



REPUBLIC OF TURKEY
MINISTRY OF ECONOMY



INDUSTRY



TECHNICAL TEXTILES AND NONWOVENS



TURKEY

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TECHNICAL TEXTILES AND NONWOVENS INDUSTRY IN TURKEY

PRODUCTION

Technical Textiles and Nonwovens is the most developing and promising sector in the global textile industry. The production and consumption of technical textiles and nonwovens has gained great economic value in the last decade.

The demand for technical textiles and nonwovens is directly related to overall economic developments and textile technology. The increase in GDP per capita in Turkey in recent years has fueled demand for technical textile and nonwoven products such as feminine hygiene products, diapers, medical textiles and disposable products. In addition, rapid growth and the requirements in the automotive, construction, filtration, agriculture and chemical industries have stimulated demand for technical textiles and nonwovens.

Today, many sophisticated, functional, high-tech and high performance textiles are produced in Turkey including waterproof, windproof, breathable, flame retardant, anti-bacterial fabrics and garments, tire cord fabrics, military and protective wear.

The production capacity in Turkey for nonwovens is over 110,000 metric tons per year. Istanbul, Bursa, Gaziantep, Kocaeli and Tekirdağ are the major cities in the production of technical textiles and nonwovens.

During the past decade, an increasing number of Turkish companies have moved into technical textiles and nonwovens production because of the high value added of the products and less vulnerability to price changes. Both production volume and the variety of products are continuing to increase. There were 9 companies which dealt with technical textiles and nonwovens among Turkey's 500 largest companies in 2007.

There are more than 150 companies manufacturing technical textiles and non-woven in Turkey. More than 20 large companies produce nonwoven roll goods. Most large-scale Turkish nonwoven and technical textile companies are members of the European Disposables and Nonwovens Association-EDANA.

The major end-user sectors for technical textiles and nonwovens in Turkey are automotive, packaging, hygiene, medical supplies, construction, clothing, military, agriculture and filtration.

Turkey is an important producer of tire cord fabrics and industrial yarns.

Some Turkish companies have formed joint ventures with foreign technical textile firms, especially in the production of technical fabrics.

Turkey is one of the world leaders in big bag (FIBC) production and ranked second in world big bag (FIBC) exports in 2010 with a share of 18,3%.

There is a suitable infrastructure for technical textiles and nonwovens which is growing and developing in terms of technology, human resources and know-how in Turkey. The technical textile industry in Turkey has the benefit of a well-established textile infrastructure, strong textile training and research institutions, a skilled workforce, the

availability of raw materials and a large domestic market. The Scientific & Technological Research Council of Turkey (TUBITAK) and its subsidiary organizations, the Marmara Research Center (MAM) and the Bursa Test and Analysis Laboratory (BUTAL) provide technical, testing and scientific assistance to the sector. TUBITAK provides research and development aid to support companies which are conducting R&D projects, regardless of the size of the company. In addition, a National Nano-technology Center has started operating at Bilkent University in Ankara.

EXPORTS

In 2011 the total value of technical textiles and nonwovens exports was estimated to exceed US\$ 1.6 billion. The main export products in 2011 were big bags (FIBC), nonwovens, tire cord fabrics, technical fabrics, safety seat belts, sacks, bags, packing of strip plastic materials and glass fibers and articles. The EU (Germany, France, Italy, the UK, and Spain), the Russian Federation, the USA, and Romania are the most important markets for Turkish technical textiles and nonwoven sectors.

Although all technical textiles products cannot be identified in the Harmonized System, the major items are given in the table below.

Turkey's Technical Textiles and Nonwovens Exports by Major Product Groups (US \$ 1000)

Product Code	Product Name	2009	2010	2011	Change (%) 2011/10	Share (%) 2011
630532	Flexible Intermediate Bulk Containers (FIBC)	192.633	244.805	284.876	16,4	17,4
5603	Nonwovens, whether or not impregnated, coated, covered or laminated	104.337	145.833	226.723	55,5	13,8
5902	Tyre cord fabrics of high tenacity yarn of nylon or other polyamides, polyesters or viscose rayon	122.974	150.670	199.049	32,1	12,1
5903	Textile fabrics impregnated, coated, covered or laminated with plastics	90.144	99.516	110.176	10,7	6,7
870821	Safety seat belts	57.016	94.898	103.834	9,4	6,3
630533	Sacks, bags, packing, of strip plastic material	56.450	72.731	102.614	41,1	6,3
7019	Glass fibres (incl glass wool) and articles thereof	76.707	92.731	100.384	8,3	6,1
540219	High-tenacity filament yarn of nylon or other polyamides (excl. sewing)	64.082	86.300	95.728	10,9	5,8
870895	Safety airbags	53.306	64.527	74.025	14,7	4,5
5601	Wadding of textile materials & art thereof textile fibres	22.803	37.291	42.724	14,6	2,6
540720	Woven fab obtained from strip/the like of synthetic textile materials	22.766	33.793	40.890	21,0	2,5
5602	Felt, w/n impregnated, coated, covered or laminated	18.469	25.174	31.287	24,3	1,9
6306	Tents & camping goods, tarpaulins, sails for boats, etc.	14.954	22.566	25.375	12,5	1,5
5907	Textile fabric impreg;painted canva (eg. theatrical scenery)	19.889	16.590	21.631	30,4	1,3
5807	Label, badge & sim art of textiles	16.102	18.431	18.927	2,7	1,2
Other		135.296	151.493	163.063	7,6	9,9
Total		1.067.927	1.357.348	1.641.305	20,9	100,0

Source: Ministry of Economy

Major Export Markets in Technical Textiles (US\$ 1000)

	Country	2009	2010	2011	Change (%) 2011/10	Share (%) 2011
1	Germany	139.943	161.680	186.513	15,4	11,4
2	France	94.220	141.327	159.727	13,0	9,7
3	Russia	52.434	65.064	88.348	35,8	5,4
4	Italy	58.000	69.610	86.840	24,8	5,3
5	USA	40.521	62.717	73.377	17,0	4,5
6	Uk	47.886	52.600	64.141	21,9	3,9
7	Spain	37.894	61.327	60.618	-1,2	3,7
8	Netherlands	34.031	39.599	53.857	36,0	3,3
9	Iran	35.595	29.040	46.601	60,5	2,8
10	Romania	43.747	42.382	45.220	6,7	2,8
	Other	483.657	632.001	776.064	22,8	47,3
	Total	1.067.927	1.357.348	1.641.305	20,9%	100,0%

Source: Ministry of Economy

A monthly issued magazine in English and Turkish, named Nonwoven Technical Textiles Technology Magazine, is available since 2003. For detailed information please visit <http://www.nonwoventechnology.com>

TRADE FAIRS OF 2012-2013

All of the trade fairs held in Turkey related to the technical 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 technical textiles industry are listed below.

- **HIGHTEX, Istanbul**, Technical Textiles & Nonwovens and Weaving Technologies Trade Fair
- **International Istanbul Yarn Fair, Istanbul, May-June**, Yarn Trade Event. Cotton Yarns, Elastic Yarns, Wool Yarns, Polyester Yarns, Metallic Yarns.

USEFUL LINKS

- The Scientific and Technological Research Council of Turkey
www.tubitak.gov.tr
- 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
- Ege University, Faculty of Engineering, Textile Engineering Department
www.tubitaktam.ege.edu.tr
- The Istanbul Textile Research and Development Center (ITA)
www.itaarge.com
- Bursa Textile and Confection R&D Center (BUTEKOM)
www.butekom.com



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