

TEXTILE and RAW MATERIALS

*Republic of Türkiye Ministry of Trade
Directorate General of Export*

Textile and Raw Materials

Having the largest share in Turkish industrial production, the textile and ready-wear sector is one of the first established industries in Türkiye. Fabric, yarn and home textile industries constitute the huge Turkish textile and raw materials industry that has improved significantly in the last decades. Especially Turkish fabric and home textile industries have had a significant role in the world's clothing and home textile markets in the last two decades. This sector is equivalent to the European Union in terms of processing capacity, modern technology, qualified workforce, and especially product quality.

Today, the Turkish textile and raw materials 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. Moreover, the sector 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 textile and raw materials 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 manufacturers and exporters to earn a good reputation in international markets.

World Textile and Raw Materials Foreign Trade

Textile production in international trade has emerged as an important segment since the Industrial Revolution. In 2020, Covid-19 negatively affected the textile industry as well as the other industries over the world. In 2022, with the inflationary pressures alongside with supply chain management crisis and increasing energy prices due to Russia-Ukraine War, textile exports decreased by 0,2% all over the world compared to the previous year and reached 331.8 billion dollars. When it is looked at the world trade of the textile sector, the leading exporter countries according to their share of the world market are China (38,4%), USA (6,2%), India (4,6%), Türkiye (4,0%) and Germany (3,8%). Based on the previous years exports, it is clearly seen that, while China's and USA's textile exports increased by respectively 2,5% and 21,1%, Türkiye's textile exports decreased by 2,3% in 2022 compared to the previous year and decreased to 115.7 billion dollars, it stays in the 4th rank with an 4% share from the world market.

Textile and Raw Materials Export by Countries

Country	2020	2021	2022	2021/2022	2022
	Value (USD 1.000)	Value (USD 1.000)	Value (USD 1.000)	Change	Share
China	156.017.296	148.188.633	151.879.524	2,5%	38,4%
United States of America	18.660.071	20.369.300	24.673.141	21,1%	6,2%
India	17.381.028	26.264.324	18.297.175	-30,3%	4,6%
Türkiye	12.342.286	16.163.088	15.799.194	-2,3%	4,0%
Germany	14.389.755	15.567.228	14.964.890	-3,9%	3,8%

Italy	10.087.420	12.477.752	13.952.400	11,8%	3,5%
Viet Nam	10.069.052	11.896.939	11.160.485	-6,2%	2,8%
Korea, Republic of	9.096.027	10.264.387	9.782.793	-4,7%	2,5%
Pakistan	7.420.051	9.615.399	9.183.347	-4,5%	2,3%
Taipei, Chinese	7.154.869	8.576.177	8.368.239	-2,4%	2,1%
Belgium	6.198.551	7.026.523	6.729.542	-4,2%	1,7%
Netherlands	6.165.093	7.238.868	6.654.474	-8,1%	1,7%
Japan	6.095.630	6.746.693	6.516.967	-3,4%	1,6%
Australia	2.148.947	4.392.949	5.792.075	31,8%	1,5%
France	4.737.392	5.579.325	5.661.831	1,5%	1,4%
Spain	4.174.389	5.266.286	5.173.263	-1,8%	1,3%
Brazil	3.929.463	4.322.574	4.646.727	7,5%	1,2%
Thailand	3.687.355	4.256.515	4.455.117	4,7%	1,1%
Indonesia	3.564.991	4.543.098	4.252.731	-6,4%	1,1%
Poland	3.347.347	3.911.586	3.945.022	0,9%	1,0%
Total of First 20 Countries	306.667.013	332.667.644	331.888.937	-0,2%	83,8%
Others	61.130.842	71.282.730	64.130.998	-10,0%	16,2%
Grand Total	367.797.855	403.950.374	396.019.935	-2,0%	100%

Source: TradeMap

Regarding to textile and raw materials imports; prominent countries are USA (with a 10,9% share), Vietnam (with a 7,1% share), China (with a 5,9% share), Germany (with a 4,4% share) and Bangladesh (with a 3,5% share) respectively. Compared to the previous year, Türkiye's textile and raw materials imports in 2022 increased to 12.7 billion dollars by the rate of 27,5% and it rose to the 6th place in the world.

Textile and Raw Materials Import by Countries

Countries	2020	2021	2022	2021/2022	2022
	Value (USD 1000)	Value (USD 1000)	Value (USD 1000)	Change	Share
China	1.399.866	1.770.495	2.530.750	42,9%	19,9%
United States of America	641.646	623.273	1.234.126	98,0%	9,7%
India	504.777	682.977	971.483	42,2%	7,6%
Brazil	350.336	512.269	646.175	26,1%	5,1%
Italy	450.344	509.074	618.431	21,5%	4,9%
Uzbekistan	243.107	502.916	594.727	18,3%	4,7%
Korea, Republic of	366.598	424.840	546.962	28,7%	4,3%
Egypt	301.706	352.017	456.859	29,8%	3,6%
Indonesia	254.455	328.541	375.972	14,4%	3,0%
Greece	286.069	515.734	372.190	-27,8%	2,9%
Germany	351.033	364.071	310.866	-14,6%	2,4%
Malaysia	192.437	217.526	304.355	39,9%	2,4%

Australia	7.377	103.095	262.348	154,5%	2,1%
Bangladesh	306.440	259.848	233.733	-10,1%	1,8%
Pakistan	184.951	205.140	232.189	13,2%	1,8%
Turkmenistan	143.981	260.485	228.554	-12,3%	1,8%
Azerbaijan	141.577	259.411	204.462	-21,2%	1,6%
Austria	125.443	170.661	198.058	16,1%	1,6%
Viet Nam	121.631	113.046	158.324	40,1%	1,2%
Spain	97.878	133.905	151.828	13,4%	1,2%
Total of List (First 20 Countries)	6.471.652	8.309.324	10.632.392	28,0%	83,6%
Others	1.300.246	1.672.975	2.090.080	24,9%	16,4%
Grand Total	7.771.898	9.982.299	12.722.472	27,5%	100,0%

Source: TradeMap

Looking at the world's major importers and exporters, it is revealed that developed countries do not actually leave the textile sector such as Germany and USA. It is observed that the largest textile importing countries are also textile exporters. It can be understood from the figures that developed countries still engage in production and trade of the textile and raw materials products. Spectacular changes in the decline of the India's exports and USA's rising exports are also worth to mention. Furthermore, Türkiye's increasing imports on textile and raw materials and declining exports are also another important topic compared to the previous years. In general, in addition to the global weakened demand due to inflationary pressures, rising cotton prices in India also discourage the downstream consumption.

Global cotton prices between 2017-2023



Source: TradingEconomics

Türkiye's Textile and Raw Materials Sector Foreign Trade

Considering the overall export performance of Türkiye's textile industry over the years, it was realized as 13 billion dollars in 2013, 12.3 billion dollars in 2017 and 16.1 billion dollars in 2021. On the other hand, with the contraction in the global textile industry because of the global inflationist pressures, rising cotton prices, increasing energy prices and supply chain management crisis were experienced in our exports of the textile and raw materials industry, as in all sectors. However, as a result of the global turbulences directly affecting the purchasing decisions of global brands, especially orders shifted from previous top exporters to countries which are meet both cotton demand and supply, such as USA or emerging competitors in textile and raw materials sector such as Australia, and with the negative effects of the global turbulences in 2022, our exports of the textile and raw materials sector decreased by 2.3% compared to the previous year and reached 15,8 billion dollars. Textile and raw materials sector is one of the sectors that have foreign trade surplus. The sector imports was realized as 9,9 billion dollars in 2013, 9,1 billion dollars in 2018 and 12,7 billion dollars in 2022. The sector imports, which has the same trend in recent decade, rose to 12,7 billion dollars by the rate of 27,4% compared to previous year.

	EXPORT		IMPORT	
	VALUE	CHANGE	VALUE	CHANGE
2013	13.014.267.530		9.914.377.973	
2014	13.409.155.428	3,0%	10.387.871.285	4,8%
2015	11.783.774.886	-12,1%	8.676.414.451	-16,5%
2016	11.793.763.991	0,1%	8.599.844.510	-0,9%
2017	12.318.595.399	4,5%	9.888.826.426	15,0%
2018	12.716.118.454	3,2%	9.165.262.417	-7,3%
2019	12.505.478.058	-1,7%	9.003.466.303	-1,8%
2020	12.332.387.992	-1,4%	7.750.781.561	-13,9%
2021	16.155.290.826	31,0%	9.962.904.762	28,5%
2022	15.790.095.767	-2,3%	12.696.856.685	27,4%

Source: Ministry of Trade

- Exports

When the exports of the textile and raw materials sector are analyzed on the basis of countries, to which we exported the most in 2022 were USA (with 11,1% share), Italy (with 7,4% share), Germany (with %7,4 share), United Kingdom (with 4,2% share) and Spain (with 3,7% share), respectively. On the other hand, our main trade partner, EU27 (except United Kingdom) countries, decreased by 5,6% in 2022 compared to the previous year and reached 6,3 billion dollars. Furthermore, it is seen that up to half of the Türkiye's total exports are made to EU countries. However, dramatic decrease of exports towards to EU-27 countries can be explained with decrease of the global demand due to ongoing global economic turbulences.

Exports based on selected sections

Section	2021	2022	2021/2022
	Value (in USD)	Value (in USD)	Change
50	5.924.363	1.677.082	-71,7%
51	87.870.725	88.647.065	0,9%
52	2.265.699.974	2.263.948.001	-0,1%

53	65.394.285	65.713.807	0,5%
54	1.871.300.675	1.883.196.992	0,6%
55	1.728.029.681	1.945.702.230	12,6%
56	1.073.428.568	1.126.841.510	5,0%
57	3.240.150.974	2.819.298.789	-13,0%
58	464.289.168	443.857.872	-4,4%
59	308.001.574	335.421.536	8,9%
60	2.156.428.102	2.052.268.267	-4,8%
63	2.894.697.100	2.765.199.698	-4,5%
Grand Total	16.161.215.189	15.791.772.849	-2,3%

Source: Ministry of Trade

Exports based on countries

Country	2021	2022	2021/2022	2022
	Value (USD)	Value (USD)	Change	Share
United States of America	2.085.454	1.756.466	-15,8%	11,1%
Italy	1.169.344	1.174.294	0,4%	7,4%
Germany	1.237.247	1.161.550	-6,1%	7,4%
United Kingdom	782.600	662.989	-15,3%	4,2%
Spain	520.904	590.543	13,4%	3,7%
Belarus	489.041	567.681	16,1%	3,6%
Russian Federation	369.393	507.452	37,4%	3,2%
Egypt	544.264	445.010	-18,2%	2,8%
France	387.473	403.863	4,2%	2,6%
Iran, Islamic Republic of	296.086	402.119	35,8%	2,5%
Netherlands	478.508	392.416	-18,0%	2,5%
Morocco	321.013	388.655	21,1%	2,5%
Bulgaria	550.176	378.715	-31,2%	2,4%
Poland	361.734	338.431	-6,4%	2,1%
Romania	325.400	317.860	-2,3%	2,0%
Iraq	292.838	300.407	2,6%	1,9%
Tunisia	250.498	284.619	13,6%	1,8%
Portugal	286.478	246.721	-13,9%	1,6%
Israel	247.974	240.107	-3,2%	1,5%
Greece	218.835	238.249	8,9%	1,5%
List Total (First 20 Countries)	11.215.260	10.798.147	-3,7%	68,3%
EU-27	6.664.122	6.293.386	-5,6%	39,8%
Grand Total	16.163.083	15.799.177	-2,3%	100,0%

Source: TradeMap

- **Imports**

When Türkiye's textile and raw materials sector imports is analyzed on basis of the countries, it is seen that China (with 19,9 % share), USA (with 9,7% share), India (with 7,6% share), Brazil (with 5,1% share) and Italy (with 4,9% share) were the most imported countries in 2022, respectively. Moreover, total imports of the most 20 imported countries constituted 83,6% of all world imports. On the other hand, it is also worth to note that Türkiye's imports are increased almost 28% compared to the previous years. Such spectacular increase is also caused by the global price increase on cotton. Furthermore, the floating exchange rate makes it difficult for producers to calculate their costs, causing disruptions in the production chain. When the amount of imports (kg) and import values (\$) are compared, it is understood that the increase in imports is not a real increase, but a nominal increase due to the increased prices of cotton on global markets.

Imports based on selected sections

Section	2021		2022		2021/2022	
	Net Weight (Kg)	Value in USD	Net Weight (Kg)	Value in USD	Change in Weights	Change in Value
50	369.020	19.387.509	297.898	25.623.226	-19,3%	32,2%
51	23.783.192	223.559.947	23.529.894	334.547.334	-1,1%	49,6%
52	1.570.412.387	3.714.927.093	1.512.960.890	4.841.968.489	-3,7%	30,3%
53	162.900.382	355.393.872	153.484.591	381.868.136	-5,8%	7,4%
54	832.897.107	2.268.569.515	891.566.342	2.882.094.767	7,0%	27,0%
55	716.308.607	1.692.588.346	792.832.939	2.256.136.179	10,7%	33,3%
56	83.682.660	393.814.314	73.797.175	426.058.255	-11,8%	8,2%
57	16.340.445	56.875.712	16.653.076	75.857.175	1,9%	33,4%
58	15.757.794	145.487.539	19.517.970	189.273.153	23,9%	30,1%
59	74.305.246	445.090.632	95.052.513	548.460.786	27,9%	23,2%
60	88.555.548	428.665.175	99.642.140	521.610.523	12,5%	21,7%
63	122.471.961	237.932.617	145.493.504	238.981.888	18,8%	0,4%
Grand Total	3.707.784.349	9.982.292.271	3.824.828.932	12.722.479.911	3,2%	27,5%

Source: Ministry of Trade

Imports based on countries

Countries	2021	2022	2021/2022	2022
	Value (USD)	Value (USD)	Change	Share
China	1.770.495	2.530.750	42,9%	19,9%
United States of America	623.273	1.234.126	98,0%	9,7%
India	682.977	971.483	42,2%	7,6%
Brazil	512.269	646.175	26,1%	5,1%

Italy	509.074	618.431	21,5%	4,9%
Uzbekistan	502.916	594.727	18,3%	4,7%
Korea, Republic of	424.840	546.962	28,7%	4,3%
Egypt	352.017	456.859	29,8%	3,6%
Indonesia	328.541	375.972	14,4%	3,0%
Greece	515.734	372.190	-27,8%	2,9%
Germany	364.071	310.866	-14,6%	2,4%
Malaysia	217.526	304.355	39,9%	2,4%
Australia	103.095	262.348	154,5%	2,1%
Bangladesh	259.848	233.733	-10,1%	1,8%
Pakistan	205.140	232.189	13,2%	1,8%
Turkmenistan	260.485	228.554	-12,3%	1,8%
Azerbaijan	259.411	204.462	-21,2%	1,6%
Austria	170.661	198.058	16,1%	1,6%
Viet Nam	113.046	158.324	40,1%	1,2%
Spain	133.905	151.828	13,4%	1,2%
List Total (First 20 Countries)	8.309.324	10.632.392	28,0%	83,6%
Others	1.672.975	2.090.080	24,9%	16,4%
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