



REPUBLIC OF TURKEY
MINISTRY OF ECONOMY



INDUSTRY



FABRICS



TURKEY
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FABRIC INDUSTRY

Having the largest share in Turkish industrial production, the textile industry is one of the first established industries in Turkey. The sector comprises 20 thousand manufacturing companies and employs about 400 thousand employees. The fabric industry as a sub-sector of the huge Turkish textile industry has improved significantly in recent years, since the Turkish clothing and home textile industries have had a significant role in the world's clothing and home textile markets in the last two decades.

The Turkish fabric finishing sector has a level of processing all the capacity of grey fabric. This sector is equivalent to the European Union in terms of processing capacity, modern technology, qualified workforce, and especially product quality.

Today, the Turkish fabric industry has competitive advantages in international markets, particularly in terms of its technology, extensive product range and the quality, design and creativity of its products. In addition to its well-developed structure, it employs a highly skilled labor force. Also, the Turkish fabric industry has great flexibility and ability to modernize its production, and adapt itself to new technologies. This ability allows the industry to reduce its reaction time to changes in consumer demand in international markets. Thus, the Turkish fabric industry satisfies its customers by meeting all their needs with the quality of its products together with its strong service ability of quick response and on-time delivery. All these features have enabled Turkish fabric manufacturers and exporters to earn a good reputation in international markets.

PRODUCTION

The Turkish fabric industry, which produces almost all kinds of fabrics for apparel, home textiles, upholstery and technical applications, has a well-developed structure, especially in production based on cotton, wool and man-made raw materials.

A large amount of fabric production is based on cotton. The fabric industry based on cotton consists of two segments. One is composed of large scale companies which have production facilities integrated vertically in all stages of fabric production, from fiber processing, spinning and weaving to dyeing, printing and finishing. Many of them also have manufacturing facilities for ready-made goods such as clothing or home textiles. The other one is composed mainly of non-integrated companies on a small scale. These companies cooperate with the Turkish finishing industry, which is one of the vital sub-sectors of the Turkish textile industry.

The sector meets its raw material needs mostly from domestic sources. As an important world cotton grower, Turkey ranked sixth in the world production of cotton with around 954 thousand tons in 2010/11 term. Although Turkey is among main cotton growers in the world, domestic cotton does not meet the production demand of the country. Therefore, Turkey is the third largest cotton importer after China and Bangladesh.

As well as the cotton textile industry, the Turkish man-made textile sector is also a well-developed industry. Having the eighth largest capacity of synthetics in the world, Turkey has a large production potential for synthetic fabrics based especially on 100% polyester and polyester blends with cotton, viscose, nylon, polyamide, wool, linen and/or multi-blends of them. 62% of the companies in this sector have finishing plants and 75% of their raw material needs are met by domestic production.

Being the third largest mohair producer in the world, Turkey also has a strong wool industry. The majority of wool products meet the demand of clothing producers and exporters.

The fabric mills are mainly concentrated in Istanbul, Bursa, Adana, Denizli, Kahramanmaras, Izmir, Gaziantep, Tekirdag, Kayseri and Usak. Many of the integrated mills are located in Istanbul, Bursa, Kahramanmaras, Adana and Gaziantep.

Today, Turkish fabric manufacturers are aware of the increasing trend in international markets for healthier and more environment-friendly products, and have adapted themselves to these developments. Many Turkish fabric manufacturers have ecological labels for their products. Many of them have best known eco-labels like Oeko-Tex Standard 100, Organic Exchange, GOTS, etc.

Turkish fabric manufacturers are aware of the importance of quality, and many have national and international quality certificates.

EXPORTS

The total value of fabrics exported in 2011 was about US\$ 4.6 billion. The main products exported in 2011 were knitted fabrics, woven synthetic fabrics, and woven cotton fabrics. The export values of knitted fabrics, woven synthetic fabrics, and woven cotton fabrics were about US\$ 1.5 billion, US\$ 1.3 billion and US\$ 1.2 billion respectively.

Fabric Exports of Turkey (US \$ 1000)

Products	2009	2010	2011	Change (%) 2011/10	Share (%) 2011
Woven fabrics of silk or of silk waste	3.149,05	2.921,05	3.292,31	12,7	0,1
Woven fabrics of carded wool or of carded fine animal hair	9.636,41	3.574,71	2.161,16	-39,5	0,0
Woven fabrics of combed wool or of combed fine animal hair	86.495,14	92.690,84	104.186,05	12,4	2,3
Woven fabrics of coarse animal hair or of horsehair	1.144,69	2.454,36	3.172,63	29,3	0,0
Woven cotton fabrics, 85% or more cotton, weight less than 200 g/m2	262.049,95	270.541,84	285.704,43	5,6	6,3
Woven cotton fabrics, 85% or more cotton, weight over 200 g/m2	444.494,41	484.057,08	559.631,25	15,6	12,2
Woven cotton fabrics, less than 85% cotton, mxd with manmade fibers, weight <200g/m2	107.774,40	114.326,00	130.373,64	14,0	2,9
Woven fabrics of cotton, less than 85%, mxd with man made fibre, weight >200g/m2	74.590,40	99.902,58	168.083,34	68,2	3,7
Woven fabrics of cotton, nes	9.659,67	19.196,09	10.478,42	-45,4	0,2
Woven fibres of flax	13.187,71	15.324,82	18.278,89	19,3	0,4
Woven fabrics of jute or of other tex bast fibres of hd no 53.03	560,18	532,33	173,39	-67,4	0,0
Woven fabric of other vegetable textile fibre & woven fabric of paper yarn	69,45	268,75	336,38	25,2	0,0
Woven fabrics of synth. filam yarn (incl. hd no 54.04)	696.358,14	731.108,16	836.515,03	14,4	18,3
Woven fabrics of synth. filam yarn (incl. hd no 54.05)	47.767,64	54.116,87	68.059,19	25,8	1,5
Woven fabrics of synth. staple fibre (> 85% of such fiber)	9.793,27	11.166,54	11.744,64	5,2	0,3
Woven fab of synth. staple fib (< 85% of such fiber), mixed with cotton	33.890,60	34.236,87	17.923,04	-47,6	0,4
Woven fab of synth. staple fib (> 85% of such fiber), mxd with cotton (wt >170g/m2)	7.896,48	8.864,34	4.726,13	-46,7	0,1
Woven fabrics of synthetic staple fibres, nes	182.466,32	185.753,84	210.684,20	13,4	4,6
Woven fabrics of artificial staple fibres	59.026,40	79.954,65	137.375,57	71,8	3,0
Nonwovens, w/n impregnated, coated, covered or laminated	104.336,55	145.833,39	226.722,52	55,5	5
Woven pile & chenille fabrics	236.236,34	262.888,40	267.901,40	1,9	5,9
Terry toweling	11.647,38	14.603,67	17.639,81	20,8	0,4
Gauze, o/t narrow fabrics of hd 58.06	1.257,75	784,87	244,61	-68,8	0,0
Woven fabrics of metallised yarn, for apparel, etc, nes	46,1	169,52	195,66	15,4	0,0
Knitted fabrics	978.721	1.265.851	1.483.691	17,2	32,5
Total	3.382.255,40	3.901.122,93	4.569.294,59	17,1	100,0

Source: Ministry of Economy

European countries, including Italy (9,9%), Germany (5,3%), Romania (4,8%) and Poland (4,2%), and Russia (16,2%) are the most important markets for Turkey's fabric exports.

Major Export Markets in Fabrics (US \$ 1000)

Countries	2009	2010	2011	Change (%) 2011/10	Share (%) 2011
Russia	434.471	622.404	740.590	19,0	16,2
Italy	315.681	358.488	452.717	26,3	9,9
Germany	177.906	198.611	239.920	20,8	5,3
Romania	201.123	214.360	219.578	2,4	4,8
Poland	160.126	153.829	190.466	23,8	4,2
Iran	132.095	149.709	162.181	8,3	3,5
Tunisia	88.525	126.357	152.241	20,5	3,3
Morocco	94.293	115.617	142.034	22,8	3,1
Bulgaria	150.848	141.349	141.434	0,1	3,1
United Kingdom	98.619	108.388	129.934	19,9	2,8
USA	74.873	95.992	116.973	21,9	2,6
Egypt	76.739	103.369	115.189	11,4	2,5
Ukrain	63.086	79.565	111.871	40,6	2,4
France	90.024	90.279	101.024	11,9	2,2
Spain	72.938	80.370	95.934	19,4	2,1
Greece	91.255	73.765	92.701	25,7	2,0
Mersin Free Zone	45.181	58.024	72.540	25,0	1,6
Hong Kong	37.578	44.183	69.703	57,8	1,5
Netherlands	53.722	57.034	62.771	10,1	1,4
Serbia	75.960	66.564	61.759	-7,2	1,4
Other	847	963	1.098	14,0	0,0
Total	3.382.255	3.901.123	4.569.295	17,1	100,0

Source: Ministry of Economy

USEFUL LINKS

- Istanbul Textile and Apparel Exporters' Associations
www.itkib.org.tr
- Aegean Exporters' Associations
www.egebirlilik.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
- 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
- Turkish Home Textile Industrialists' and Businessmen's Association
www.tetsiad.org
- Turkish Textile Employers' Association
www.tekstilisveren.org
- The Associations of Denim Industrialist's and Businessmen's of Turkey
www.denimder.org.tr/eng/



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