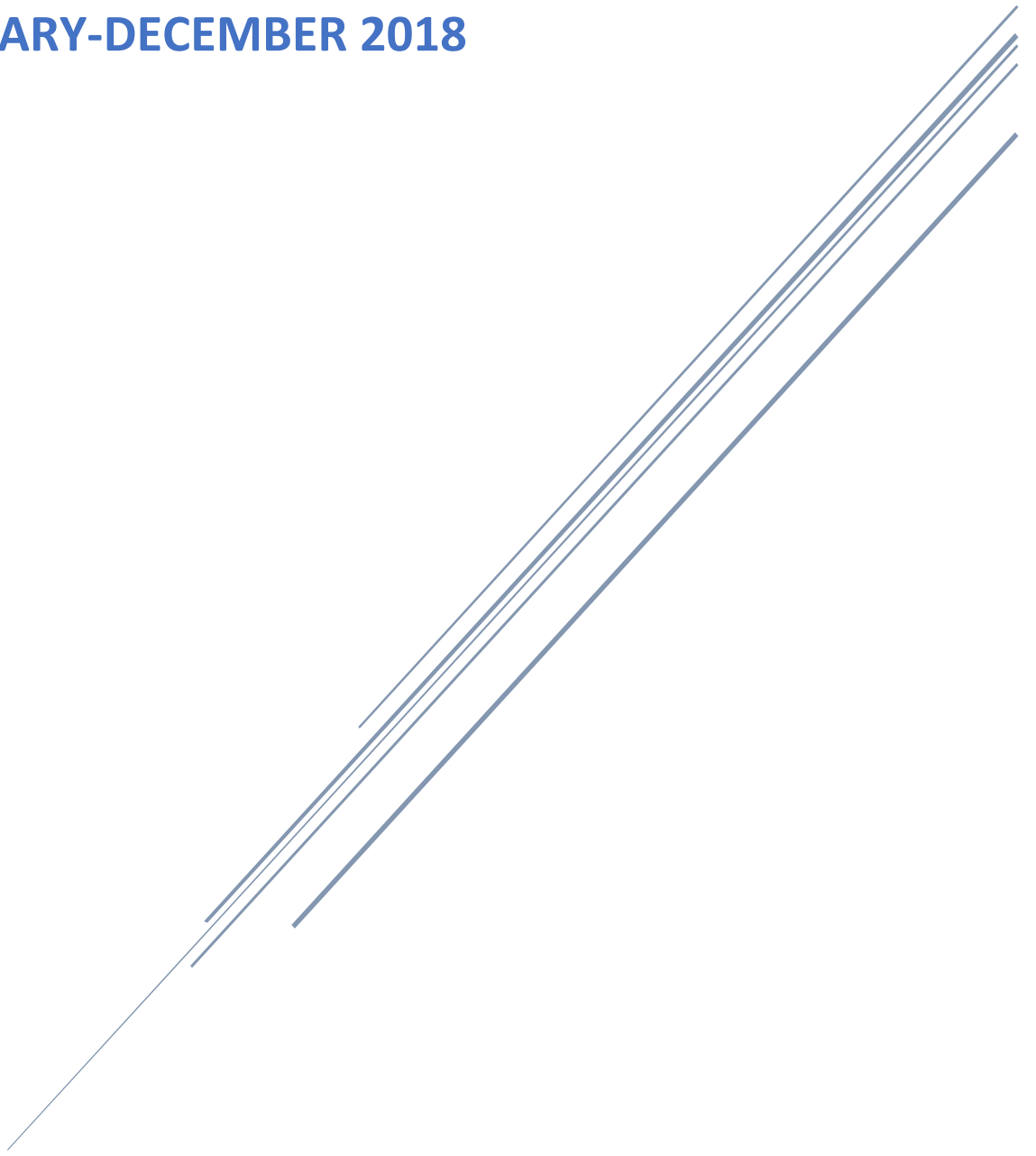


# GENERAL OUTLOOK TO TURKEY'S APPAREL EXPORT-2018

JANUARY-DECEMBER 2018



ITKIB APPAREL R&D DEPARTMENT

## **General Outlook to Turkey's Apparel Export**

In 2018, Turkey's general export has risen from 157 billion dollars to 168.1 billion dollars with an increase rate of 7.1%. In 2018, Turkey's apparel export is recorded as 17.6 billion dollars with an increase rate of 3.6%, compared to 2017. These figures show that the upward trend started since the second half of 2017 continues.

In 2018, the share of apparel export in Turkey's total export has been calculated as 10.5%. This share was 10.8% in 2017.

<b>Turkey's Apparel Export Share within General Export</b>			
	<b>2017</b>	<b>2018</b>	<b>2017/18</b>
	<b>January-December</b>	<b>January-December</b>	<b>Change</b>
<i>Units: 1000 \$</i>			<b>%</b>
<b>Turkish General Export</b>	<b>156.991.707</b>	<b>168.087.637</b>	<b>7,1</b>
<b>Apparel Export</b>	<b>17.031.269</b>	<b>17.642.157</b>	<b>3,6</b>
Apparel Export's Share %	10,8	10,5	
<b>Industrial Export</b>	<b>121.278.547</b>	<b>136.325.297</b>	<b>12,4</b>
Apparel Export's Share within Industrial Export %	14,0	12,9	
<i>Source: Exporters Associations Records</i>			

On the other hand, the share of apparel export within the industrial export has been 14% in 2017 and 12.9% in 2018. Data shows that, both the share of apparel sector within the general export and industrial export has decreased 2018.

## **Leading Countries in Apparel Export**

Germany, Spain and the UK are the first three countries in Turkish apparel export in 2018. In the same period, Turkey exported 3.2 billion dollars of apparel to Germany with a decrease rate of 0.9%. Export to Spain is recorded as 2.4 billion dollars, with an increase rate of 15% compared to 2017. Following Spain, apparel export to the United Kingdom is recorded as 2 billion dollars with an increase rate of 3.6%.

Netherlands is Turkey's fourth biggest market in apparel, with an export value of nearly 1 billion dollars, followed by France, whom Turkey exported 887.9 million dollars of apparel products in 2018. Respectively Iraq, the USA, Italy, Denmark and Israel are Turkey's leading markets in apparel export.

Leading Markets in Apparel Export 2016-2017-2018 Yearly Changes								
<i>Units: 1000 \$</i>								
	2016	Share %	2017	Share %	2016/17 Change %	2018	Share %	2017/18 Change %
<b>Germany</b>	3.167.603	18,7	3.228.022	19,0	1,9	3.200.122	18,1	-0,9
<b>Spain</b>	1.748.558	10,3	2.090.513	12,3	19,6	2.403.813	13,6	15,0
<b>United Kingdom</b>	2.026.987	12,0	1.954.245	11,5	-3,6	2.023.790	11,5	3,6
<b>Netherlands</b>	782.483	4,6	860.143	5,1	9,9	999.753	5,7	16,2
<b>France</b>	847.400	5,0	843.154	5,0	-0,5	887.889	5,0	5,3
<b>Iraq</b>	564.082	3,3	715.056	4,2	26,8	666.478	3,8	-6,8
<b>USA</b>	535.986	3,2	560.719	3,3	4,6	600.181	3,4	7,0
<b>Italy</b>	617.676	3,6	559.345	3,3	-9,4	578.022	3,3	3,3
<b>Denmark</b>	425.160	2,5	392.608	2,3	-7,7	412.203	2,3	5,0
<b>Israel</b>	304.713	1,8	327.075	1,9	7,3	357.979	2,0	9,4
<b>Top 10 Countries</b>	<b>11.020.648</b>	<b>65,0</b>	<b>11.530.882</b>	<b>67,7</b>	<b>4,6</b>	<b>12.130.231</b>	<b>68,8</b>	<b>5,2</b>
<b>Apparel Export</b>	<b>16.956.074</b>	<b>100</b>	<b>17.031.269</b>	<b>100</b>	<b>0,4</b>	<b>17.642.157</b>	<b>100</b>	<b>3,6</b>
<b>Share of top 10 Countries %</b>	<b>65,0</b>		<b>67,7</b>			<b>68,8</b>		

*Source: Exporters Associations Records*

Except Germany and Iraq, leading markets in apparel export has witnessed increase rates changing from 3.3% to 16.2% in 2018. However, export to Germany has decreased from 3.22 million dollars to 3.20 million dollars and export to Iraq has declined by 6.8% and recorded as 666.5 million dollars.

### **Emerging Countries in Apparel Export: Russia, Romania and Libya**

In 2018, within the leading countries which have increase rates over 20%, Russia is the first country with an increase rate of 39.2% and export value of 273.6 million dollars. Following Russia, apparel export to Romania has increased by 26.2% and recorded as 183.4 million dollars. The third emerging country in Turkey's apparel export is Libya, with an increase rate of 71.6%. With this increase rate, apparel export to Libya has increased from 106.2 million dollars to 182.4 million dollars.

<b>Emerging Countries in Turkish Apparel Export</b>					
<i>Units: 1000 \$</i>	<b>1 January - 31 December</b>				
<b>Countries</b>	<b>2016</b>	<b>2017</b>	<b>2016/17 Change %</b>	<b>2018</b>	<b>2017/18 Change %</b>
<b>Russian Federation</b>	122.133	196.583	61,0	273.580	39,2
<b>Romania</b>	138.023	145.306	5,3	183.425	26,2
<b>Libya</b>	104.766	106.247	1,4	182.360	71,6
<b>Kazakhstan</b>	103.773	89.253	-14,0	109.162	22,3
<b>Egypt</b>	120.098	80.228	-33,2	109.095	36,0
<b>Slovakia</b>	71.540	60.201	-15,8	92.485	53,6
<b>China</b>	61.561	68.663	11,5	85.203	24,1
<b>Serbia</b>	43.087	61.628	43,0	83.924	36,2
<b>Qatar</b>	21.443	32.520	51,7	64.528	98,4
<b>Albania</b>	40.640	45.250	11,3	57.448	27,0

*Source: Exporters Associations Records*

On the other hand, the 98.4% increase rate in export to Qatar is noteworthy. In addition, export to Slovakia increased by 53.6% and export to Serbia increased by 36.2%. Other countries that have noteworthy increase rates and export value are Kazakhstan, Egypt, China and Albania.

### **Apparel Export Based on Product Groups**

In 2018, three main product groups of apparel export increased by between 1.9% and 5.8%. Export of knitted products, which is the most exported product group, increased by 2.4% in 2018 compared to 2017, reaching 9.1 billion dollars.

<b>Apparel Export Based on Product Groups 2017 - 2018 January-December</b>			
<i>Units: 1000 \$</i>			
<b>Product Groups</b>	<b>2017 January-December</b>	<b>2018 January-December</b>	<b>Change %</b>
<b>Knitted Products</b>	8.863.664	9.075.567	2,4
<b>Woven Products</b>	5.967.451	6.315.621	5,8
<b>Made-Up Articles</b>	2.012.006	2.049.796	1,9

*Source: Exporters Associations Records*

The second largest group, export of woven products increased by 5.8% and recorded as 6.3 billion dollars. Export of made-up articles, including home textile products, rose by 1.9% and reached to 2 billion dollars.

### **Leading Products in Turkish Apparel Export**

When leading products in Turkish apparel export is examined in 2018, the export of t-shirts, singlets and other vests is calculated as 2.8 billion dollars, with a decrease rate of 2.4%. Following these products, the export of woven suits, ensembles and dresses for women and girls has risen by 11.7% and recorded as 2.8 billion dollars.

<b>Leading Products in Turkish Apparel Export</b>					
<i>Units: 1.000 \$</i>					
<b>HS Code</b>	<b>Content</b>	<b>2017 January-December</b>	<b>2018 January-December</b>	<b>Change %</b>	<b>2018 Share %</b>
<b>6109</b>	T-shirts, singlets and other vests, knitted or crocheted	2.884.084	2.813.509	-2,4	15,9
<b>6204</b>	Woven suits, ensembles, jackets, dresses etc. for women/girls	2.482.037	2.771.645	11,7	15,7
<b>6110</b>	Knitted or crocheted jerseys, pullovers, cardigans and similar articles	1.804.867	1.942.210	7,6	11,0
<b>6203</b>	Woven suits, ensembles, jackets, dresses etc. for men/boys	1.414.754	1.464.523	3,5	8,3
<b>6104</b>	Knitted suits, ensembles, jackets, dresses etc. for women/girls	1.165.875	1.236.683	6,1	7,0
<b>6302</b>	Bed linen, table linen, toilet linen and kitchen linen	1.217.171	1.199.566	-1,4	6,8
<b>6115</b>	Hosiery; panty hose, tights, stockings, socks and other hosiery	1.063.982	1.087.324	2,2	6,2
<b>6206</b>	Woven blouses, shirts and shirt-blouses for women/girls	705.448	714.264	1,2	4,0
<b>6205</b>	Woven shirts; men's or boys'	557.619	574.670	3,1	3,3
<b>6106</b>	Knitted blouses, shirts and shirt-blouses for women/girls	464.001	465.318	0,3	2,6
<b>Total Apparel Export</b>		<b>17.031.269</b>	<b>17.642.157</b>	<b>3,6</b>	<b>100</b>

*Source: Exporters Associations Records*

Except products with HS Code of 6109 and 6302, all leading products have witnessed increase rates between 0.3% and 11.7%. Bed, table, toilet and kitchen linen products' export decreased by 1.4% and recorded as 1.2 billion dollars.

**March 2019,**

**ITKIB Apparel R&D Department**