



REPUBLIC OF TURKEY
MINISTRY OF ECONOMY



INDUSTRY



FOOTWEAR



TURKEY
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FOOTWEAR

Turkey's footwear industry has developed at a rapid pace due to modern manufacturing processes, the availability of major quality raw materials, skilled workers and high design capacity. Today the Turkish footwear industry has a strong position among exporters of high quality fashion goods. Another sign of positive development is the increase in foreign investments in the sector.

It is obvious that the footwear industry is extremely dependent on the leather industry of Turkey. The Turkish leather industry, which has a history of 500 years, is becoming a leading center in the world leather industry. The Turkish leather industry, which occupies a prominent place in the Turkish economy, continues to develop day by day by combining new technology and its historical background.

Although the initial efforts to modernize the leather industry began in the 70s, significant progress at a real industrial scale began in the mid-80s. The sector produces according to international standards and is becoming more sensitive to health and the environment – about 90% of the production is based on health and environmental standards.

Leather is one of Turkey's leading export sectors. The export figure of the leather sector (including footwear) for 2015 was about US\$ 1.3 billion.

PRODUCTION

The shoe industry, which began to appear as a small-size industry in 1950, is a well-developed industry now. Especially in the 1980s, significant investments in machinery parks were made and now, over 15% of the sector has completed its industrialization process. About 70% of the production in the sector is carried out by semi-mechanized production processes and almost 15% of production is hand-made.

According to Ministry of Science Industry and Technology statistics of 2015, the footwear industry¹ employs 43.499 people and the industry has about 2.544 companies. Almost 50% of the total number of companies is active in Istanbul. Konya, Gaziantep, İzmir, Ankara, Manisa, Hatay are other important shoe production centers in Turkey.

According to Turkish Statistical Institute statistics of 2014, Turkey's shoe production reached more than 325 million pairs, including sneakers, boots, plastic shoes and slippers.

The footwear sector relies on Turkish-made shoe production machinery, as well as shoe parts. The share of the shoe parts industry in the total shoe industry production is around 5% and production is quite diversified. The soles, heels, casting molds and the welt of the shoes are exported. The shoe parts industry is located in İzmir and the Aegean region, Konya, Gaziantep and in particular Istanbul.

The military boots, work and safety shoes production in Turkey have developed significantly in recent years. These sectors make production according to international standards, and shoes with the CE mark are exported to the European countries.

¹ NACE Code: 1520

The footwear sector closely follows the latest trends in the fashion world. Turkish shoe companies prepare their own collections for every season according to fashion trends both in Turkey and the world.

The industry is now concentrating its efforts on training and design. In this context, with the initiative of shoe industry, the Turkish Shoe Industry Research, Development and Education Foundation (TASEV) was established in 2001. In order to meet the need of qualified personal in shoe design, a new department of education, “The Shoe Design Department” has been opened at Mimar Sinan University in Istanbul, which offers two-year courses. In addition to these, every year, various shoe design competitions are being organized in order to discover new talents in the field of design.

EXPORTS

Today the Turkish footwear sector has the capacity of creating its own brands and fashion. The performance of the sector largely depends on exports. The Turkish shoe sector had an export value of US\$ 670,5 millions in the year 2015.

Major markets for the Turkish made shoes are Iraq, the Russian Federation, Lithuania, Germany, Saudi Arabia, United Kingdom, U.A.E, Algeria and Italy.

Footwear Exports of Turkey by Countries (US\$)

COUNTRIES	2014	2015	Change (2014/2015)
IRAQ	109.340.059	116.487.133	6,50%
RUSSIAN FEDERATION	111.197.573	69.683.397	-37,30%
GERMANY	39.819.802	36.229.332	-9,00%
SAUDI ARABIA	38.152.500	33.300.236	-12,70%
ENGLAND	32.257.027	22.153.265	-31,30%
U.A.E	8.098.971	20.446.487	152,50%
ALGERIA	17.803.326	18.246.086	2,50%
ITALY	16.714.461	17.626.226	5,50%
HOLLAND	7.469.693	16.806.636	125,00%
LIBYA	14.399.123	16.758.003	16,40%
ROMANIA	12.555.493	15.201.190	21,10%
FRANCE	13.840.480	14.445.072	4,40%
UKRAINE	29.355.057	13.170.014	-55,10%
ISRAEL	11.516.254	12.989.424	12,80%
BULGARIA	13.554.863	12.016.259	-11,40%
IRAN	6.335.937	11.680.146	84,30%
TURKMENISTAN	11.305.606	10.416.559	-7,90%
AZERBAIJAN	14.015.944	10.311.536	-26,40%
GREECE	10.400.146	9.311.219	-10,50%
T.R.N.C.	8.595.867	8.683.146	1,00%
OTHER	192.529.876	184.582.032	-4,10%
TOTAL	719.258.058	670.543.398	-6,80%

Source: Ministry of Economy

TRADE FAIRS

The Turkish footwear sector takes part in important international fairs and exhibitions abroad. GSD Shoe Fair – Düsseldorf / Germany, Motexha Spring Fair – Dubai / U.A.E., Mosshoes Moscow / Russia, Micam Shoeevent / Milano and Lineapella - Italy are the most attended ones.

As an important footwear producer/exporter country, many fairs are also held in Turkey in the related sector every year. Major fairs in the Turkish footwear industry in 2016 and 2017 are as follows:

Trade Fairs in Turkey

Fair	City	Organizer	Date
Leather Technologies, Leather Products, Leather Garments, Footwear	Antalya	Artı	06.12.2016-08.12.2016
Leather Technologies, Leather Products, Leather Garments, Footwear	Gaziantep	Akort	14.12.2016-17.12.2016
MAYFU Manisa	Manisa	SNS	02.02.2017-05.02.2017
SHOEXPO İzmir	İzmir	İZFAŞ İzmir	20.02.2017-23.02.2017
Aymod 18	İstanbul	Pozitif	05.04.2017-08.04.2017
Eksposhoes 3-İstanbul	İstanbul	EKS	24.04.2017-27.04.2017
Aysaf 18	İstanbul	Pozitif	03.05.2017-06.05.2017
Gapshoes 25	Gaziantep	Akort	19.07.2017-22.07.2017
MAYFU Manisa 4	Manisa	SNS	03.08.2017-06.08.2017
SHOEXPO İzmir 42	İzmir	İZFAŞ İzmir	20.09.2017-23.09.2017
AYMOD 19	İstanbul	Pozitif	04.10.2017-07.10.2017
Eksposhoes 4-İstanbul	İstanbul	EKS	07.11.2017-10.11.2017
Aysaf 19.	İstanbul	Pozitif	15.11.2017-18.11.2017
Gapshoes 26	Gaziantep	Akort	13.12.2017-16.12.2017

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

USEFUL LINKS

- Aegean Exporters' Associations
www.egebirlik.org.tr

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