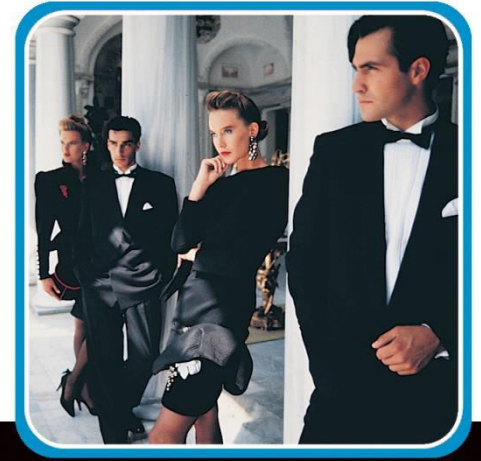




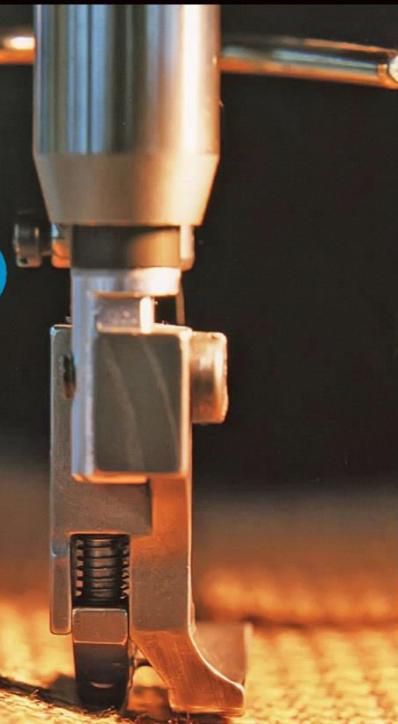
REPUBLIC OF TURKEY  
MINISTRY OF ECONOMY



INDUSTRY



CLOTHING



TURKEY

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# **CLOTHING INDUSTRY**

## **PRODUCTION**

Textiles and clothing are among the most important sectors of the Turkish economy and foreign trade. Accounting for about 7% 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 10,32% share in total export volume in 2015.

Turkey is one of the main actors in the world clothing industry. Turkey ranks 7<sup>th</sup> in world cotton production and 4<sup>th</sup> in world cotton consumption. Turkey also ranks 3<sup>rd</sup> in organic cotton production after India and China. The Turkish clothing industry with a share of 3,32% is the 8<sup>th</sup> largest supplier in the world, and the 3<sup>rd</sup> largest supplier to the EU. It has a share of 3,99% in world knitted clothing exports and it ranks 5<sup>th</sup> among the exporting countries. With a share of 2,65%, Turkey ranks 9<sup>th</sup> among the woven clothing exporters in the world. The Turkish textile industry, which is listed in the world's top ten exporters, is the 2<sup>nd</sup> largest supplier to the EU.

In 35 years from 1980 to 2015, the production and export of the industry shifted from low value added commodities to high value added manufactured items and fashionable goods. With its qualified and educated human resources, design capacity, accumulation of know-how, investment in technology, dynamic and flexible production capacity, advanced sub industry in clothing sector, concern about quality, health and environment; 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.

## **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. Istanbul Fashion Week is organized twice a year to gain recognition for Turkish designers and brands in national and international tribunes where they present their latest collections. 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 2013 the total value of clothing exports was US\$ 15 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\$ 9.3 billion, had a share of 61,8% in total clothing exports, and woven clothing had a share of 38,2% with a value of US\$ 5.7 billion in 2013.

T-shirts and pullovers are the most important export products in knitted clothing sector. Exports of t-shirts and pullovers were US\$ 3.3 billion and US\$ 1.6 billion respectively in 2013. In addition, as the second largest manufacturer in the world, Turkey's hosiery exports amounted US\$ 1.2 billion in 2013.

***Knitted or Crocheted Clothing Exports of Turkey (USD 1,000)***

HS	Products	2013	2014	2015	Change (%) 2014/2015
6101	Men's/boys' overcoats, capes, cloak etc	35.431	38.125	37.936	-0,49%
6102	Women'/girls' overcoat, cape, cloak etc	30.140	37.802	38.985	3,13%
6103	Men's/boys' suits, jackets, trousers etc & shorts	348.749	374.371	338.533	-9,57%
6104	Women's/girls' suits, dresses, skirt etc & shorts	1.211.741	1.369.948	1.272.573	-7,11%
6105	Men's or boys' shirts	242.611	258.946	237.394	-8,32%
6106	Women's or girls' blouses, shirts & shirt-blouses	532.896	573.039	541.048	-5,58%
6107	Men's/boys' underpants, nightshirts, pyjamas, bathrobes etc	118.263	150.732	164.903	9,40%
6108	Women's/girls' slippers, panties, pyjamas, bathrobes etc	292.801	319.602	311.989	-2,38%
6109	T-shirts, singlets and other vests	3.276.038	3.566.429	2.979.122	-16,47%
6110	Jerseys, pullovers, cardigans, waistcoats etc	1.629.288	1.753.886	1.613.651	-8,00%
6111	Babies' garments and clothing accessories	141.915	146.059	144.418	-1,12%
6112	Track-suits, ski-suits and swimwear	73.892	76.041	79.172	4,12%
6113	Garments, rubberised or impregnated, coated or covered with plastics or other materials	298	636	865	36,04%
6114	Special garments for professional, sporting or other purposes	115.268	85.349	85.516	0,20%
6115	Pantyhose, tights, stockings, socks and other hosiery	1.151.172	1.216.564	1.024.528	-15,79%
6116	Gloves, mittens and mitts	2.511	2.946	3.297	11,90%
6117	Clothing accessories, parts of garments or of clothing accessories	41.925	53.773	52.542	-2,29%
	<b>Total</b>	<b>9.244.940</b>	<b>10.024.248</b>	<b>8.926.475</b>	<b>-10,95%</b>

Source: Ministry of Economy

“T-shirts, singlets and other vests” and “Women's/girls' suits, dresses, skirt etc & shorts” are the most important export products in woven clothing sector. In 2015

exports of “T-shirts, singlets and other vests” and “Women's/girls' suits, dresses, skirt etc & shorts” were USD 2.98 billion and US\$ 1.27 billion, respectively.

***Woven Clothing Exports of Turkey (USD 1,000)***

HS	Products	2013	2014	2015	Change (%) 2012/2013
6201	Men's/boys' overcoats, capes, wind-jackets etc.	86.465	96.051	93.107	-3,06%
6202	Women's/girls' overcoats, capes, wind-jackets etc.	108.616	142.498	111.356	-21,85%
6203	Men's or boys' suits, jackets, trousers etc & shorts	1.512.380	1.566.322	1.492.773	-4,70%
6204	Women's/girls' suits, jackets, dresses skirts etc & shorts	2.283.085	2.417.476	2.195.246	-9,19%
6205	Men's or boys' shirts	533.457	630.212	606.952	-3,69%
6206	Women's or girls' blouses, shirts and shirt-blouses	630.687	732.708	735.725	0,41%
6207	Men's or boys' singlets, briefs, nightshirts, pyjamas, bathrobes etc	42.912	46.930	52.407	11,67%
6208	Women's or girls' singlets, slips, briefs, pyjamas, bathrobes etc	205.010	217.371	219.521	0,99%
6209	Babies' garments and clothing accessories	54.972	74.742	86.704	16,01%
6210	Garments made up of felt or nonwovens, whether or not impregnated, coated, covered or laminated	20.535	23.967	27.721	15,66%
6211	Track suits, ski suits and swimwear; other garments	98.351	129.862	134.246	3,38%
6212	Brassieres, girdles, corsets, braces, suspenders etc & parts	63.468	69.213	53.887	-22,14%
6213	Handkerchiefs	417	810	668	-17,61%
6214	Shawls, scarves, mufflers, mantillas, veils and similar articles	57.869	68.820	91.000	32,23%
6215	Ties, bow ties and cravats	4.001	4.510	4.533	0,51%
6216	Gloves, mittens and mitts	1.098	1.036	735	-29,08%
6217	Clothing accessories and parts of garments or clothing accessories	10.877	9.976	9.857	-1,19%
	<b>Total</b>	<b>5.714.199</b>	<b>6.232.503</b>	<b>5.916.438</b>	<b>-5,07%</b>

Source: Ministry of Economy

EU is the most important market for Turkey’s clothing exports. In 2015 Turkey exported clothing of USD 10,94 billion to the EU, which was equivalent to 73,74% of Turkey’s total clothing exports. Main markets among the members of EU were Germany and the UK. Clothing exports to these countries were USD 4,77 billion, which was nearly half of Turkey’s clothing exports to the EU.

### **Turkey's Clothing Exports by Countries (USD 1,000)**

<b>Countries</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>Change (%) 2014/2015</b>
Germany	3.115.131	3.321.488	2.684.510	-19,18%
UK	2.055.206	2.354.640	2.090.053	-11,24%
Spain	1.452.228	1.588.537	1.627.018	2,42%
France	917.778	930.608	723.014	-22,31%
Netherlands	788.612	812.877	700.485	-13,83%
Iraq	512.878	609.029	699.129	14,79%
Italy	604.541	600.158	513.759	-14,40%
Romania	241.785	451.373	465.005	3,02%
Poland	303.366	403.822	415.777	2,96%
Denmark	481.862	488.460	390.719	-20,01%
Belgium	378.781	372.891	290.897	-21,99%
USA	229.004	236.434	273.440	15,65%
Ukraine	282.443	274.407	271.427	-1,09%
Saudi Arabia	214.243	243.342	241.024	-0,95%
Israel	165.733	199.049	222.581	11,82%
Slovakia	125.308	151.460	211.542	39,67%
Sweden	267.356	267.339	199.108	-25,52%
Algeria	139.232	136.130	173.570	27,50%
Russian Fed.	300.814	260.570	159.239	-38,89%
Libya	112.229	120.892	148.095	22,50%
Others	2.270.609	2.433.247	2.342.519	-3,73%
<b>Total</b>	<b>14.959.139</b>	<b>16.256.751</b>	<b>14.842.913</b>	<b>-8,70%</b>

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 2015, Turkish companies exported to more than 180 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 on abroad. In addition, the Turkish clothing products are exhibited in international and national fairs organized in Turkey. Major fairs which will be organized in 2017 are:

- 3<sup>rd</sup> Fashionist Evening Gowns, Wedding Dresses And Suits Fair, (Ready to Wear, Fashion, Fabrics, Garment Industries), İstanbul, 17-19 January 2017, [www.fashionist.com.tr](http://www.fashionist.com.tr)
- IF Wedding Fashion İzmir, 10th International Wedding Dresses, Suits And Evening Gowns Fair, 7-10 February 2017 (Wedding Dresses, Suits and Evening Gowns and Accessories), <http://ifwedding.izfas.com.tr/home>

## USEFUL LINKS

- Istanbul Textile and Apparel Exporters' Associations  
[www.itkib.org.tr](http://www.itkib.org.tr)
- Aegean Exporters' Associations  
[www.egebirlilik.org.tr](http://www.egebirlilik.org.tr)
- Uludağ Exporters' Association  
[www.uib.org.tr](http://www.uib.org.tr)
- Denizli Exporters' Association  
[www.denib.gov.tr](http://www.denib.gov.tr)
- Mediterranean Exporter Associations  
[www.akib.org.tr](http://www.akib.org.tr)
- Southeast Anatolia Exporters' Associations  
[www.gaib.org.tr](http://www.gaib.org.tr)
- Turkish Clothing Manufacturers Association  
[www.tgsd.org](http://www.tgsd.org)
- Aegean Clothing Manufacturers' Association  
[www.egsd.org.tr](http://www.egsd.org.tr)
- Turkish Textile Employers' Association  
[www.tekstilisveren.org](http://www.tekstilisveren.org)
- The Fashion Designers Association of Turkey  
[www.mtd.org.tr](http://www.mtd.org.tr)
- United Brands Association of Turkey  
[www.birlesmismarkalar.org.tr](http://www.birlesmismarkalar.org.tr)
- The Association of the Registered Trademarks  
[www.tescillimarkalar.org.tr](http://www.tescillimarkalar.org.tr)
- Turkish Knitwear Industrialists Association  
[www.trisad.org](http://www.trisad.org)
- Osmanbey Textile Manufacturers Association  
[www.otiad.org.tr](http://www.otiad.org.tr)
- Laleli Industrialists and Businessmen Association  
[www.lasiad.org.tr](http://www.lasiad.org.tr)
- Merter Industrialists and Businessmen Association  
[www.mesiad.org.tr](http://www.mesiad.org.tr)

- Turkish Bridal Manufacturers and Exporters Association  
[www.gelinlik.org.tr](http://www.gelinlik.org.tr)
- Socks Manufacturer Association  
[www.csd.org.tr](http://www.csd.org.tr)
- Turkish Fashion and Apparel Federation  
[www.mhqf.org.tr](http://www.mhqf.org.tr)
- Turkey Fair Guide  
<http://fuarrehberi.org.tr/>