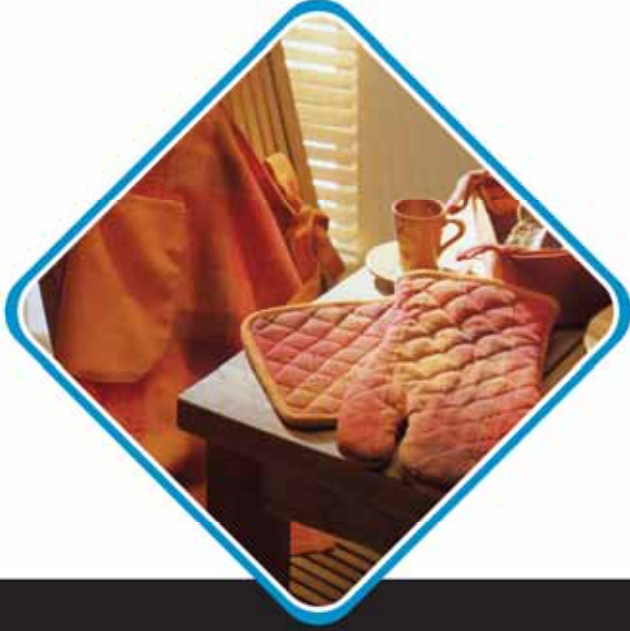




REPUBLIC OF TURKEY
MINISTRY OF ECONOMY



INDUSTRY



HOME TEXTILES



TURKEY
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HOME TEXTILES IN TURKEY

PRODUCTION

The Turkish home textile industry as a subsector of the Turkish textile industry, which is the world's fourth largest supplier and the EU's second largest supplier, has now a significant role in world trade and capacity to meet the high standards of all sophisticated consumers.

Almost all kinds of home textiles are produced in Turkey and may be listed by export value as follows: towels, bed sheets, bed spreads, curtains, blankets, pillows, quilts, cushions, eiderdowns, table linens, tulle, lace, goblen, flander, aubusson, wall hangings and sleeping bags.

The Turkish home textile industry is one of the world leaders with its wide range of products and superior quality in home textile production, especially in the production of towels, bed sheets and covers, curtains, tulle, embroidery, guipure and quilt covers. Turkey has the largest machine park for the production of both embroidery and guipure in the world. Europe's largest factory producing quilt covers is in Turkey. The Turkish home textile industry has also acquired the latest technology with a high production capacity, a highly skilled labor pool, and design and fashion capabilities. In addition, the industry has managed to reduce the cost of production below the world average while it has increased the quality of its products. Therefore, with a huge production capacity, high quality and strong competitiveness, Turkey was among the world's top three suppliers of towels, bed sheets, bedspreads and curtains in 2009. In the same way, Turkey was the largest supplier of EU in towels, bed sheets, table clothes, bedspreads and curtains in 2009.

In Turkey, the towel sector has traditional roots and its towels are known as "Turkish Towels" worldwide. Today the Turkish towel sector has competitive power in international markets in terms of jacquard and embroidery technologies. Lace, which is commonly used in many textile applications, especially in home textiles, is originally a Turkish handicraft. It is an embroidery art reaching back to the mid 1500s and crowned by the labor of Turkish women. It is an outstanding handicraft with its traditional taste and motifs in different colors and lines, which are now reflected in modern home decoration. Turkish home textile producers are mainly located in Istanbul, Denizli, Bursa, Tekirdag, Izmir, Gaziantep, Kayseri and Usak. Towel and bathrobe producers are concentrated in Denizli and Bursa, voile producers in Istanbul and Bursa, and blanket producers in Usak. Many of the producers in these cities have integrated their production process from yarn and fabric production to product design, dyeing, finishing and sewing in order to obtain the best quality in every stage of production.

Denizli is the manufacturing center of toweling sector city is mostly concentrated on toweling sector. 187 companies in Denizli manufacture cotton towels and bathrobes. Such a manufacturing facility on one product group in the same area is a success story and a good example of the cluster development. In Denizli, towels and bathrobes are manufactured from Aegean cotton which is the finest cotton in the world. These towels and bathrobes are well known throughout the world with their extraordinary softness, absorbency and warmth. Their extraordinary pile thickness and density give towels and bathrobes these superior features. In addition, the more these towels and bathrobes are washed, the softer and more absorbent they become, contrary to the ordinary products. That's why Denizli on its own has a major share in world's cotton towel and bathrobe exports. About 90% of these products are exported to all over the world. "Turkish Towels

and Bathrobes”, especially the ones from Denizli, are not used only at homes but also presented by 5 or 4 star hotels in all over the world as a quality service sign. Moreover, visitors of these hotels would consider a negative point in their services if “Turkish Towels and Bathrobes” were not kept in bathrooms, sport centers, saunas and Turkish baths.

Bursa is one of the most important manufacturing centers in the textile field in the world and it is mostly concentrated on the manufacturing of curtains, curtaining and upholstery fabrics, decoration fabrics, bedding products, towels and bathrobes as well as other textiles. There are hundreds of companies which are active in manufacturing and trading on all kinds of textiles in Bursa. Many of these companies have been organized very well and come together in “Bursa International Textile and Shopping Centre”, called Buttım in short. In Buttım, there are about 850 textile companies, most of which are active in the sector of home textiles, curtaining and upholstery fabrics. In Buttım, there are about 320 showrooms where every kind of home textiles and textile products are presented to thousands of national and international visitors. Buttım is such a huge center that it has a daily visitor capacity of 20 thousand. Therefore, visitors abroad looking for upper quality and a wide range of home textiles, curtains, curtaining and furnishing fabrics etc. should not go back home without visiting Buttım.

Besides large-scale firms, there are many small and medium sized companies scattered all around the country. In the rural areas around some cities like Denizli, Mugla and Kastamonu, the production of traditional fabrics is still widespread, and recently they have been used in the production of home textiles. One of these traditional fabrics having worldwide fame is the "Buldan Fabric", from the Buldan province of Denizli. With its characteristic designs, it is unique and carries the heritage of the past into the present as it is woven on traditional hand looms. This fabric, which has a completely natural look and basic textile characteristic due to its being made of pure cotton, is widely used both in traditional and modern home decoration. Another traditional fabric is "Selalmaz Çemberi" which takes its name from Selalmaz, a region in Kastamonu. This fabric is also obtained from pure cotton yarn and woven on hand looms. It is a very thin fabric like tulle. It is a difficult fabric to weave that one can only weave one meter per day. Due to its outstanding originality it is used widely in-home decoration as well as in clothing. "Azdavay Çemberi" is another famous fabric woven in Azdavay, a town of Kastamonu. It is made from linen or pure cotton and it is a very original hand woven fabric. This fabric like Selalmaz Çemberi, is woven loose or dense. It is used widely in home decoration and clothing production. Since all of these traditional fabrics are natural, made of pure cotton or linen without using any chemical dyes, they are environmentally friendly. Therefore, there is considerable demand for home textiles made of these fabrics in international markets.

Today the Turkish home textile industry is aware of the trend in international markets towards the increasing demand for healthier and more environmentally friendly products and quickly adapts itself to developments in legal and technical regulations. Many manufacturers in the sector are able to produce with quality and environment management systems, e.g. ISO 9000 series. Additionally, some companies in the home textile sector have private Eco labels.

In a rapidly changing world, the home decoration field is very sensitive to all changes. That's why the creation of collections with innovative and modern designs and motifs in addition to the quality of the product is essential. Turkish home textile manufacturers are very conscious about fashion creation and design, which enables them to gain a special place in international markets. New and modern designs and unique motifs, all created by

Turkish designers, keep a finger on the pulse of world home decoration fashion and meet most tastes and preferences.

EXPORTS

Besides meeting domestic demand in Turkey, the Turkish home textile sector with its high potential in the export market and its wide range of products and superior quality is an important export earner for the country. The sector exports about 60% of its production. According to the International Trade Center's (ITC) statistics, Turkey was the fourth largest exporting country in home textiles with a value of US\$ 2,7 billion in 2010.

With its fashion products, the advanced technology of production and quality of products, Turkey has been increasing her share in the main markets, especially in the European market. Therefore, prominent world suppliers have started to cooperate with Turkish manufacturers for joint production in the home textile field.

In recent years, Turkish companies in many consumer goods sectors such as clothing, home textile, carpets, footwear, leather clothing and goods, furniture and jewelry have been very active in retailing sector abroad and had stores over 1,700 worldwide. The number of newly established stores abroad has been increasing day by day and expected to reach 5,000 until the year 2012. Home textile sector ranks second with 280 stores in terms of the number of stores abroad, following the clothing sector which has 1,350 stores.

Turkey's Home Textile Exports (US\$ 1,000)

Product Name	2009	2010	2011	Change (%) 2011/10	Share (%) 2011
Towels, Bathrobes and Dressing Gowns (Including toilet and kitchen linens)	727.472	774.863	824.959	6,5	27,8
Bed Linens	472.561	500.291	582.228	16,4	19,6
Furnishing and Curtain Fabrics	466.745	477.838	521.192	9,1	17,5
Other Home Textile Products	334.125	356.396	376.075	5,5	12,7
Bed Spreads and Other Furnishing Articles	158.827	211.571	274.973	30,0	9,3
Curtains, Drapes and Interior Blinds	161.446	172.250	172.007	-0,1	5,8
Tulles and Crocheted Fabrics	47.132	54.194	72.809	34,3	2,4
Blankets	56.712	41.386	53.807	30,0	1,8
Sleeping Bags, Pillows, Quilts	44.886	51.613	51.411	-0,4	1,7
Table Linens	28.860	31.120	42.058	35,2	1,4
Hand-Woven Tapestries	17	52	292	465,4	0,0
Total	2.498.784	2.671.573	2.971.811	11,2	100,0

Source: Ministry of Economy

The main export products in 2011 were towels, bathrobes, dressing gowns, bed linens, furnishing and curtain fabrics, and bed spreads. The European countries are the most important markets for Turkey's home textile exports. A large quantity of home textiles is exported to Germany. The other main markets are Russia, USA, France, Iran, the U.K., Italy and the Netherlands.

Major Export Markets in Home Textiles (US\$ 1,000)

Countries	2009	2010	2011	Change (%) 2011/10	Share (%) 2011
Germany	502.571	575.226	694.639	20,8	23,4
Russia	214.421	260.990	301.555	15,5	10,1
USA	197.353	211.231	220.817	4,5	7,4
France	153.383	180.925	197.491	9,2	6,6
Iran	100.888	145.836	147.562	1,2	5,0
United Kingdom	183.501	143.869	140.094	-2,6	4,7
Italy	125.637	121.051	126.644	4,6	4,3
Netherlands	82.554	103.409	117.977	14,1	4,0
Poland	84.558	72.919	79.243	8,7	2,7
Ukraine	37.825	43.677	63.613	45,6	2,1
Belgium	54.256	54.903	56.830	3,5	1,9
Spain	58.749	50.400	50.916	1,0	1,7
Austria	49.483	44.338	48.804	10,1	1,6
Iraq	44.933	29.620	38.341	29,4	1,3
Greece	60.977	44.878	34.977	-22,1	1,2
Romania	45.857	39.755	32.682	-17,8	1,1
Switzerland	23.897	28.828	32.062	11,2	1,1
Kazakhstan	22.389	38.740	30.557	-21,1	1,0
Israel	21.322	22.508	29.984	33,2	1,0
China	15.205	18.862	27.733	47,0	0,9
Other	419.026	439.606	499.291	13,6	16,8
Total	2.498.784	2.671.573	2.971.811	11,2	100,0

Source: Ministry of Economy

TRADE FAIRS OF 2012-2013

All of the trade fairs held in Turkey related to the home textiles industry are listed at the <http://www.fuarrehberi.org.tr> website which is an official website of the Union and Chambers of Commodity Exchanges of Turkey (TOBB). Some of the trade fairs related to the home textiles industry are listed below.

- **Evtteks 19th Istanbul Home Textiles Exhibition, Istanbul, May 2012-2013**
(Curtains & Tullies, Bed linen & Blanket, Furniture & Upholstery, Kitchen textiles, Bathroom products, Carpet, Wall Covering, Solar-protective materials, Design, Technology, Services, Contract, Raw materials & textile inputs, Trade Publications)
www.cnrevteks.com
- **Adana Furniture - Decoration Fair, Adana, September-October 2012-2013**
(Home and Office Furniture, Decoration, Lighting, Glassware, Carpet, Home textile, Garden, Home Electronics and Accessories Fair)
- **MEÇEF - Mersin Furniture, Home Textile and Consumer Goods Fair 2012, Mersin, September 2012**

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 Home Textile Industrialists' and Businessmen's Association
www.tetsiad.org
- Turkish Textile Employers' Association
www.tekstilisveren.org
- United Brands Association of Turkey
www.birlesmismarkalar.org.tr
- The Association of the Registered Trademarks
www.tescillimarkalar.org.tr
- Osmanbey Textile Manufacturers Association
www.otiad.org.tr
- Laleli Industrialists and Businessmen Association
www.lasiad.org.tr
- Merter Industrialists and Businessmen Association
www.mesiad.org.tr



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Prepared by

General Directorate of Exports

Address: İnönü Bulvarı No:36
06510 Emek
Ankara - Turkey

www.economy.gov.tr

Turkey Contact Point



+90 312 444 43 63