

**iTKiBHedef**

July 2023 · Issue: 1 Istanbul Textile and Apparel Exporters' Associations

# VISION

**IFCO**



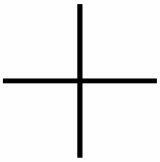
ISTANBUL  
FASHION  
CONNECTION

**NEW GLOBAL DESTINATION OF  
FASHION INDUSTRY**

**TEXHIBITION**

ISTANBUL

**TÜRKİYE'S  
LARGEST  
TEXTILE FAIR**



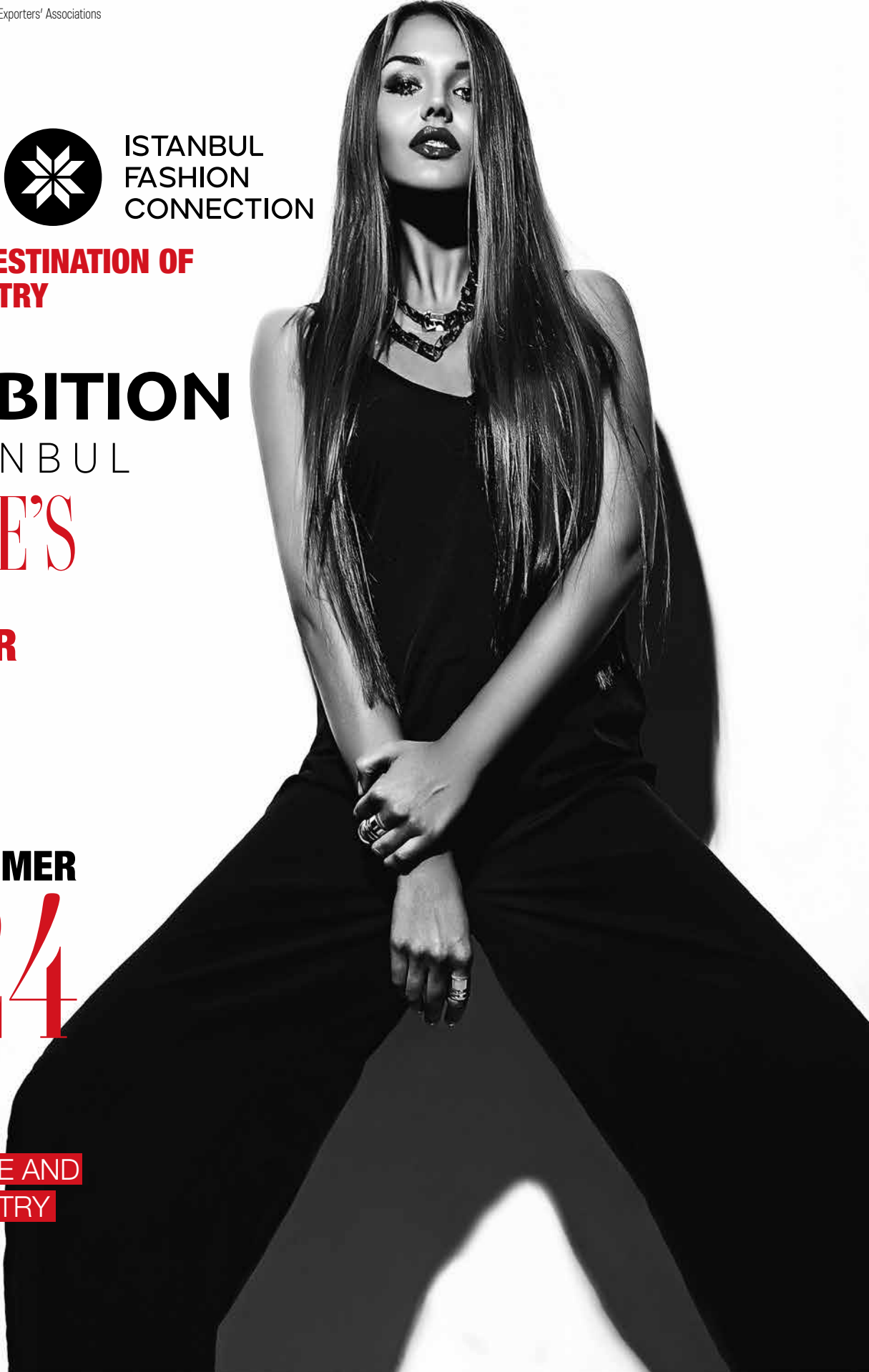
**SPRING/SUMMER**

**2024**

**FABRICS AND  
MATERIALS**

**TURKISH TEXTILE AND  
APPAREL INDUSTRY**

**LEADS THE GREEN  
TRANSFORMATION**





# TEXHIBITION ISTANBUL

**FABRIC, YARN &  
TEXTILE ACCESSORIES  
FAIR**

**13-15 SEPTEMBER 2023**

ISTANBUL EXPO CENTER

AUTUMN | WINTER 24/25



**TİM** TÜRKİYE  
EXPORTERS  
ASSEMBLY



THIS FAIR IS ORGANIZED WITH THE AUDIT OF TOBB (THE UNION OF CHAMBERS AND COMMODITY EXCHANGES OF TÜRKİYE) IN ACCORDANCE WITH THE LAW NO.5174

THIS FAIR IS ORGANIZED BY İTKİB FUARCILIK A.Ş.





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## TÜRKİYE'S RAW COTTON PRODUCTION EXCEEDS 1 MILLION TONS

In the 2022-2023 season, Türkiye's raw cotton production exceeded 1 million tons for the first time.

Türkiye, which holds a significant place in the production and export of textiles and garments, meets a considerable portion of the cotton used in this industry through domestic production. Cotton production, which has been decreasing in recent years due to drought, has increased the cotton prices in global markets. Rising prices have facilitated the sowing of new cotton fields in Türkiye. In the production year of 2022, cotton was produced in an area of 550,000 hectares. Thus, for the first time in many years, raw cotton production exceeded 1 million tons in the 2022-2023 season.

According to the plant production estimates of the Turkish Statistical Institute, the bulk cotton production in Türkiye was about 2.25 million tons in the 2021/22 season, with an increase of approximately 27%. In 2021, 832,500 tons of raw cotton was produced in Türkiye, equivalent to 2.25 million tons of bulk cotton production in an area of 4.3 million hectares. The six provinces that accounted for 87% of the cotton produced in Türkiye in 2021 were Şanlıurfa (40%), Diyarbakır (14%), Aydın (12%), Hatay (9%), İzmir (7%), and Adana (5%), respectively.

Türkiye ranks 6<sup>th</sup> in global cotton production, following China, India, the United States, Brazil, and Australia. In terms of imports, it is among the top five countries along with Bangladesh, China, Vietnam, and Pakistan. Cotton producers indicate that the production of cotton in Türkiye can be increased and its import can be reduced with new incentives to be offered to farmers.



## A GUIDE IS PUBLISHED FOR CLEAN PRODUCTION

For the first time, a threshold was determined for the reduction of volatile organic compound and dust emissions specific to the industry.

The Ministry of Environment, Urban Planning and Climate Change of the Republic of Türkiye has published the 'Guide for Clean Production Practices in the Textile Industry' aimed at minimizing the possible adverse effects of textile industry activities on the environment, and ensuring water and energy conservation. According to a written statement from the Ministry, the guide sent to the governorships of all 81 provinces aims to reduce the oil vapor released into the atmosphere from the chimneys of textile factories that cause complaints in the provinces where textile production is carried out in Türkiye. The guide aims to reduce energy consumption and air emissions originating from textile plants. For the first time, a threshold was determined for the reduction of volatile organic compound and dust emissions specific to the industry.



## ONLINE MONITORING OF EMISSIONS IS NOW MANDATORY

In the 2022-2023 season, Türkiye's raw cotton production exceeded 1 million tons for the first time.

Compliance with this value, reducing energy consumption per production and reporting, application of appropriate treatment systems to ensure reduction of dust emissions, and mandatory online monitoring of emissions using suitable information technologies have been enforced.

Techniques that remove color from dye bath wastewater in textile businesses and allow the reuse of brackish water in fabric dyeing and washing have become mandatory for the removal of color from and reuse of treated wastewaters originating from textile textile

finishing processes.

With the guide, subsequent to wastewater treatment, its reuse in possible areas is encouraged for water and energy saving, while separate collection and reuse of cooling waters and wastewaters with a low pollutant ratio have also become mandatory.

It is announced in the guide that these techniques will be applied in textile facilities with an installed capacity of 10 tons/day and above by 15 January 2024, in textile facilities between 5 tons/day and 10 tons/day by 15 January 2025, and in textile facilities below 5 tons/day by 15 January 2026.



## TÜRKİYE IS AIMING FOR \$265 BILLION IN EXPORTS IN 2023

Despite the recession in advanced economies, including the European Union, Türkiye's exports reached \$123.4 billion in the first half of 2023.

Türkiye had ended 2022 with \$254 billion in exports and set a target of \$265 billion for the end of 2023. Despite facing the largest earthquake in its history on February 6, the country quickly recovered and continued its production. According to the data announced by the Türkiye Exporters Assembly (TİM), exports reached \$123.4 billion in the first half of 2023, experiencing a 1.8% decrease compared to the previous year. However, exporters remain optimistic about the second half of the year, largely due to the recent changes in economic management, increased interest rates, and a rising exchange rate. TİM President Mustafa Gültepe regarded the exchange rate level as a positive development for our competitiveness and stated, "We are much stronger in terms of pricing compared to a month ago. The Central Bank raised its policy rate to 15%, with a 6.5 percentage point increase in June, marking the first interest

rate hike in 27 months. We, as the export community, welcome the gradual implementation of monetary tightening." Based on the announced export data, the top countries Türkiye exported to in the first six months were Germany with \$9.45 billion, the United States with \$6 billion, the United Kingdom with \$5.6 billion, and Italy with \$5.5 billion. The automotive sector remained in the top position for exports, achieving \$3 billion in June. Chemicals ranked second with \$2.4 billion, while ready-to-wear and clothing maintained its third-place position with \$1.7 billion in exports. The export value per kilogram increased by 4% compared to the same month last year, reaching \$1.46. In the first six months, the textile and raw materials sector achieved exports of \$4.8 billion, followed by carpet exports with \$1.3 billion and leather and leather products sector with \$1 billion in exports.

Cansu Bodur

IMA Fashion Design Program Team Leader

# spring/summer 2024

## Fabrics and Materials

As the fashion industry continues to renew seasons, it presents us with a range of innovative, technological, environmentally friendly materials, and fabrics developed with more natural fibers. Undoubtedly, these innovations will be at our disposal in the upcoming spring/summer 2024 season.



Let's get ready for a colorful summer season that triggers positive emotions like never before, encourages movement, and stimulates creativity. Future effects that are based on creativity and imagination are blended with fresh spring structures that create a center of attraction in fabric development. Carbon-neutral effective, recyclable synthetics, bio-based content, and dyeing methods reduce environmental impact, while energy-efficient production processes form the main outlines of developing more sustainable resources. At Pitti Filati, Woolmark Company and Luna Rossa Prada Pirelli developed a merino

wool-based fabric, which stands out with its lightness, elasticity, strength, and moisture-wicking properties, making it one of the leading products. Linen in ecological structures provides an extra layer in designs. It gathers fluid materials, allows easy swinging of classics, and provides a magical look to smooth fabrics. It creates a breezy layer between us and the sun while providing coolness. It is observed that fabrics with the finest ends and with a softness that supports a comfortable and steady posture are among the season's prominent qualities, providing flexibility for running, cycling, and pedaling products.



# Interaction with Nature



Arnia Textile



Ma.AL.Bi 1947



Lanificio Campore



Springtex



Manifattura Emmetex



Omnipiega

The renewed partnership between textiles and nature highlights natural fibers such as traceable linen, silk, and Tencel as well as woven surfaces and textured fabrics are created with blends of linen. Dyed yarns and irregularities that appear as minor flaws on flat weaves create

eye-catching surfaces, making them standout fabrics. Random, artisanal handcrafts with sandy, rustic natural and organic shades, and small flaws evoke us a sense of belonging. Slubbed linen and silk blends, dry brushed clean cotton crepes, paper-like wrinkled summer fabrics, and breathable

surfaces are the highest-quality materials that reflect the effects of nature. Chic knits and weaves inspired by artisanal crafts, macramé, and knitting, combined with modern versions of basket weaves, promote the development of delicate surfaces and the growth of this trend.

# Conformist Materials



Guigou



Textil Santanderina



Arche Principio Tessile

Toteme



New uses for functional materials that support casual wear and liberate movement are being highlighted with fabrics that feel good and offer new clothing forms. In the new season, we see the increased use of hybrid fabrics that support multi-use and seasonless wear. Tight poplins, thin gabardines, and stable knits adapt to different uses. Structured, easily producible, and long-lasting mixtures that shift from chic

to casual and from feminine to masculine. Soft and flexible fabrics can replace second skin while anatomically bi-directional stretch fabrics that borrow designs from flexible lounge-wear support body movement in ergonomic designs. Dense suiting fabrics and silks that provide generous draped falls and a saturated, lived-in feeling are seen as prioritizing comfort in chic clothing.



# Digital Sparkle



© Cutecircuit



© Panther Denim



© Omniapiega

© Gipitex



© Duksung



Technical taftas, glossy calendar effects, wrinkle-resistant and breathable synthetics are featured prominently in this theme. Rather than metallic shine, they create sharp, reflective light and color effects with a dreamlike quality. Clean-surfaced, glossy ripstop, mesh, and jacquard qualities work beautifully in functional designs.

# Hidden Sharpness



© Belinac



© Sprintex2



© Pratifabrics



© Meltam

Sophisticated textured sparkles and transparent fabrics represent the luxury that can be seen and felt only up close. Silky voiles, tulle, and translucent finishes support the glittering appearances. Hollow and solid spaces in net and mesh surfaces offer a mathematical geometric elegance. Fine lines and calmly repeating geometric patterns are displayed on tulle and lightweight guipures. Perfectly delicate knits, fine twisted yarns, meticulously woven miniature textured surfaces will provide valuable appearances in subtle collections that please the eye.

© Loewe



# CAPITAL OF CULTURE, FINANCE AND FASHION

# istanbul

With its thousands of years of historical and cultural heritage, İstanbul, a source of inspiration for the creative industry, is also making steady progress towards becoming the capital of fashion. With its fashion week, fairs, international organizations, investments, successful fashion designers, and production power, İstanbul draws world's attention.



**F**rench Emperor Napoleon Bonaparte once said about İstanbul: "If the world was a single country, its capital would be İstanbul." This role of İstanbul has been valid for centuries in trade, culture, and tourism. With its strait, historical peninsula, and cosmopolitan structure, İstanbul is not only the most visited city in Türkiye but also one of the most important touristic points in the world. İstanbul, playing a central role in all transformations of the Turkish economy, has had a significant influence, not only being the gateway for foreign inflows but also being a center where creativity and innovation are focused, and entrepreneurship intensifies. İstanbul, considered the capital of trade, business, investment, finance, and tourism in the country, accounts for 20.3% of Türkiye's labor force, 50.6% of exports, and 54.6% of imports.

The fashion show organized by Servet Babataş in the historical Şerefiye Cistern.



Fashion designers who have made their names known and recognized worldwide are conduct significant contributions to the development of Türkiye's perception in this field.



With its thousands of years of history and cultural heritage, İstanbul is now solidifying its place among the fashion capitals.



**The 8<sup>th</sup> most business-friendly in Europe**

In İstanbul, where three-quarters of Türkiye's commercial activities take place, commercial exchanges are performed with more than 200 countries today. According to the report "İstanbul from the Perspective of International Entrepreneurs", 63% of the 12,634 foreign-capital companies established in Türkiye in 2019 are located in İstanbul.

According to fDi Magazine 2020/2021 Future European Cities and Regions Report, İstanbul was selected as the 8<sup>th</sup> "most business-friendly" city in Europe. Serving as a transit point among Middle Eastern and Eastern European companies, İstanbul directs mostly Middle East, Eastern Europe, North Africa, and Central Asian markets. Due to its strategic location and ease of transportation, İstanbul, preferred as a regional base by

international companies, stands out among other global cities. International entrepreneurs preferring İstanbul can access a market of approximately 30 trillion dollars and a population of 1.5 billion with a four-hour flight. Turkish Airlines, based in İstanbul, provides transportation to 255 points in 122 countries.

**The rising star of fashion**

Throughout history, even though

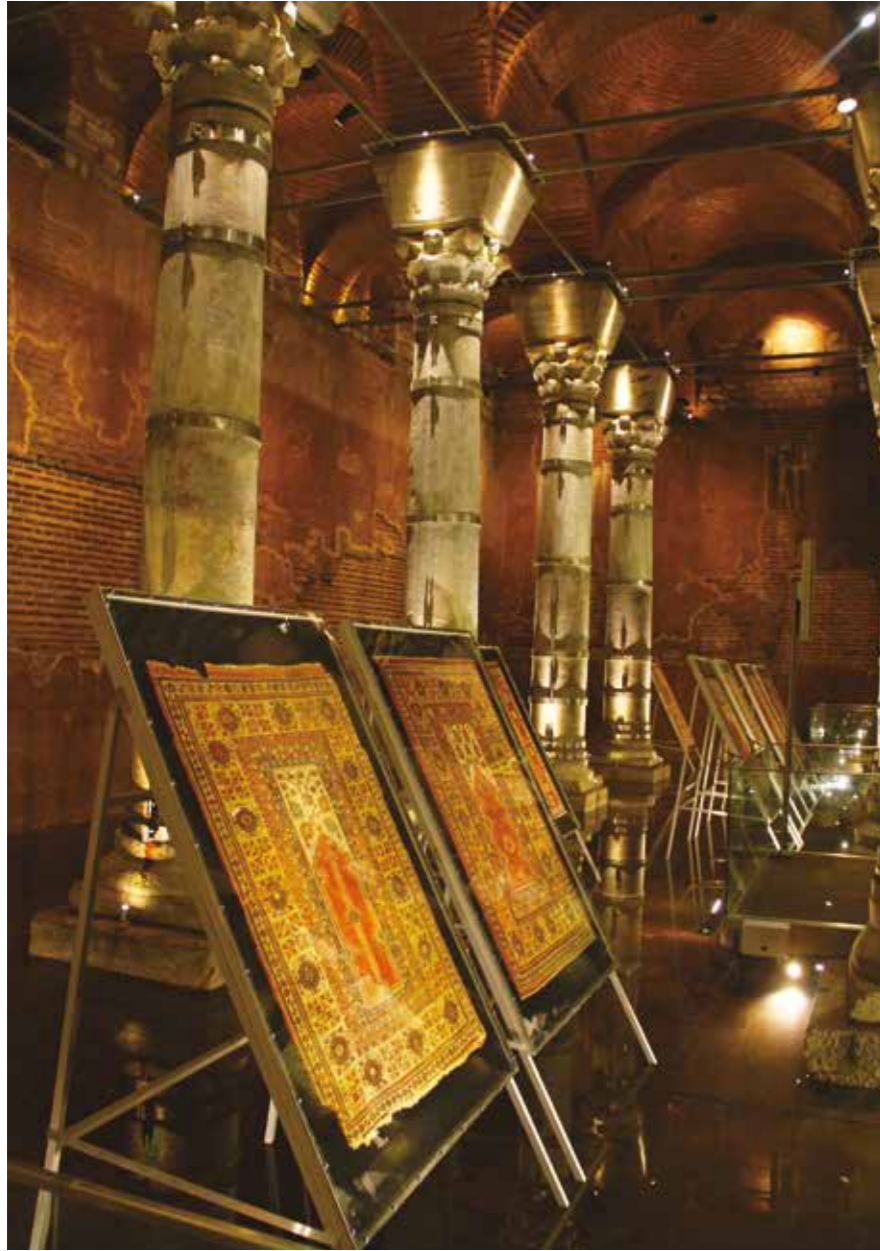
the fashion industry is notable for not being confined to a specific area or patterns, activities in this area have been associated with certain regions being synonymous with fashion. With its thousands of years of history and cultural heritage, İstanbul is now solidifying its place among the fashion capitals. Fashion designers who have made their names known and recognized worldwide are conduct significant con-

tributions to the development of perception of Türkiye in this field. In addition, the country's success in the textile and apparel sector is enhancing the perception of "Türkiye" in the fashion industry. The textile and apparel sectors, shown as the locomotive of employment in Türkiye with over one million people, are generating exports close to 30 billion dollars in total. As investments in the textile and apparel industry

spread across the Anatolian geography in recent years, İstanbul increases its recognition with activities worthy of the fashion capital title.

**Fashion Week İstanbul, Türkiye's global showcase**

Firstly, İstanbul Fashion Academy's activities in the field of education are known as an indicator of Türkiye's international academic offerings. Compe-



titions, fairs, and fashion weeks organized by exporter associations pave the way for İstanbul's fashion-leading approach to be shared with the whole world. Fashion Week İstanbul, which promotes Türkiye on the global stage, has been running uninterrupted for 17 seasons. This event, which showcases collections of Türkiye's most successful fashion designers, has

even met with fashion lovers through hybrid models during the pandemic. At the event, which draws attention through runways showcasing İstanbul's historical and cultural heritage, fashion merges with visual arts. This event, which goes beyond the borders of Türkiye, carries great importance in reaching the fashion industry and consumers in target countries. At the same

**İstanbul from the eyes of fashion designers**

**Şansım Adalı**

"The raw materials, creativity, and production quality developing in such geography make İstanbul not only the capital of Türkiye but also the capital of many matters in Eurasia and the Middle East."

**Özlem Süer**

"Türkiye's fashion capital is undoubtedly İstanbul. The place of İstanbul in the world is a huge world to be discovered with its alternative journey and inspiring identity"

**Selin Koç**

"In İstanbul, the capital of contemporary fashion, there's also a role of metropolitan city life and the speed of keeping up with the modern age. İstanbul is the address of quality production and material in the fashion industry."

**Neslişah Yılmaz**

"The lands on which our country stands are culturally very fertile. Even many designers in the world are influenced by this cultural heritage and create collections."

Turkish Airlines, based in İstanbul, provides transportation to 255 points in 122 countries.



time, the world's leading buyers can easily access collections via digital showrooms and place orders. Having managed to get onto the calendar of international fashion weeks, Fashion Week İstanbul aims to increase the share of designers in exports and the value of branded exports within total export value to 25 percent. Collaborations with the world's most distinguished fash-

ion platforms within the scope of the event also provide positive contributions to the global perception of Turkish textile and apparel sectors.

**Europe's most important supplier**

The increasing investment capacities of the textile and apparel sectors enable the industry's fast and integrated production capacity to improve day by day.

Türkiye, especially İstanbul, which can meet all the needs of the fashion industry from raw materials to fabric supply, technology to sustainability, is among the top three suppliers in Europe. İstanbul, which has now become a trendsetter in international fashion, also hosts unique organizations for discovering young and successful designers. The 30<sup>th</sup> Koza Young Fashion Designers Competition organized by the İHKİB this year and the Futuretex İstanbul Fabric Design Competition organized by the İTHİB for 16 years are shown among these organizations. Both competitions are making significant efforts to introduce young talents to the industry.

**"İstanbul has become a global fair and congress center"**

Two significant fairs that will consolidate İstanbul's power in fashion began to be organized under the leadership of İTKİB. İstanbul Fashion Connection (IFCO) Fair and Texhibition İstanbul Fabric and Textile Accessories Fair, which have been held for two years, have quickly



The city of derbies hosted the UEFA Champions League Final game for the 2022-23 season, recently.



played on the pitch, thanks to the wave of love it creates. So much so that it has become a sport integrated with cities as the most popular game of the 21st century. İstanbul, which hosts derbies followed by the world, is one of these cities. The city of derbies hosted the UEFA Champions League Final game for the 2022-23 season, recently. A suitable preparation process was carried out in İstanbul for the final match played between Manchester City, one of the most successful English football clubs of all time, and Inter, the Italian team that has never been relegated throughout history. Thousands of football lovers came to İstanbul from abroad. The Champions League final, played at the Ataturk Olympic Stadium on June 10, was won by Manchester City. Türkiye hosted also hosted an unforgettable final match between Liverpool and AC Milan in 2005.

**İstanbul Financial Center Commenced Operations**

Constructed in one go and possessing the world's most extensive and advanced infrastructure, the İstanbul Financial Center was inaugurated in a ceremony attended by President Recep Tayyip Erdoğan. The IFC, expected to be a source of pride for İstanbul and Türkiye with its architectural designs and top-level facilities, will host many guests from both within the country and abroad with its 1.3 million square meters of office space, 100 thousand square meters of shopping center, a congress center with a capacity for 2,100 people, a 5-star hotel, and a smart city model.

become the meeting point of the fashion industry. İstanbul Chamber of Commerce President Şekib Avdagiç, noting that İstanbul, the locomotive city of Türkiye which has become a supply base for developed countries with its geostrategic location and production infrastructure, has achieved similar success in the fair industry, says, "İstanbul ranked 12<sup>th</sup> in the list of face-to-face congresses and meetings in 2021. İstanbul

is now a global fair and congress center in itself."

**"İstanbul has become a global fair and congress center"**

Textile centers inspire fashion İstanbul, which makes significant contributions to creativity with its historical and cultural heritage, continues to inspire fashion designers. Furthermore, areas known as İstanbul's textile centers such as Osmanbey, Laleli, Merter,

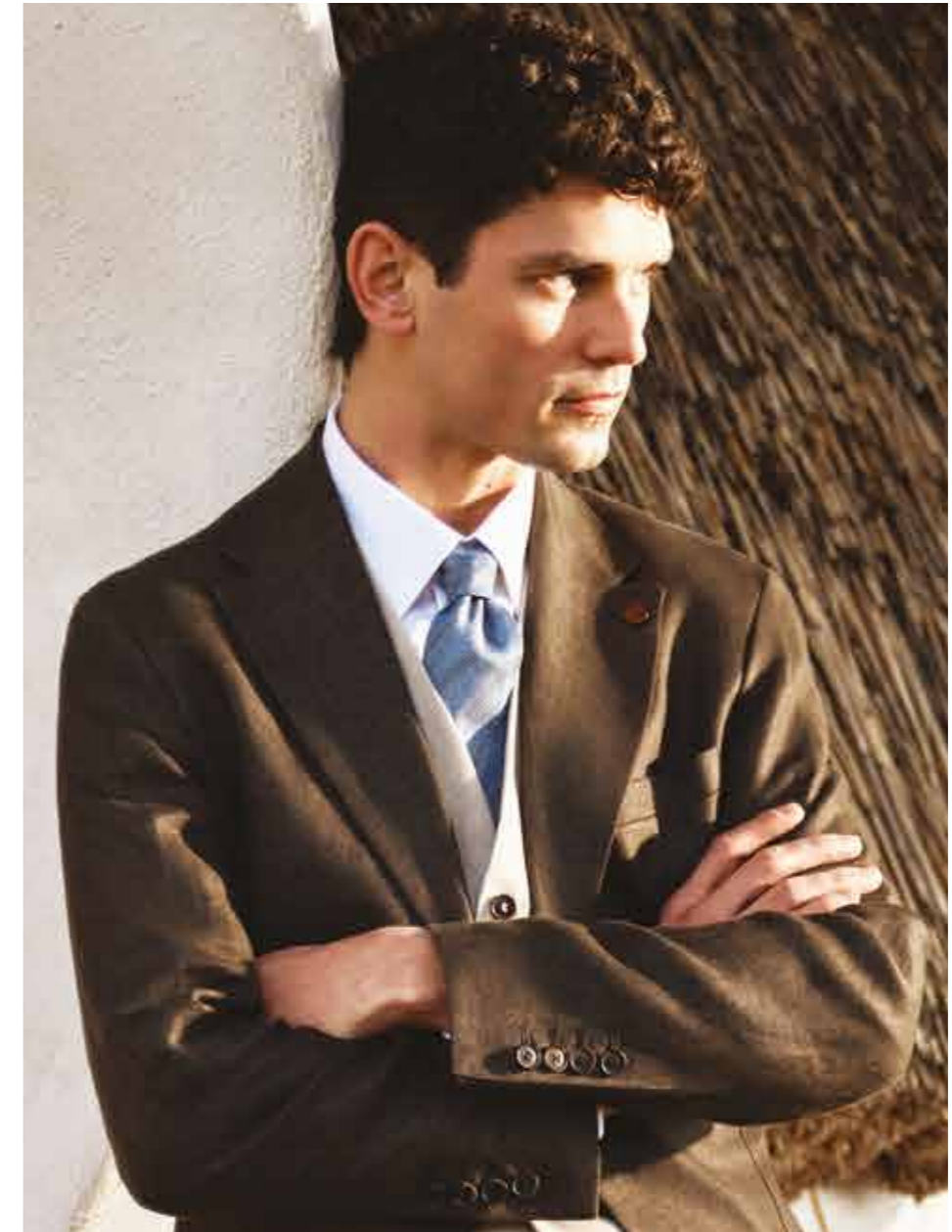
Zeytinburnu, Bayrampaşa are among the indicators of the industry's integrated production capability. Saffet Tonguç, a well-known travel writer and tourism expert in Türkiye, often emphasizes in his articles that İstanbul is not only historical and natural beauty; it is also a dynamic metropolis. He says that many events, from fashion and art events to music festivals, represent the modern face of İstanbul.

**Champions meet in İstanbul**

İstanbul, a city that connect Asia and Europe, is also a warm and inclusive city that brings people together. This city, which hosts countless options like literature, fashion, and art that unite people, holds the pulse not only of cultural and commercial values but also the world of sports. Hence, it has its place among the world's football cities. Football has long surpassed being just a game



# DAMAT | TWEEN

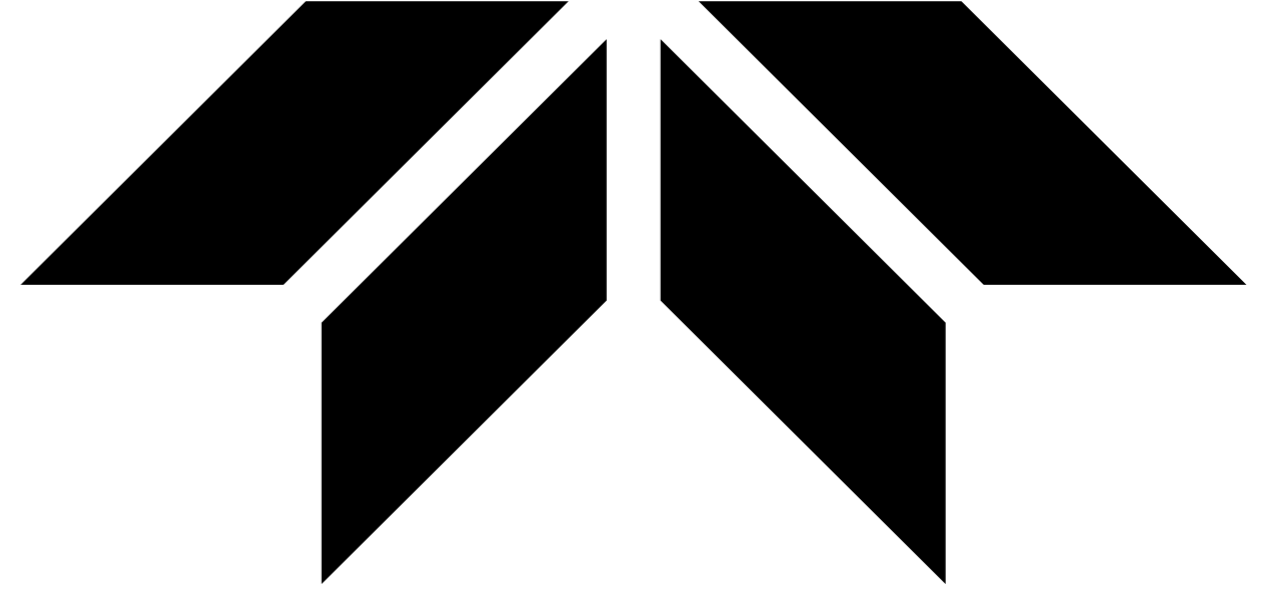


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aims to become  
the new destination for the  
global fashion industry



The İstanbul Fashion Connection Apparel and Fashion Fair (IFCO), which is advancing towards becoming the meeting point of the global fashion industry, is preparing to open its doors for the fourth time on August 9-11.

IFCO, established by the İstanbul Apparel Exporters' Association (İHKİB), has become Europe's largest apparel and fashion fair in a short period of time by bringing together all product groups of the apparel and fashion industry under one roof. IFCO, which has also made a name for itself on the international platform, has hosted thousands of buyers and welcomed over 50,000 visitors from more than 132 countries in the three previous fairs. IFCO is preparing to achieve a record number of participants and visitors this year by bringing together a wide range of participants from the textile and apparel industry, as well as leading designers in the sector, under one roof. IFCO is making significant

strides towards becoming the new hub of the global fashion industry, attracting both domestic and international participants with its diverse product range and innovative events. IFCO İstanbul Fashion Connection, which will bring together the apparel industry for the fourth time, will host a wide range of companies from women's, men's, and children's apparel to denim, sportswear, evening wear, bridal wear, groom's wear, underwear, socks, leather and fur garments, footwear, and haberdashery. These companies will have the opportunity to meet international buyers at the event.

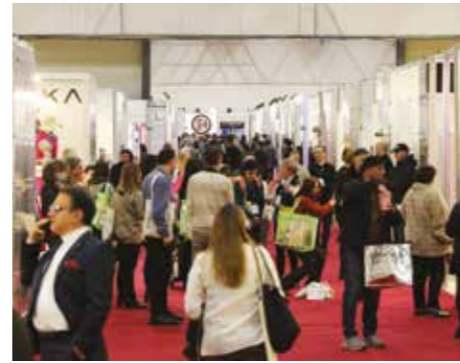
**The Core İstanbul brings new approaches to fashion**  
Organized concurrently with

the IFCO Fair, The Core İstanbul offers creative and collaborative solutions covering every aspect of the fashion industry, bringing together fashion designers with international buyers of apparel brands and providing opportunities for brands and designers to transform their collections into commercial ventures. At the first fair of the year, The Core İstanbul hosted 22 designer brands and achieved great success throughout the event. Buyers from many countries, including the US, South Korea, the UK, France, Germany, Qatar, and Italy, closely examined the products of designer brands. During the fair, designers held over 220 bilateral meetings with foreign buyers.

In the second season fair of 2023,



IFCO contributes to making the fair more interactive with seminars and programs given by significant figures.



400+

Participants

5,000

Qualified buyers

30,000

Total visitors

it is aimed to establish new collaborations through bilateral business meetings between participating companies and organized buying delegations from distant and target countries such as the USA, Germany, UAE, Brazil, South Africa, South Korea, UK, Canada, Colombia, Malaysia, Mexico, Nigeria, Panama, Chile, and Thailand.

**“We continue our preparations to offer more than just a fair”**  
Mustafa Paşahan, Vice President of İHKİB, stated, “IFCO, besides the fair itself, offers visitors a

unique atmosphere with various events and activities. These include fashion shows, a trend area, The Core İstanbul, which is our most innovative B2B activity for designer brands, seminars that keep track of the pulse of the industry, KOZA and Fashion Week İstanbul booths, dedicated halls tailored to the activities of participating brands, a B2B area where we connect international buyers with our participants, a gala night organized for foreign attendees, and many other events and organizations. IFCO goes beyond being a regular fair

Trends inspiring all sectors, from fabrics to textures, from clothing to colors, and related to fashion and other industries, are showcased in the trend area.



and provides visitors with an experience that goes above and beyond their expectations.”

**Strong brands of production come together at IFCO**

In the special section of IFCO, Türkiye’s well-established companies such as İpekyol, Damat, Kiğılı, B&G Store, Lufian, Jakamen, Lee Cooper, Climber, Giovane Gentile, Naramaxx, gathered. Companies that have the power to export to many parts of the world presented their quality, sustainable, and trendy products to potential

buyers from abroad. Companies serving leading global brands, such as Talu, Zevigas, Bozkurt, Bilce Tekstil, Gelişim, Esso, Bozpa, and Demezoğlu, in the sourcing section explained Türkiye’s advantages regarding production and delivery processes to participants.

**Fashionist special section at IFCO**

IFCO hosts the Fashionist Special Section, featuring 30 leading brands in the formal wear and groom’s wear categories of the apparel industry.



**Mustafa Paşahan**  
Vice President of İHKİB

**IFCO has become Türkiye’s most stylish brand!**

Mustafa Paşahan, Vice President of İHKİB, emphasized the importance of an international-scale fair in İstanbul to achieve the goal of making İstanbul a fashion center and Anatolia a production base. He stated, “We have come together as an industry to turn a 30-year dream into reality. We have brought a ambitious fair like IFCO to our country, and our fair has quickly found its place in the calendars of procurement groups.

As Europe’s largest apparel and fashion fair, IFCO hosted the convergence of the major fashion industry in İstanbul, bringing together brands, designers, and export-oriented companies with buyers from all around the world.

Last February, we fulfilled our promise for the 100<sup>th</sup> anniversary of our Republic by organizing our fair on an area of 100,000 square meters. With nearly 600 participants in 9 halls, we welcomed around 23,000 visitors from 134 countries, with over 10,000 of them being foreign visitors.

As part of our goal to make our country and İstanbul a prominent player in the global fashion industry, we are facing intense interest for the fourth edition of IFCO, which will take place on August 9-11. With more ambitious plans, higher-quality participants and buyers, and a larger number of visitors than the previous editions, we will strengthen the international position of our fair.

With the participation of over 400 companies, IFCO will take place in a total of 5 halls, bringing together 30,000 industry professionals from over 100 countries.”



The IFCO Fashion Show, featuring special collections from participating companies, will provide enjoyable moments for both domestic and international visitors.

These brands present their distinct designs, innovative colors, and dynamic styles at IFCO. In the Fashionist special section, visitors are offered a unique fair experience with a visual showcase of the products.

**IFCO trend area continues to receive high praise from visitors**  
The trend area, prepared by Istanbul Fashion Academy (İMA),

Nearly 20 members of the press from many countries of the world came to İstanbul for the IFCO Fair and closely observed the fair activities.



the leading fashion education platform of today and the future, continues to receive high praise from participants and visitors. In the trend area of the fair to be held in August, timeless designs, inspiring trends that will contribute to the industry, sustainable innovations, and fashion trends will come together with the themes of the upcoming season. The Trend Area, presented to the taste of participants and visitors, will be positioned as the liveliest showcase of the fair. Trend-setting materials that determine the themes of future seasons will be presented, reflecting the aesthetic harmony that is an indicator of Türkiye's success in textile and apparel production extending to trend creation.

At the IFCO Fair, which showcases the strength of the Turkish apparel and clothing sector, seminars and programs will be organized by prominent figures in the industry. Seminars will cover all developments in the fashion industry and convey the latest trends. Various topics will be addressed, from organic and sustainable products to technological and digital approaches, and climate-independent designs.

The IFCO Fashion Show, featuring special collections from participating companies, will provide enjoyable moments for both domestic and international visitors. The fashion show will showcase modular designs, impressive colors, and collections composed of fabrics with different textures, offering a delightful and high-quality fair experience for fashion enthusiasts.



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# Türkiye's largest textile fair

**TEXHIBITION  
ISTANBUL**

Texhibition, a textile fair that brings together global buyers and Turkish manufacturers, held on March 8-10, 2023, will host its second event of the season on September 13-15.



**T**exhibition İstanbul Fabric, Yarn and Textile Accessories Fair, organized by İTKİB Fuarçılık A.S. between March 8-10, brought global buyers and Turkish manufacturers together for the third time. Despite being in its third year, Texhibition İstanbul Fabric, Yarn and Textile Accessories Fair has risen to become Türkiye's largest textile fair, with an additional hall added to meet the high demand. Fair officials emphasized that Texhibition's priority is to increase quality rather than growth. Texhibition İstanbul showcases all components of the textile industry, from organic, sustainable,

recycled, and ecological fabrics in trendy colors and textures to yarns synthesized with natural and functional properties, as well as trendy accessories that complement textile products. It adds value to Türkiye's design and manufacturing power.

**Trade volume of 1 billion dollars**  
In the fair organized in March 2023 in three halls and 15,000 square meters of area with the participation of over 400 companies, a trade volume of approximately 1 billion dollars was achieved. The fair, which hosted a total of 18,525 local and foreign professional visitors from 104

countries, received praises from the sector. Texhibition İstanbul, where all components of the industry, including fabrics in trendy colors and designs, quality yarn varieties, and textile accessories, were present, contributed to value-added trade and exports thanks to the synergy created by bringing together designers and buyers with participants. Ahmet Öksüz, the Chairman of the İstanbul Textile and Raw Materials Exporters' Association (İTHİB), stated that Texhibition İstanbul has become Türkiye's largest textile fair in terms of participant and visitor numbers. He said, "We will continue our

efforts to bring our fair to a level where it can compete with other textile fairs around the world in the coming years.” Despite being in its third edition, the fair has already become Türkiye’s largest textile fair in terms of participant and visitor numbers, as mentioned by Ahmet Öksüz, the Chairman of İTHİB. He stated, “In our previous fair, 313 leading Turkish textile companies participated, representing woven fabrics, knitted fabrics, denim fabrics, textile accessory manufacturers, and yarn product groups. This year, the number of participating companies reached 437. Our fair, which was visited by 18,525 industry professionals, brought our companies together with thousands of qualified buyers from 104 countries, including European Union countries, the United Kingdom, the United States, North African countries, and the Middle East. In the future, we aim to grow in a controlled manner and elevate the quality by organizing fairs.”

**The trends will continue to be showcased**

Seminars prepared and presented by representatives of companies that shape trends in the world of fashion take place with the active participation of fair participants and visitors. These seminars, which will present themes for the 2024-2025 autumn-winter trends, shed light on topics that will strengthen companies’ collections, such as the reflections of technology on fashion and materials that have reduced environmental impact, in addition to trend themes.



At the first fair of the year, where the color, texture, and style details of the 2024 spring-summer fashion were shared, the latest trend products of companies were also exhibited in the trend area. In addition, the Trend Seminar prepared by WSGN discussed the autumn-winter 2024/2025 women’s and men’s clothing fabric trends. It was announced that trend areas and seminars will continue at the second fair of the year. It is stated that the developments in technology and creativity will have an impact in the theme of “Expanded Imagination,” with artificial intelligence determining

**M. Fatih Bilici**  
İTHİB Vice President and Chairman of the Texhibition Istanbul Fair Committee

**“Texhibition is a branded fair”**



“We received positive feedback in terms of trade from participating companies and visitors of our fair, which we organized for the third time in March. Texhibition Istanbul contributes to the sector’s value-added production, branding, quality production, increased investments, employment, and exports. Alongside the internationally recognized fairs in the industry, Texhibition Istanbul stands as a branded fair on the sector’s agenda, with its rising success momentum.”

Seminars prepared and presented by representatives of companies that shape trends in the world of fashion take place with the active participation of fair participants and visitors.



the trends. Futuristic and fluid forms, changing surfaces, materials that respond to different stimuli, the influence of the metaverse on fashion, and symmetrical and digital imagery will be on the agenda. In the theme of “Landscapes of the Future,” the focus is on the synergy between industry and the environment. In a world with limited resources, textile products inspired by nature-rooted, biosynthetic alternatives and different planets will take the lead. The transition of regenerative products into alternative options across all industries is being considered within the scope of

sustainability efforts in the textile sector. The third theme, “Interactions,” draws inspiration from societal and political movements. Craft influences mixed with the energy of political crises and activism indicate the reflection of circular processes in textiles. While brands should activate their sense of empathy during this period, individuality and strong connections are important. Product development draws inspiration from the past, myths, and spiritual themes. The weight of recycling and repair-based products like patchwork will increase.

**In the 2023/2<sup>nd</sup> season:**

Major Apparel Manufacturers, International Chain Stores, Department Store Purchasing Managers, Managers of international brands and chains that produce their own collections, Managers of stores specializing in certain product groups, Online sales platform managers, Importers, wholesalers, distributors, Designers, those who produce with their own brands, and domestic and foreign textile industry professionals will come together.

**Product Groups:**

- Woven Fabrics
- Knitted Fabrics
- Denim
- Textile Accessories
- Yarn
- Synthetic Leather

# I of the world

Turkish textile industry meets with leading apparel manufacturers, designers, and textile distributors in the US at the 'I of the World' event held in New York.



Making a special effort for the US market shows how important the US is for the Turkish textile industry.

**I**stanbul Textile and Raw Materials Exporters' Association (İTHİB) organized the third 'I of the World' event in New York, which is one of the most strategic export markets for the Turkish textile industry. Ahmet Öksüz, the President of İTHİB, stated that the event, which was held on January 17-18, 2023, received great interest and said, "I of the World is an organization that we specifically designed for the US market. Making a special effort for the US market shows how important the US is for the Turkish textile industry.

With the fair, we brought together the leading apparel manufacturers, designers, and textile distributors of the US under one roof. In addition to Türkiye's largest textile companies, new firms that want to enter the US market also participated in our event. We aim to increase our market share in the US while contributing more to our country's economy with the exports we make."

**Increasing our share from the US**  
Ahmet Öksüz pointed out that the US ranked third among the

countries where the Turkish textile industry exports the most and continued his words as follows: "Our most important target market is the US, and we achieved \$866 million worth of exports in 2022. We increased US imports share to over 3%. As the world's fifth-largest textile exporter and the second-largest textile exporter in the EU, the Turkish textile industry with a \$36.3 billion export volume aims to be more effective in the US, which is the world's largest textile importer."



# THE TURKISH APPAREL INDUSTRY STANDS OUT WITH ITS COMPETITIVENESS

The availability of cotton, agility, better understanding of fashion, and environmentally friendly approaches in production make Türkiye's apparel industry competitive.

**W**ith its extensive infrastructure from raw materials to design and production, the Turkish apparel industry, with its vertical integration, agility, fast and quality production, continues to be a major supplier to global brands. Türkiye surpasses its competitors in various aspects such as fabric, accessories, design, production capacity, environmental and health conditions in production, and investment. Being one of the main cotton producers of the world enhances the competitiveness of the apparel industry. As the apparel industry stands out as one of the most vertically integrated industries in the sector, it also has the leading capacity in yarn production in Europe and one of the largest in the world. Flexibility and elasticity in production are noteworthy in the apparel industry,

and stock-based business is not conducted. Production volume can be custom tailored in both small and large quantities.

## The right address for slow fashion

Türkiye, which is very ambitious in long-lasting clothes, is pointed out as the right address for the "slower fashion" trend. This is because the competitiveness of the Turkish apparel industry relies on the production of more sellable commercial and durable clothing items in small quantities. The same applies to the product diversity of the sector. From jerseys to knitwear, from denim to socks, from t-shirts to outerwear, it's a country where manufacturers of any desired garment can be found. The İstanbul Textile and Apparel Exporters' Associations (İTKİB) serve foreign buyers to reach the right companies.



#### Contributing successful designers to the fashion world

The apparel industry invests in the human resources of the production and fashion industry under the leadership of the Istanbul Apparel Exporters' Association (İHKİB). Some of these investments have been implemented with European Union projects. İHKİB, which has 5 Vocational High Schools specializing in clothing production with Qualified Human Resources, financially supports these schools to contribute to the training of qualified labor in the industry. In addition, İHKİB is one of the partners in the project "My Choice is Textile Engineering". This project focuses on raising the level of students in textile engineering faculties. It has managed to contribute many successful designers to the fashion world with the KOZA Young Fashion Designers Competition it has been organizing for over 30 years.

#### Turkish apparel industry is branding

In addition to production, Türkiye is among a few countries in Europe in design and trend setting. The industry has over 50 years of experience and has a great accumulation in adding value to garments. Many designers grown in the country have stores and offices on Europe's most prestigious streets. Türkiye also owns various brands that operate thousands of stores and shops, particularly in Europe, worldwide.

#### İstanbul is for fashion, Anatolia is a production center

With a significant part of production in the İstanbul region shifting to Anatolian cities, İstanbul has become a center of design, marketing, and trade. Anatolian cities have become the production center of apparel production with new manufacturing facility investments and a well-trained workforce. With the country's developing logistical infrastructure, it has the opportunity for fast delivery to all parts of the world.

World leader by product Türkiye, one of the world's largest exporters of knitted products, is the second largest supplier in the socks sector and has the lead in denim products. The ability to produce all types of garments places the country at the forefront of the global garment supply chain and secures a leading position in the market. In addition, it stands out with environmentally friendly products in children's clothing, a rapidly growing market worldwide.

The apparel industry utilizes digitalization in tracking sustainability, contributing to the transformation of its industry into an environmentally friendly industry.



#### Seasonal inventory management capability

The Turkish clothing industry produces in compliance with the rules and regulations surrounding the clothing industry, relying on compliance with health and safety issues. Since many manufacturers are the main suppliers of the EU market, they work directly with European buyers and brands on sustainability issues. Seasonal inventory management and stock holding is a very important traditional compet-

itive advantage of the Turkish clothing industry. The industry's seasonal inventory management capability is recently attracting the attention of international buyers and brands. Rather than being a link in the supply chain, the Turkish apparel industry wants to be a "link in the partnership chain".

#### The digitalization approach of the Turkish Apparel Industry

The Turkish Apparel Industry has a strong foundation in dig-

italization and investments in digitalization have accelerated significantly with the pandemic. The apparel industry uses digitalization in tracking sustainability, contributing to the transformation of its industry into an environmentally friendly industry. The serious water saving achieved by using laser technology in design processes with digitalization in denim production is a good example of the contribution of digitalization to sustainability.



## DOMESTIC PRODUCTION POWER OF TURKISH TEXTILE INDUSTRY

Denim fabric product group, which is considered as one of the most important examples of Türkiye's domestic production power and has enabled the Turkish textile industry to achieve a strong position in global markets, continues to grow stronger and expand.

The double-digit growth of denim fabric exports in recent years is attracting new investments to the country.



**T**urkish textiles have a globally recognized reputation. The performance of Türkiye in the denim fabric market, which is among the most important product groups in the textile and raw materials industry, indicates that the country will become a strong player in the denim sector. The double-digit growth of denim fabric exports in recent years is attracting new investments to the country. Türkiye is among the top four countries in global denim fabric production, with its biggest competitors being China, Pakistan, and India. Türkiye stands out from its competitors with its production quality and proximity to the market. With this

advantage, Türkiye is the largest denim fabric supplier to the European Union.

Ahmet Öksüz, President of the İstanbul Textile and Raw Materials Exporters' Association (İTHİB), commented on Türkiye's place in the world denim fabric exports, saying, "Türkiye has made significant progress in denim fabric exports in recent years and has ranked fourth in the world rankings. The success is due to Turkish denim producers producing high-quality and innovative products, branding efforts, and technological investments. The denim sector has significant potential for Türkiye and plays an important locomotive role in exports. With more investment

and work in this area, we believe that Türkiye will expand its denim fabric exports."

### Türkiye's most important export market is Tunisia

Türkiye, the world's fourth-largest denim fabric exporter with a 7.2% share and \$338 million in exports, saw a 33.2% increase in denim fabric exports in 2021. In Türkiye's denim fabric exports, Tunisia has the largest share with 18.3%. Türkiye's denim fabric exports to Tunisia increased by 33.4% in 2021, reaching \$62 million. Egypt ranks second in Türkiye's denim fabric exports with a 15.6% share and \$53 million in exports, followed by Morocco with a 9.9% share



Turkish denim sector has a significant potential and plays an important locomotive role in exports.

The European Union's (EU) denim fabric imports in value increased by 7.2% to €167 million in 2021.



**Türkiye's 5-Years Denim Fabric Export (million dollars)**



and \$33 million in exports. These countries are followed by Italy, Bangladesh, Hong Kong, Germany, Serbia, Iran, and the United States, respectively.

**Türkiye meets the denim demand of the EU**

The European Union's (EU) denim fabric imports in value increased by 7.2% to €167 million in 2021. During this period, 33.6% of the EU's denim fabric imports were supplied from within the Union, while 66.4% were out-sourced. The EU's denim fabric

imports from within the union decreased by 7.1% in value in 2021, while imports from outside the zone increased by 16.2%. With a 35.8% share, Türkiye became the largest denim fabric supplier to the EU from outside the union. In 2021, the EU's denim fabric imports from Türkiye increased by 1.9% to €40 million. Pakistan ranked second in the EU's denim fabric imports with a 16.6% share and €18 million in supply, followed by Japan with a 12.6% share and €14 million in supply.

**Türkiye stands out in the denim clothing sector as well**

According to the data, Türkiye's denim apparel exports reached a record amount of \$1.9 billion in 2021, with a 29.8% increase compared to the previous year. Over the last 10 years, Türkiye's denim apparel exports have shown an increase of 19.6%. Spain is Türkiye's largest export market for denim apparel with a 21% share, followed by Germany with a 16.4% share and the Netherlands with a 13.6% share. In 2021, Türkiye's denim apparel exports to Spain increased by 65.3% to \$392 million, while exports to Germany increased by 23.7% to \$306 million, and exports to the Netherlands increased by 16.8% to \$253 million.

On the other hand, Türkiye's denim apparel imports increased by 12.6% in 2021, reaching \$137 million. However, Türkiye's denim apparel imports have shown a 25.8% decrease over the last 10 years. Egypt is Türkiye's largest supplier of denim apparel with a 34.4% share, followed by Bangladesh with a 16.4% share and Spain through a 9.8% share. In 2021, Türkiye's denim apparel imports from Bangladesh increased by 9.6% to \$22 million, while imports from Spain increased by 104.8% to \$13 million. Import of denim apparel from Egypt decreased by 9.2% to \$47 million in 2021.



## TÜRKİYE BLINKS AT THE



## RANKING AMONG TOP FIVE IN SHOE PRODUCTION

Türkiye with an annual production capacity of 550 million pairs, is the sixth largest producer in the world and continues to increase its global market share in shoe exports. The sector, which achieved \$1.22 billion in exports in 2022, is aiming to be among the top five in the world with new investments.

Türkiye's craftsmanship and handwork tradition in the shoe sector is appreciated worldwide.



The Turkish leather and leather goods sector, with its most important product group of footwear, has been experiencing rapid growth in the production of military boots, work boots, and shoes in recent years. In the sector where production is carried out in accordance with international standards, products marked with the CE sign are offered for sale and exported to many parts of the world, especially EU countries. The footwear machinery and footwear sub-industry production have emerged as a highly developed sector in terms of both capacity and technology, while production in the sector has also become more diverse.

The sub-sector is dense mainly in İstanbul, İzmir and the Aegean Region, Konya, and Gaziantep, and Türkiye exports products such as soles, heels, molds, and insoles. The momentum in footwear exports over the past five years has also raised capacity utilization rates. The Turkish footwear sector has focused more on exports by adopting elements such as environmental sensitivity and design-oriented production in the last five years, resulting in a multi-fold increase in export volume, surpassing 1 billion dollars. Türkiye is one of the most important footwear suppliers of the neighboring geography, especially to the EU countries

and Russia. In 2022, the Turkish footwear sector increased its exports by 21% to \$1.22 billion, despite the adverse effects of global trade and the largest export markets. The sector showed a good performance in the first quarter of the year with a 20% increase in footwear exports to \$392.2 million. The largest buyers in the sector were Germany, Russia, Iraq, Ukraine, Spain, Romania, and Italy.

### The sixth largest shoe producer in the world

Türkiye is the sixth largest shoe producer in the world with a strong production infrastructure spread throughout the country,



although capacity utilization is not at the targeted levels yet. The goal of the sector, where small workshops are widespread, is to accelerate the transition of craftsmanship manufacturing to industrialization. The industry's skilled handcraft talents are also considered an advantage in competition. Güven Karaca, President of the İstanbul Leather

and Leather Products Exporters' Association (IDMIB), states that Türkiye's craft tradition and handiwork in the shoe sector are appreciated worldwide and says, "By combining these talents with innovative design and technology, we can produce higher value-added products." Karaca, who says that small businesses in the sector need to transform

into larger scale production facilities, evaluates that "In this way, we can increase our production quality and further raise our exports. Our goal in shoe exports is to reach a level of \$2 billion annually. To achieve this, we need to increase our sector's production, design, and branding capacity."

#### Among the top five shoe suppliers to the EU

Türkiye is among the top five shoe supplier countries to the European Union. After Italy, Spain, Germany, and Portugal, Türkiye is the country that exports the most shoes to the EU. While Türkiye is known as a supplier that offers more affordable and wider product ranges in the European market, in recent years it has been seeking a market share in the luxury segment in European countries, especially in Italy.

#### IDENTIFICATION OF THE TURKISH SHOE INDUSTRY

- Annual production capacity of 550 million pairs
- Competitors: China, India, Indonesia, Italy, Mexico, Thailand, South Korea
- 300,000 employees
- Exports of \$1.2 billion in 2022
- Provinces where the sector is dense: İstanbul (50%), İzmir, Konya, Bursa, Ankara, Gaziantep, Manisa, Denizli, Adana, Malatya, Çorum (Iskilip)
- Export markets are the EU, US, Russia and Ukraine.

# HEMINGTON



## A GLOBAL BRAND



# “TURKISH TOWEL”

Traditional Turkish towels, which have managed to become known worldwide, are among the most important export products of the Turkish home textile industry with their thousands of years of history. Produced in many regions of the country, these towels meet the needs of the whole world with wide variety of types, patterns, colors, and sizes.

Denizli also leads in terms of patents, branding, and production volume in towel and bathrobe production. Denizli carries out 70% of Türkiye's towel exports.



Anatolia, which is considered the center of weaving, one of the oldest known arts since the existence of humanity, has hosted a rich culture from past to present. The towel, also known as “peşkir” in Turkish weaving and embroidery art, has become a brand worldwide with the name “Turkish Towel”. The quality of Turkish cotton and the success of the industry in production and craftsmanship are among the characteristics that introduced Turkish towels to the world. Turkish towels, which are famous globally for their flawless embroidery and specially produced cotton, emerged as a reflection of the Turkish bath

culture and the Islamic tradition of performing ablution five times a day. The towels, which also attract attention with their traditional Turkish motifs and embroidery designs, meet every need with wide variety, pattern, color, and size diversity.

### The brand journey of Turkish towel

The term “peshtemal” (Turkish towel) was first mentioned in Anatolian Seljuk period sources. Turkish towels continued to evolve and maintain their relevance in social and economic life during the Ottoman period. The Ottomans, who demonstrated superior achievements in woven fabric production, also managed

to introduce their little-known towels to Europe during this period. Turkish towels, which have a history of 1,600 years, gained importance, especially with the Turkish bath culture that is a part of Turkish culture. This field, which developed as a result of the combination of Turkish traditions with production opportunities in Anatolia, still harbors considerable potential today. Turkish towels, with their current industrial production volume, are among the most exported products from Türkiye. Türkiye has also developed its production of bathrobes alongside towels, and has become a brand known as “Turkish Towel.” World Turkish Towel and Bath-



Türkiye has a 10% share in woven bathrobe exports, while having only a 1.3% share in knitted bathrobe exports.



**Türkiye's towel exports (million dollars)**



robe Day has been celebrated on March 6<sup>th</sup> since 2012. Bursa and Denizli stand out in terms of towel production. It is noted that the first weaving workshop in Anatolia was established in a monastery in Bursa in the 15<sup>th</sup> century, and Bursa, which was prominent in silk production and silk weaving, was also the first place where towels were produced. Denizli also leads in terms of patents, branding, and production volume in towel and bathrobe production. Denizli carries out 70% of Türkiye's towel exports.

**The shining star of home textile exports**

In 2022, Türkiye's home textile

exports reached \$2.2 billion. The towel group, which has the highest share in the sector's exports with 31.8%, achieved an export of \$701.3 million. In 2021, the export of the towel product group was \$731.6 million in the home textile industry, which had an export of \$2.319 billion. Due to the slowdown in global trade, the export of the towel product group also experienced a 4.1% decrease in 2022.

In the first quarter of 2023, Türkiye made towel exports amounting to \$135 million. During this period, towels continued to be the most important product group in the Turkish home textile sector with a share of approximately 30%.

**Türkiye ranks fourth in towel exports**

China ranks first with a 39.8% share in towel and cleaning cloth exports, followed by Pakistan and India. According to 2021 export data, Türkiye, which ranks fourth in global towel exports, has a higher share of the global pie than European countries such as Portugal, Germany, and the Netherlands, although its export volume has not yet reached the desired level.

**Top two in woven bathrobe exports**

It seems that Turkish manufacturers have transferred their weaving and design experience gained from towels to bathrobe

production as well. Türkiye's woven bathrobe exports, which were around 140 million dollars in 2020, increased by 48.5% in 2021 to reach 208 million dollars. Türkiye, which ranks second in the world in woven bathrobe exports, has not yet reached the desired level in knitted bathrobe exports. Türkiye, which has had an export volume of around 44-48 million dollars in knitted bathrobes for the past few years, ranks seventh in knitted bathrobe exports globally. Türkiye has a 10% share in woven bathrobe exports, while having only a 1.3% share in knitted bathrobe exports.

**The characteristics that make Turkish towels special**

Turkish towels have become a popular choice for many people, including the British Royal Family. The quality of Turkish cotton, which is the raw material for the towels, is the most important factor that sets Turkish towels apart from others. Turkish cotton is made up of long and durable fibers, and its quick-drying properties help reduce moisture and prevent bacteria growth, making Turkish towels healthier and more comfortable to use. Traditional Turkish designs, which are commonly found on ceramic tiles in hammams, also make Turkish towels unique. Both hand-woven and machine-woven patterned towels continue to attract the attention and interest of people around the world.

When choosing a towel, features such as being made of 100% cotton and having high absorbency are often prioritized. However, factors such as texture sensitivity and the use of chemicals and synthetics in production also influence consumer preferences.

# Turkish SOCKS

exporters are  
expanding their  
share in the major  
markets

the American market, the world's largest importer, is noteworthy. Turkish socks exporters aim to expand their leadership in France to the US and German markets.



Türkiye's socks exports to the US increased by 158.2% over a 5-year period.



The socks industry, one of the leading sub-industries of the Turkish apparel and apparel industry, draws attention with its successful graph that reveals Türkiye's strength in the industry. Competing with China in the global socks market and being the second-largest socks exporter in the world after China, the Turkish socks industry is the largest producer in the region. The industry, which experienced a 4.5% decline in 2020 due to the pandemic, closed the year affected by the outbreak with

an export of 1 billion dollars. Despite export losses, Turkish socks exporters who can meet any demand quickly showed a rapid recovery in 2021 with their dynamic and flexible structure, quality products, and strong R&D infrastructure. Despite the difficulties experienced by the producer in supplying raw materials, rising costs, fluctuations in the exchange rate, and the energy crisis in 2021, socks manufacturers managed to increase their exports by 24% in 2021 and exceeded the \$1.3 billion

threshold. In 2022, when global trade fell in the last quarter, Türkiye's socks exports increased by 1.8% to \$1.33 billion. The share of socks products in the total exports of the Turkish apparel and apparel industry, which exported \$21.2 billion in the same year, was 6.3%. The most exported socks product was knitted socks from cotton.

#### The top 3 markets are from Europe

While China's socks exports increased by 11.6% in the 2017-2021



Türkiye comes after China (34.5) with a share of 28.1% in the ranking of the most important suppliers of England, the fifth-largest socks importer in the world.

**\$1.33**  
Billion

Türkiye's socks export volume in 2022

period, Türkiye's socks exports grew by 24%. In the 2021-2022 period, the export performance of the two countries was realized at the level of 25%. Although Türkiye's largest export market is European countries, it is also fortifying its presence in new markets, especially in the USA. In the January-December period of 2022, the countries to which the most socks were exported from Türkiye were Germany, England, France, the

Netherlands, and Spain, while there was a significant increase of approximately 158% in exports to the USA in the 2018-2022 period. During the same period, the increase in China's socks exports to the USA was 11.4%. Turkish socks exporters, who are ranked eighth among the US's socks suppliers with a 1.9% share from the US market, are trying to increase their shares with the fairs they participate in and trade delegations in the country.

**Germany's second, France's biggest supplier**

When the suppliers of Germany, the second-largest socks importer in the world, are taken into consideration, China ranks first with a 28.4% share, and Türkiye is in the second place with a 26.1% share. Türkiye's socks exports to Germany increased by 46.2% in the 2018-2022 period. The total socks export volume to the country in 2022 was \$340 million. While Türkiye ranked first with \$195.3 million in 2022

among the suppliers of France, the fourth-largest socks importer in the world, imports from Türkiye increased by 7.6% compared to the previous year. Türkiye had a 25.4% share in France's total socks imports, while China and Italy ranked second and third with 23.8% and 14.5% respectively. Türkiye comes after China (34.5) with a share of 28.1% in the ranking of the most important suppliers of England, the fifth-largest sock importer in the world.

**Türkiye is increasing its market share**

In the market where the world's socks exports were \$14.8 billion in 2021, Türkiye is the second-largest socks exporter in the world with a 8.8% share. Turkish socks companies, the largest suppliers of the European market, have become the production base for many international brands today with their quality production. The sector, which has an important role in the country's employment and exports, is improving itself in terms of labor, design, and production lines to take its success higher every day.



# TÜRKİYE

## THE NEW DESTINATION FOR ACTIVE WEAR SUPPLY

Türkiye's dynamic growth in the active wear industry is catching global attention, making it a new preferred destination for importers. In the past five years, Türkiye has witnessed a significant 100% increase in the major active wear markets such as the USA, France, Germany, Japan, and the UK.

In 2022, while Türkiye carried out apparel and garment exports worth \$21.2 billion, sports clothing products made up 2.4% of this, amounting to \$499 million.

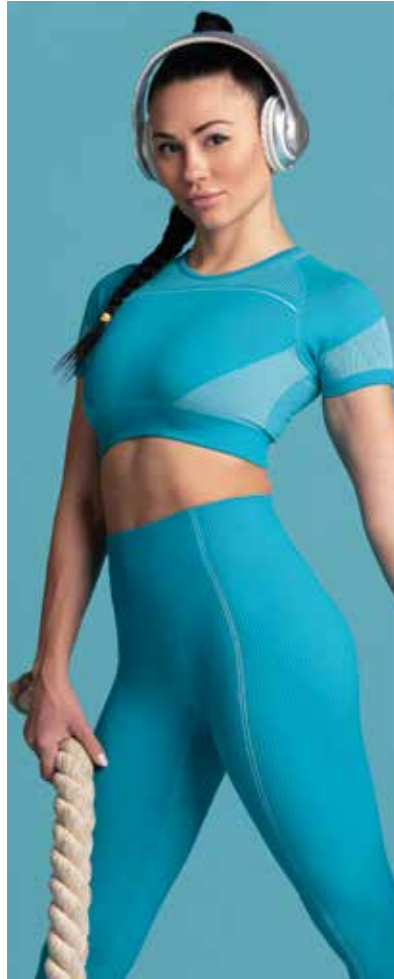


The world's largest exporter is China with approximately a 36% share and a volume of \$7 billion.

As physical and mental health have been placed at the core of daily life, the role and importance of sports in human life have increased. The comfort of the clothes chosen during sports activities has led to a change in dressing styles and sports clothing has started to be preferred in daily life as well. After Covid-19, sports and comfy clothing fashion showed a faster development. Consequently, at the end of 2021, total sports clothing exports in the world were \$19.9 billion, and the import market was \$16.4 billion. The fastest growth in the market is taking place in developed countries. The most important sports clothing importers in the world are ranked as the USA, France, Ger-

many, Japan, and the UK. With a 20.5% share, the USA, the most important sports clothing importing country in the world, increased its imports by 12.1% compared to the previous year, reaching \$3.4 billion in 2021, followed by France with a 7.4% share. France's sports clothing imports in the same period were \$1.2 billion. Germany, in third place, had a 6.2% share in the global import market, and the import volume was \$1 billion. France also ranks second among the world's most important sports clothing exporters. The world's largest exporter is China with approximately a 36% share and a volume of \$7 billion. The growth rate of Türkiye, which ranked 10<sup>th</sup> on the list, in recent years is noteworthy. The Turkish

sports clothing industry grew by 112% in the 2007-2021 period and increased its share of the global market to 2.3%. In 2022, while Türkiye carried out apparel and garment exports worth \$21.2 billion, sports clothing products made up 2.4% of this, amounting to \$499 million. While Türkiye's apparel and garment exports in 2022 grew by 4.8% compared to the previous year, sports clothing exports caught an increase rate above the increase in apparel and garment exports, with 8.5% for the year. In the five-year period between 2018-2022, the sports clothing product group that Türkiye exported the most was woven sports, ski, and swimwear, while knitted sports, ski, and swimwear ranked second.



Türkiye increased its active wear exports to the UK, the fifth-largest importer, by 155.7% during the same period, reaching a market share of 8.2%.



**Elastane fabric creates a revolution**

Active wear, a burgeoning market, is seeing fashion designers create new trends with designs that allow ease of movement in daily life. New fabric fibers that are sweat-resistant, stretch to fit the body, breathable, and dirt-resistant are contributing to the rise of active wear trends. Elastane fabric, which is lighter, elastic, and body-shaping, is blended with natural fabrics to produce clothes that fit the body better and are more comfortable to wear. This revolution in active wear is driven by clothes made from this fabric that wraps around the body without the need for expensive cutting and sewing operations. Clothing made from elastane fabric is now being used for a range of sporting activities, from swimming to skiing, and from dancing to yoga.

**Türkiye shows over 100% growth in major active wear markets**

When the leading active wear importers were analyzed, the top three suppliers to the USA were China, Vietnam, and Mexico. Over a five-year period from 2018 to 2022, US imports of active wear from China decreased by 19.3%, while imports from Vietnam increased by 75.4% and those from Mexico by just 6.6%. During this five-year period, Türkiye, which ranks 15<sup>th</sup> among US active wear suppliers with a

0.7% share, increased its active wear exports to the US by an impressive 126.9%. Türkiye ranks eighth among France's suppliers, having increased its active wear exports to France by 127.8% in the 2018-2022 period.

**The third supplier for Germany and the UK in active wear**

In Germany, Türkiye holds a 7.8% share of active wear imports, having boosted its exports to the country by 138.1% in the last

five years. Türkiye has shown similar growth in the Japanese and British markets. In Japan, the fourth-largest importer of active wear, Türkiye ranks 11<sup>th</sup> among suppliers. From 2018 to 2022, Türkiye increased its active wear exports to Japan by 149.8%. Türkiye increased its active wear exports to the UK, the fifth-largest importer, by 155.7% during the same period, reaching a market share of 8.2%. This makes Türkiye one of the top three suppliers to the UK.

PREMIUM QUALITY

NEW INVESTMENTS

Bossa  
72  
years

TOWARDS ZERO WASTE

NEW INNOVATIONS



# İHKİB

## PREPARES A ROADMAP FOR GREEN TRANSFORMATION

The apparel and garment industry, one of the top three export industries in Türkiye, has completed the Sustainability Strategy and Action Plan document, which will serve as the roadmap for the compliance process with the Green Deal. The Sustainability Strategy and Action Plan consists of 40 actions under six components.

We are currently the third largest supplier to the EU in apparel. Although we have an important place in this large market, we are not indispensable.

**R**eminding that the Turkish apparel and garment industry, the third largest supplier to the EU, embraced the green transformation long before the Green Deal, Mustafa Gültepe, Chairman of the Türkiye Exporters' Assembly (TİM) and İstanbul Apparel Exporters' Association (İHKİB), stated that more than 60% of Türkiye's apparel and garment exports are to the European Union (EU) countries. He said, "We must closely follow the European Green Deal in order to maintain our global competitiveness. We need to quickly prepare the industry for the zero carbon target in 2050. Our goal is to increase the unit value per kilogram in apparel and clothing to 40 dollars, and our annual exports to 40 billion dollars. In order to reach the target, we need to increase our green production capacity to the maximum level in addition to increasing designed, innovative, and branded production. Because every three out of four firms based in the EU will restructure the supply chain



The plan was announced to the public at the meeting attended by Türkiye Exporters Assembly (TİM) President Mustafa Gültepe and industry leaders.

its competitors with its design power, quality, proximity to target markets, and strong supplier infrastructure. Pointing out that sustainability must be added to the current advantages, Kaya said, “We believe that we will turn the green transformation process into an opportunity with a partnership chain approach. Instead of being any link in the supply chain, we must be an indispensable unit in the partnership chain. Here, compliance, competitiveness and sustainability criteria stand out. We need to be fully compliant in terms of environmental, social and managerial aspects, competitive in terms of price performance, and complete our sustainability compliance. We must provide these standards not because someone requested them, but because we are responsible. We prepared our sustainability strategy and action plan with this understanding. The contribution of all our stakeholders to the study was very important. We also set off with a participatory, inclusive and active approach. As a result of our analyzes and opinions from the authorities, we have created 40 actions by collecting the transformation agenda under six components. Thanks to the collaborations resulting from participation, we have moved to the implementation process in 13 of the actions we determined.”

on the basis of sustainability by 2030. In textile products, being long-lasting, recyclable and free from hazardous chemicals will be mandatory. We are currently the third largest supplier to the EU in apparel. Although we have an important place in this large market, we are not indispensable. We must prepare considering this reality in mind and quickly transform our infrastructure. We have determined our roadmap with the Sustainability Strategy and Action Plan. After the textile, which is an inseparable whole, the apparel and garment industry completed the whole with the clarification of its sustainability strategy. With this document,

we will be sending a very strong commitment message to our European business partners, especially on the issue of green production.”

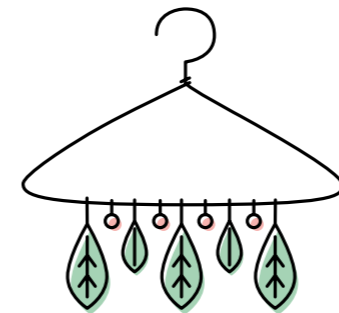
**“We must be an indispensable unit in the partnership chain”**

Mehmet Kaya, a member of the İHKİB Board of Directors and the Chairman of the Joint Sustainability Committee of the Apparel Sector, also emphasized in his speech that Türkiye is one of the rare countries where all components from the fiber to the final product are completed in the apparel supply chain. Kaya reminded that Türkiye also differentiates itself from

**40 ACTIONS TO BE CARRIED OUT UNDER 6 TRANSFORMATION AREAS**

**Governance**

- Sectoral Sustainability Committee & Advisory Board
- R&D & Eco-Design Collaboration Platform
- Information Campaigns & Guides
- & Mentorship Programs
- Competitor Country Sustainability Comparison
- Turkish Product Durability Consumer Analysis
- Sustainable Turkish Apparel Promotion Campaign
- Sustainable Raw Material Need Analysis



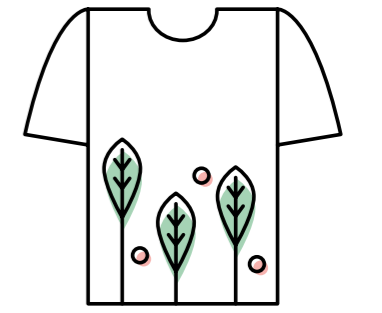
**Digitization**

- Digital Transformation Readiness Analysis
- Green Transformation Technology
- Requirement Map
- Digital Transformation Roadmap
- From Design to Production
- Digital Transformation Services
- Digital Product Passport Infrastructure
- Sectoral Digital Transformation Center



**Financing the Transformation**

- Role of the Sector in National Development – Economic Footprint Analysis
- Green Transformation Financing Needs Analysis & Green Banking Models
- Green Transformation State Support Model Suggestions
- Incentive & Support & Loan Mechanisms Information Programs



**Social Compliance & Green Skills**

- Sustainable Management & Production Continuous Education Model
- Working Conditions Mentorship Programs
- Sustainable Fashion & Eco-Design Continuous Education Model
- Social Compliance Regulation - Information Programs on Developments

**Environmental Footprint**

- Incentives-Policies for Sustainable Material Supply
- LCA (Life Cycle Assessment) Guide
- Analysis of Additional Audit Burden imposed by Regulations
- Greenhouse Gas Measurement and Reduction Guide
- Establishment of Sectoral Carbon Service Center
- BAT - Best Available Techniques Implementation Guides

**Circularity**

- Apparel Recycling Center / System
- Waste Management and Recycling Guide in Apparel
- EPR - Proposal for an Extended Producer Responsibility Model in Türkiye
- Circularity Platform for Supply of Recycled Materials

# TEXTILE AND APPAREL INDUSTRY LEADS THE GREEN TRANSFORMATION



The textile and apparel manufacturing industry, with their sustainability action plans, play a leading role in Türkiye's net-zero emission target.



Energy Information Administration, the textile and apparel industry is the fifth industry contributing most to CO<sub>2</sub> emissions.

**T**ürkiye has declared its 2053 climate target as net-zero emissions under the Paris Climate Agreement. Although energy plays a key role in meeting these targets, the manufacturing industry also has a significant share in emissions. While the manufacturing industry continues its green transformation under the guidance of the European Green Deal, the textile and apparel industries are prioritized in the industry. Türkiye, which exports more than half of its goods to the European continent, continues to increase its share in US imports post-pandemic. Distancing itself from Far East countries with its proximity to the market and

quality production, Türkiye is also trying to strengthen its competitiveness with sustainability investments. The steps taken towards carbon emissions taxation for sectors within the framework of the EU Green Deal are also leading to an increase in work in this area. Because research reveals that the global fashion industry is responsible for 20% of water pollution and 35% of microplastic pollution in the oceans. It is estimated to cause 10% of global carbon emissions. According to the U.S. Energy Information Administration, the textile and apparel industry is the fifth sector contributing most to CO<sub>2</sub> emissions.

## Leading the green transformation

With Türkiye's acceptance of the Paris Climate Agreement and its joining of the COP26's official targets covering the year 2050, the textile industry became the first sector to push the button for the green transformation. The representatives of the textile industry, who shared the Sustainability Action Plan with the public under the leadership of the Türkiye Exporters Assembly (TİM) in July, are taking decisive steps. The TİM Industrial Sustainability Science Committee was established in September for the first target of the plan. However, the textile industry is quite familiar with these studies! Companies that



Turkish textile and apparel manufacturers continue to make significant efforts to improve the industry's report card.

have been receiving consultancy for carbon footprint measurement for some time stand out with their sustainability-centered approaches in their innovation and R&D-focused approaches in recent years.

**AIM: spread sustainability to the base**

The action plan, which came to life under the leadership of TİM, was prepared by the Textile and Raw Materials Exporters' Associations with the aim of spreading the "Sustainable Textile" vision to

the base. Exporting textile companies strive to further increase their market share in global exports by providing a permanent transformation and to achieve high-level compliance with the standards of the European Green Deal.

Turkish textile and apparel manufacturers continue to make significant efforts to improve the sector's report card. Exporters in Türkiye, who carry out a large part of textile and apparel exports to EU countries and global brands, are focusing on innovative tech-

nologies and sustainable solutions that will reduce the carbon footprint in production processes. Brands are starting to use natural fibers in production, while they are switching to machines with the latest technology to reduce water consumption during pre-finishing, dyeing and washing after dyeing. Non-renewable energy sources are also being converted to renewable sources such as solar panels, biomass, and wind energy. The most common application is the reuse of wastewater. Combining processes

such as bleaching, softening, and dyeing in a single step reduces the number of process steps and decreases water and energy consumption.

**Supply chain is being reshaped as 'green'**

Ahmet Öksüz, the President of İTHİB (İstanbul Textile and Raw Materials Exporters' Association), stated that their prepared Turkish Textile Sector Sustainability Action Plan is inclusive of all platforms within companies, from production to management



İstanbul Textile and Raw Materials Exporters' Association (İTHİB) President Ahmet Öksüz stated that with Turkish Textile Industry Sustainability Action Plan that they prepared covered all in-house platforms from production to management units.

units. He emphasized that this guiding work will help facilitate the adaptation of sustainability to all components of companies. Ahmet Öksüz also highlighted that climate change, land use, and scarce resources have shaped the textile sector's supply chain. He pointed out that the difficulties in accessing potential raw materials also cause price fluctuations and reputation risks to companies. Öksüz mentioned that global brands have announced their intention to remove products without a sustainability plan

from their supply chains in the short and medium term. He said, "Our industry has entered a major transformation in this regard. We aim to disseminate the European Union's Green Deal approach and its goals of reducing carbon footprint throughout our industry under the leadership of our Turkish Exporters Assembly and the Ministry of Trade. Therefore, with this published guide, I believe that our companies will establish solid foundations in response to the risks and opportunities faced by our sector."

Anatolian

Investments

## ANATOLIA'S ROLE AS A SUPPLIER IS

### STRENGTHENING WITH NEW INVESTMENTS

New investments in textile, apparel, leather, and carpet production in Anatolia, which has centuries-old experience in these sectors, are increasing plan. With over \$3 billion in new investments made in 2022, Anatolia will strengthen its role as a supplier in global trade.



The textile, apparel, leather and leather goods, and carpet sectors continue to revive Anatolia and strengthen production with their investments. Despite the pandemic that negatively affected global trade three years ago, these sectors did not lose their appetite for investment and provided

significant support to the Turkish economy. With the motto "İstanbul as a fashion center and Anatolia as a production base," in 2022, they carried out high-scale investments in many cities of Anatolia. The total investments of merely these four sectors exceeded 3 billion US dollars in 2022, creating new

Cities	Investment (million TL)
Gaziantep	6.436
<b>Bursa</b>	<b>6.411</b>
Kahramanmaraş	4.617
<b>Tekirdağ</b>	<b>3.908</b>
Şanlıurfa	3.442
<b>Diyarbakır</b>	<b>2.190</b>
Bitlis	1.832
<b>Elâzığ</b>	<b>1.515</b>
Uşak	1.402
<b>Niğde</b>	<b>1.261</b>
TOPLAM	44.998

Textile and Raw Materials Investments  
(Top 10 Cities)

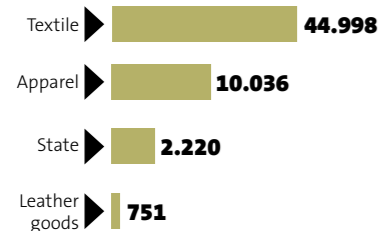


The sector realized the most investment in Bursa. Investments worth 295 million TL provided an additional employment of 175 people in Bursa.



Investments of 178 million TL were made to Aksaray, 93 million TL to Uşak, 34 million TL to Malatya, 10 million TL in Izmir, and 5 million TL to Kayseri.

**Sectors' Investment Volumes for the Year 2022 (million TL)**



employment opportunities for 115,000 people.

**The second largest investor in Anatolia**

The Anatolian 500 survey, which determined the top 500 companies conducted by the Economist Magazine, was published at the end of 2022. The increase in exchange rates and the liveliness in foreign demand enabled the companies on the Anatolian 500 list to grow by 82.8% in terms of

turnover compared to the previous year. During this period, the total turnover of the Anatolian 500 companies also increased from 9.6% to 12.3% of GDP. During the pandemic, where Turkish companies turned the problems in the supply chain from China to the West into an opportunity, exports of Anatolian 500 companies also increased by 39% and reached 21.742 billion dollars. Anatolian 500 companies provided employment for

nearly 304,000 people in 2021. The second-largest sector on the list was the textile and apparel industry.

**Investments in apparel sector exceeded 10 billion TL**

Investments in the apparel clothing sector exceeded 10 billion Turkish liras in Anatolia in 2022. With these investments, an additional employment of 94,258 was created. The sector realized the most investments in İstan-

bul, with 1.2 billion TL investments providing an additional employment of 2,989 in the city. The cities with the second, third, fourth and fifth highest investments were Elazig with 865 million TL, Malatya with 754 million TL, Diyarbakir with 699 million TL, respectively, and Sivas, Van, Tokat, Tekirdag, Sinop and Duzce followed them.

**Textile investment pioneer**

The textile and raw materials

sector has also taken important steps in investment. In 2022, total investments in the sector exceeded 44.9 billion Turkish Liras. The employment created by these investments was 19,226 people. The textile and raw materials sector invested the highest amount in Gaziantep. While Gaziantep investments exceeded 6.4 billion TL, additional employment also rose to 2,101. Investments of 6.4 billion TL were actualized in Bursa, 4.6



The textile and raw materials sector, which closed the year with 10.3 billion dollars in exports, was led by İstanbul with 4.3 billion dollars among the provinces with the highest exports.



Investments in the carpet sector exceeded 2.22 billion TL in 2022. The employment created by these investments was 641 people.

billion TL to Kahramanmaraş, and 3.9 billion TL to Tekirdağ. These were followed by Şanlıurfa, Diyarbakır, Bitlis, Elazığ, Uşak, and Niğde.

**Leather and leather goods prefer Bursa**

Anatolian investments in the leather and leather goods sector exceeded 751 million TL in 2022. With these investments, additional employment also increased to 499. The sector invested the most in Bursa. Investments worth 295 million TL provided an additional employment of 175 people in Bursa. Bursa

was followed by Bolu with 220 million TL, followed by İstanbul with 97 million TL and Tekirdağ with 87 million TL. Niğde followed with investments of 39 million TL and Uşak with investments of 14 million TL.

**Gaziantep likes carpet production**

Investments in the carpet sector exceeded 2.22 billion TL in 2022. The employment created by these investments was 641 people. The carpet sector carried out the highest amount of investment in Gaziantep. While Gaziantep investments exceed-

ed 1.898 billion TL, additional employment also rose to 467. Investments of 178 million TL were made to Aksaray, 93 million TL to Uşak, 34 million TL to Malatya, 10 million TL in İzmir, and 5 million TL to Kayseri.

**Investments of sectors create balanced exportation**

In 2022, the apparel and clothing sector, which realized an export volume of 21.2 billion dollars, has İstanbul at the top of the export volume with 14.7 billion dollars, based on the export volumes by province. Bursa followed İstanbul with

1.6 billion dollars, İzmir with 1.4 billion dollars, Denizli with 1.3 billion dollars, and Ankara with 253.7 million dollars. Other provinces with the highest apparel exports were Duzce, Tekirdag, Gaziantep, Adana, and Kahramanmaras, respectively. İstanbul, Duzce, and Tekirdag, which are among the top 10 apparel investments, also stand out as the top 10 provinces with the highest exports. The textile and raw materials sector, which closed the year with 10.3 billion dollars in exports, was led by İstanbul with 4.3 billion dollars among the

provinces with the highest exports. Gaziantep followed with 1.7 billion dollars, Bursa with 1.2 billion dollars, Kahramanmaras with 868.8 million dollars, and Adana with 604.9 million dollars. The other provinces with the highest exports in the sector were Denizli, Kayseri, İzmir, Tekirdag, and Usak, respectively. The provinces that were included in both the top 10 investment and top 10 export city rankings were Gaziantep, Bursa, Kahramanmaras, Tekirdag, and Usak. In 2022, İstanbul was at the top with an export volume of

1.3 billion dollars in the leather and leather goods sector, which achieved an export of 2.057 billion dollars, based on the export volumes by province. Gaziantep followed İstanbul with 173.9 million dollars, İzmir with 162.4 million dollars, Ankara with 110.6 million dollars, and Bursa with 53.6 million dollars. The other provinces with the highest leather and leather goods exports were Konya, Usak, Tekirdag, Adana, and Bolu, respectively. Bursa, Bolu, İstanbul, Tekirdag, and Usak, which were among the top 10 leather investments, also appeared in the top 10 provinces with the highest exports. The carpet sector, which closed 2022 with 2.7 billion dollars in exports, was led by Gaziantep with 1.9 billion dollars among the provinces with the highest exports. İstanbul followed with 623.8 million dollars, Usak with 70.1 million dollars, Denizli with 24.8 million dollars, and Isparta with 20.4 million dollars. The other provinces with the highest exports in the sector were Kayseri, Bursa, Duzce, Ankara, and Mardin, respectively. The provinces that were included in both the top 10 investment and top 10 export city rankings were Gaziantep, Usak, and Kayseri.



# HIS SIGNATURE IS FEATURED ON THE SHIRTS OF FAMOUS BRANDS

We spoke with Mustafa Paşahan, the Chairman of the Board of Zevigas Textile, which designs and produces high-quality men's shirts for world-famous clothing brands, about the secrets of long-term collaborations with global brands and the supplier role of the Turkish apparel industry.



Mustafa Paşahan, Chairman of the Board of Zevigas Textile

**W**ith two production facilities in İstanbul and Malatya, Zevigas Textile has a production capacity of over 1.2 million units per year and continues to invest to make growth sustainable. Mustafa Paşahan, the founder of Zevigas and also the Vice Chairman of the İstanbul Apparel Exporters' Association, emphasizes that sustainability in quality is as important as growth, stating that "The fact that all world-famous brands source their products from Türkiye is an indicator that the industry's production is of high quality."

**I would like to start with a question that represents the reason why we conducted this interview with Zevigas. What do you see as**

## the reasons why global brands choose Zevigas?

There are actually several reasons for this, and the most important is the references we have gained from our initial work. These references have made us Türkiye's leading shirt manufacturer and exporter since 1993. As Zevigas, we design and produce high-quality men's shirts for world-famous clothing brands. Working with leading brands from all over the world, in other words, our references distinguish us from our competitors. It was not easy to earn these references. We have created a significant design power in 30 years. We are one of the companies with the lowest personnel turnover in the industry with our highly satisfied, committed, and



With our 16,000 square meter production area and 500 employees, we have an annual production capacity of over 1.2 million units.



loyal employees. As much as machinery investment in the apparel industry, the continuity of employees is also very important. We establish long-term partnerships with our employees through the organic bonds we create for them and never forget the importance and value of the human factor in production.

**Now, the environmental factor has also been added to the competition. Where do you see yourself in this regard, and what kind of demands do brands have?**

One of the factors that differs us is our production facilities' ability to provide any requested product in different segments to our customers in a short time. Now, environmental sensitivity has been added to this. Working with global brands for many years has made Zevigas one of the first companies to realize the importance of sustainability. We pay attention to using environmentally friendly materials from raw material selection to packaging. Our clean energy and efficient use of water-based production and sustainability efforts continue at full speed. In addition, we have HIGG FEM & FSLM, BSCI, Sedex,

GOTS, OCS, RCS, BCI, and European Flax certificates, which are of great importance to the industry.

**I believe İHKİB, of which you are the Vice Chairman, has also prepared a roadmap for the industry.** Yes, "A Sustainable World" is one of the most urgent issues of humanity today. The number, obligations, impacts, and bindingness of international agreements for this goal are increasing. Carbon emissions, the efficient use of resources, and the reduction of waste are among the most important issues. The roadmap developed by the İstanbul Apparel Exporters' Association sets out the steps that should be taken in the industry

for sustainable production and consumption, and we are working to implement it.

Türkiye is the largest exporter of apparel and textile products to the European Union (EU), with almost 45% of its total exports going to EU countries, and this figure reaching 60% in the clothing and apparel industry. Türkiye has taken action and initiated sustainability efforts much earlier than many other countries, and continues to rapidly advance in this area.

We have made significant progress in sustainability efforts as a country. We will work even harder to promote this strength globally.

**How has Zevigas' production and customer portfolio evolved in the past few years as the supplier network has been reshaped?**

First of all, we need to evaluate it as a country. The fact that we did not stop production even during the pandemic period demonstrates our reliability. The export success we have achieved in the past few years is also an indicator of this. The companies that can export to the world's most important markets with fast and flexible production like us have brought Türkiye to this point. This needs to be made sustainable, and producers are fulfilling their responsibilities for this. As Zevigas, we use the latest technologies in the fashion

The companies that can export to the world's most important markets with fast and flexible production like us have brought Türkiye to this point.

and textile market to produce our designs that are suitable for innovative trends and showcase them to our customers in different corners of the world through fairs. We constantly invest in R&D in our high-capacity production facilities located in İstanbul and Malatya and continue to produce. With our 16,000 square meter production area and 500 employees, we have an annual production capacity of over 1.2 million units. We play a big role in sectoral exports. With export-oriented growth, we export to the world's leading brands in the most important markets such as the United States, Italy, Germany, the Netherlands, Spain, Poland, Denmark, the United Kingdom, and Canada.

**If we were to rank the reasons why global brands choose Türkiye, among price, quality, and delivery, which one would come first?**

Türkiye is among the global players in the apparel industry with its proximity to Europe, flexible production capacity, design power, quality, and compliance with social responsibility criteria. We are the sixth largest and the third largest supplier in the apparel industry in the world and Europe, respec-

tively. Our long-standing cooperation with European brands, our brand-country identity in production, and our social responsibility criteria in compliance with EU standards distinguish us from our competitors. We continue to put efforts towards sustainable production in line with the Green Deal targets in the Turkish apparel industry. Our factories are rapidly shifting towards sustainable energy sources. With our green factories, we plan to make İstanbul a fashion hub and Anatolia a production base. I believe that all these efforts will strengthen our existing cooperation with our European buyers in the coming period. Therefore, Turkish apparel with its design power, flexible production structure, quality products, price-quality balance, and logistic advantages will further strengthen its position in the world in the upcoming period.

**In which product groups does Türkiye have a competitive advantage in every aspect, especially?**

Our knitted and woven clothing products, predominantly denim, socks, and underwear products, are in a unique position to differentiate themselves from their global competitors in every aspect.

# Türkiye

## Lace for Global Brands

Antik, which has a wide range of customers from famous designer Karl Lagerfeld's team to Primark, is a leading supplier to global brands with over 5 million meters of stock and a collection of over 15,000 patterns.



Antik Dantel Chairman of the Board Adil Tuğsal Solak

**A**ntik Dantel Chairman of the Board Adil Tuğsal Solak says that they started lace production in 1995 with the aim of filling the gap in French lace manufacturing in, and since 2004, they have been operating under the name Antik Dantel. We interviewed with Adil Solak about Türkiye's signature in the lace fashion, and he believes that their extensive pattern collection, service, price, and fast delivery, as well as their sample stock, make Antik Dantel the best lace manufacturer in the world.

**How did you decide to enter the lace production while operating**

**in the home textiles sector? What kind of difference did you achieve in the industry?**

Lace production was a difficult job, and in the 1990s, there was no French lace in Türkiye. We made that difficulty even more challenging and have produced 15,000 patterns to date. We produce lace to meet all kinds of needs in the range of 1-140 centimeters. We focused our profession area on lingerie. Our largest customer was H&M. After participating in fairs, we started working with brands like Zara and Mango. These brands taught us what Fast Fashion was. Today, when Zara's design team wants a lace, they firstly contact

us. We have a very well-prepared connection system, so we can respond to customer needs instantly. This makes us stand out in the eyes of brands.

As Antik industry, we participate in 22 fairs worldwide from Japan to the United States, France to Italy. We export to 47 different countries. We try to serve all companies in Türkiye that value quality and follow fashion trends. We work with leading brands abroad. We have a wide range of customers, from the team of world-famous designer Karl Lagerfeld to Primark. Japan is an excellent market for us, where quality is more important than price. We also have

"In Fast Fashion, deadline comes before price. We need to deliver our orders within 3-4 weeks at the latest."



"With a wide collection of patterns, a deadline advantage, and over 5 million meters of stock, we are the world's best lace manufacturer."



**The productive living space**

Antik Dantel, which makes a difference in terms of architecture and design, also has a showroom in its office. Adil Solak explains the story of the specially designed building as follows: "We spend a large part of our day in our office. Therefore, we wanted our office to be a safe, peaceful and pleasant space. The view in the location we are in also impressed us. We built our office with the very valuable contributions of Zemberek Tasarım two years ago. We wanted it to be a place where visitors would have a good time. We prepared an infrastructure that can meet all the Fast Fashion focused demands of our business partners in the six thousand square meter indoor area. It became an office that I have never seen anything similar in Türkiye and in the world. As a team, we are a customer-oriented company. Therefore, it makes us proud that our customers and employees enjoy the office.

We have established a smart sample system here. As a fashion-focused company, we need to respond very quickly to our customers' sample and color chart requests. We prepared our entire infrastructure for this purpose. It is not just important to create designs. We keep the stock of all 15 thousand of our designs, including the yarns used on those patterns. When our customers request a sample of any product, we can quickly provide it. We have set up shelves for all of our designs in our smart sample system. When information reaches the sample preparation department through our ADS application, samples are quickly and easily collected from the shelf system and prepared to be sent to customers."

an excellent collaboration with companies in the United States. We serve all over Europe, but we can say that Spain is predominant due to Mango and Zara. We also have significant buyers in the UK, and we indirectly offer products to Germany through producers in Türkiye.

**How do you evaluate Türkiye's position in the textile industry as Antik Dantel?**

In Türkiye, lace work, which

we call needle lace, has been performed since the Ottoman Empire. We contributed to the production of these handmade products with machines. Antik Dantel is one of the two companies in Türkiye that produces fine, delicate and elegant lace known as French lace on modern machines. Today, there are around 30-40 small and large companies producing French lace in Türkiye. Türkiye has developed significantly in the textile

industry and has a high potential. We attach great importance to change and follow all trends. We see that lace is used as one of the main fabrics in women's lingerie, especially in recent years. In addition to this, lace is used as the main fabric in evening wear, home textiles, bridal wear, and in casual wear and the fast fashion movement today.

**You said "We contributed to the production of these handmade**

**products with machines". What kind of technology is used in Antik Dantel's production processes?**

We have a manufacturing facility in Çorlu with an indoor area of 23,000 square meters. We have made new machinery investments to provide extended services in our factory. We have increased our production by around 40%. In fast fashion, delivery deadlines come before price. We have to deliver our orders within 3-4 weeks at the

latest. Therefore, we always have to work with new patterns and highly advanced machines, and we attach great importance to this.

**What is Antik Dantel's strategy and team regarding design?**

As a company, we are successful in training qualified employees. New graduates gain experience by starting work here. We have a total of 300 experienced staff members, which enables us to

meet all of our customers' needs. With 15,000 patterns, we are the company with the largest number of patterns in the world. We have a design team of 10 people, and we also work with French, Italian, English, and Spanish designers on a freelance basis. Since we cater to the entire world, we must work with different designers and gain different perspectives from different countries. The most important feature that makes Antik Dantel the best lace producer in the world is our broad collection of patterns, service, price, and delivery, as well as our sample stock. We have over 5 million meters of stock, which is why we are the world's best lace producer. We try to patent most of our patterns. For example, Zara wants to hear

the story behind the chosen pattern. As brands prioritize this, we will also be protected.

**What digitalization steps are you taking as Antik Dantel? How do you evaluate your customer relations and the effectiveness of virtual fairs during this process?**

We adapted to the digital world before the pandemic. We made our team capable of quickly responding to all customer requests with a mobile phone application. With the Antik Dantel System (ADS) application, when the digital barcode of our lace cards is scanned or the code of the desired pattern is entered, various information such as the pattern's image, technical specifications, and the color of the sample we have in stock can be instantly accessed. An online order form can also be created through the application. As executives, we can also track which product has been sold to which company through the application. For our customers unable to visit us physically, we have prepared special links. All of our patterns can be viewed through these links, and online orders can be placed simultaneously. This specially designed program makes us the best in our industry.

As managers, we can also track which product has been sold to which company through the application.



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# 100

## THE 100-YEAR *Journey* OF THE REPUBLIC OF TÜRKİYE...

As the Republic of Türkiye celebrates its centenary, it is remarkable to witness the strides it has made in terms of industrialization, particularly in the textile and apparel industry. Over the past 100 years, the country has gone under significant transformation, evolving from an agrarian economy to a diversified industrial power.



Atatürk while visiting Merinos Factory after its opening. (February 1938)

In the early days of the Republic, Türkiye faced the challenge of rebuilding an economy shattered by the fall of the Ottoman Empire. A weary country that had spent its last 10 years in wars and suffering great losses quickly achieved significant success in economy and industry. The first few decades of the Republic were shaped by efforts to achieve economic independence and self-sufficiency. State-led industrialization initiatives in the 1930s paved the way for the development of many industries, including textiles.

Weaving has been one of the main areas of development for Turks since ancient times. According to archaeological studies, the history of weaving on Anatolian lands dates back to 6000 BC, during the Hittite and

Assyrian periods. The Turkish textile industry, which has roots extending back to these times, went through a modernization process in the first half of the 20<sup>th</sup> century. This period witnessed the establishment of numerous textile factories across the country and a significant increase in the industry's production capacity.

#### The transition to liberal economy

The transition to a more liberal economy in the 1950s and 1960s opened the way for foreign investment and accelerated the growth of the private sector. Turkish textiles began to make a name for themselves on the international market. Particularly, cotton and wool production experienced significant growth during this period, strengthen-

ing the country's crucial position in the global textile industry. The real development of the textile and apparel industry in Türkiye began with the establishment of Sümerbank. The industry reached the predicted 7% production targets set out in the first five-year development plan implemented between 1963 and 1967, and significant quality issues were resolved. During the second five-year development plan implemented between 1968 and 1972, industry production increased by 8.3%. Product groups and variety were increased. The investments made during this period led to today's extensive capacities in cotton yarn.

#### It led the way in textile and apparel exports

In the 1980s, Türkiye adopted an



In Sümerbank's woolen industry establishments, there were 5 contemporary enterprises with a total number of 534 looms.



export-oriented economic model. The textile and apparel industry spearheaded this transition. The industry, encouraged by a skilled workforce, an advantageous geographical location, and an expanding domestic market, grew rapidly. The influx

of foreign capital, technological advancements, and the liberalization of trade enabled Turkish textile and apparel products to reach markets worldwide. In the last decade, even though the Turkish textile and apparel industry faced stiff competition

from countries with lower production costs, it has managed to maintain its strong position by focusing on value-added products, investing in high-quality materials, innovative design, and advanced production technologies. Today, Türkiye is the third-largest supplier of textiles and clothing products worldwide. The apparel industry is internationally recognized for its quality and design, and Turkish brands continue to achieve success at both local and global levels.

**The industry's exports exceeded 30 billion dollars**

Especially during the pandemic period when all countries implemented trade measures and the supply chain was at the brink of breaking, the Turkish textile and

apparel industries drew attention with their superior achievements. In 2021, the industries' successes in the field of export continued to increase. The textile industry increased its exports by 33.2% in 2021, achieving an export of 12.8 billion

dollars. The apparel industry increased its exports by 18.3% in the same period, reaching an export of 20.3 billion dollars. As of November 2022, the textile industry's export in 11 months approached 12 billion dollars, while the export of the apparel

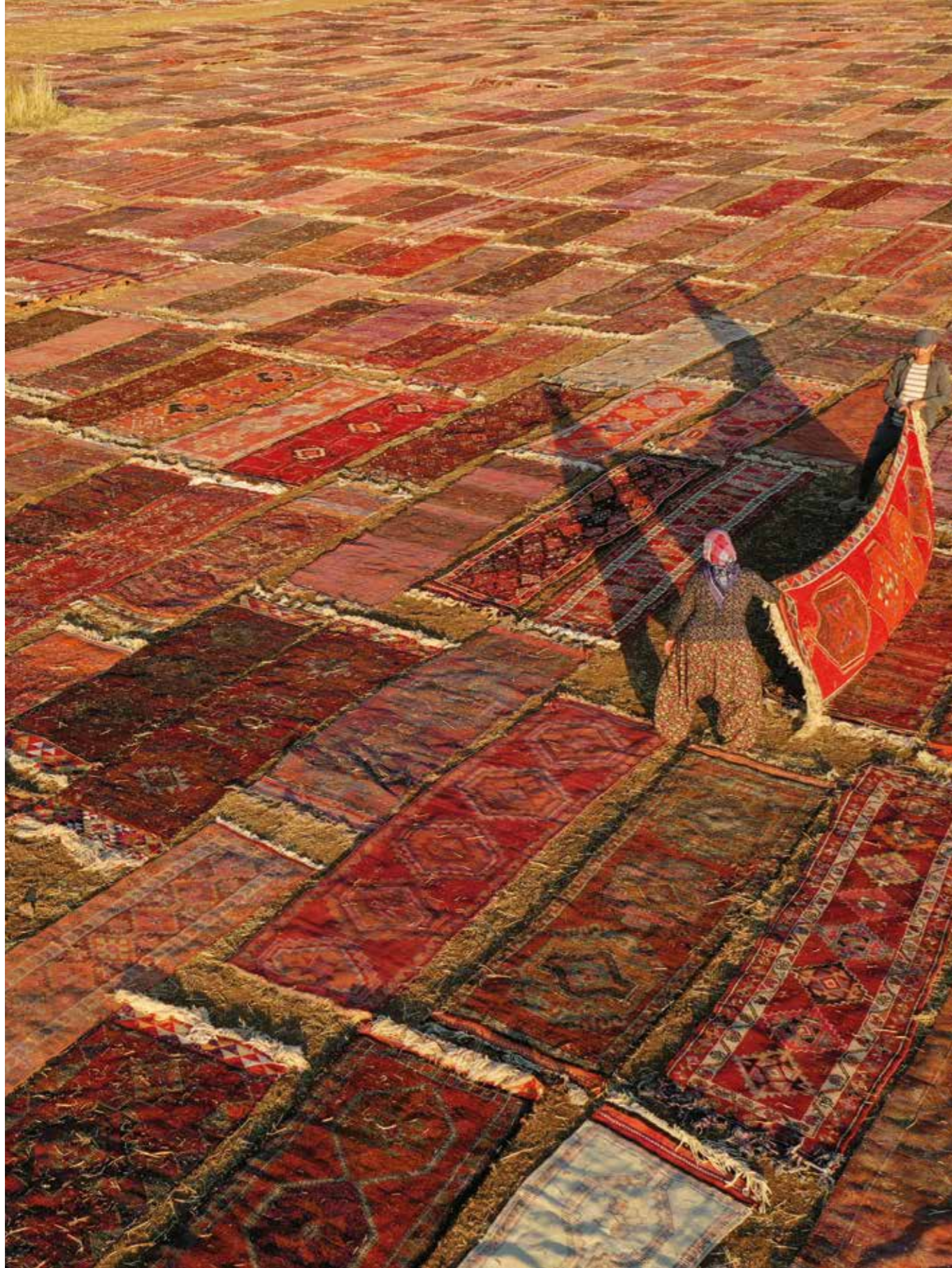
industry was 19.5 billion dollars. When considered together, the industries that signed exports of over 30 billion dollars also provide employment to more than 1 million people. The industries, which continue to make significant contributions to the country's economy into the second century of the Republic, reflect Türkiye's domestic production power to many points in the world, especially EU countries, with their exports. The sectors, which carry out many events and projects to make Anatolia a production base and İstanbul one of the fashion capitals of the world, also lead value-added exports with their strong structure in the design field.

**Sümerbank cottons opened up to the world**

In Türkiye, a cotton country, Sümerbank cottons were processed in 19 plants and became world-renowned. Built upon centuries of knowledge and cultural heritage, it was developed by adding contemporary techniques and international standards. In 18 modern cotton weaving facilities, with 24,594 personnel and 7,387 weaving looms, an average of 276 million meters of cotton fabric and 69 thousand tons of cotton yarn were produced each year. Cotton industrial establishments in Adana produced weaving yarn and raw cloth, while in Adıyaman, 14 million pieces of apparel production were manufactured annually. There were also facilities in Bakırköy, Denizli, Diyarbakır, Ereğli, Erzincan, Eskişehir, İzmir, and Kahramanmaraş.

**A unique factory in the world opened in Türkiye**

Sümerbank's Merinos Woolen Industry Establishment was put into operation by Atatürk on February 2, 1938. Sümerbank was producing carpets in four carpet manufacturing establishments in Kayseri, Diyarbakır, Hereke, and Isparta. Nazilli Sümerbank Print Factory was the first significant work of the young Republic's first five-year development plan. This operation, which was the first Turkish print factory established by Sümerbank, was also the first print factory established by the state. It was a project unmatched in the world of the 1930s.



Coşkun Aral

Documentary Producer



Murat Türkbkmez

## THE LANGUAGE OF MY SOUL, THE COLOR OF MY WORDS: ANATOLIAN CARPETS

Coşkun Aral, one of the figures that symbolizes the power of visual content in Türkiye, has undertaken the filming of the documentary "Anatolian Carpets: The Language of My Soul, the Color of My Words," which is a project of the İstanbul Carpet Exporters' Association (İHİB).

Oğuz Özdemir



Gökay Gökulu



"I was happy to meet the people who do this job all over Türkiye, who reflect their sweat and tears on their loom and never lose hope."

Tolga Sert



Tamer Günel

Dilan Bozyel



Coşkun Aral started his journey with a camera in his hand, taking successful people as role models. He followed the traces of these people from different parts of the world and the accumulation they brought to life. He says the reason for deciding to become a photojournalist is his desire to touch people, to see and document the places where people live, and to convey it to those who do not know by reporting it. Aral, who worked for the Sipa Press agency while photographing the Bloody May 1st incidents in 1977, started working at this

agency's office in France from 1980 onwards. During this period, the fact that his archive photographs about the September 12 coup were published in world magazines, as well as his testimony on the Iran-Iraq War and his interview with the hijackers of a plane he boarded after it was hijacked, enabled Coşkun Aral to work as an international journalist and photojournalist. Since then, Aral has been following the events developing in the world and has signed numerous documentaries. We talked to Aral, who travelled every corner of Türkiye for the Anatolian

Carpet Documentary, about his latest observations on Türkiye.

**As someone who has travelled almost all over Anatolia since childhood, what kind of richness do you observe that our country has in terms of visual content?**

We are very lucky to be in this geography. For example, in the carpet documentary we recently shot, we see that this art has a history of thousands of years in our country. Anatolia has become the center of agriculture. All the values left by those before us also have a visual aspect. Today, everyone knows about

Göbeklitepe. But settlement areas dating back almost 2,000 years before it were discovered. The visual richness brought by this rich culture is the subject of not only me but also filmmakers and archaeologists. We are in a magnificent nature and texture. As a photographer, I try to convey my aesthetic concerns and increase permanence. When I was given a camera, it encouraged me to capture and document good moments. I aimed to document moments at the right time and place. That's why my field was photojournalism and documentary photography.

**You undertook the shooting of the "Anatolian Carpet: The Language of My Soul, the Color of My Word" documentary, which is a project of İHİB, and you travelled every corner of Anatolia during the shooting process. First of all, did you observe any changes in Anatolia over the years?**

As I grew older, I started to delve into historical research. As I traveled the world, I followed the traces of various initiatives in my own country, visited more museums, and read more books. It is certain that we are in a very rich geography. Before starting the documentary on carpets,

I had done a few researches. However, with this documentary, I had the opportunity to delve deeper into the subject because I embarked on the journey with people who knew about this business. By feeding on the right sources from the right people, I better understood the difference and magnitude of the subject. I have traveled throughout Türkiye for different purposes. In the past, I have traveled for honey, grains, and social events. I saw that while there were hundreds of thousands of weaving looms in the past, the numbers have decreased significantly. I





Tolga Sert

We documented the work of weavers, especially women, in the geographies where this craft has been performed for hundreds of years.

saw that weaving, which has a history of thousands of years, is not preferred due to its lack of economic return or the lack of correct policies. Skilled weavers cannot receive the rewards for their efforts. On the other hand, I questioned how inadequate my previous knowledge was and why an extraordinary geography with an extraordinary accumulation of knowledge cannot market this business to the world. When we go to the USA or Europe, we observe that neighboring countries to Türkiye are more active in the carpet sector. I wondered why people who run this business properly in our country cannot get the earnings they deserve. Türkiye is one of the major exporting countries in machine

carpet production. However, our market share is very low in hand-woven carpets. When I realized this, I felt sad but also happy. Because I saw that there are entrepreneurs who support hand-woven carpet production. There are people in Türkiye who work not only for their personal gain but also to reach wider audiences and increase the number of looms in this art and craft. When I got to know the people who produce and revive Turkish carpet weaving, who reflect their sweat and effort on their looms and do not lose hope, I felt happy. My wife Müge Aral took on the production of the documentary. It was a very beautiful work for us. By discovering a field that I barely knew and bringing that knowledge to

light, I also took my share. I saw that this art is not disappearing and can be revived again.

#### How did the filming process go from your perspective? What do you think was the lesson of this documentary?

We worked with a large team during the filming process. We continued preparations and filming for over a year. Before starting filming, the İHİB team, consisting of experts on carpet weaving, went on a discovery trip in Anatolia. The information obtained during the discovery trip was a decisive work in our roadmap for filming. We traveled for thousands of kilometers. With that information, we determined the geographical locations. We documented the work



Müge Aral

I can say that I matured during these shootings. I realized how valuable weaving is during the shootings.

of weavers, especially women, in the geographies where this craft has been performed for hundreds of years. We took a journey into the world of people who spent days, even months, on those looms, putting in sweat and tears into every stitch. We shared the stories of products that came out of different weaving looms such as silk carpets, felt, and kilim.

I can say that I matured during these shootings. I realized how valuable weaving is during the shootings. I realized that all these works that our people have been weaving stitch by stitch, putting in their sweat and tears for thousands of years, are very meaningful and that everything in Anatolia's history is expressed with patterns by

a narrator. We also saw different shared cultures. We read how some motifs came from Central Asia to here like a letter, and how hands changed when they came. Those figures, those motifs are really like books. I can say that I learned how to read during the shootings.

#### Will the Anatolian Carpet documentary be taken to an international level with its broadcasting on TRT Documentary channel?

The broadcasting of the documentary on TRT has a special meaning for us. I am eagerly waiting for the different language versions we have created to be broadcasted worldwide after TRT. Our values such as carpets and kilims, which are among the products of this ge-

ography that are light in weight and heavy in price, are very important in reaching their real target audience worldwide with this documentary. There must have been people who have done this kind of work before. But it is the first time it has been done on such a comprehensive scale. This documentary can be a great resource for many people. You are taking a journey through the wool from which the work was created, the work itself created with those stitches, and the geography where the animal lived that gave us the wool. I can say that it is an encyclopedia that teaches many things about this work. We prepared a documentary series with long versions that can be watched without getting bored.

# THE LANGUAGE OF CULTURAL MOTIFS

The unique motifs that touch Turkish carpets and kilims, which are a great bridge between the past and the present, contain a message inspired by nature, mythology, and mysticism.



Carpet weaving, one of the greatest historical and cultural heritages of the Turks, has been the center of attention of the world for centuries. Carpet weaving, known as the oldest profession of the Turks, continued its development from centuries before Christ to the present day. The Turks, who have continued their weaving tradition they brought with them from Central Asia to

Anatolia for centuries in a way that will set an example for the world, contribute to the survival of this cultural heritage. Carpets woven with a mythological and traditional narrative style actually reflect a cultural language. Turkish carpet and kilim motifs, each with a different message, reflect emotions stitch by stitch while appealing to the eye and also containing semantic and conceptual elements.

### Carrying the traces of oral culture and nature

The motifs carried by Turkish carpets and kilims carry the traces of various geographies, stories, and oral culture where the Turks live. Carpet and kilim motifs that reflect the common life culture with mythological narratives and nature turn into perfect visuals with the mastery of the weavers' imagination. In Anatolian carpets and flat

weaves, motifs with mostly geometric characteristics, plant patterns, natural events, items, and animal depictions seen by people in their environment are found. At the same time, motifs loyal to Turkish traditions and religious symbols adorn carpets and kilims. In addition to all these, path-border patterns created by placing different colors side by side and written motifs are also used in carpets. The

motifs seen in Anatolian Seljuk carpets have undergone some changes through the beyliks and Ottoman period and reached today. Among the plant motifs in Anatolian carpets, motifs such as tulips, carnations, roses, violets, and hyacinths are mostly seen.

### Eagle and bird

It is believed that the origin of the Oghuz tribes, considered the ancestors of the Anatolian Turks,

is based on a bird totem. The figure of the double-headed eagle, which is also the symbol of the Anatolian Seljuk State, is among the carpet motifs used since ancient times. It is known that the eagle motif represents power, the ability to govern, and justice. Among bird motifs in carpets and flat weaves, peacock is also seen. The peacock motif, known mostly for its long and colorful tail and creating a fascinating



Representing femininity and motherhood and having a great place in the art of Turkish carpets and rugs, the hand on the waist motif symbolizes productivity and abundance.



One of the main reasons why Turkish carpets have become a worldwide brand is their unique patterns.



effect with its dazzling colors, is still considered a symbol of paradise today, just like in the past.

**Tree of life**

The Tree of Life motif is one of the most known and important motifs of Turkish carpet and kilim art. This symbol, found in almost all cultures of the world, symbolizes the nature consciousness and respect for nature for the Turks. In Turkish belief, a tree is a living creature that carries a soul, must be respected, and protected. Therefore, it is believed that a tree cut down while still alive will offend the owner's soul and cause

various disasters. Dead trees are approached with respect and gratitude for reuse. All these beliefs turn the tree into a symbol used to tell the life journey for Turkish society, and the symbol is often processed in carpets and kilims. The Tree of Life motif symbolizes being born as part of nature, continuing life by respecting nature, and returning to the essence of nature at the end of life.

**Star**

The star symbol found in many cultures expresses the reflection of God in man. In Turkish culture, the star motif can be used in

carpets and kilims to represent the talents that God has bestowed upon man. The star motif is a pattern seen from Central Asia to Anatolia and is often interpreted in carpets and kilims. The star represents wisdom, knowledge, light, and guidance. The star, which is considered a guide to travelers in the dark night, is a symbol of hope in the face of difficulties. The star motif is also used to symbolize man's search for truth.

**Hook and plus**

The hook and plus are motifs used in Turkish carpet and kilim art. These motifs are not only aesthet-

ic patterns but also elements with specific meanings in the cultural context. The hook motif, with its angled, pointed shape, is often associated with protection against evil, symbolizing a guardian or protector. The plus sign, on the other hand, is usually interpreted as a symbol of positivity, fertility, and abundance. It is believed that these symbols are used in carpet and kilim art to transmit cultural beliefs and traditions through generations.

**Lamp**

In Anatolia, lamp motifs are especially embroidered on prayer

rugs. The lamp, symbolizing divine light, is compared to a glass lantern in the Quran. This figure can be embroidered alone or with ewer, tree of life, and bunches of flowers. In Islamic belief, the ewer symbolizes bodily cleanliness, the tree of life motif represents eternal life and paradise, and a bouquet of flowers is said to symbolize the heavenly garden.

**Hands on hips**

The hands on hips motif, which represents femininity and motherhood and has a significant place in Turkish carpet and

kilim art, symbolizes fertility and abundance.

**Eye**

The eye motif, often woven using blue thread, is thought to ward off negative energy and curses, much like an evil eye bead.

**Fertility**

The point in the middle of the fertility motif symbolizes the concept of family. The parts embroidered on the edge and resembling horns represent spouses. The motif conveys the message that spouses protect and care for the family.

# BURSA SILK REVIVES

A project has been launched to reintroduce Bursa silk, which is of strategic importance for Turkish textiles and has become a global brand with its geographical indication, to the world stage.

To meet the cocoons coming from the villages and turn it into a festive atmosphere, the International Silk Festival from Cocoon to Fabric has also been held in Bursa for the last three years.



**B**ursa, known for its silk and ceramic products, is included in UNESCO's list. Every year between May and June, cocoon farming is carried out in villages around Bursa, the capital of silk. Afterwards, villagers come together with factory owners and traders at Kozahan to sell their cocoons. The money received by the villagers is called "hoe money". They use the cash they receive to meet their needs at Bursa Bazaar. This is a cycle that has been home to many cultures, traditions, and customs for centuries. To meet the cocoons coming from the villages and turn it into a festive atmosphere, the International Silk Festival from Cocoon to Fabric has also been held in Bursa for the last three years. The aim of the festival is to introduce Anatolian arts, traditions, and customs to the younger generations. While preventing Bursa silk from being buried in the dark pages of history and disappearing, Bursa Metropolitan Municipal-

ity has also enabled Bursa silk to gradually come to light with the projects it has carried out so far. Nine years ago, with the Bursa Silk Comes to Life Project, Bursa Metropolitan Municipality set a goal to pass on the memory of those who were over 75 years old and about to be lost in Bursa to future generations, and succeeded in doing so very well. When the project started, Muradiye Silk Factory, the first factory established by the Ottoman Empire in 1790, was restored to its original state and put into operation. Umurbey Silk Production and Design Center, which was established in 1810 as the upper factory of this factory, was rescued from the rubble and rebuilt in its original form. This center was put into operation as the center of the project. 16 abandoned primary schools in the villages around the factories were identified. With the support of the Ministry of National Education, these schools were renovated. Two of the schools

were converted into fabric workshops and four into silk carpet workshops. Since the project started, 2,700 people have been taught how to weave silk carpets, 760 people have been taught how to weave silk fabrics. 63 silk masters and nearly 50 assistant workers have been trained.

#### From silk to surgical thread...

Silk is a very special product. Since it is composed of proteins, it has a DNA. The DNA of silk is almost identical to that of human beings. Non-absorbable surgical threads are currently produced using silk. Mehmet Ünal, the Production Manager and Project Coordinator at Bursa Metropolitan Municipality Umurbey Silk Production and Design Center, stated that they sent surgical thread samples produced through the Surgical Thread Project, which was launched five years ago, to TÜBİTAK (The Scientific and Technological Research Council



Since the project started, 2,700 people have been taught how to weave silk carpets, 760 people have been taught how to weave silk fabrics.

of Türkiye). He said, "TUBITAK tested the prototype surgical threads and used them on animal subjects for one year. Then they concluded that we could establish a factory." At Umurbey Silk Production and Design Center, a machine park at the highest level of this technology with a monthly capacity of 150 kilograms will be installed. When we activate our park, we will manufacture prototype surgical threads and provide them to the two firms we have contracted with to use on human subjects for one year. We will then obtain licenses and patents and move on to the software of the main project. Within the next three years,

we will complete this project and introduce a surgical thread factory to our country.

#### **Bursa Silk makes textiles more valuable**

Reminding that silk cocoons were produced in every city of Anatolia in past centuries but its industry was established in Bursa, Ünal stated that Bursa silk has proven itself as a sought-after product in the world market with its quality. He said, "The most well-known brand in the world for silk carpets is Hereke silk carpet. Bursa Metropolitan Municipality has prepared several projects with Hereke and Körfez Municipalities to bring Hereke carpet back to where it

deserves and to reweave Hereke silk carpets in the region. In the future, with the implementation of these projects, Hereke silk carpet will be woven again in the region under the leadership of Körfez Municipality. The reason for the high quality of Hereke silk carpet is that it is made from 100% Bursa silk. If producers use Bursa silk more in carpets and textiles, they will expand their markets. Because, in addition to being a global brand, Bursa silk is the highest-quality silk in the world. Europe has not taxed Bursa silk for centuries. Companies that sell abroad will see the benefits of this legacy by increasing their product range in the world market."

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**KİGİLİ**  
1938



Bora Aksu

Fashion Designer



## CAPTIVATING AND ROMANTIC DESIGNS ON THE LONDON- HONG KONG ROUTE

Bora Aksu, one of the most prolific designers with a total of 64 stores in Beijing, Shanghai, Parisian Macao, Tokyo, Hong Kong, Singapore and Korea, we learn about his collection creation process and sources of inspiration.





After the years we used the world very roughly, we have realized that its resources are not infinite and everything proceeds with very delicate balances, and we have all understood the importance of preserving resources for future generations.

As we talk about the strengthening of individual fashion, we spoke with Bora Aksu, who discovers new ways to express himself every season as part of this trend and appeals to romantic women with his poetic collections, about the turning points of his career and Turkish fashion.

**How and when did you decide to turn your love for fashion and clothes, which has been inside you, into your profession?**

As long as I can remember, I

recall drawing tirelessly with paper and pencil. I always had a visual memory. Even now, when I want to explain something to my team, I do it not by writing but by drawing. In 1996, I headed to London with a desire to get immersed in design. When I applied to Central Saint Martins, I had my entrance interview with the then department head, Wendy Dagworthy. I realized that I had started a new adventure when they told me that I was accepted as a result of the interview I had with a folder

containing only my drawings. I discovered who Bora Aksu was and the spirit of his design during this adventure. I call the period of my master's education over my undergraduate education as a period in which I discovered my design identity. In addition to talent and effort, being in the right place at the right time is of great importance. The graduation show of my master's degree was a turning point for my career. Being identified as the star of the show by newspapers such as The Times, The Daily

It was a great pride for me to see the rapid rise of a brand that values labor and craftsmanship, not just in terms of fabric, but also seeing their production workshops in Gaziantep.



about producing new ideas and creativity. No matter how much I travel, I produce my design ideas in my London workshop where I have a small team of 12. Our second office is in Hong Kong, where we have a team of 60. This platform is more about logistics, management, and financial categories. There is a design team there, and they work more specifically. With my core team in London, we form the main framework of the mood and designs we will create for that season. Then we transfer this information to our team in Hong Kong. Then, following the established framework, the design process begins, and the first samples are produced. We make the collection more concise by editing based on the produced samples. This editing is done with my team in London. Then we determine the final form of the collection with the show team.

**Recently, what does the concept of sustainability, which is on the agenda, mean for you and your designs?**

Perhaps besides a pile of negativity that the pandemic has brought us, the biggest positive phenomenon it created in the world is changing people's perception. After the years we used the world very roughly, we have realized that its resources are not infinite and everything proceeds with very delicate balances, and we have all understood the importance of preserving resources for future generations. When prepar-

Telegraph, and The Guardian, and Dolce&Gabbana duo buying my collection after the show can be considered as my first steps in the fashion world. Thanks to my first sponsorship award, I held my first fashion show at London Fashion Week in 2003. In the following period, I received the new generation award four times by the British Fashion Council. Since 2003, I have been listed in the official list of London Fashion Week and have been holding fashion shows. When I held my first fashion show, I had

never thought that my designs would turn into a business.

**How do you prepare for fashion shows?**

Fashion shows are the most ideal platform for a designer to display their vision. The chosen models, styling, mood, and music complete this vision. As expected, after the pandemic, a period began where consciousness, less is more became important. Currently, I have two teams in two locations. One of my teams is in London, which is more



ing my first collections, I aimed to create designs that can last and can be passed down from generation to generation. Just like my grandmother's clothes were able to pass to her grandchildren, seeing this in my own designs is the greatest gift for me.

**In sustainable fashion, what role do designers take on?**

In sustainable fashion, fashion designers have responsibilities, just like everyone else. With the pandemic, the fashion industry also entered a significant period of transformation and questioning. We are experiencing a time where we are returning to the essence of everything in the world

of fashion. The fashion world, which experienced a period where too much was produced and consumed, where collections were created, and lots of fabrics were cut and used irresponsibly against nature and its resources, had to stop. This is an opportunity for us to look at everything anew, to shrink and reduce. Thus, the world of fashion will have to transition to a more conscious era. We will hopefully move to a period where fewer collections will be produced, and collections will be more authentic from within. Designers will start producing fewer but more unique collections that best reflect their unique fingerprint. Even though

we are going through a period that is putting a lot of strain on the global economy, I think we will find this reset beneficial when we look back in the future.

**Who do you see as the main responsible party in this matter? Is it the brand, the manufacturer, the designer, or the consumer?**

Actually, we are in a period where everyone shares the responsibility. Perhaps one of the most significant positive effects that the pandemic brought to the world, among a heap of negatives, is that it changed people's perception. After years of using the world recklessly, we realized that resources are not infinite and that everything operates on very delicate balances. We all understood the importance of preserving resources for future generations. I hope for a world where we will be more thoughtful, treat the world better, produce less but more valuable, and shop more consciously.

**How do you assess the producers in Türkiye regarding environmentally friendly production?**

In Türkiye, I recently had the opportunity to work with Kutnia, a brand that I hold dear, which produces on handloom looms, with the kutnu fabric representing a cultural heritage and known as the fabric of palaces. Working with Jülide Konukoğlu, who keeps these values alive and standing, was an important experience for me. It was a great pride for me to see the rapid rise of a brand that values labor and craftsmanship,

I usually use handcrafts, embroidery, and crochet products that I buy directly from people who produce in Türkiye in my collections.

not just in terms of fabric, but also seeing their production workshops in Gaziantep. I haven't been closely working with other producers in Türkiye for a long time, so I don't have deep knowledge in this regard. I usually use handcrafts, embroidery, and crochet products that I buy directly from people who produce in Türkiye in my collections.

**Do you have a new collection or fashion show you're preparing?**

I last showed my Autumn/Winter 2023/2024 collection at London Fashion Week. During a research trip in Paris, I came across Edward Munch's earliest works at the D'orsay Museum. Edward Munch's approach to art and his persistence in maintaining his style despite being ostracized by the art circles in his early years was an inspiration for me. One of the most common criticisms Edward Munch faced from the very beginning was that his works seemed unfinished. But what the critics overlooked was that the effect Munch was trying to create was exactly this. Edward Munch wasn't interested in his works looking polished and finished; his goal was to evoke emotions with his paintings. Another characteristic of Munch was to return to his works and repeat them at certain intervals. The aim here was not repetition, but to create transformation. Inspired by this feature of Edward Munch, I reviewed my own collection archives and reapplied some special pieces to my collection. Particularly, pieces knitted by my mother and aunt, crochet works and motifs in my



first collections found life again in this collection.

One other feature of the fashion show, which started with a moment of silence in memory of those who lost their lives in the earthquakes in Türkiye and Syria, was that a large part of the fabrics were created from stock fabrics, fabrics that had been left in warehouses, stained and worn. Instead of newly produced fabrics, collections were prepared by reviving fabrics produced years ago but somehow forgotten, unsold due to defects, and faded from the sun.

**How do you evaluate the situation that Turkish fashion is in**

**and Turkish designers?**

I definitely think progress has been made, although Türkiye is going through very sensitive periods, but I think fashion and art should somehow be able to give people strength. It's a time when we can have a single voice in terms of fashion in Türkiye. İstanbul is an incredible source of inspiration for many artists, it's possible to find a hidden treasure in every corner. In order for İstanbul to become a city that can set fashion trends, the number of individual designers needs to increase and a market where the products created by these designers can be accepted needs to be created.



# İstanbul Moda Academy İMA

İstanbul Moda Academy (İMA), the fashion education platform of present and the future, is one of the most competent fashion schools in Türkiye with international collaborations that carry out educational activities with an innovative and modern approach in all areas related to fashion and fashion.



İMA was established in 2007 with the cooperation of the European Union, the Ministry of Trade and the İstanbul Textile and Apparel Exporters' Association (İTKİB). Its goal is to train fashion designers with high fashion, design and art awareness and international market awareness, and to bring in a creative and innovative workforce that will shape the future of the industry in textile and apparel, one of Türkiye's most basic industries. İMA, which has adapted systems

and structures that have proven successful worldwide, is a member of the board of directors of the International Foundation of Fashion Technology Institutes (IFFTI) as of 2019. İMA, in cooperation with Polimoda, Institut Français de la Mode, Nottingham Trent University, as well as University of Arts London/London College of Fashion, which is its strategic partner in the academic field, follows a simultaneous education program with these world-famous fashion schools. It offers the opportunity to reach

fashion schools, brands, and designers. Combining its academic content with real life, İMA is a privileged fashion education institution. It nurtures the theoretical infrastructure of the training programs and applied industry projects with the sector support it receives. The experienced education staff consisting of local and foreign experts with professional experience in the fashion industry, the up-to-date education curriculum designed in parallel with the needs of the



Bringing academic content to real life, İMA is a privileged fashion education institution.



The core training areas of the İMA are "Fashion Design, Fashion Management, Technology and Product Development, Fashion Communication and Media".



industry, the education building equipped with the latest technology and Türkiye's largest fashion library within its structure are just a few of the features that make İMA one of the world's elite schools in fashion education. The contents of all educational programs of İMA are designed in a way that predicts the future of fashion and responds to the current needs and issues in the sector. Educational contents are supported by hands-on projects, case studies

and industry professionals. Thus, İMA students have the privilege of actively experiencing the operation of the industry, obtaining project outputs, and developing connections with the leading representatives of the industry during their education. İMA's core training areas are "Fashion Design, Fashion Management, Technology and Product Development, Fashion Communication and Media". Within the framework of these four basic headings, all training programs

are constructed. All training programs are supported by various seminars, workshops, and projects. In order to develop and diversify its students' approaches to fashion, art and design, and to nurture their visual and intellectual infrastructure, İMA hosts valuable organizations related to art and fashion as well as academic and continuing education. For detailed information about İMA: [https:// www. Istanbulmodaakademisi.com/](https://www.istanbulmodaakademisi.com/)



All training programs are supported by various seminars, workshops, and projects.



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# İTKİB CONTINUES ITS ACTIVITIES TO ENHANCE EXPORTS



İTKİB continues its activities to develop trade by collecting and disseminating all kinds of trade-related information to its members.



As of 2009, 61 Exporters associations are operating in 27 different sectors/sub-sectors in Türkiye.



**E**xporters Associations are organizations that have been providing services in various sectors in various cities of Türkiye since 1937, aiming to increase, support, and coordinate exports to contribute to economic development. The İstanbul Textile and Apparel Exporters' Associations General Secretariat (İTKİB), which

represents the Apparel, Textile, Leather, and Carpet sectors, supports its members in increasing value-added exports and also assists foreign companies in finding the right manufacturers and products in Türkiye. İTKİB continues its activities to develop trade by collecting and disseminating all kinds of trade-related information

to its members. It informs its members about collaboration opportunities with foreign companies and import demands. It organizes national participation in international fairs related to the Apparel, Textile, Leather, and Carpet sectors. It supports the participation of its members in international fairs and organizes over 30 international fair partic-



İTKİB continues its activities to develop trade by collecting and disseminating all kinds of trade-related information to its members.

ipations annually. İTKİB organizes trade delegations to foreign countries and buying missions in Türkiye to develop relationships between domestic and foreign companies. It prepares market research reports, sector analyses, and country profiles to provide its members with valuable information.

**Our vision**

To be a guiding association that provides sustainable service

quality to all stakeholders for increasing high-value-added exports.

**Our mission**

To produce solutions that meet the needs of our members with a visionary business approach based on the goal of strengthening the country's economy through exports.

**Our core values**

Solution-oriented, Accessible,

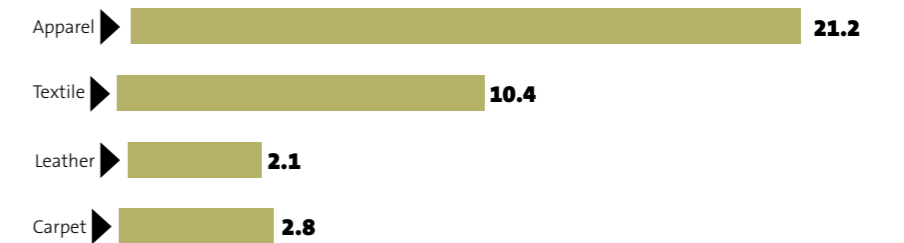
Fair, Efficient, Unifying spirit, Reliable, Pioneer, Transparent

**İTKİB's main activities**

The main purpose of İTKİB is to increase Türkiye's export potential, improve export performance, and contribute to the development of bilateral and multilateral trade relations by providing assistance in its field of activity. İTKİB carries out numerous tasks and activities to achieve this goal. Some of the main activities can

be summarized under the following headings:  
Trade development activities  
Statistical records  
Economic research and reporting  
PR activities  
Training activities  
Consulting services  
Coordination activities  
Publishing activities  
Services and duties related to supporting exports

**Exports of sectors in 2022 (million dollars)**



# Contact information to reach Turkish exporters

Turkish exporters, with their superior competitiveness, product diversity, and fast and high-quality production networks, carry out exports to many countries around the world. They connect with buyers through online and offline platforms. Türkiye, strategically located in terms of logistics, also provides significant advantages to foreign buyers in terms of exports. There are multiple ways to reach Turkish exporters.

## İSTANBUL TEXTILE AND APPAREL EXPORTERS' ASSOCIATIONS (İTKİB)



**Address:** Dış Ticaret Kompleksi B-Blok Çobançeşme Mevkii Sanayi Cad. Yenibosna / İstanbul

**Phone:** 0 212 454 02 00

**Fax:** 0 212 454 02 01

**e-mail:** info@itkib.org.tr

## THE MINISTRY OF TRADE OF THE REPUBLIC OF TÜRKİYE



**Address:** Dumlupınar Bulvarı No: 151 Eskişehir Yolu 9. Km 06800 Çankaya / Ankara

**Ministry Switchboard:** + 90 312 449 10 00

**Ministry General Correspondence Fax:** +90 312 449 18 18

## EXPORTERS ASSOCIATIONS

İstanbul Apparel Exporters' Association



İstanbul Textile and Raw Materials Exporters' Association



İstanbul Leather and Leather Products Exporters' Association



İstanbul Carpet Exporters' Association



## FOREIGN REPRESENTATIONS OF THE MINISTRY OF TRADE OF THE REPUBLIC OF TÜRKİYE





## TURKISHLEATHER BECOMES THE MEETING POINT FOR THE LEATHER AND LEATHER PRODUCTS INDUSTRY

Launched by İDMİB, TurkishLeather brought together leather and leather goods manufacturers with buyers on the same platform.

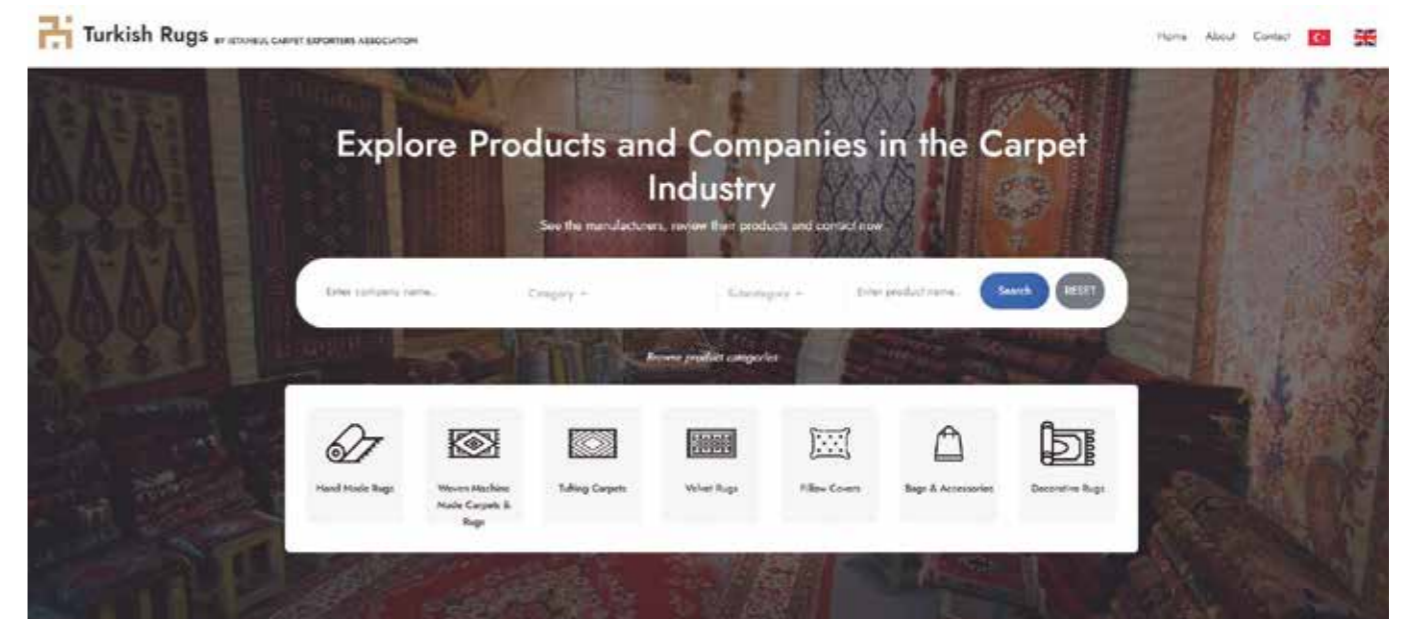
Istanbul Leather and Leather Products Exporters' Association (İDMİB), which continues to operate towards the digitalization of the industry in order to increase the international market share of the Turkish leather and leather products sector, launched the [www.turkishleather.com](http://www.turkishleather.com) and [turkishshoes.com](http://turkishshoes.com) B2B portal on January 25, 2021. This portal aims to become a meeting point for overseas leather and leather goods buyers with producers in Türkiye. With 67 exporting firms initially, the platform is now operating

in English and Russian, hosting nearly 197 exporting firms and listing around 3,037 products. The number of firms on the portal is increasing daily with new registrations. As part of the efforts to develop the platform, German language service was provided in addition to English and Russian as of May. Thus, the portal started to provide services in three different languages. Through the digital advertisements of [www.turkishleather.com](http://www.turkishleather.com) and [turkishshoes.com](http://turkishshoes.com) published on overseas platforms such as Google, Yandex search

engines and LinkedIn, over 4,100 buyers from 164 different countries ranging from Australia to Canada, including mainly the USA, UK, Russia, Germany, have registered on the portal. Thanks to the created buyer traffic, interaction has begun between the registered exporter firms on the platform and foreign buyers. Buyers are reaching out to exporting firms using the "Messaging" or "Request Zoom Meeting" features provided by the platform, and are able to hold bilateral meetings via online video conferencing.

## DISCOVER TURKISH CARPET WEAVERS!

The digital platform [turkishrugs.org](http://turkishrugs.org), which will bring together handmade carpet weavers and machine carpet manufacturers in Türkiye with buyers abroad, has been launched.



The Istanbul Carpet Exporters' Association (İHİB) has launched its digital platform [www.turkishrugs.org](http://www.turkishrugs.org), created for carpet manufacturers. The platform is expected to contribute to carpet exports. İHİB has established a digital platform to bring its members together with overseas buyers. This new platform, operating at [www.turkishrugs.org](http://www.turkishrugs.org), has started serving as a portal where Turkish carpet exporters can become members, upload their photos, and present their

products to buyers and interior designers abroad. Companies can easily take their place on the platform thanks to the application button on the platform, which many firms have already joined. Turkish Rugs will enable Turkish carpet exporters and manufacturers to present their products to buyers worldwide more easily. In this way, it is aimed to increase Turkish carpet exports. The platform also aims to promote the use of Turkish carpets in domestic markets by offering

products suitable for the needs of interior designers. Ahmet Hayri Diler, President of İHİB, stated that the Turkish Rugs platform will take the marketing activities of members in the Turkish carpet industry even further, saying, "The platform offers an opportunity for our members to establish direct connections with international buyers. This platform will also modernize the Turkish carpet industry and give significant momentum to Turkish carpet exports."

## TÜRKİYE'S SUPERYACHT POWER INSPIRES

# TEXTILES



Türkiye has extended its strength in superyacht production to boat decoration and textiles. Turkish textiles, offering a variety of alternatives from bed linen to tablecloths, towels to bathrobes for yachts, add diversity to the style of megayachts with their world-famous production quality and diversity.

► Neslihan Böle Arslan

**T**ürkiye, a global supplier with its product diversity, is also highly ambitious in the luxury product group. At the forefront of these products are its success in the production and design of jewelry and megayachts. Türkiye is one of the top three countries that build and sell the most megayachts over 30 meters. Today, hundreds of superyachts are being built primarily in Antalya, as well as İstanbul and Bodrum. When you step inside the megayachts, which are impressive just from the outside, you encounter an atmosphere that resembles a palace. The details that make this atmosphere attractive are the touches in the decoration. The living and sitting areas inside, furniture, and decorative objects turn megayachts into luxurious homes. The tex-

Türkiye also holds promise in terms of high-value yacht exports. It is estimated that Türkiye's annual yacht exports are between 1.3-1.5 billion dollars.



tile products used inside these floating homes contribute them a stylish and trendy ambience. Bed linens, decorative pillows, beds, towels and bathrobes, and tablecloths are now designed as special collections for yachts. The Turkish textile industry, which is among the top in the world in terms of production quality and product diversity, is the most fruitful market in this regard. As Türkiye's success in megayacht production combines with tex-

tiles, the yacht textile products market continues to grow.

**Megayacht production capacity is being pushed**

Although Türkiye sometimes falls back, it has been the world's third-largest in megayacht production for over a decade and has great potential in this field. The latest data also suggests that this potential could increase. Dozens of yachts are launched every year in Antalya Free Zone (ASBAŞ),

Türkiye's number one megayacht center. Of these, 20 are delivered to their owners, while nine are said to be undergoing sea trials. ASBAŞ General Manager Zeki Gürses states that after the pandemic, there was a significant demand for the Turkish yacht sector from all over the world and that yacht companies had to turn down many requests due to lack of space. Gürses says the yacht shipyards in the region are full until 2024.

In addition, there are over 80 shipyards in Türkiye, especially in İstanbul Tuzla, Yalova and Muğla Marmaris, each of which has been successful in yacht production. The rising search for safe holidays along with the pandemic also has a major impact on increasing megayacht production.

Türkiye also holds promise in terms of high-value yacht exports. It is estimated that Türkiye's annual yacht exports are between 1.3-1.5 billion dollars.

**Türkiye's Difference in Custom Made**

Türkiye is a brand in the field of "custom made" or personal design and ranks among the top 10 countries in the world for exports in special purpose ship and megayacht construction. As the third-largest producer of megayachts in the world after Italy and the Netherlands, Türkiye is increasingly reinforce its presence in global markets. According to the yacht order statistics (Global Order Book) announced worldwide every year, Türkiye has long been at the top and, as of February 2020 data, reached 3.71 thousand meters in terms of megayacht count and length. This number represents the total lengths of yachts ordered from shipyards. Our shipyards, led by Antalya, İstanbul, and Bodrum, which produce worldwide, continue to launch enviable beautiful yachts.





Ranking third in the world after Italy and the Netherlands in mega yacht production, Türkiye is gradually reinforcing its presence in global markets.



The momentum Türkiye has achieved in megayachts has also led to movement in the home textile sector. At this point, yachts, with their unique designs and decorations, have also created their own fashion.



**High potential in design**

Competing with Italy, the world's industry leader in terms of production quality, Türkiye is also demonstrating remarkable work in yacht design. Developing the design side of Turkish yacht manufacturing is very important for creating high added value. In this regard, world-famous designers such as Rıza Tansu and Tanju Kalaycıoğlu, as well as gifted young designers, are promising.

**It has its own fashion**

The momentum Türkiye has caught in megayachts has also sparked movement in the home textile industry. At this point, yachts, which differ from other spaces with their own designs and decorations, also created their own fashion. With the increasing production of luxury yachts and megayachts, a subgroup called "yacht textiles" has been formed, and

new brands as well as existing textile brands have put forward special designs. The products in the yacht textile group are very similar to home textile products such as bed linen, bedspreads, towels, bathrobes, slippers and peshtemals, pillowcases, tablecloths. However, more durable and practical materials are preferred in textile products used in boat decoration than in home textile products. In this

context, products with marine, maritime and boat themed products are more popular. Anchor, rope, sailboat, rudder, seashell, coral, etc. are the predominant patterns in the products, with navy, white, and red, known as marine colors, being used more frequently.

**Durable materials are used in yacht textiles**

Yacht textile, due to each

yacht's interior being of different sizes, structures, and atmospheres, goes through a slightly more difficult production and service process than other textiles. Thus, the goal is to make the designs suitable for both the yacht and the taste of the yacht owner. It is expected that the interiors of the personally designed yachts will also be personalized. Although the process of

producing and placing yacht textiles in a way that completes the yacht in the yacht owner's imagination is challenging, a unique picture emerges at the end. The primary features that yacht textiles should have are defined as durable and high-quality materials. Along with this, elite and elegant designs complete the pleasure of sailing.

# TURKISH HOME TEXTILES



## SWEEPS UP THE WORLD

Türkiye continues to increase its share and value in the global market, especially in the home textile industry, with products such as towels and loincloths, which are the world's first choice. The industry, which has become a global brand, achieved an export of 2.2 billion dollars in 2022.

Today, many companies in Türkiye, which is one of the world's leading countries in the home textile industry, have started to establish their own brand and store chains in the country and abroad.

**T**he reputation of Turkish products in the world is increasing daily. Türkiye, which draws attention with its strategic location, easy access to raw materials, and vast production capacity, has become indispensable with its products that have become a global brand. Home textile is one of the industries contributing the most to the country's worldwide reputation. The home textile industry, which has the largest share of Türkiye's success in the global arena, is the largest exporter in Europe. Today, many companies in Türkiye, which is one of the world's leading countries in the home textile industry, have started to establish their own brand and store chains in the country and abroad. The majority of the manufacturers in the industry are small and medium-sized enterprises.

Home textile, one of the Turkish textile industry's most successful primary product groups, exported 2 billion 207 million dollars in 2022. Türkiye is continuously strengthening its presence in the international market, particularly in the home textile industry, with products such as towels and peshtemals that are highly sought-after by consumers across the globe. Bursa, Denizli, İstanbul, İzmir, and Uşak are the leading provinces contributing

to this export success and where the sector's production is concentrated.

### Great demand for Turkish products

When looking at the world's export of home textiles in terms of sub-product groups, it's observed that the most exported product group is pillows, quilts, and sleeping bags, accounting for 22.8% of total exports. In 2021, the export of pillows, quilts, and sleeping bags increased by 23.8% to reach a value of \$14.9 billion. The leading countries in the ex-



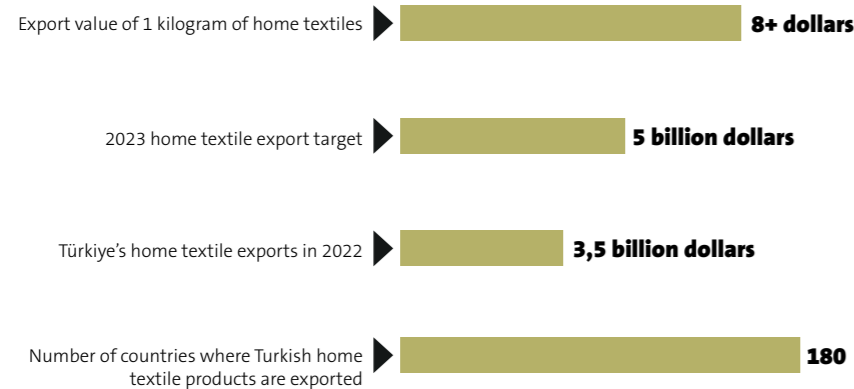
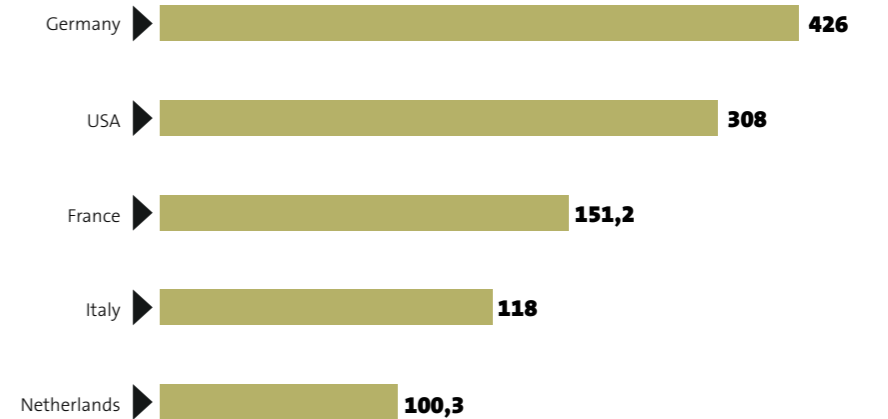
**In 2021, the export of pillows, quilts, and sleeping bags increased by 23.8% to reach a value of \$14.9 billion.**





In 2022, Germany accounted for 19.3% of Türkiye's exports. Exports to Germany decreased by 7.4% in 2022 to reach \$425.9 million.

**Top five countries in 2022 home textile exports (million dollars)**



port of this product group were China, India, and Poland, with Türkiye ranking 15th. Bed sheets, with a share of 22.2%, were the second most exported product group. The export of bed sheets increased by 34.1% in 2021 to reach \$14.5 billion. The leading countries in the export of this product group were China, Pakistan, and India, with Türkiye ranking fourth. The export of towels and cleaning cloths, which is the third

most exported home textile product group, increased by 21.9% in 2021 to reach a value of \$8.8 billion. Türkiye drew attention as the fourth largest exporter in this product group. While the global export value of curtains and bed covers was \$6.4 billion, Türkiye was the fifth largest exporter in this area. Türkiye ranked sixth in blanket exports, which rose to \$5.7 billion, and third in other upholstery items, with exports totaling \$4.6 billion.

The global export of knitted bathrobes was \$3.6 billion, with Türkiye ranked seventh. Woven bathrobes reached an export volume of \$2 billion, with Türkiye climbing to second place.

**The most exports from Türkiye to Germany**

Looking at the positions of countries in Türkiye's home textile exports over the past years, it's noticeable that Germany has long held the top spot. In 2022,

Germany accounted for 19.3% of Türkiye's exports. Exports to Germany decreased by 7.4% in 2022 to reach \$425.9 million. The export of home textiles to Germany was \$401 million in 2018, \$429 million in 2019, \$436 million in 2020, and \$465 million in 2021. Since 2017, the ranking of countries to which Türkiye exports the most home textiles has continued with the UK, Italy, the Netherlands, Israel, Bulgaria, Austria, and Spain."

# WHY TÜRKİYE?



**240**  
billion US dollars

Foreign Direct Investment (FDI) inflows to Türkiye have reached levels of 240 billion US dollars during the period of 2003-2021.



**78,257**

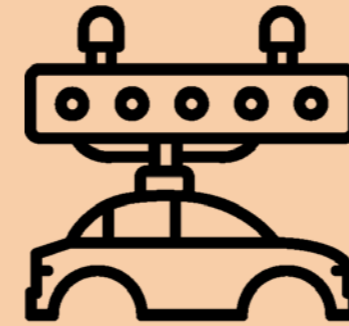
The number of internationally funded companies in Türkiye has reached 78,257 as of the first half of 2022.



**51.4**  
million

The number of international tourists visiting Türkiye has increased from 13 million in 2002 to 51.4 million in 2022.

## SECTORAL OPPORTUNITIES



### AUTOMOTIVE

Ranked as the 14<sup>th</sup> largest automotive producer in the world  
Annual production: 1.5 million units  
Market: 13 billion US dollars  
Exports: 25.5 billion US dollars



### AGRICULTURE & FOOD

**66**  
billion US dollars

Market: 103 billion US dollars  
Exports: 19 billion US dollars  
Exports to approximately 200 countries

### 342 destinations

Turkish Airlines operates flights to 342 destinations in 121 countries.

### ENERGY

Market: 66 billion US dollars  
Increasing demand  
Energy hub  
Untapped renewable resources



**27%**

Türkiye became the most preferred FDI destination among developing European countries in 2021, with a 27% increase in total FDI projects.

**1.3 billion** **50 million**

Türkiye provides easy access to a market of 1.3 billion people and a value of 28 trillion US dollars, covering Europe, the Middle East, North Africa, and Central Asia, all within a 4-hour flight distance.

Türkiye ranks as the 11<sup>th</sup> largest economy in terms of GDP per capita among countries with a population exceeding 50 million.

**2023**

It is expected that the population of Türkiye will reach 86.9 million in 2023 and 100.3 million by 2040. In 2020, Türkiye had the youngest population compared to EU member countries, with more than half of its population being below the age of 32.7.

**33.3 million**

With a workforce of 33.3 million people, Türkiye constitutes the third-largest labor force pool in Europe.

**170**  
billion US dollars

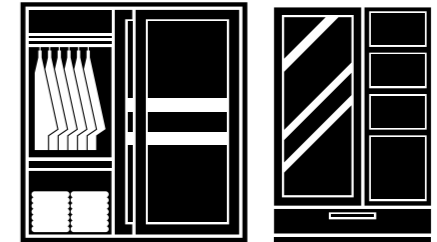
### MACHINERY

Europe's largest TV and white goods producer  
Market: 34 billion US dollars  
Exports: 28 billion US dollars

## THE TURKISH FURNITURE SECTOR IS MAKING ITS MARK ON CHATEAUS AND HOTELS

In recent years, the Turkish furniture industry, which has started to capture a larger share of global trade, continues to increase its popularity with concept projects such as chateaus, hotels, villas, and restaurants implemented abroad. Turkish architects and designers, who have gone global, have played a significant role in the sector's momentum.

*Turkish  
furniture*



**T**he furniture sector, which has seen rapid growth in exports in the last 20 years, is also improving its report card in value-added exports each year. Between 2016 and 2021, Türkiye's furniture exports increased by 73%. According to the export data for 2022 by the Türkiye Exporters Assembly (TİM), the sector's exports reached \$4.7 billion, with an increase of 11.2% compared to the previous year.

### **Qatar's choice for new projects was Turkish furniture**

Iraq took the top spot in 2021 for Turkish furniture sector exports. Iraq, with a share of \$538.4 million, was followed by Germany with a share of \$402.5 million. Exports to Israel were \$243.7 million, while exports to the United States in fourth place were \$240.8 million and to France in fifth place were \$212.8 million. Libya, Romania, the United Kingdom, and the Netherlands followed, with Qatar being the country that increased its export share the most in 2022, by 70.29%. Qatari companies preferred Turkish furniture in many places such as new homes, hotels, and restaurants they built especially for tourists during the World Cup period. The furniture sector, which exported \$4.2 billion in



While it was stated that Türkiye took good advantage of the markets China lost due to the pandemic, a significant increase in demand for Turkish furniture, especially from European countries, was reported.



**“Heartmade Furniture” will enhance the brand power of Turkish furniture**

The Heartmade Furniture Digital Platform (www.heartmade furniture.com), which was brought to life with the vision of increasing the brand power and market share of Turkish furniture, is expected to elevate Turkish furniture to a different level. With the platform, industry stakeholders not only get to showcase their products but also have the opportunity to express their goals and values. The platform also includes educational, guiding, fair, competitive, and unique content.

2022, achieved an export of \$4.7 billion with an increase of 11.2% in 2022. While it was stated that Türkiye took good advantage of the markets China lost due to the pandemic, a significant increase in demand for Turkish furniture, especially from European countries, was reported. The US market is another growing market. The value per kilogram of the sector’s exports to the EU and US markets has reached \$6.

**Türkiye’s signature on chateaus**  
The sector, which has over 40,000 manufacturers spread all over Türkiye, has elevated Türkiye to be one of the world’s largest furniture manufacturers. Türkiye

is among the top four countries globally that can produce a diverse range of products. One-third of the manufacturers in Türkiye are export-focused and constantly improve their product quality and designs. The sector, which has a goal of six billion dollars in exports for the entire year of 2023, aims to raise the export unit value, which is currently \$3, to higher levels. Therefore, brands’ priority is product diversity and special projects. The reason why Turkish manufacturers have attracted so much attention in recent years is the large concept projects such as chateaus, hotels, villas, and restaurants that Turkish brands carry out abroad.

**turkishleather.com**

aims to bring together Turkish manufacturers in the footwear, leather goods, leather and fur apparel and leather sectors with buyers on a global scale.

The buyers are provided with the opportunity to “easily reach the product they are looking for with the detailed filtering option” and “send a message” to the company they are interested in or “request a zoom meeting” through the platform.





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THIS FAIR IS ORGANIZED WITH THE AUDIT OF TOBB (THE UNION OF CHAMBERS AND COMMODITY EXCHANGES OF TÜRKİYE) IN ACCORDANCE WITH THE LAW NO. 5174.

