



REPUBLIC OF TURKEY
MINISTRY OF ECONOMY



INDUSTRY



CLOTHING



TURKEY

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CLOTHING INDUSTRY IN TURKEY

PRODUCTION

Textiles and clothing are among the most important sectors of the Turkish economy and foreign trade. Accounting for about 8-10% of the GDP together, these two sectors are the core of Turkish economy in terms of GDP contribution, share in manufacturing, employment, investments and macroeconomic indicators. These sectors had a 18,5% share in total export volume in 2011. There are more than 40,000 textile and clothing companies in Turkey with an estimated workforce of 750,000 employees.

Turkey is one of the main actors in the world clothing industry. Turkey ranks 8th in world cotton production and 4th in world cotton consumption. Turkey also ranks 3rd in organic cotton production after India and Syria. The Turkish clothing industry is the 6th largest supplier in the world, and the 2nd largest supplier to the EU. It has a share of 4,2% in knitted clothing exports and it ranks 5th among the exporting countries. With a share of 2,7%, Turkey ranks 9th among the woven clothing exporters in the world.

The Turkish textile industry, which is listed in the world's top ten exporters, is also the second largest supplier to the EU. The Turkish textile and clothing industry has a significant role in world trade with the capability to meet high standards, and can compete in international markets in terms of high quality and a wide range of products.

The established capacity of woven production in Turkey is estimated to be around 1.350.000 tons while that of knitted products is around 2.250.000 tons. In recent years, pantyhose, tights, stockings, socks and other hosiery production in Turkey shows a faster growth and with the new investments it is estimated to have reached a production capacity of 200 million dozens per annum.

Istanbul: City of Fashion

Istanbul is proud of its designers, fashion and shopping centers where it has kept its unique Occidental-Oriental, old-meets-new, and East-meets-West characteristics. Istanbul is becoming a leading fashion and shopping center due to both foreign and local investments recently. The world's largest shopping centers are opening in Istanbul. Many tourists have added Istanbul to their itinerary for shopping. As a global sourcing hub for both Asia and Europe, Istanbul attracts a number of international buying offices, trading houses, major retailers and department stores. Since Istanbul is becoming a fashion and shopping center, most of the companies have shifted their production facilities to the inner provinces. Izmir, Bursa, Ankara, Denizli, Gaziantep, Kayseri, Tekirdag, Adiyaman, Kahramanmaras and Adana are now major cities for textile and clothing production.

EXPORTS

Turkish clothing exports have continued to increase even after the expiration of the global textile quota system at the end 2004, as agreed under the World Trade Organization Agreement on Textiles and Clothing (ATC). The sector continues to maintain and enhance its competitiveness.

In 2011 the total value of clothing exports was US\$ 13.5 billion. The sector exports about 65% of its production. Approximately 80% of the clothing exported is cotton clothing. Knitted clothing and accessories, with an export value of US\$ 8.4 billion, had a share of 62,1% in total clothing exports, and woven clothing had a share of 37,9% with a value of US\$ 5.1 billion in 2011.

T-shirts and pullovers are the most important export products in knitted clothing sector. Exports of t-shirts and pullovers were US\$ 3 billion and US\$ 1.3 billion respectively in 2011. In addition, as the second largest manufacturer in the world, Turkey's socks exports amounted US\$ 1 billion in 2011.

Knitted or Crocheted Clothing Exports of Turkey (US\$ million)

HS	Products	2009	2010	2011	Change (%) 2010/2011
6101	Men's/boys' overcoats, capes, cloak etc	42,41	36,19	40,45	11,8
6102	Women'/girls' overcoat, cape, cloak etc	35,08	27,98	30,91	10,5
6103	Men's/boys' suits, jackets, trousers etc & shorts	198,94	189,61	216,01	13,9
6104	Women's/girls' suits, dresses, skirt etc & shorts	816,29	1.052,62	1.125,07	6,9
6105	Men's or boys' shirts	204,03	186,69	199,6	6,9
6106	Women's or girls' blouses, shirts & shirt-blouses	590,28	626,98	622,83	-0,7
6107	Men's/boys' underpants, nightshirts, pyjamas, bathrobes etc	82,43	77,41	91,05	17,6
6108	Women's/girls' slips, panties, pyjamas, bathrobes etc	251,37	262,8	270,03	2,8
6109	T-shirts, singlets and other vests	2.398,38	2.755,47	3.053,33	10,8
6110	Jerseys, pullovers, cardigans, waistcoats etc	1.079,97	1.205,35	1.322,19	9,7
6111	Babies' garments and clothing accessories	71,16	83,5	103,87	24,4
6112	Track-suits, ski-suits and swimwear	63,75	69,96	69,75	-0,3
6113	Garments, rubberised or impregnated, coated or covered with plastics or other materials	0,19	0,2	0,41	105,0
6114	Special garments for professional, sporting or other purposes	173,25	165,46	150,38	-9,1
6115	Pantyhose, tights, stockings, socks and other hosiery	881,06	952,72	1.057,79	11,0
6116	Gloves, mittens and mitts	2,49	2,71	2,94	8,5
6117	Clothing accessories, parts of garments or of clothing accessories	34,47	35,57	39,56	11,2
	Total	6.925,55	7.731,21	8.396,17	8,6

Source: Ministry of Economy

“Women's or girls' suits, jackets, dresses skirts etc.” and “Men's or boys' suits, jackets, trousers etc.” are the most important export products in woven clothing sector. In 2011 exports of “Women's or girls' suits, jackets, dresses skirts etc.” and “Men's or boys' suits, jackets, trousers etc.” were US\$ 2 billion and US\$ 1.4 billion, respectively.

Woven Clothing Exports of Turkey (US\$ million)

HS	Products	2009	2010	2011	Change (%) 2010/2011
6201	Men's/boys' overcoats, capes, wind-jackets etc.	79,91	84,75	81,34	-4,0
6202	Women's/girls' overcoats, capes, wind-jackets etc.	68,11	85,7	96,51	12,6
6203	Men's or boys' suits, jackets, trousers etc & shorts	1.191,93	1.284,58	1.383,17	7,7
6204	Women's/girls' suits, jackets, dresses skirts etc & shorts	1.704,68	1.853,80	2.072,02	11,8
6205	Men's or boys' shirts	411,64	458,27	547,38	19,4
6206	Women's or girls' blouses, shirts and shirt-blouses	431,98	447,91	512,37	14,4
6207	Men's or boys' singlets, briefs, nightshirts, pyjamas, bathrobes etc	38,94	46,11	47,64	3,3
6208	Women's or girls' singlets, slips, briefs, pyjamas, bathrobes etc	154,87	152,81	150,73	-1,4
6209	Babies' garments and clothing accessories	30,44	34,98	38,6	10,3
6210	Garments made up of felt or nonwovens, whether or not impregnated, coated, covered or laminated	16,89	16,18	15,69	-3,0
6211	Track suits, ski suits and swimwear; other garments	56,12	56,59	65,61	15,9
6212	Brassieres, girdles, corsets, braces, suspenders etc & parts	64,77	66,74	67,8	1,6
6213	Handkerchiefs	0,33	0,26	0,25	-3,8
6214	Shawls, scarves, mufflers, mantillas, veils and similar articles	29,68	31,36	34,23	9,2
6215	Ties, bow ties and cravats	4,82	3,66	3,32	-9,3
6216	Gloves, mittens and mitts	1,16	0,89	0,85	-4,5
6217	Clothing accessories and parts of garments or clothing accessories	8,54	11,54	11,91	3,2
	Total	4.294,83	4.636,12	5.129,43	10,6

Source: Ministry of Economy

EU is the most important market for Turkey's clothing exports. In 2011 Turkey exported clothing of US\$ 11 billion to the EU, which was equivalent to 81,6% of Turkey's total clothing exports. Main markets among the members of EU were Germany and the UK. Clothing exports to these countries were US\$ 5.2 billion, which was nearly half of Turkey's clothing exports to the EU.

Turkey's Clothing Exports (US\$ million)

Countries	2009	2010	2011	Change (%) 2010/2011
Germany	2.769,05	3.004,83	3.219,86	7,2
UK	1.686,02	1.934,01	1.950,52	0,9
Spain	900,76	1.075,03	1.297,75	20,7
France	869,98	979,1	1.049,63	7,2
Netherlands	571,47	612,61	742,34	21,2
Italy	593,77	616,35	722,3	17,2
Denmark	391,67	420,95	445,29	5,8%
Belgium	286,76	360,09	383,17	6,4%
Sweden	238,31	255,63	260,89	2,1%
Russian Fed.	108,01	206,5	232,54	12,6%
Iraq	161,41	171,02	227,49	33,0%
USA	173,35	214,68	220,74	2,8%
Poland	75,75	96,22	147,39	53,2%
Romania	96,28	174,92	136,31	-22,1%
Saudi Arabia	52	65,95	129,57	96,5%
Israel	91,72	110,72	127,23	14,9%
Czech Rep	103,87	104,57	121,99	16,7%
Switzerland	94,81	98,8	107,77	9,2%
Austria	131,48	100,01	103,37	3,4%
Greece	148,08	98,08	98,71	0,6%
Ukraine	84,37	46,65	96,5	106,9%
Algeria	161,67	80,26	92,57	15,3%
United Arab Emirates	45,07	61,5	83,07	35,1%
Norway	65,59	75,49	76,57	1,4%
Others	1.319,13	1.403,37	1.452,04	3,5%
TOTAL	11.220,38	12.367,34	13.525,61	9,4%

Source: Ministry of Economy

With its fashion-oriented and quality products, Turkey has been increasing her share in the main markets, especially in the European market which has high standards and sophisticated customer needs. In 2011, Turkish companies exported to more than 170 countries in the world.

TRADE FAIRS IN TURKEY

Many Turkish clothing companies have expanded their marketing and distribution channels in global markets by opening stores and chain stores all over the world. To increase awareness of Turkish fashion in international markets, they participate in many fashion shows and international fairs in abroad. In addition, the Turkish clothing products are exhibited in international and national fairs organized in Turkey. Major fairs which will be organized in 2012 are:

- Collection Premiere Istanbul 2012-I, Istanbul, February 2012 (Men's, Women's and Children's Ready-to-Wear, Knitwear, Lingerie & Swimwear and Accessories)
www.cnrexpo.com/
- IF Wedding Fashion, Izmir, February 2012 (Wedding Dress, Suits and Evening Gowns)
wedding.izfas.com.tr/
- Islamic Fashion Show 2012- 4th Islamic Clothes Fashion and Accessories Fair, Istanbul, March (Bridal Veil, Evening Dresses, Wedding Dress, Swimming Dress, Scarf, Special Scarf Designs and Accessories)
www.demosfuar.com.tr
- Collection Premiere Istanbul 2012-II, Istanbul, September 2012 (Men's, Women's and Children's Ready-to-Wear, Knitwear, Lingerie & Swimwear and Accessories)
www.cnrexpo.com/
- Bursa Baby and Kidswear and Necessities Fair, Bursa, June 2012
www.tuyap.com.tr

USEFUL LINKS

- Istanbul Textile and Apparel Exporters' Associations
www.itkib.org.tr
- Aegean Exporters' Associations
www.egebirlik.org.tr
- Uludağ Exporters' Association
www.uib.org.tr
- Denizli Exporters' Association
www.denib.gov.tr
- Mediterranean Exporter Associations
www.akib.org.tr
- Southeast Anatolia Exporters' Associations
www.gaib.org.tr
- Turkish Clothing Manufacturers Association
www.tgsd.org
- Aegean Clothing Manufacturers' Association
www.egsd.org.tr
- Turkish Textile Employers' Association
www.tekstilisveren.org
- The Fashion Designers Association of Turkey
www.mtd.org.tr
- United Brands Association of Turkey
www.birlesmismarkalar.org.tr
- The Association of the Registered Trademarks
www.tescillimarkalar.org.tr
- The Association of Denim Industrialist's and Businessmen's of Turkey,
www.denimder.org.tr
- Turkish Knitwear Industrialists Association
www.trisad.org
- Osmanbey Textile Manufacturers Association
www.otiad.org.tr



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