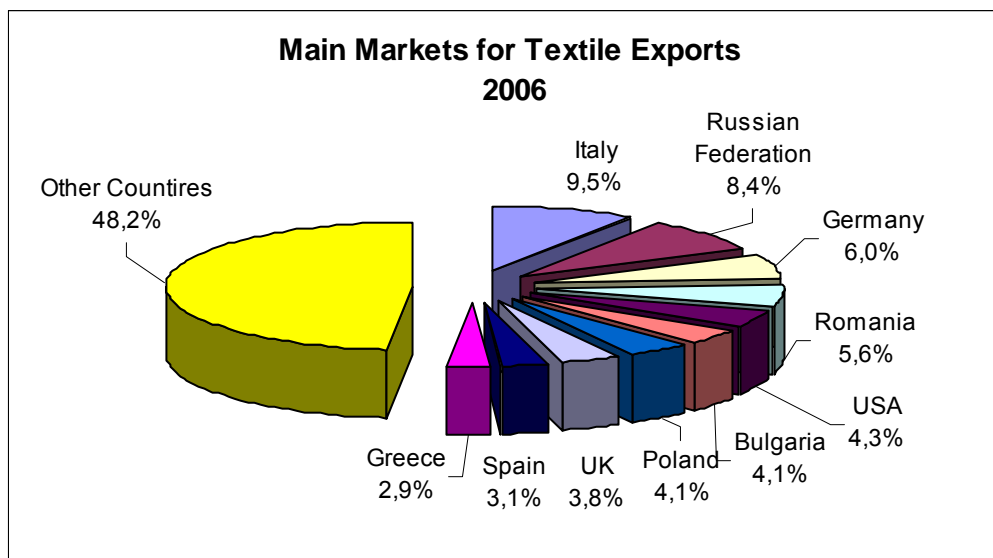
Many pattern design competitions that make important contributions to development of fabric design in Turkey are organized by different institutions leading to emergence of young designers and creation of product diversity

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

Annual Turkish Textile Exports			
Year	Total Exports (1000 \$)	Textile Exports (1000 \$)	Share of Textile Exports in total (%)
1990	12.959.289	1.424.249	11,0
1991	13.593.539	1.374.357	10,1
1992	14.365.414	1.369.322	9,5
1993	15.345.000	1.457.490	9,5
1994	18.107.000	1.944.818	10,7
1995	21.637.041	2.130.665	9,8
1996	23.224.465	2.352.142	10,1
1997	26.261.072	2.730.421	10,4
1998	26.973.952	2.811.763	10,4
1999	26.588.264	2.733.641	10,3
2000	27.774.906	2.818.768	10,1
2001	31.339.991	3.060.947	9,8
2002	36.059.089	3.204.383	8,9
2003	47.252.836	3.943.499	8,3
2004	63.167.153	4.952.271	7,8
2005	73.476.408	5.477.132	7,5
2006	85.278.802	6.143.377	7,2

Source: Undersecretariat of Foreign Trade / March 2007



Main Markets for Turkish Textile Exports					
	2005 (1000 \$)	Share in total %	2006 (1000 \$)	Share in total %	06 / 05 Change %
Italy	495.019	9,0	581.943	9,5	17,6
Russian Federation	409.499	7,5	513.160	8,4	25,3
Germany	328.783	6,0	370.633	6,0	12,7
Romania	315.519	5,8	346.044	5,6	9,7
USA	265.033	4,8	264.919	4,3	0,0
Bulgaria	213.950	3,9	251.098	4,1	17,4
Poland	194.107	3,5	249.857	4,1	28,7
UK	206.185	3,8	231.596	3,8	12,3
Spain	166.935	3,0	193.117	3,1	15,7
Greece	141.434	2,6	178.862	2,9	26,5
10 Countries Total	2.736.463	50,0	3.181.229	51,8	16,3
Other Countires	2.295.902	41,9	2.962.148	48,2	29,0
Total Textile Exports	5.477.132	100,0	6.143.377	100,0	12,2

Source: Undersecretariat of Foreign Trade / March 2007

Textile Associations and Institutions in Turkey

ASSOCIATION / INSTITUTION	ADDRESS	TEL	FAX	WEB SITE & E-MAIL
REPUBLIC OF TURKEY PRIME MINISTRY UNDERSECRETARIAT FOR FOREIGN TRADE	İnönü Bulvarı No:36 06510 Emek / ANKARA	(+90) 312 204 75 00	(+90) 312 212 82 46	http:// www.dtm.gov.tr E-Mail: ih@dtm.gov.tr
EXPORT PROMOTION CENTER	MİTHATPAŞA CAD. NO: 60 06420 KIZILAY / ANKARA	(+90) 312 417 22 23 (7 LINES)	(+90) 312 417 22 33	http:// www.igeme.org.tr E-Mail : igeme@igeme.org.tr
ISTANBUL TEXTILE & APPAREL EXPORTERS' ASSOCIATIONS	DIŞ TİCARET KOMPLEKSİ ÇOBANÇEŞME MEVKİİ SANAYİ CAD. B BLOK YENİBOSNA / İSTANBUL	(+90) 212 454 02 00	(+90) 212 454 02 01 (+90) 212 454 04 10	http://www.itkib.org.tr E-Mail: info@itkib.org.tr
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MEDITERRANEAN EXPORTERS' ASSOCIATIONS	URAY CAD. TURAN İŞ HANI KAT : 3-4 33001 MERSİN	(+90) 324 237 68 00 (5 LINES)	(+90) 324 237 71 17 (+90) 324 237 71 09	http://www.akib.org.tr E-Mail : akib@akib.org.tr
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SOUTH EAST ANATOLIA EXPORTERS' ASSOCIATIONS	İNÖNÜ CAD. KELEŞ HOCA SOK. NO :1/1 27200 ŞAHİNBEY / GAZİANTEP	(+90) 342 220 00 10 (4 LINES)	(+90) 342 220 00 15 (+90) 342 220 00 16	http://www.gaib.org.tr E-Mail : gaib@gaib.org.tr
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ISTANBUL CHAMBER OF INDUSTRY	MEŞRUTİYET CAD.NO:62 TEPEBAŞI / İSTANBUL	(+90) 212 252 29 00	(+90) 212 249 50 84 (+90) 212 293 43 98	http://www.iso.org.tr E-Mail: info@iso.org.tr
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SOCK INDUSTRIALISTS' ASSOCIATION	FATİH CAD. KÖKNAR SOK. MAVİ ÇARŞI KAT:3 NO: 28 MERTER - İSTANBUL	(+90) 212 637 76 60 (+90) 212 637 74 88	(+90) 212 637 76 51	http://www.csd.org.tr E-mail: csd@csd.org
TURKISH CLOTHING FINDINGS & TRIMMINGS ASSOCIATION	TURGUT REİS MAH.GİYİMKENT SİTESİ B131-A BLOK NO:34 ESENLER, İSTANBUL TÜRKİYE	(+90) 212 438 12 96	(+90) 212 438 12 98	http://kysd.org.tr E-mail: kysd@kysd.org.tr
TURKISH TEXTILE FINISHING INDUSTRIALISTS ASSOCIATION	AKARETLER VIŞNEZADE CAMİİ SOK. MEYDAN APT. NO:6/10 BEŞİKTAŞ/İSTANBUL	(+90) 212 227 06 86	(+90) 212 260 11 57	http://www.ttsd.org.tr E-mail : ttsd@ttnet.net.tr