



REPUBLIC OF TURKEY
MINISTRY OF ECONOMY



INDUSTRY



LEATHER WEAR



TURKEY

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LEATHER WEAR

The Turkish leather industry has a history dating back more than 500 years. The sector's production is based on combination of two assets; modern technology and historical background. Today, the sector is known world wide with its well-designed and fashionable products.

Initial efforts to modernize the leather industry began in the 70s but significant progress on a real industrial scale began in the mid-80s. The sector has showed a rapid progress in recent years. At present, the production is made in line with the international standards and great importance is attached to environmentally-friendly production policies – about 90% of the production is based on health and environmental standards.

PRODUCTION

There are nearly 1.500 companies in the Turkish leather sector and approximately 23,000 workers are employed. Leather manufacturers are mainly located in Istanbul (Tuzla), Izmir (Menemen), Tekirdag (Çorlu), Usak, Denizli, Bolu (Gerede), Bursa, Balikesir (Gönen), Isparta, Hatay and Manisa (Kula). Istanbul (Zeytinburnu) is considered the most important trade centre for the Turkish leather wear industry. Today, there are about 600 leather shops operating in Zeytinburnu.

Technological advancements in the sector, which are a must for a competitive industry, are increasing rapidly. Today, Turkish leather sector exports its own technology. Turkish firms produce all the leather processing machinery and 90% of the chemicals required for production and exports of leather products.

Turkish leather wear industry produces the finest women and men leather garments. Most of the big companies in the sector produce original collections with their own brand names. The sector creates its own fashion by using an unsurpassed blend of colors, patterns, manufacturing care and quality materials. Thanks to these traits of the sector, Turkish leather wear products have a good reputation and are appreciated all over the world.

EXPORT

The leather industry is one of the significant export sectors of Turkey. Sector's annual export value was around US\$ 1.262 million in 2011 and its share in total exports of Turkey was nearly 0.9%. The most important item exported by the leather industry was footwear with a share of 35% in total leather goods exports in 2011. In addition to this, more than half of Turkey's officially recorded leather exports result from sales to tourists.

Leather and Leather Products Exports of Turkey (US\$)

Products	2007	2008	2009	2010	2011
Raw Leather (HS:41)	120.162.021	121.070.629	93.630.629	115.730.895	138.672.275
Leather Goods (HS:42)	409.486.069	451.604.093	349.507.148	370.851.730	419.920.739
Furs (HS:43)	171.399.511	140.835.282	104.878.474	174.587.309	262.147.262
Footwear (HS:64)	316.739.641	344.889.810	289.472.603	395.624.111	441.300.453
Total	1.017.787.242	1.058.399.814	837.488.854	1.056.794.045	1.262.040.729

Source: Ministry of Economy

The majority of the exports of the sector were used to be directed to the Russian Federation and other Commonwealth of Independent States-CIS countries through shuttle trade. But after the economic crisis in the Russian Federation in 1998, the Turkish leather wear industry sought for new markets and today, the industry exports to more than 100 countries.

Exports of leather wear amounted US\$ 222 million in 2011. The main markets such as Germany (19,3%), the Russian Federation (16%) and France (11,1%) are followed by Italy, Spain, Denmark and Austria in 2011.

Leather Wear Exports of Turkey by Country (US\$) (HS: 4203)

Country	2007	2008	2009	2010	2011
Germany	67.018.115	62.650.417	44.213.491	42.647.444	43.050.223
Russian Federation	29.935.852	36.104.288	22.787.212	29.020.227	35.546.368
France	28.369.809	25.543.183	21.501.179	25.300.082	24.746.072
Italy	20.520.752	25.555.009	20.174.206	23.187.525	20.637.138
Spain	16.451.106	35.889.103	36.453.636	20.753.148	17.902.588
Denmark	9.553.673	18.013.655	12.793.435	11.540.808	13.361.318
Austria	2.023.088	2.537.698	4.564.763	5.122.076	7.131.183
Holland	12.764.689	10.154.532	11.298.657	6.114.524	6.726.670
United Kingdom	17.381.714	17.873.632	10.085.485	12.146.389	6.167.746
USA	14.675.522	9.582.742	6.127.972	5.497.427	4.645.438
Total	271.991.609	300.512.511	228.381.946	220.809.127	222.741.778

Source: Ministry of Economy

Turkish saddler products sector has also showed a remarkable progress in terms of exports along with shoes. Exports of Turkish leather trunks, suitcases and handbags increased by 33% and reached at US\$ 186 million in 2011. Italy (37,9%), the United Kingdom (19,7%) and Germany (7,8%) were the main destinations for leather trunks, suitcases and handbags in 2011. The other significant markets were Russia, France, the USA and Romania for the same period.

Leather Trunks, Suit-Cases, Handbags, etc. Exports of Turkey by Country (US\$) (HS:4202)

Country	2007	2008	2009	2010	2011
Italy	26.311.454	25.748.298	36.076.476	53.435.921	70.637.120
United Kingdom	18.363.032	27.922.089	7.876.138	19.568.280	36.637.658
Germany	11.663.861	12.696.700	12.031.417	13.597.468	14.484.615
Russian Federation	13.569.244	7.472.588	4.197.710	6.461.043	12.211.835
France	5.668.055	7.258.587	4.654.656	5.046.240	6.068.956
Usa	8.076.430	10.891.057	5.464.654	5.043.929	5.679.330
Romania	1.790.659	2.289.811	3.733.413	3.595.656	2.636.853
Holland	1.171.143	2.992.336	1.526.144	2.021.229	2.578.084
Ukraine	1.684.365	2.322.642	1.630.476	2.286.701	2.508.712
Austria	897.412	974.488	570.730	1.056.036	2.475.916
Total	120.859.446	140.829.646	110.858.156	140.389.045	186.332.872

Source: Ministry of Economy

Turkey exhibits its unique leather wear collections, capacity and products in major leather fairs which are mostly organized in Istanbul. A leather fair named "IDF Istanbul Leather Fashion Fair" is organized two times a year in Istanbul. The fair covers leather wear, fur wear, tanning machines, chemicals, raw leather, leather accessories, new designs, sectoral associations and press, finishing plants.

Leather and Leather Related Industries Trade Fairs Schedule - 2012

Fair	City	Organizer	Date
Ayakkabı Summer- Izmir Shoes, Bags And Accessories Fair	Izmir	http://www.izfas.com.tr	5-8 January
Istanbul 6 th Leather Fair	Istanbul	http://www.tuyap.com.tr	17-19 January
GAPSHOES-14 th FOOTWEAR, SLIPPER, Saddlery And Footwear Industry Suppliers Fair	Gaziantep	http://www.akort.com	19-22 January
AYSAF 8 th International Footwear Industry Suppliers Fair	Istanbul	http://www.pozitifhuarcilik.com	29 February - 03 March
AYMOD 8 th International Footwear Fashion Fair	Istanbul	http://www.pozitifhuarcilik.com	19-22 April
Ayakkabı Winter- Izmir Shoes, Bags And Accessories Fair	Izmir	http://www.izfas.com.tr	14-17 June
GAPSHOES WINTER 15 th FOOTWEAR, Slipper, Saddlery And Footwear Industry Suppliers Fair	Gaziantep	http://www.akort.com	5-8 July
AYSAF 9 th International Footwear Industry Suppliers Fair	Istanbul	http://www.pozitifhuarcilik.com	3-6 October
AYMOD9 th International Footwear Fashion Fair	Istanbul	http://www.pozitifhuarcilik.com	20-23 November

Source: <http://www.fuarrehberi.org.tr/>

USEFUL LINKS

- Turkish Leather Council
www.turkishleather.com
- Leather Manufacturers' Association of Turkey
www.tdsd.org.tr
- Footwear Industrialists Association of Turkey
www.tasd.com.tr
- Istanbul Textile and Apparel Exporters' Associations
www.itkib.org.tr
- Aegean Exporters' Associations
www.egebirlilik.org.tr
- Southeast Anatolia Exporters' Associations
www.gaib.org.tr
- Uludağ Exporters' Association
www.uib.org.tr
- Denizli Exporters' Association
www.denib.gov.tr
- Mediterranean Exporter Associations
www.akib.org.tr



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