

GENERAL OUTLOOK TO TURKEY'S APPAREL EXPORT-2019

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ITKIB APPAREL R&D DEPARTMENT

General Outlook to Turkey's Apparel Export

In 2019, Turkey's general export has risen from 176.9 billion dollars to 180.5 billion dollars with an increase rate of 2%. In 2019, Turkey's apparel export is recorded as 17.7 billion dollars with an increase rate of 0.4%, compared to 2018. These figures show that the upward trend started since the second half of 2018 continues.

In 2019, the share of apparel export in Turkey's total export has been calculated as 9.8%. This share was 10% in 2018.

Turkey's Apparel Export Share within General Export			
	2018 January-December	2019 January-December	2018/19 Change %
<i>Units: 1000 \$</i>			
Turkish General Export	176.860.826	180.468.488	2,0
Apparel Export	17.628.348	17.700.869	0,4
Apparel Export's Share %	10,0	9,8	
Industrial Export	136.205.716	138.253.659	1,5
Apparel Export's Share within Industrial Export %	12,9	12,8	
<i>Source: Exporters Associations Records</i>			

On the other hand, the share of apparel export within the industrial export has been 12.9% in 2018 and 12.8% in 2019. Data shows that, both the share of apparel sector within the general export and industrial export has decreased in 2019.

Leading Countries in Apparel Export

Germany, Spain and the United Kingdom are the first three countries in Turkish apparel export in 2019. In the same period, Turkey exported 3.1 billion dollars of apparel to Germany with a decrease rate of 3.8%. Export to Spain is recorded as 2.3 billion dollars, with a decrease rate of 3.3% compared to 2018. Following Spain, apparel export to the United Kingdom is recorded as 1.9 billion dollars with a decrease rate of 5.6%.

Netherlands is Turkey's fourth biggest market in apparel, with an export value of 1.1 billion dollars, followed by France, whom Turkey exported 874.3 million dollars of apparel products in 2019. Respectively Iraq, the USA, Italy, Denmark and Israel are Turkey's leading markets in apparel export.

Leading Markets in Apparel Export 2017-2018-2019 Yearly Changes								
Units: 1000 \$								
	2017	Share %	2018	Share %	2017/18 Change %	2019	Share %	2018/19 Change %
Germany	3.228.022	19,0	3.195.651	18,1	-1,0	3.073.797	17,4	-3,8
Spain	2.090.513	12,3	2.398.964	13,6	14,8	2.318.637	13,1	-3,3
United Kingdom	1.954.245	11,5	2.022.055	11,5	3,5	1.908.866	10,8	-5,6
Netherlands	860.143	5,1	999.076	5,7	16,2	1.125.491	6,4	12,7
France	843.154	5,0	887.625	5,0	5,3	874.283	4,9	-1,5
Iraq	715.056	4,2	666.449	3,8	-6,8	707.199	4,0	6,1
USA	560.719	3,3	599.693	3,4	7,0	647.306	3,7	7,9
Italy	559.345	3,3	577.446	3,3	3,2	574.634	3,2	-0,5
Denmark	392.608	2,3	412.000	2,3	4,9	403.175	2,3	-2,1
Israel	327.075	1,9	357.976	2,0	9,4	393.176	2,2	9,8
Top 10 Countries	11.530.882	67,7	12.116.935	68,7	5,1	12.026.563	67,9	-0,7
Apparel Export	17.031.269	100	17.628.348	100	3,5	17.700.869	100	0,4
Share of top 10 Countries %	67,7		68,7			67,9		

Source: Exporters Associations Records

Except the Netherlands, Iraq, the USA and Israel, leading markets in apparel export has witnessed decrease rates changing from 0.5% to 5.6% in 2019. Especially export to UK has decreased from 2 million dollars to 1.9 million dollars with a decrease rate of 5.6% which is remarkable.

Emerging Countries in Apparel Export: Russia, Romania and Libya

In 2019, within the leading countries which have increase rates over 20%, Libya is the first country with an increase rate of 30.2% and export value of 237.4 million dollars.

Following Libya, apparel export to Kazakhstan has increased by 46.8% and recorded as 159.8 million dollars.

The third emerging country in Turkey's apparel export is Egypt, with an increase rate of 32.5%. With this increase rate, apparel export to Egypt has increased from 109 million dollars to 144.5 million dollars.

Emerging Countries in Turkish Apparel Export					
<i>Units: 1000 \$</i>		1 January - 31 December			
Countries	2017	2018	2017/18 Change %	2019	2018/19 Change %
Libya	106.247	182.369	71,6	237.377	30,2
Kazakhstan	89.253	108.793	21,9	159.762	46,8
Egypt	80.228	109.045	35,9	144.515	32,5
Slovakia	60.201	92.468	53,6	133.519	44,4
Hungary	180.875	69.075	-61,8	108.012	56,4
Serbia	61.628	83.906	36,1	101.254	20,7
Belarus	31.525	49.873	58,2	68.992	38,3
Syria	29.795	26.297	-11,7	32.530	23,7
Moldova	23.037	24.318	5,6	31.488	29,5
Uzbekistan	10.304	11.324	9,9	17.624	55,6

Source: Exporters Associations Records

On the other hand, the 56.4% increase rate in export to Hungary is noteworthy. In addition, export to Uzbekistan increased by 55.6% and export to Slovakia increased by 44.4%. Other countries that have noteworthy increase rates and export value are Serbia, Belarus, Syria and Moldova.

Apparel Export Based on Product Groups

In 2019, knitted products group of apparel export decreased by 0.1% and made-up articles of apparel export decreased by 2.2%. On the other hand, woven products group of apparel export increased by 1.9%.

Apparel Export Based on Product Groups 2018 - 2019 January-December			
<i>Units: 1000 \$</i>			
Product Groups	2018 January-December	2019 January-December	Change %
Knitted Products	9.065.810	9.054.191	-0,1
Woven Products	6.312.134	6.431.010	1,9
Made-Up Articles	2.049.374	2.004.770	-2,2

Source: Exporters Associations Records

Export of knitted products, which is the most exported product group, decreased by 0.1% in 2019 compared to 2018, reaching 9.1 billion dollars.

The second largest group, export of woven products increased by 1.9% and recorded as 6.4 billion dollars. Export of made-up articles, including home textile products, decreased by 2.2% and reached to 2 billion dollars.

Leading Products in Turkish Apparel Export

When leading products in Turkish apparel export is examined in 2019, the export of woven suits, ensembles, jackets, dresses etc. is calculated as 2.9 billion dollars, with an increase rate of 6%. Following these products, t-shirts, singlets and other vests has decreased by 3.2% and recorded as 2.7 billion dollars.

Leading Products in Turkish Apparel Export					
<i>Units: 1.000 \$</i>					
HS Code	Content	2018 January-December	2019 January-December	Change %	2019 Share %
6204	Woven suits, ensembles, jackets, dresses etc. for women/girls	2.770.431	2.937.368	6,0	16,6
6109	T-shirts, singlets and other vests, knitted or crocheted	2.810.285	2.719.028	-3,2	15,4
6110	Knitted or crocheted jerseys, pullovers, cardigans and similar articles	1.939.761	1.966.746	1,4	11,1
6203	Woven suits, ensembles, jackets, dresses etc. for men/boys	1.463.019	1.456.387	-0,5	8,2
6104	Knitted suits, ensembles, jackets, dresses etc. for women/girls	1.235.054	1.250.529	1,3	7,1
6302	Bed linen, table linen, toilet linen and kitchen linen	1.199.290	1.189.094	-0,9	6,7
6115	Hosiery; panty hose, tights, stockings, socks and other hosiery	1.087.065	1.100.623	1,2	6,2
6206	Woven blouses, shirts and shirt-blouses for women/girls	713.908	628.778	-11,9	3,6
6205	Woven shirts; men's or boys'	574.467	532.741	-7,3	3,0
6106	Knitted blouses, shirts and shirt-blouses for women/girls	464.372	433.930	-6,6	2,5
Total Apparel Export		17.628.348	17.700.869	0,4	100

Source: Exporters Associations Records

Except products with HS Code of 6204, 6110, 6104 and 6115, all leading products have witnessed decrease rates between 0.5% and 11.9%. Woven blouses, shirts and shirt-blouses for women/girls products' export decreased remarkably by 11.9% and recorded as 628.8 million dollars.

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