



REPUBLIC OF TURKEY
MINISTRY OF ECONOMY

INDUSTRY



FOOTWEAR



TURKEY
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FOOTWEAR IN TURKEY

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. At present, there are three organized leather industry zones in Turkey. In addition, eight organized leather industry zones are under construction. 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 for 2011 was about US\$ 1.262 million.

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 Turkish State Institute of Statistics, the footwear industry employs 26.954 people and the industry has about 4.753 companies which are manufacturing various shoes and slippers. Almost 50% of the total number of companies is active in Istanbul. Konya, Ankara, Gaziantep, Manisa, Denizli, Adana, Malatya and Corum (Iskilip) are other important shoe production centers in Turkey.

The production capacity of the 33 leading companies in the sector is 328.100 pairs daily. In addition, there are many small and medium-size establishments in the sector.

Turkey's shoe production reached 212 million pairs. Almost 26% of the production consists of leather shoes. In addition, there has been a rapid increase in the manufacture of 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 Izmir 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.

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 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\$ 441 millions in the year 2011.

Major markets for the Turkish made shoes are the Russian Federation, Iraq, Saudi Arabia, Germany, Bulgaria, the United Kingdom, France, Italy, the Netherlands and Romania.

Footwear Exports of Turkey by Countries (US \$)

Countries	2009	2010	2011
The Russian Federation	52.258.839	101.531.319	95.416.241
Iraq	30.912.526	44.598.310	58.985.130
Saudi Arabia	21.582.401	25.457.962	28.935.714
Germany	13.947.534	17.664.723	20.232.289
Bulgaria	9.302.012	12.584.779	14.602.912
The United Kingdom	13.229.356	12.023.414	12.534.151
France	10.217.561	16.108.070	10.971.517
Italy	7.255.374	9.043.939	10.880.341
The Netherlands	13.699.721	13.348.440	10.596.619
Romania	9.580.051	10.747.473	10.329.649
Belgium	3.298.124	5.108.669	9.441.671
Greece	11.694.738	8.863.440	8.912.711
Kazakhstan	2.577.786	7.064.752	7.809.870
Kyrgyzstan	3.207.654	3.240.641	7.643.347
Azerbaijan	3.178.735	4.673.993	6.947.771
Northern Cyprus	4.552.747	6.699.674	6.897.096
Georgia	1.690.464	4.756.560	6.871.977
Israel	5.715.944	5.974.503	6.839.335
Turkmenistan	3.597.903	5.817.863	6.718.418
Oman	3.563.658	5.175.867	4.551.635
Albania	3.356.233	3.725.097	4.352.712
The United Arab Emirates	2.112.197	3.400.906	3.864.202
USA	1.472.679	2.172.927	3.836.835
Algeria	2.922.432	1.736.538	3.819.468
Switzerland	1.597.006	2.191.015	3.612.768
Ukraine	1.349.426	1.586.991	3.342.740
Tunisia	1.145.940	2.750.209	3.232.660
Hungary	3.357.332	2.865.642	2.964.521
Macedonia	3.436.618	3.439.877	2.954.731
Libya	2.249.553	2.177.374	2.922.571
Total	289.472.603	395.624.111	441.246.902

Source: Ministry of Economy

Shoes made with leather coated outer surface make up 50% of shoe exports and had a value of US\$ 200 million in 2011. Russia is currently the most important market of Turkish leather shoes. The second important group consists of rubber or plastic materials coated outer soles and surface with an export value of US\$ 100.9 million in 2010.

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 2012 are as follows:

Trade Fairs in Turkey

Fair	City	Organizer	Date
Ayakkabi Summer- Izmir Shoes, Bags And Accessories Fair	Izmir	http://www.izfas.com.tr	January 2012
GAPSHOES-14 th Footwear, Slipper, Saddlery And Footwear Industry Suppliers Fair	Gaziantep	http://www.akort.com	January 2012
AYSAF 8 th International Footwear Industry Suppliers Fair	Istanbul	http://www.pozitiffuarcilik.com	March 2012
AYMOD 8 th International Footwear Fashion Fair	Istanbul	http://www.pozitiffuarcilik.com	April 2012
Ayakkabi Winter-Izmir Shoes, Bags And Accessories Fair	Izmir	http://www.izfas.com.tr	June 2012
GAPSHOES WINTER 15 th Footwear, Slipper, Saddlery And Footwear Industry Suppliers Fair	Gaziantep	http://www.akort.com	July 2012
AYSAF 9 th International Footwear Industry Suppliers Fair	Istanbul	http://www.pozitiffuarcilik.com	October 2012
AYMOD 9 th International Footwear Fashion Fair	Istanbul	http://www.pozitiffuarcilik.com	November 2012

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

USEFUL LINKS

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



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