



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 worldwide with its well-designed and fashionable products.

Although initial efforts to modernize the leather industry began in the 70s, significant progress on a real industrial scale began in the mid-80s. The sector has showed a rapid progress in recent years. Today, 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

According to Ministry of Science, Industry and Technology statistics of 2015, the leather and leather products industry¹ employs 70.404 people and the industry has about 4.585 companies. Leather manufacturers are mainly located in Istanbul (Tuzla), Izmir (Menemen), Tekirdag (Corlu), Usak, Denizli, Bolu (Gerede), Bursa, Balikesir (Gönen), Isparta, Hatay and Manisa (Kula). Istanbul (Zeytinburnu) is considered as the most important trade centre for the Turkish leather wear industry.

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 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.

EXPORTS

The leather industry is one of the significant export sectors of Turkey. Sector's annual export value was around US\$ 1.311 million in 2015 and its share in total exports of Turkey was nearly 0,91%. The most important item exported by the leather industry was footwear with a share of 51% in total leather goods exports in 2015. 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 | 2013 | 2014 | 2015 | Change (2014-2015) |
|-----------------------|----------------------|----------------------|----------------------|--------------------|
| Raw Leather (HS:41) | 198.676.452 | 226.492.957 | 181.133.599 | -20% |
| Leather Goods (HS:42) | 421.312.114 | 427.034.628 | 323.480.470 | -24% |
| Furs (HS:43) | 283.010.638 | 239.768.058 | 136.685.502 | -43% |
| Footwear (HS:64) | 723.219.481 | 719.258.058 | 670.432.007 | -7% |
| Total | 1.626.218.685 | 1.612.553.701 | 1.311.731.578 | -19% |

¹ NACE Code:1411, 1511, 1512, 1520

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 180 countries.

Exports of leather wear amounted US\$ 156 million in 2015. The main markets such as Germany (21,0%), France (12%) and the Russian Federation (8 %) are followed by Italy (7%) in 2015.

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

| Country | 2013 | 2014 | 2015 | Change (2014-2015) |
|--------------------|--------------------|--------------------|--------------------|--------------------|
| Germany | 41.434.525 | 42.865.865 | 32.286.495 | -25% |
| France | 29.651.202 | 29.271.566 | 19.441.127 | -34% |
| Russian Federation | 29.073.108 | 27.538.306 | 11.976.594 | -57% |
| Italy | 13.390.026 | 12.752.694 | 11.700.812 | -8% |
| United Kingdom | 11.169.725 | 14.974.064 | 10.236.600 | -32% |
| U.S.A. | 12.288.298 | 13.028.550 | 9.573.322 | -27% |
| Spain | 5.443.866 | 4.930.159 | 8.692.812 | 76% |
| Holland | 4.481.540 | 6.486.148 | 5.971.657 | -8% |
| Austria | 6.611.140 | 6.557.310 | 4.904.001 | -25% |
| Iraq | 2.531.568 | 2.804.067 | 3.792.377 | 35% |
| LIST | 156.074.998 | 161.208.729 | 118.575.797 | -26% |
| OTHER | 61.849.477 | 54.996.679 | 37.505.590 | -32% |
| TOTAL | 217.924.475 | 216.205.408 | 156.081.387 | -28% |

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 reached at US\$ 191 million in 2015. Italy (33,3%), the United Kingdom (15,1%) and Germany (9,2%) were the main destinations for leather trunks, suitcases and handbags in 2013. The other significant markets were Russian Federation, USA, Iraq, Spain, France, Switzerland and Austria for the same period.

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

| Country | 2013 | 2014 | 2015 | Change (2014-2015) |
|----------------|------------|------------|------------|--------------------|
| Italy | 63.528.103 | 61.610.851 | 34.062.297 | -45% |
| United Kingdom | 28.918.920 | 27.752.724 | 26.295.645 | -5% |
| Germany | 17.594.846 | 16.607.341 | 15.698.879 | -5% |
| Iraq | 5.889.158 | 8.591.076 | 9.576.873 | 11% |
| Iran | 79.724 | 1.687.777 | 7.590.565 | 350% |
| Spain | 5.771.870 | 7.667.191 | 7.530.118 | -2% |
| France | 5.355.520 | 4.766.669 | 5.340.466 | 12% |
| Denmark | 4.314.860 | 4.930.671 | 3.905.422 | -21% |
| Switzerland | 4.371.723 | 4.068.325 | 3.720.885 | -9% |
| U.S.A | 6.671.378 | 4.638.244 | 3.416.859 | -26% |

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|--------------|--------------------|--------------------|--------------------|-------------|
| LIST | 142.496.102 | 142.320.869 | 117.138.009 | -18% |
| OTHER | 48.439.143 | 52.834.988 | 37.830.005 | -28% |
| TOTAL | 190.935.245 | 195.155.857 | 154.968.014 | -21% |

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 twice 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 – 2016-2017

| Fair | City | Organizer | Date |
|---|-------------|------------------|-----------------------|
| LEATHER FASHION SHOW | Antalya | Artı | 06.12.2016-08.12.2016 |
| GAPSHOES | Gaziantep | Akort | 14.12.2016-17.12.2016 |
| ALLEATHER IDF | İstanbul | Akort | 01.02.2017-03.02.2017 |
| MAYFU MANİSA SHOE FASHION FAIR | Manisa | SNS | 02.02.2017-05.02.2017 |
| SHOEXPO İzmir | İzmir | İZFAŞ İzmir | 20.02.2017-23.02.2017 |
| AYMOD 18. INTERNATIONAL FOOTWEAR FASHION FAIR | İstanbul | Pozitif | 05.04.2017-08.04.2017 |
| EKSPOSHOES İSTANBUL | İstanbul | EKS | 24.04.2017-27.04.2017 |
| AYSAF (18) | İstanbul | Pozitif | 03.05.2017-06.05.2017 |
| LEATHER FASHION SHOW | Antalya | Artı | 06.06.2017-08.06.2017 |
| GAPSHOES 25. INTERNATIONAL FOOTWEAR, SLIPPER, SADDLERY AND FOOTWEAR INDUSTRY SUPPLIERS FAIR | Gaziantep | Akort | 19.07.2017-22.07.2017 |
| MAYFU MANİSA SHOE FASHION FAIR | Manisa | Akort | 03.08.2017-06.08.2017 |
| SHOEXPO İzmir "42.Ayakkabı ve Çanta Fuarı" | İzmir | SNS | 20.09.2017-23.09.2017 |
| AYMOD 19. INTERNATIONAL FOOTWEAR FASHION FAIR | İstanbul | İZFAŞ İzmir | 04.10.2017-07.10.2017 |
| EKSPOSHOES İSTANBUL | İstanbul | Pozitif | 07.11.2017-10.11.2017 |
| AYSAF (19) | İstanbul | EKS | 15.11.2017- |

| | | | |
|--|-----------|---------|---------------------------|
| | | | 18.11.2017 |
| LEATHER FASHION SHOW | Antalya | Pozitif | 05.12.2017- 07.12.2017 |
| GAPSHOES 26. INTERNATIONAL FOOTWEAR, SLIPPER, SADDLERY AND FOOTWEAR INDUSTRY SUPPLIERS FAIR | Gaziantep | Artı | 13.12.2017- 16.12.2017 |

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.egebirlik.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