

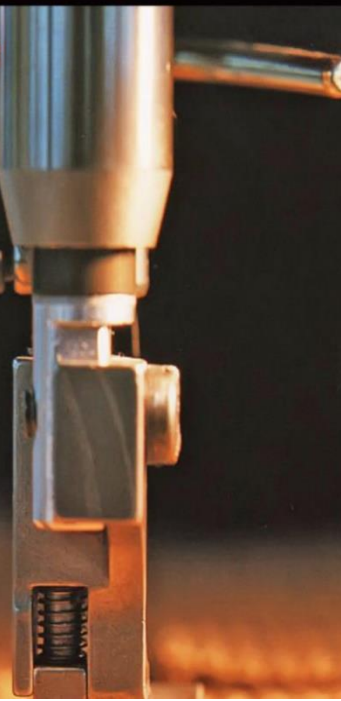


REPUBLIC OF TÜRKİYE
MINISTRY OF TRADE

INDUSTRY



CLOTHING



CLOTHING INDUSTRY

PRODUCTION

Textiles and clothing are among the most important sectors of the Turkish economy and foreign trade. These two sectors are the core of Turkish economy in terms of GDP contribution, share in manufacturing, employment, investments and macroeconomic indicators. These sectors had a 7,66% share in total export volume in 2022.

Türkiye is one of the main actors in the world clothing industry. The Turkish clothing industry with a share of 3.7% is the 6th largest supplier in the world, and the 3rd largest supplier of the EU. It has a share of 4,1% in world knitted clothing exports and it ranks 6th among the exporting countries. With a share of 3,3%, Türkiye ranks 7th among the woven clothing exporters in the world. The Turkish textile industry, which is listed 7th largest exporter in the world and is the 3th largest supplier to the EU.

In 41 years from 1980 to 2021, the production and export of the industry shifted from low value added commodities to high value added manufactured items and fashionable goods. With its qualified and educated human resources, design capacity, accumulation of know-how, investment in technology, dynamic and flexible production capacity, advanced sub industry in clothing sector, concern about quality, health and environment; the Turkish textile and clothing industry has a significant role in world trade with the capability to meet high standards, and can compete in international markets in terms of high quality and a wide range of products.

Istanbul: City of Fashion

Istanbul is proud of its designers, fashion and shopping centers where it has kept its unique Occidental-Oriental, old-meets-new, and East-meets-West characteristics. Istanbul is becoming a leading fashion and shopping center due to both foreign and local investments recently. The world's largest shopping centers are opening in Istanbul. Many tourists have added Istanbul to their itinerary for shopping. As a global sourcing hub for both Asia and Europe, Istanbul attracts a number of international buying offices, trading houses, major retailers and department stores. Istanbul Fashion Week is organized twice a year to gain recognition for Turkish designers and brands in national and international tribunes where they present their latest collections. Since Istanbul is becoming a fashion and shopping center, most of the companies have shifted their production facilities to the inner provinces. Izmir, Bursa, Ankara, Denizli, Gaziantep, Kayseri, Tekirdag, Adiyaman, Kahramanmaras and Adana are now major cities for textile and clothing production.

EXPORTS

Turkish clothing exports have continued to increase even after the expiration of the global textile quota system at the end 2004, as agreed under the World Trade Organization Agreement on Textiles and Clothing (ATC). The sector continues to maintain and enhance its competitiveness.

In 2022 the total value of clothing exports was US\$ 19.47 billion. Approximately 80% of the clothing exported is cotton clothing. Knitted clothing and accessories, with an export value

of US\$ 11.01 billion, had a share of 56.55% in total clothing exports, and woven clothing had a share of 43,45% with a value of US \$ 8.46 billion in 2022.

T-shirts and pullovers are the most important export products in knitted clothing sector. Exports of t-shirts and pullovers were US\$ 2.76 billion and US\$ 2.66 billion respectively in 2022. In addition, as the second largest manufacturer in the world, Türkiye's hosiery exports amounted US\$ 1.33 billion in 2022.

Knitted or Crocheted Clothing Exports of Türkiye (1.000 USD)

HS Code	Product label	Exported value in 2020	Exported value in 2021	Exported value in 2022	Change % (2021/2022)
6101	Men's or boys' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, ...	24.374	43.212	72.332	67,4%
6102	Women's or girls' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, ...	22.095	28.989	32.081	10,7%
6103	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches ...	376.167	629.226	740.744	17,7%
6104	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, ...	1.127.093	1.515.166	1.403.453	-7,4%
6105	Men's or boys' shirts, knitted or crocheted (excluding nightshirts, T-shirts, singlets and ...	169.274	220.929	361.066	63,4%
6106	Women's or girls' blouses, shirts and shirt-blouses, knitted or crocheted (excluding T-shirts ...	339.047	398.863	368.521	-7,6%
6107	Men's or boys' underpants, briefs, nightshirts, pyjamas, bathrobes, dressing gowns and similar ...	139.791	189.760	214.724	13,2%
6108	Women's or girls' slips, petticoats, briefs, panties, nightdresses, pyjamas, négligés, bathrobes, ...	280.097	357.787	302.417	-15,5%
6109	T-shirts, singlets and other vests, knitted or crocheted	2.302.830	2.702.589	2.759.552	2,1%
6110	Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted (excluding ...	1.989.524	2.609.952	2.661.889	2,0%
6111	Babies' garments and clothing accessories, knitted or crocheted (excluding hats)	215.825	284.257	278.318	-2,1%
6112	Track-suits, ski-suits and swimwear, knitted or crocheted	158.702	234.376	201.419	-14,1%
6113	Garments, knitted or crocheted, rubberised or impregnated, coated or covered with plastics ...	3.469	3.989	5.655	41,8%
6114	Special garments for professional, sporting or other purposes, n.e.s., knitted or crocheted	118.836	151.856	208.094	37,0%
6115	Pantyhose, tights, stockings, socks and other hosiery, incl. graduated compression hosiery ...	1.048.556	1.312.477	1.335.126	1,7%
6116	Gloves, mittens and mitts, knitted or crocheted (excluding for babies)	5.483	6.975	7.404	6,2%
6117	Made-up clothing accessories, knitted or crocheted; knitted or crocheted parts of garments ...	66.560	93.667	58.677	-37,4%
Grand Total		8.387.723	10.784.070	11.011.472	2,1%

Source: Trademap

“Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches etc” and “Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers etc” are the most important export products in woven clothing sector. In 2022 exports of these groups were USD 2.03 billion and US\$ 3.78 billion, respectively.

Woven Clothing Exports of Türkiye (1.000 USD)

HS Code	Product label	Exported value in 2020	Exported value in 2021	Exported value in 2022	Change % (2021/2022)
6201	Men's or boys' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, ...	139.194	178.887	207.961	16,3%
6202	Women's or girls' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, ...	100.557	159.991	170.230	6,4%
6203	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches ...	1.290.093	1.618.975	2.028.500	25,3%
6204	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, ...	2.523.670	3.416.172	3.781.501	10,7%
6205	Men's or boys' shirts (excluding knitted or crocheted, nightshirts, singlets and other vests)	403.004	489.965	634.957	29,6%
6206	Women's or girls' blouses, shirts and shirt-blouses (excluding knitted or crocheted and vests)	518.176	630.659	663.079	5,1%
6207	Men's or boys' singlets and other vests, underpants, briefs, nightshirts, pyjamas, bathrobes, ...	49.422	66.890	61.506	-8,0%
6208	Women's or girls' singlets and other vests, slips, petticoats, briefs, panties, nightdresses, ...	164.876	225.183	205.465	-8,8%
6209	Babies' garments and clothing accessories of textile materials (excluding knitted or crocheted ...	77.447	112.815	110.681	-1,9%
6210	Garments made up of felt or nonwovens, whether or not impregnated, coated, covered or laminated; ...	928.791	241.721	124.798	-48,4%
6211	Tracksuits, ski suits, swimwear and other garments, n.e.s. (excluding knitted or crocheted)	287.949	225.356	298.830	32,6%
6212	Brassieres, girdles, corsets, braces, suspenders, garters and similar articles and parts thereof, ...	49.916	62.980	79.363	26,0%
6213	Handkerchiefs, of which no side exceeds 60 cm (excluding knitted or crocheted)	1.236	1.445	1.472	1,9%
6214	Shawls, scarves, mufflers, mantillas, veils and similar articles (excluding knitted or crocheted)	51.841	58.537	68.286	16,7%
6215	Ties, bow ties and cravats of textile materials (excluding knitted or crocheted)	2.328	3.761	4.791	27,4%
6216	Gloves, mittens and mitts, of all types of textile materials (excluding knitted or crocheted ...	1.299	2.595	2.322	-10,5%
6217	Made-up clothing accessories and parts of garments or clothing accessories, of all types of ...	10.786	19.569	21.158	8,1%
Grand Total		169.657.940	225.264.314	254.171.899	12,8%

Source: Trademap

EU is the most important market for Türkiye's clothing exports. In 2022 Türkiye exported clothing of USD 11,86 billion to the EU, which was equivalent to 60,9% of Türkiye's total clothing exports. Main markets among the members of EU were Germany, Spain, UK and the Netherlands. Clothing exports to these countries were USD 9,56 billion, which was more than half of Türkiye's clothing exports to the EU.

Türkiye's Clothing Exports by Countries (USD)

Countries	2021	2022	Change % (2021/2022)
Germany	3.083.610	3.432.935	11,3%
Spain	2.690.665	2.537.815	-5,7%
United Kingdom	1.991.157	1.960.300	-1,5%
Netherlands	1.429.172	1.638.046	14,6%
France	876.734	1.005.272	14,7%
United States of America	690.590	822.729	19,1%
Italy	580.044	693.786	19,6%
Iraq	511.315	481.654	-5,8%
Denmark	440.596	480.638	9,1%
Israel	464.051	465.911	0,4%
Ukraine	202.910	428.906	111,4%
Poland	363.248	357.391	-1,6%
Russian Federation	273.934	337.678	23,3%
Belgium	331.418	330.551	-0,3%
Romania	225.721	267.279	18,4%
Sweden	259.776	265.843	2,3%
Kazakhstan	314.646	244.731	-22,2%
Libya, State of	209.600	238.531	13,8%
Serbia	176.181	173.710	-1,4%
United Arab Emirates	165.493	170.970	3,3%
Others	3.018.710	3.141.695	4,1%
Grand Total	18.299.568	19.476.370	6,4%

Source: Trademap

With its fashion-oriented and quality products, Türkiye has been increasing her share in the main markets, especially in the European market which has high standards and sophisticated customer needs. In 2022, Turkish companies exported to 200 countries in the world.

TRADE FAIRS IN TÜRKİYE

Many Turkish clothing companies have expanded their marketing and distribution channels in global markets by opening stores and chain stores all over the world. To increase awareness of Turkish fashion in international markets, they participate in many fashion shows and international fairs on abroad. In addition, the Turkish clothing products are exhibited in international and national fairs organized in Türkiye. Major fairs which will be organized in 2022 are:

- IF Wedding Fashion İzmir, International Wedding Dresses, Suits And Evening Gowns Fair, 21-24 November 2023 (Wedding Dresses, Suits and Evening Gowns and Accessories), <http://ifwedding.izfas.com.tr/home>
- Junioshow Bursa, 10-13 July 2023, <https://www.junioshow.com.tr/en/pre-registration-form>

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- CBME Türkiye, 41st International İstanbul Children Baby Maternity Industry Expo İstanbul, 13-16 December 2023 <https://www.cbmeturkiye.com.tr/en/visit/register-your-interest.html>

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
- Turkish Clothing Manufacturers Association
www.tgsd.org
- Aegean Clothing Manufacturers' Association
www.egsd.org.tr
- Turkish Textile Employers' Association
www.tekstilisveren.org
- The Fashion Designers Association of Türkiye
www.mtd.org.tr
- United Brands Association of Türkiye
www.birlesmismarkalar.org.tr
- The Association of the Registered Trademarks
www.tescillimarkalar.org.tr
- Turkish Knitwear Industrialists Association
www.trisad.org
- 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 Bridal Manufacturers and Exporters Association
www.gelinlik.org.tr
- Socks Manufacturer Association
www.csd.org.tr
- Turkish Fashion and Apparel Federation
www.mhgf.org.tr
- Türkiye Fair Guide
<http://fuarrehberi.org.tr/>



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www.trade.gov.tr

ihticari@ticaret.gov.tr

Call Center
+90 850 808 04 04