

**iTKiB Hedef**

# VISION

January 2024 • Issue: 2  
Istanbul Textile and Apparel Exporters' Associations

**IFCO**  **ISTANBUL  
FASHION  
CONNECTION**

**THE GRAND GATHERING  
BRINGING TOGETHER  
THE FASHION WORLD**



**TEXHIBITION**

ISTANBUL

**THE GLOBAL RADIANCE  
OF TURKISH TEXTILES  
CONTINUES**



**KOZA**

**CREATIVE VISION  
ENRICHES THE  
FASHION INDUSTRY**

**AUTUMN/WINTER**

**2024**

**FABRICS AND  
MATERIALS**





ISTANBUL  
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& FASHION  
EXHIBITION

7-9 AUGUST 2024

ISTANBUL EXPO CENTER



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## THE TURKISH ECONOMY GREW IN 3 CONSECUTIVE QUARTERS

Turkish economy grew 4% in the first quarter and 3.9% in the second, while last year it racked up growth of 5.5%.

Türkiye's gross domestic product (GDP) rose 5.9% in the third quarter of this year.

According to the Turkish Statistical Institute (TurkStat), the country's GDP totaled 7.68 trillion Turkish liras (\$295.8 billion) at current prices this July-September.

"The value added increased by 8.1% in construction, 5.7% in (the) industry sector, 5.1% in financial and insurance, 4.3% in services, 3.6% in public administration, education, human health and social work activities, 2.7% in real estate activities, 2.2% in other service activities, 1.7% in information and communication and 0.3% in agriculture, forestry and fishing," TurkStat said.

TurkStat expressed over the same period final consumption expenditures of resident households rose 11.2%, government final consumption expenditures 5.3%, and gross fixed capital formation 14.7%. Imports of goods and services soared 14.5% while exports of goods and services climbed 1.1% year-on-year in the third quarter. Earlier this year the Turkish economy grew 4% in the first quarter and 3.9% in the second, while last year it racked up growth of 5.5%.

Commenting on the figures, Mehmet Simsek, the Turkish Treasury and finance minister, said: "As envisaged in our program, we are moving towards a more balanced composition in growth." Simsek pledged: "We will continue to implement our predictable, rule-based policies until inflation and the current account deficit fall permanently and macro-financial stability is achieved. We will implement structural reforms to increase productivity. Thus, we will strengthen the foundations of sustainable high growth."

## THE SECOND-LARGEST SECTOR IN ANATOLIA IS TEXTILES

The sectors that contributed the most companies to the Anatolian 500 research, which reveals the largest 500 companies in Anatolia in 2022, were food and textiles.



The results of the "Anatolian Top 500 Companies" research, which has been conducted for 20 years and monitors production outside the three major cities in Türkiye, were announced by Ekonomist Magazine. With the impact of the depreciation of the Turkish Lira and high inflation, the total turnover of the Anatolian 500 companies increased by 119 percent compared to the previous year, reaching 1 trillion 942 billion 470 million TL. The number of sectors sending 10 or more companies to Anatolian 500 was 10. Among these sectors, food, textiles, and the metal industry were leading. According to the research results, companies from 30 sectors entered the list. The sector with the most companies on the list was the food sector, with 114 firms, while the textile sector had 95 firms on the

list. Thus, the food and textile sectors, which brought in 10 or more companies to the list, constituted 50 percent of these sectors. The textile sector, which has the largest companies in Anatolia, also makes a significant contribution to regional employment.

### The entry barrier exceeded 1 billion TL

The increase in limits is also noteworthy in the 'entry barrier', which represents the turnover of companies entering the Anatolian 500 list from the last place. The entry barrier, which was 37 million TL when the first research was conducted in 2013, reached 496 billion TL in 2021 and increased by 113 percent to 1 billion 57 million TL in 2022.

The first two cities that sent the most companies to the Anatolian 500 list were Bursa and Gazian-

tep, where the textile sectors are predominant. Bursa had 66 companies, and Gaziantep had 65 companies on the first 500 list.

### Textile groups are in the top four of the list

It is observed that the holding companies operating in the textile sector are the ones that sent the most companies to the Anatolian 500 list. Kipaş Holding, based in Kahramanmaraş, ranked first in the group of companies that sent the most companies to the list with nine firms, while Sanko Holding, based in Gaziantep, ranked second with eight companies. Erciyes Anadolu Holding, based in Kayseri, brought eight of its companies to the list, and Erdemoğlu Holding, based in Gaziantep, which also includes Sasa Polyester, had seven companies on the list.

# LOSS PREVENTED IN EXPORTS WITH NEW MARKETS

Despite the contraction in global trade, Türkiye closed the year 2023 with an export volume parallel to the previous year. Türkiye's total exports amounted to 255.8 billion dollars. The country's textile, apparel, leather, and carpet sectors were among the industries experiencing a decline in exports.



Despite the 2 trillion dollars contraction in global trade, Turkish exporters, with a new market strategy, organized trade delegations to various parts of the world in the year 2023, which marked the 100<sup>th</sup> anniversary of the Republic of Türkiye. They participated in dozens of fairs. Thanks to this effort, Türkiye's exports, despite the contraction in global trade, managed to achieve a modest growth in 2023 compared to the previous year. In a speech during the announcement of the 2023 foreign trade figures, President Erdoğan stated, 'Our exports in 2023 reached a record of 255 billion 809 million

dollars' with an increase of 0.6 percent compared to the previous year, surpassing our 255 billion dollar export target set in the Medium-Term Program. The share we took from global exports, which exceeded 1 percent for the first time in 2021, increased to 1.02 percent in 2022. In the first two quarters of 2023, this rate rose to 1.03 percent.

### Exporters turned to alternative markets

"To compensate for our losses, we turned to alternative markets" emphasized Mustafa Gültepe, the President of the Turkish Exporters Assembly (TİM), highlighting the

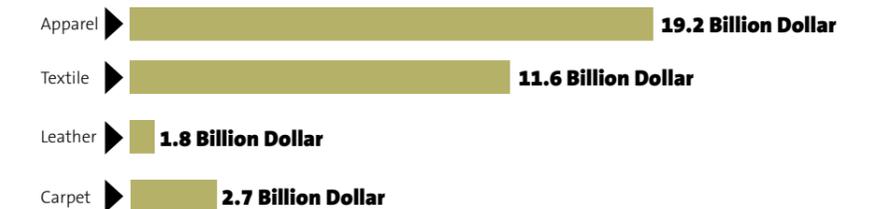
challenging nature of the year 2023 for exporters. Gültepe, stating that they directed towards alternative markets to offset losses, continued: "We made a record number of delegation organizations in our history. We organized 72 procurement delegations and 150 trade delegations. In total, we covered 1.5 million kilometers, in other words, circumnavigated the globe 40 times. With all these efforts, we closed 2023 in the positive. We increased our share in global exports from 1.02% to 1.06%. In 2023, we added 18 thousand more companies to our export family, reaching a total of 120 thousand exporting compa-

In 2023, the top five European countries that imported the most apparel products from Türkiye were Germany, Spain, the Netherlands, the United Kingdom, and France.

nies. We achieved the highest export value in 10 sectors and surpassed the \$1 billion export limit in 23 sectors. The top three countries we exported to were Germany, the United States, and Iraq. While increasing our exports to 113 countries, we set export records in 66 countries. We increased the number of countries where we made exports exceeding \$1 billion to 50. Our unit export value became \$1.57."

### The textile, apparel, leather and carpet sectors experienced losses in exports

In 2023, the export of the Apparel and Apparel sector decreased by 9.2% compared to the previous year, reaching 19.254 billion dollars. The sector's exports to EU countries decreased by 9.1% during this period, with Germany, Spain, the Netherlands, the United Kingdom, and France being the top export destinations. Among the top 50 countries in 2023, Saudi Arabia experienced the highest increase in Apparel and Apparel exports with 130.6%, followed by a 48.9% increase to Kyrgyzstan and a 47.8% increase to Poland. The Textile and Raw Materials sector's export in 2023 decreased by 10% compared to the previous year, reaching 11.646 billion dollars. The sector's exports to EU countries decreased by 17.6% during this period, with Italy, Ger-



2023 Sectoral Exports

many, the United States, Spain, and the United Kingdom being the top export destinations. In the January-December period, Vietnam experienced the highest increase in textile and raw material exports among the top 50 countries with 162.1%, followed by a 106.1% increase to Saudi Arabia and an 80.3% increase to China. The Leather and Leather Products sector's export in 2023 decreased by 9.5% compared to the previous year, recording 1.857 billion dollars. The sector's exports to EU countries decreased by 14.3% during this period, with Germany, Italy, Iraq, France, and the United States being the top export destinations. In the January-December period, Saudi Arabia experienced

the highest increase in leather and leather products exports among the top 50 countries with 125.2%, followed by a 49.8% increase to China and a 47.4% increase to Syria. The Carpet sector's export in 2023 decreased by 0.03% compared to the previous year, reaching 2.752 billion dollars. The sector's exports to EU countries decreased by 7.6% during this period, with the top export destinations being the United States, Saudi Arabia, Iraq, the United Kingdom, and Germany. In the January-December period, Saudi Arabia experienced the highest increase in carpet exports among the top 50 countries with 129.6%, followed by a 109.6% increase to Japan and a 95.1% increase to Ukraine.

IMA Fashion Design Programs Team Leader Cansu Bodur

IMA Library and Learning Resources Officer Elif Şengüler

# Autumn/Winter 2024/2025 Fabrics and Materials

In the midst of the winter season, shimmering silks with their unique natural textures, frequently chosen dense cottons, and wool fabrics that emit energy and impact performance are enriching the winter season with innovative uses. These high-quality fabrics make a meaningful impact on the fashion world with their durability and long-lasting usability. These elements, carrying the power to reshape the fashion industry, inspire us by boosting our courage.

Continuing to nourish designers, these creative and functional fabrics make our daily lives easier. This season, influenced by both strength and fragility, imitates nature with its endless energy while shedding light on all materials with technology. Enriched elegance can be seen in modern sparkles and intricately hidden weaves and finishes. A wide range is created, from fur to lace, shining surfaces with the energy of orange. Dramatic play of light on dark backgrounds, blurred transitions in jewel tones, and touched surfaces in tweeds stand out among the highlights of the season.

## POSITIVE INTERACTION

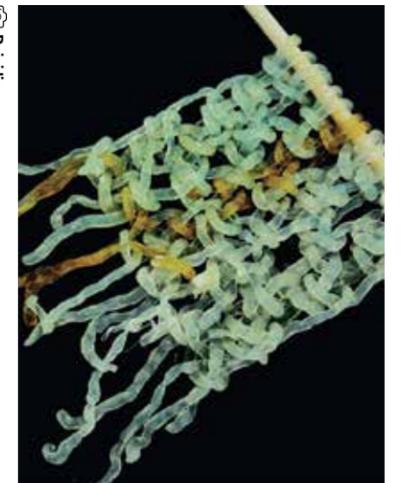


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**P**atterns, embroidery, and surfaces designed in pursuit of originality and creativity enrich our wardrobe. This fashion, which focuses on material, brings out creative energy through repair, restoration, or reevaluation, providing purpose to untreated, raw-looking qualities such as melange, burnt, and degrade. In this journey of energy-efficient processes, surfaces with a

gradient color palette inspired by nature, handcrafted thick stitch effects, and compressed surfaces are felt. Under the theme's influence, we see fabrics that move with the natural flow of our body, breathable, lightweight, and airy. Large loops, velvets, melanges, and unravelled fringes highlight tactility while supporting forms that create volume, inspired by nature.

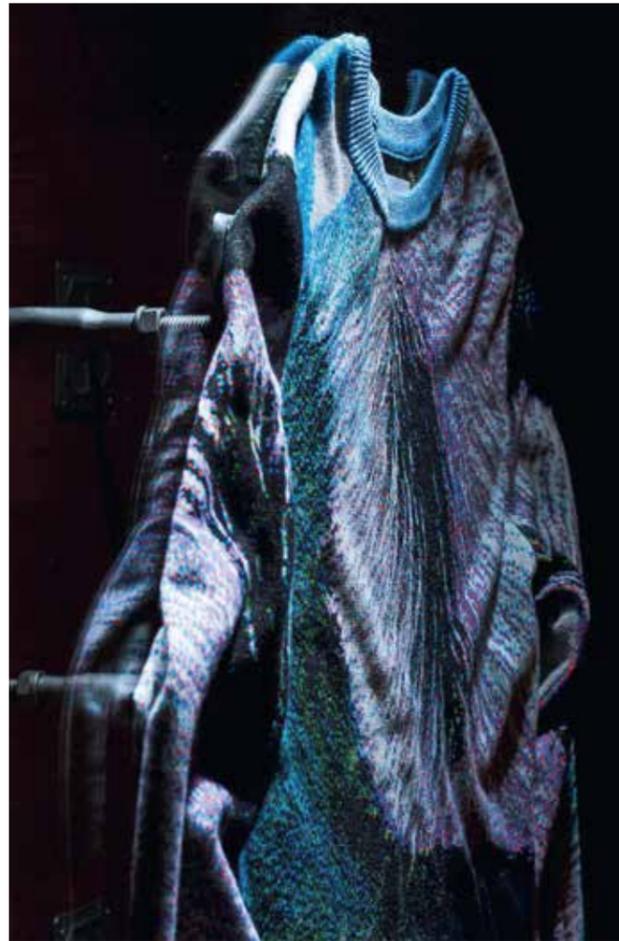
# CREATIVE DIMENSION



📷 Hatra hatroid



📷 Mallalius



📷 Hatra hatroid

**T**he current harmony between formal and casual is captured through unexpected and creative material clashes. Lightweight yet voluminous fabrics, colorful wools, airy plush effects, and bonded fabrics are observed. Jacquard patterns consisting of round forms accompany furry and fluffy fabrics, while intense and exaggerated curls in transitional colors with an optimistic

energy support key pieces of the season to capture three-dimensional forms. Dense spongy, felted textures absorb color, and playful spirit captivates the eye with pleasant matte shades, wet or even sticky shines contrasting with playful graphics on a black background. Fur-like and looped effects, large-scale jacquards in bright vibrant colors, and fun intersia on a black background create indispensable looks for

the theme. In addition, recycled polyamide in waterproof qualities exhibits a protective technical approach. Smooth yet slick super bio synthetics create a tactile sensation. Padded synthetics, small heringbone thin slicks, fluffy, dusty pastel-toned boucles, leather-look gloss, burnout reversible colored mohair and fuzzy wools, glossy smooth brushed qualities stand out on knitted surfaces."

# FUNCTIONAL WORLD



📷 Carlo Pozzi



📷 Mapel Stelloni



📷 PineSkins Quelle Studio Sarmite Frankfurt



📷 TGM International

**D**ifferent approaches are anticipated in materials that prioritize functionality, used in performance areas and moderate weather conditions. From simple and classic qualities to pure wools, silks, mohair, frosted and coated fabrics, as well as new investments in rising technological tools, bio-fiber characteristics will continue to rise against nature-damaging synthetics, focusing on environmentally friendly, reclaimed, organically grown materials. Metallic fabrics, along with

hard touches, support the apocalyptic mode with wrinkled and compressed surfaces. Dystopian feelings are conveyed through irregular jacquards with large loops, woolens with an orange hue, and lightly shimmering fabrics with a rusty dirty appearance. In knitted qualities, alpaca and wool, felted, cloudy, untreated, and recycled materials accompany soft-touched fine wool that feels good on the skin, as well as blends of silk or wool and viscose with bronze and lead metallics.

# THE DEPTH OF ELEGANCE

© Juni



© Juni



© Lurdes Sampaio

Taking center stage in the spotlight, black, the strong pioneer of couture elegance, celebrates the season with dramatic details in magnificent grace. Embracing an attitude that refuses to go unnoticed, black, supporting gothic and tailor-made ensembles, subtly distributed shimmer adds a touch of modernity with understated elegance. Velvety textures, sleek and glossy surfaces, along with sharp synthetics, cleverly designed

full laces, and embossed surfaces come together in a modern look. Monochromatic jacquards, sparkly textures in embossing, elegant fabrics with fine fuzz, and patterns adorned with small delicate dots showcase a range of fabrics. Silk, satin or polyamide sheens create the backdrop for plush and velvets. In fine-furred faces like mohair, black and white jewels add a sparkle, accompanying a magical night. Flowing satin, sequins, beads,

and accents created by brushed surfaces bring classic suit fabrics to the forefront again, mixed with fluid, technical performance effects. Rediscovering woolen fabrics, whether for chic or technical purposes, we are unafraid to mix them with natural or artificial fibers. Creating an interplay of intertwining patterns and textures, embossed, veined, structured, and sometimes rough surfaces contribute to a dark atmosphere.

# KİĞİLİ | 85.YIL



## KİĞİLİ'DASIN RAHATSIN

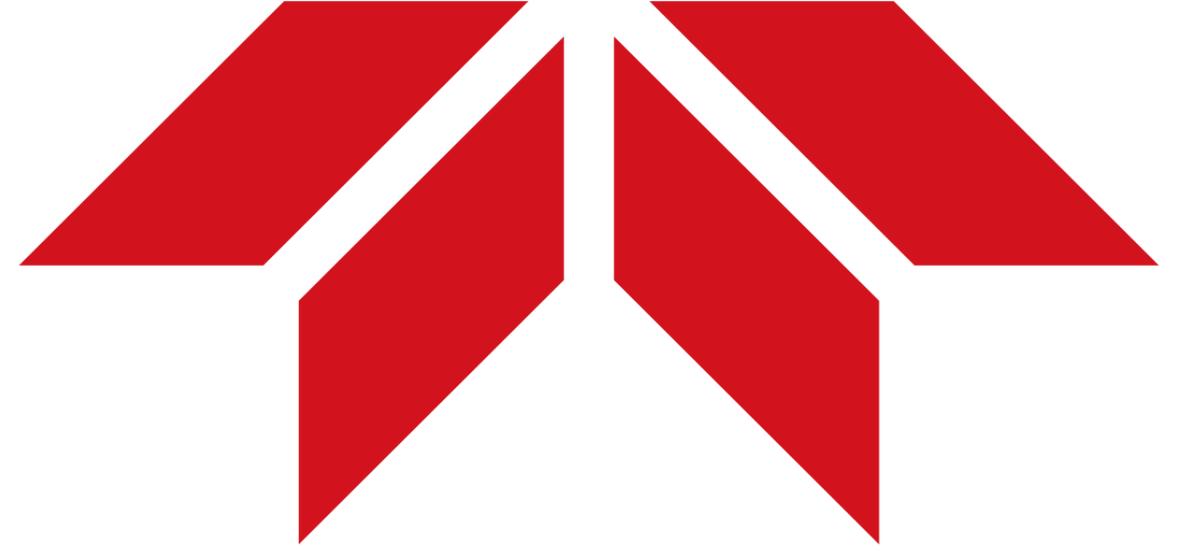
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# IFCO

07-10 February, 2024

Will bring together  
the brands leading the  
**fashion**  
in 5 continents in  
*Istanbul*



IFCO, Europe's largest apparel and fashion exhibition, whose fourth season was held in August 2023, has made exclusive preparations for the new season to be held on 7-10 February 2024. It will host a wide range of product groups, brands and trend areas in a total of 9 halls on an area of 100 thousand square meters.



**D**ozens of procurement officials including Walmart and Inditex, and thousands of exclusive buyers from five continents came to Istanbul for the fourth season of the Istanbul Apparel Clothing and Fashion Exhibition (IFCO), which

has become one of the prestige organizations of the Turkish fashion industry on a global scale with its success in a short time and is one of the largest exhibitions in its field in Europe. İHKİB Vice President Mustafa Paşahan stated that they were preparing

very ambitiously for the first fair of 2024, as in the first four fairs, and continued, "We brought together all product groups under one roof through IFCO. More than 400 distinguished companies participated in our exhibition in all product groups, from



Türkiye's brand identity in two industries, strengthened design skills, trained human resources and brands that open up to the outside world will be the dynamos of the industry in reaching the determined goal.



400+

Participant

125

Country

20.000+

Visit



women's, men's and children's clothing to denim and sportswear, evening dresses, wedding dresses, groom's suits, underwear and socks, leather and fur garments and shoes. We are happy and proud to host thousands of buyers from more than 100 countries. Our participating companies and procurement delegations from target and distant countries, especially the USA, Germany and the UK, will hold

bilateral business meetings and sign new collaborations. We will all see the positive reflections of these collaborations on our exports in the coming months." Turkish textile and apparel clothing industry is among the most critical industries of the country's economy with its contribution to employment and exports. The industries with a total export of 32 billion dollars have high targets in the medium term.

An export of 60 billion dollars is targeted, constituting of 40 in apparel clothing and 20 in textiles. Türkiye's brand identity in two industries, strengthened design skills, trained human resources and brands that open up to the outside world will be the dynamos of the industry in reaching the determined goal. It is stated that İstanbul Apparel Clothing and Fashion Exhibition is an important part of this goal.

# The Core İSTANBUL IFCO

## TURKISH DESIGNERS AT THE CORE İSTANBUL



**A**t the IFCO exhibition, visitors, in addition to visiting companies and stands, can also tour The Core İstanbul area, which is reserved specifically for Turkish fashion designers, and see the latest trend designs. The Core İstanbul, located at the IFCO Exhibition, which brings together Türkiye's leading fashion designers and apparel brands with international buyers and provides the opportunity to turn the collections of brands and designers into commercial activities, attracts great attention from visitors. Among the Turkish fashion designers and brands who exhibited their designs within the scope of The Core İstanbul at the August 2023 season exhibition, there are Alaii, Arzu Kaprol, Bist,

Ceren Ocak, Çiğdem Akın, Ece Eriği, Essin Baris, Emre Erdemoğlu, Ezgi Karayel, Eynaco, F.I.L.K.K, Guaj London, Kuela, Meltem Özbek, Mert Erkan, Murat Aytulum, Mohair & Angora, NEJ, Özlem Erkan, Selin Küçüksoz, SHYZ Wear, Tuba Ergin, Viola & Vesper and Y Plus. The Core İstanbul will again host many fashion designers to attract appreciation from the visitors at the exhibition to be held in February.

### Türkiye's leading brands are at IFCO

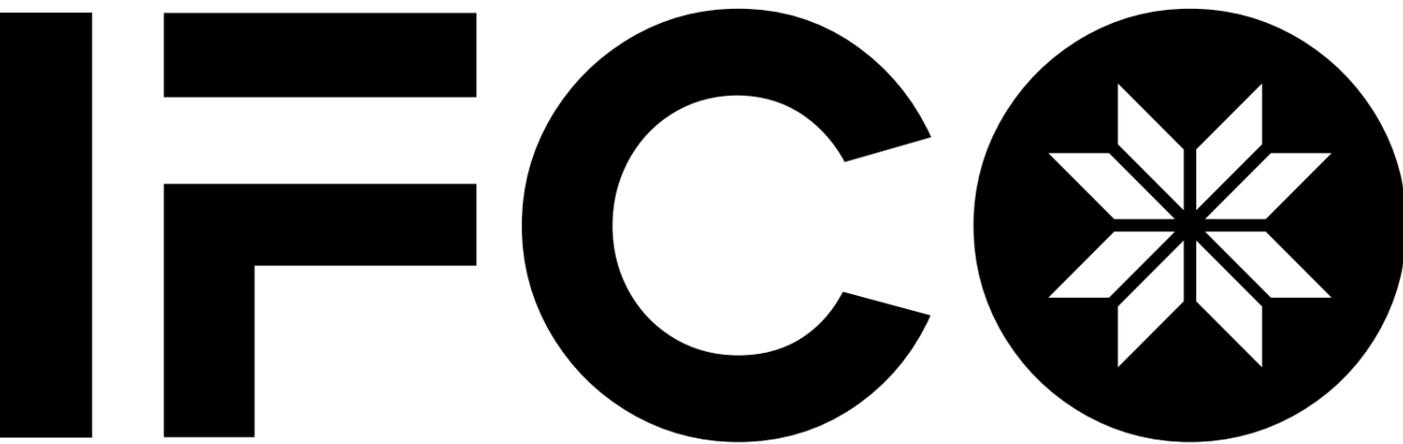
In the brands special section of IFCO, there are companies that have become brands in the apparel clothing industry, export to many parts of the world and stand out with their collections.

IFCO, which hosted many domestic brands with the capacity to export all over the world in previous years, will be the meeting point for domestic brands that wish to expand their international customer network this season.

### The evening dress industry meets at Fashionist

30 leading brands of the apparel industry manufacturing in the evening dresses and gowns wear categories met at IFCO with their different designs, innovative colors and dynamic styles. Visitors had a different exhibition experience in the special section of Fashionist, where products were exhibited accompanied by a visual show.

# trend area



## IMA TREND AREA NEW SEASON THEME: RESILIENCE



Istanbul Moda Academy, the leading fashion training platform of the present and the future, continues its work blending design, trends and creativity at the very center of the fashion and apparel industry. İMA, which has designed the Trend Area of the IFCO Exhibition for the last three seasons as the fashion center that follows the current developments, is the first to announce and implement them, and took on this task in the fifth season. The theme of the new season is Resilience. While visitors visiting the Trend Area will discover the color codes, forms, textures,

fibers, materials and accessories that will stand out in the winter of 2025, they will also be able to see pieces from the New Gen collection of young generation designers who are İMA graduates.

### IFCO brings fashion and knowledge together with events

Fashion shows organized at the exhibition, seminars keeping the pulse of the industry, B2B area bringing together foreign buyers with participants, Gala Night organized and many other events increased the appeal of IFCO. IFCO, which is preparing to carry out even more ambitious events in the new season, will offer its visitors

a memorable exhibition experience in a distinctive atmosphere. In the seminars, where all developments in the fashion industry will be discussed, the themes will be conveyed with the latest fashion trends. Many topics will be reviewed, from organic and sustainable products to technological and digital approaches and climate-independent designs. The fashion show at IFCO, consisting of the special collections of participating companies, aims to provide an enjoyable time for domestic and international visitors. Fashion lovers will experience a quality exhibition experience in fashion shows featuring collections consisting of modular designs, impressive colors and fabrics of different textures.

## IFCO RECEIVES TOP MARKS FROM FASHION DESIGNERS

**Nejla Güvenç**  
Fashion Designer

IFCO Exhibition has become the face of the Turkish Apparel Clothing industry and Turkish designers to open up to the world. The exhibition has had echoes in many parts of the world, especially in Europe, the USA and the Middle East, for four seasons. This year, we have seen that African countries also took part in the exhibition.

**Çiğdem Akın**  
Fashion Designer

IFCO is an exhibition that has potential. That's why we are excited and we support this exhibition that supports designers. We have received good orders. We also had visitors who asked for a lookbook. I hope there will be good collaborations.

**Emre Erdemoğlu**  
Fashion Designer

IFCO is a very well-prepared exhibition. Bringing the designers together in The Core area was a brilliant idea. Having open stands is also very impressive. IFCO is actually a market for us. It is very important for us to make sales and for our commercial steps.

## BRANDS SATISFIED WITH THE INTEREST

**Gökhan Er**  
Kişili

Having a special area for brands at the exhibition is very important for the industry. It was an exhibition where both domestic and foreign manufacturers visited us. We had a chance to contact buyers from African countries, Azerbaijan, Lebanon and Russia.

**Eren Göze**  
Giovane Gentile

The brands section is beneficial for apparel clothing brands in terms of adding new customers. We see that there is an increasing density at each exhibition. In addition to positive results for brand awareness, we also received new orders.

**Pelin Paksoy**  
B&G Store

At IFCO, we established many contacts from Europe, the Middle East, America and Canada. There was participation from a wide range of countries, not specific countries around the world. It was very productive for us in terms of promoting our company. Since we are in the children's clothing industry, we generally receive visits from families with children.

**Faruk Ortakaya**  
Kayra

The exhibition went well beyond our expectations. The fact that the brands section is specific to retail makes a great contribution to us. We had visitors from many countries. We had visitors from Russia, America, Israel, Kuwait, Qatar and Gulf countries. The interest in the exhibition was high.

## TREND ZONE OF IFCO FAIR IS ONCE AGAIN ENTRUSTED TO ISTANBUL MODA ACADEMY!



Istanbul Moda Academy (İMA), the leading fashion education platform of today and tomorrow, and the designer of the trend zone of IFCO İstanbul Fashion Connection for the past seasons, introduces fall/winter 25 - 26 trends to the industry at the 5<sup>th</sup> exhibition to be held between February, 7 - 10. At the four-day exhibition contributed by İMA with a trend zone for future trends, color codes, materials, and forms, New Gen collections of its graduates will also be exhibited in the same zone.

**FW25/26: "INTROSPECT"**  
"The variety in the daily demands became the center of

attention with the dawn of the rapidly changing era. Accelerating advancements in every area offer us unlimited possibilities and new perspectives. However, following global macro trends may not be enough to stand out in this competitive era. We may talk about a research process that we expanded through individual and local research in order to adapt by improving both our perspectives and values. With this perspective in mind, we based our concept for "FW 25/26" season on our efforts to observe and introspect on both individual and social levels, to create a better version of ourselves and to strive for the good. The integration of arti-

cial intelligence into our lives, technology's passion for innovation, the diverse influences of cultures and innovative fashion design come together in 4 different concepts. The advancement of technology gives us powerful tools for rapidly bringing ideas and creativity to life. The trend area of the season, discovering and innovating, has been created through a mosaic philosophy that integrates the assimilation of different cultures and all perspectives that have been passed on from the past to the present."

**Melis Karapaşa Örün**  
Istanbul Moda Academy

# Turkish Textiles Continues to Shine in the Global Arena



**TEXHIBITION**  
ISTANBUL

## THE STARS OF TURKISH TEXTILE WILL COME TOGETHER AT

**TEXHIBITION ISTANBUL ON 6-8 MARCH, 2024**

The Texhibition Istanbul Fabric and Textile Accessories Exhibition, widely anticipated by the textile industry, will further solidify its representation of the Turkish textile sector on the global stage by expanding its capacity in 2024. The first exhibition of the year is scheduled to be held in Istanbul from March 6<sup>th</sup> to 8<sup>th</sup>.

The textile industry, which opens the Turkish economy to the world through exports, continues a similar pioneering role with Texhibition Istanbul. Texhibition Istanbul, which has become one of the leading textile exhibitions in Europe in a short time, is of great importance in terms of highlighting the power and diversity of Turkish textile by bringing together industry professionals in Istanbul. This important event, held every year in March and September, continues to bring Turkish textile to the forefront in the world market by offering many advantages to the industry. Texhibition Istanbul, which demonstrates the production and design capacity of the Turkish textile industry, will continue to grow in 2024 with the addition of the leading yarn manufacturers of the sector, in addition to its weaving, knitting, denim fabric, artificial leather and textile accessories brands, and bring them together under one roof. The size of the exhibition is increasing with the intense demand of national and global visitors. The first exhibition of 2024 will



be held in Istanbul between 6-8 March.

### The yarn sector also participates in the exhibition in the new season

While Texhibition Istanbul inspires participants by bringing together the latest innovative products and textile trends for the industry, innovative products and designs offer companies participating in the exhibition a platform to stand out in the industry. significant international

participation supports Turkish companies to gain a competitive advantage in the global market. Hundreds of textile companies participating in four exhibitions held in two years had the opportunity to present their collections consisting of a wide range of products, especially woven fabrics and textile accessories, with the addition of yarn this season, to international buyers. Offering a wide selection of suppliers to foreign brands



Visitors the chance to experience this quality firsthand.

The Turkish textile industry ranks as the fifth-largest supplier in the world and the second-largest supplier within the EU.



Türkiye manufactures in accordance with EU norms.



Texhibition stands out by exhibiting the wide product range of the Turkish textile industry and offering various supplier options for foreign buyers and brands. The exhibition provides the opportunity for foreign buyers, brands and industry professionals to get to know Turkish textiles and textile products closely and to create cooperation opportunities with qualified manufacturers. Turkish textile is known in the international arena for its quality products and expertise in workmanship. The exhibition offers visitors the chance to experience this quality firsthand. Texhibition also offers an effective marketing platform to companies that want to increase

brand awareness and create new customer bases. For this reason, the interest in the exhibition continues to increase every year.

**“The largest textile exhibition in Türkiye”**

Underlining that Texhibition İstanbul paves the way for new collaborations, İTHİB Board Chairman Ahmet Öksüz said, “With our exhibition, we aim to carry the Turkish design power beyond the borders of the country.” Texhibition İstanbul, which adds value to Türkiye’s design and production power, includes all components of the textile industry, from organic, sustainable, reclaimed, ecological fabrics in colors and textures in line with the latest

**Texhibition İstanbul is growing as a well-established brand**

M. Fatih Bilici, Vice Chairman of the Board of Directors of İTHİB (Istanbul Textile and Raw Materials Exporters’ Association) and President of the Executive Board of Texhibition İstanbul, also made positive evaluations after the September fair: “Throughout our fair, we consistently received positive feedback from participants and visitors. Texhibition not only contributes to creating value and branding in the industry but also contributes to quality production, increased investment, and exports. Texhibition İstanbul is growing as a well-established brand. In March 2024, we plan to expand the exhibition area from three halls to five halls and dedicate one hall exclusively to the yarn product group.”

trends, to trendy accessories that complement textile products.” Stating that the exhibition has become Türkiye’s largest textile exhibition in terms of the number of participants and visitors, Ahmet Öksüz expressed, “We aim to make our Texhibition Exhibition an exhibition that we will pass on to future generations and that will be a reference all over the world.”

**Turkish textile is the second largest supplier of the EU**

Underlining that the textile industry produces 50 billion dollars annually and exports 13 billion dollars, Ahmet Öksüz continued his statements as follows: “We are the fifth largest supplier in

the world and the second largest supplier in the EU. While Türkiye’s general exports receive a 1 percent share of global exports, our textile industry receives a 3,5 percent share. Our goal is to be one of the top three exporting countries in the world. We are a country that carries out integrated production from fiber to dyehouses, from yarn to the end product. We manufacture in accordance with EU norms. We are much further ahead of our competitors in the journey of sustainability and green transformation. When all these come together, we differentiate ourselves positively from our competitors. Texhibition is a showroom of this distinction.”

## BRANDS PARTICIPATING IN THE FAIR EAGERLY AWAIT THE UPCOMING FAIR

**Tarik Karaman**  
Gayret Tekstil

We are participating in the Texhibition Fair for the fourth time, and each time it proves to be a gratifying event for us. The high attendance at the fair, the number of foreign buyers present, and the opportunity to meet with our own clients all indicate that the fair is progressing in the right direction.

**Canan Yüksel Özcan**  
Bossa

As a company participating in every season of the fair, we can say that the fourth season was experienced with a similar intensity. Buyers mainly came from Russia, Azerbaijan, Italy, and England. The fair is quite diverse in terms of products, ranging from denim to knitted fabrics, covering a wide range of fields.

**Mustafa Can**  
Can Tekstil

According to our general impression, we see that the fair is exceeding expectations. We had visitors from countries such as Poland, Russia, and Spain, as well as representatives of significant brands. We consider it a successful fair and plan to expand it internationally in the coming period.

**Bengü Yanoğlu**  
Söktaş

We observe that the fourth season is even more successful than the previous ones. We notice an increase in the quality of buyers attending the fair, with more conscious buyers participating. We are also pleased with the intensity of the fair.

**Murat Turan**  
Afa

We are quite pleased with the organization of this fair, which provides significant advantages to our industry. We have observed a substantial participation from Eastern European countries. Texhibition contributes to the sector not only in terms of marketing but also demonstrates Türkiye as a hub point.

**Osman Yıldız**  
Cotton Fabric

A very good and unique fair. Buyers from all European countries except Russia participated in the fair. We hosted customers from countries like the Netherlands, Germany, and Spain. I observe that Texhibition has elevated its level with the September 2023 fair.

**Murat Ayvaz**  
Efes Kumaş

We have been participating in the Texhibition Fair since its first season, and we see that the fair has been developing with each passing season. There is a diverse and attractive customer potential. We had meetings with buyers from many countries such as Russia, Arab countries, Kuwait, France, and Spain.

# panels

shed light on the  
future of the industry



Pascaline Wilhelm gave information about the use of artificial intelligence in the textile field.



The panels and seminars held during the Texhibition İstanbul fair also attracted the attention of participating companies and visitors. There will be presentations that determine the trends of the sector, as well as panels of experts in their fields reflecting the industry's agenda in both exhibitions to be held this year.

#### The fourth fair received great attention

Texhibition İstanbul, which presents the potential of Turkish textiles to international buyers, attracted great attention again with its fourth edition held on 13-15 September 2023. Hosting visitors from every corner of the textile industry, the exhibition brought together more than 400 participating Turkish companies and 25 thousand industry professionals from more than 100 countries. Texhibition, organized by İTKİB Fuarçılık AŞ on behalf of the Istanbul Textile and Raw Materials Exporters Association (İTHİB), will bring together weaving, knitting, yarn, denim fabric, artificial leather, and textile accessories under one roof in two exhibitions to be held in 2024.

# TEXHIBITION TREND AREA

INSPIRES INDUSTRIES

# trend area



In the fourth season of the Texhibition Exhibition, the Trends Creative Hub trend area, where fabric, accessory and yarn innovations for the 2024-2025 fall/winter season are introduced, will be present in both exhibitions to be held this year. Texhibition Trends Creative Hub will continue to inspire with unique stories where sustainability comes to the fore.



Özlem Süer

Fashion Designer



## CONSCIOUS AND RESPONSIBLE BRANDS ARE HAVING THEIR PRODUCTION CARRIED OUT IN TÜRKİYE

Fashion designer Özlem Süer highlights the ethical values in production and export in Türkiye, and emphasizes that conscious and responsible global brands opt to manufacture in the country for this reason. She believes that there is a lack of promotion of the industry in this field in the global market.





**W**e would like to start our interview by hearing about the transition from your academic career to entrepreneurship...

In fact, my journey progresses with the title they call both amateur and educated. I graduated from Marmara University Faculty of Fine Arts, Department of Fashion and Textile Design. After that, I pursued my master's and doctoral degrees at Mimar Sinan University, advancing with the title of assistant professor. I worked full-time for about 13 years and then established my

own brand. During my doctoral exam, I held my first fashion show at Tophane-i Amire. This show was a turning point for me. In the following seasons, I presented opening shows for fairs held abroad. We received orders and expanded to many sales points around the world during this process. We have been carefully preserving our collections and the artistic value of the brand with the goal of expanding since the year 2000.

**Does Özlem Süer House engage in production besides design?**

We've converted our lower floor into a workshop where we complete smaller projects and our haute couture productions. Generally, we outsource our other productions. This allows me to handle smaller projects more efficiently and dedicate myself more to the design process. Our efforts in the Apparel sector have seen significant growth, especially during the pandemic. I haven't stopped during this period and have emphasized consultancy projects. We've continued our journey, constantly renewing ourselves without disconnecting from life.

Design, for us designers, essentially means problem-solving. The pandemic was a period where life and human relationships were scrutinized, leading us to understand the need for a multi-purpose approach to our clothing. During this time, we streamlined our collections and developed a special Apparel brand. This was a planned initiative that emerged during the pandemic. We created a brand that is simple, minimalist, effective, has tactile harmony, is recyclable, and environmentally friendly. Our collection has gained significant attention globally, and we are highly energized in this regard. We enjoy using technological fabrics and multi-purpose surfaces. In design, apart from using good forms and colors, we

Since 2000, we have been trying to carefully protect our collections and the artistic value of the brand with the aim of becoming widespread.



The Show of Tophane-i Amire was a turning point for me.

prefer to benefit from multi-purpose approaches and innovation.

**Which collection did you use to enter the international market?**

Beginnings are crucial. In this regard, the "Healing" collection, which marked our first venture into the international market, is very important to me. Subsequently, we continued to produce two new themed collections each year, each of which deeply influenced me, without neglecting the stories, and expressed that creative attitude within us in words. In this respect, the digital world

offers a significant advantage. Thanks to technology, we have a better chance of expressing ourselves. In previous years, if we could hold a fashion show, we expressed ourselves from a podium there. We conveyed our messages in texts in newspapers. But now, through our own social media, we can address the whole world. As technology advances, you can expand your presence, your voice in your field in the digital world. We are discovered through these channels. Someone from the other side of the world knocks on our door. That's why I look at the dig-

ital world with sympathy. Digital visibility is crucial at this point. If you are visible somewhere and open to communication, you can receive orders. We have to be visible. A very good buyer group has also formed domestically.

**You are an important brand in the bridalwear industry. What are your priorities and inspirations when preparing women for this special day, which is one of the most important moments in their lives?**

Women can be someone else until they receive a marriage proposal and get married. For example, there are those who say, "I am a very simple woman," but choose the most glamorous wedding dress or those who say, "I am very ornate," but feel happy in a simple choice. It's a topic filled with surprises, much like taking the stage. I consider it the most important stage in your life. I love creative perspectives in wedding dresses. A wedding dress is like love. It creates tremendous passion from the moment it is worn. We start preparing for the collection every autumn. Orders peak in March, April, and May.

**Your design style is often described as avant-garde and neo-classical. How do you personally describe your design style? How would you characterize the Özlem Süer woman?**



Being avant-garde is a responsibility. We know that we cannot achieve this in every product. As brands grow and the variety of products increases, a few avant-garde pieces emerge within collections. Pieces that are experimental, through manual manipulations, excite me. Building an emotional connection with the product is crucial, and avant-garde elements stem from this. We expect avant-garde to come from all designers or artists with a design education and a closeness to art because being a pioneer emphasizes the identity

of art. It's a realm brought forth by those who undertake the unsaid and the undone. Successfully and patiently managing the sense of exploration in the collection also brings out the avant-garde. I have a side that is within classical approaches. We strive to depict an attitude that is perfectionist, sensitive, and progresses beyond the currents of art.

**The textile and apparel industry is criticized for its lack of sustainability, particularly drawing attention to the seasonal collections and excessive production, especially**

**after the pandemic. What are your thoughts on this matter?**

Sustainability has been a subject of scrutiny for a long time, especially in an industry overshadowed by the fast fashion trend. We, as a part of our industry, consider this matter with great importance. A global production line has been established in this regard, and we are one of the countries within the supply chain. I believe that the efforts made and the progress achieved in this area are highly valuable. Our country has learned to preserve the influential values within the fashion

"I am a very simple woman." and then choose the most magnificent wedding dress or say, "I'm very fancy." There may be women who feel happy with a simple choice.



Wedding dress is like love. It creates tremendous passion from the moment it is worn.

and textile industry from the past. Globally conscious and responsible brands choose to manufacture in Türkiye. Sustainability certifications require principled practices, and even though the world has recently started discussing this, our country has been using these certifications for years. We have ethical values in production and export as a nation. The increased competition has led to higher production, impacting water and energy usage in the sector, while unconscious consumption contributes to an increase in textile waste. Like many conscientious

individuals and designers, I also value sustainability. I believe that there should be an increase in practices in this field. Türkiye, with its contribution to the future of the world and its leadership in design, should be more assertive in the industry. Many manufacturers are sensitive to this issue as well. When we promote this area more, both our designers and brands can benefit even more.

**As one of the fashion designers representing Türkiye internationally, could you provide information about your work abroad? What can**

**we expect in the new year in terms of your new projects, and what awaits us in the next Özlem Süer collection?**

Ümit Ünal and I have been working as the Turkish delegates at INTERCOLOR, the World Color and Concept Association for over 20 years. We collaborate simultaneously with 16 design and color offices worldwide. Representing our country there and establishing a lasting presence is of utmost importance to us.

We highly prioritize our exports and accessibility abroad as a brand. Customers from overseas can easily purchase products they see on any platform by providing their measurements. We are a group capable of promoting and selling our brand globally. Users of our brand also follow our story. We have customers who no longer see buying from a designer as a luxury but as a right, knocking on our door, browsing the collection, and happily making purchases. Our Apparel brand was born with the ambition of being accessible to everyone. In the past, our boundaries were clear, and we couldn't stretch, but in Apparel, we have created a solid foundation in this regard. It has significantly changed our image.

We are intensively preparing for our 2024-25 export collection and our House collection for the summer of 2024, which will be introduced to the domestic market. The fashion world continues to progress rapidly.

# THE TRADITIONAL WEAVING CULTURE OF ANATOLIA IS COMING TO LIGHT

The Türkiye Weaving Atlas Project, implemented to preserve and sustain the endangered traditional weaving culture of Anatolia and to transfer the rich cultural heritage to future generations, enables the recognition of Anatolian weavings at the international level.



The Weaving Atlas Exhibition featured over 150 types of weavings gathered from various regions of Türkiye, following regional routes.

The Türkiye Weaving Atlas Project, a result of the renewal efforts of adult education institutes, is being carried out by the İstanbul Sabancı Beylerbeyi Adult Education Institute under the Lifelong Learning General Directorate of the Ministry of National Education. Supported by the İstanbul Textile and Raw Materials Exporters' Association (İTHİB) and with contributions from Marmara University, the project also receives support from the Türkiye Exporters Assembly (TIM) and

the Ministry of Trade. The aim of the Türkiye Weaving Atlas Project is to preserve the endangered traditional weaving culture of Anatolia, protecting this unique culture for future generations. The project also seeks to achieve international recognition of traditional Anatolian weavings and to impart a commercial identity to them. As part of the project, 397 regional fabrics were identified under the titles "Ottoman Palace Fabrics" and "Anatolian Regional Fabrics" through academic research,

and their characteristics were recorded in the database. Marmara University is conducting research and development activities to analyze regional weavings using scientific methods, as well as natural dye coloring and improvements to the weavings. Within this scope, weavings such as Antep Kutnu, Ankara Sofu, Şal Şapık, Rize Bezi/Feretiko, Ehlam, Beledi, and Denizli Buldan will be introduced to the world. The goal is to showcase the color and pattern of Kutnu, the silky softness of Ankara Sofu, the

patterns and colors of Üsküdar Çatması, and the transformation of Denizli Buldan Bezi's naturally dyed weaving into contemporary designs. Additionally, the creation of "Weaving Culture Routes" and "Living Museums" will contribute to the revitalization of cultural tourism.

#### The exhibition and stage performances are attracting great interest

As the first activity of the project, an exhibition was held. The Weaving Atlas Exhibition, held

under the auspices of Emine Erdoğan, the wife of President Recep Tayyip Erdoğan, and bringing together for the first time Türkiye's regional weavings, took place initially at the Presidential Beştepe Exhibition Hall and later at Tophane-i Amire in İstanbul. The exhibition featured over 150 types of weavings gathered from various regions of Türkiye, following regional routes. Designs created by young designers inspired by traditional fabrics were showcased in a chronological display. As part of the project,

a special stage performance depicting the place of weavings in our culture was also prepared. Garments designed by renowned designers such as Arzu Kaprol, Nedret Taciroğlu, Ece Ege, Tuvana Büyükcınar, Dilek Hanif, Simay Bülbül, Gülden Bilgili, Gül Ağış, and Aslı Filinta, inspired by centuries-old weavings from various regions of Türkiye, came to life on the Türkiye Weaving Atlas Stage. Emine Erdoğan presented the Weaving Atlas Project at the New York Turkish House during the 78<sup>th</sup> United Nations



Jülide Konukoğlu, the Founder and CEO of Kutnia.



General Assembly meetings. Distinguished figures from the U.S. fashion world also attended the event, expressing admiration for the showcased products. The spouses of leaders from Kenya, Serbia, Albania, Croatia, and North Macedonia, present at the event, praised the Turkish textile sector, impressed by the displayed items. The project aims to make traditional weavings sustainable, promote them, and brand Anatolia's heritage weavings. Brands that bring products to life by using heritage weavings carrying trac-

es of Turkish culture have gained significant attention abroad. One of these brands is Kutnia.

**THE KUTNU FABRIC SHINING ON DIOR'S RUNWAYS**

Gaziantep's unique Kutnu fabric holds a significant place in Turkish textile history, as emphasized by Jülide Konukoğlu, the Founder and CEO of Kutnia. She describes the efforts for the sustainability of Kutnu fabric as follows: "My deep love and commitment to traditional Anatolian weaving inspired the birth of Kutnia. The idea focused on bringing this

unique fabric, produced by local weaving masters with hand-craftsmanship, together with modern designs to breathe new life into contemporary fashion. Kutnia has evolved beyond being just a fabric brand by skillfully combining traditional and contemporary elements, becoming a cultural expression. Without compromising the essence of Kutnu, we increased the fabric's strength and widened its width through a 4-5 month R&D process, ensuring its compatibility with modern sewing. We obtained all the necessary

The collaboration between the two brands created a tremendous impact at Paris Fashion Week, with Dior skillfully incorporating Kutnu fabric into its designs.



documents for international standards compliance. The forgotten weaving of Anatolia marked the beginning of a very special story for me. This journey was crowned one day with Kutnu fabric shining on the runways of fashion giant Dior. It all started with a meeting in London. As representatives of Kutnia, we shared the story of traditional Kutnu fabric, our samples were examined, and there was a detailed exchange of information about its weaving properties. After the meeting, our collaboration officially began. The collab-

oration between the two brands created a tremendous impact at Paris Fashion Week, with Dior skillfully incorporating Kutnu fabric into its designs."

**"We aim for greater global brand recognition"**

Kutnia has reached significant potential in exports, and through our international efforts, we aim to enhance the global recognition of our brand. The uniqueness of Kutnu fabric and the cultural context of our brand stand out in the international market. We collaborate with showrooms

in Italy and Germany. Currently, we are present in 13 countries, with 40 points of sale and two online sales channels. The image we aspire to create worldwide emphasizes our brand as one that highlights quality, authenticity, and cultural richness. We aim for Kutnia to become a globally recognized brand, spreading Kutnu weaving worldwide and achieving sustainable success."

**The masters of Kutnu weaving are being trained again** Konukoğlu, emphasizing the



K'ai&Vrosi Founder  
Çiğdem Kacar Selimoğlu



Weaving is one of the most ancient forms of production that has existed for thousands of years worldwide. In our lands, the peştamal is a cultural element unique to women from the Black Sea region.



positive impact of the revival of Kutnu fabric on the local economy, states, "Kutnia's efforts to support local masters and train a new generation of Kutnu weaving masters are commendable. The cultural designs and unique collections of Kutnia are also significant for tourism. The story of our brand and the production process have the potential to provide valuable information to visitors about Gaziantep's rich culture and art. Focusing on sustainability and social responsibility principles, Kutnia is creating an environmentally and socially conscious brand image.

#### LOINCLOTHS (PEŞTAMAL) CAME TO LIFE IN LEATHER BAGS

K'ai&Vrosi Founder Çiğdem Kacar Selimoğlu, who says that Anatolia is a treasure hosting thousands of cultural mosaics, is also pioneering the resurgence of the traditional fabric of the Black Sea region. Reflecting on the care and storytelling power that Italians showed for their own values during the years she produced for them, Selimoğlu, while questioning not being able to turn such a rich culture into value-added products, tells the story of the born idea as follows: "Anatolian lands are a treasure containing

thousands of cultural mosaics. Although the idea dates back to earlier times, I reintroduced a product that is unique to us in 2018. The loincloth, a cultural element specific to women from the Black Sea region, is sometimes a practical skirt wrapped around the waist when going to the garden, and sometimes a cover used to veil the head or cover the shoulders in the market. In today's conditions, the existence of the loincloth, which mostly continues as a souvenir or memorabilia, has decreased to the point of being almost nonexistent. However, the number of looms, which used to

be in the hundreds, is now less than the fingers of one hand. Unfortunately, we are talking about a value that is becoming forgotten culturally. I wanted a product that we could wear in our daily lives, mingle with life, and leave a heritage for future generations to remember and understand when they look back. That's why I can say loincloths came to life in leather bags.

#### "The consciousness of preserving culture is increasing the number of looms"

Traditional weaving, both in the past and today, allows craftsmen

to carry out their work without disconnecting from daily life, as the looms are located in a room in the producers' homes or in a nearby area. In this context, our productions continued without interruption during the pandemic, thanks to the presence of looms that involve the whole family. As a cultural element passed down from generation to generation, weaving becomes a part of life, enabling producers to survive, even though their numbers are relatively small in today's conditions. For a producer to continue weaving, there must be demand, and consequently,

there must be a market. Unfortunately, fully automatic machines have led to a decrease in demand for handwoven fabrics. I believe that the demand will increase and the number of looms will continue to rise thanks to those who have a consciousness of preserving culture, going beyond simply buying a product and contributing to sustaining a culture."

"Our products are sold in a total of eight different locations globally" Selimoğlu mentions that products



Tapis Founder Alp Samancı



produced in traditional weaving workshops can be accessed through various sales points such as the brand's website and the İstanbul Modern museum store. Regarding the brand's sales network, she states: "In addition, our customers can visit us by appointment at our showroom located in İstanbul Suadiye. Since our establishment, we have prioritized international activities and continue to serve domestic and foreign customers in various parts of the world. Our products are sold in a total of eight different locations globally, with six of them in

the United States. Expanding our wholesale network and focusing on operations in the United States, in line with the growing demand, are among our goals for 2024."

**ANATOLIAN KILIMS ARE TRANSFORMING INTO MODERN FASHION**

Alp Samancı, who brought the Tapis brand to life to interpret the contemporary clothing model with tradition, narrates the story of the brand's inception as follows: "It all started with the question 'What if we dress kilims, woven fabrics, and textiles

into clothing?' We embroidered a piece of fabric on my friend's sweatshirt and wore that design to an event. Many people at the event liked our outfit, found it unique, and asked us where we got it. That's when we mentioned that we started a brand, and this outfit was our first product. I define Tapis as a Turkish clothing brand that redesigns traditional, cultural, and ancient symbols and elements associated with the Turkish geography and Anatolia in a modern way. Our goal is to interpret today's contemporary clothing model with tradition.



Boss  
73  
years

Our aim is to show the modern version of Turkish culture to the whole world and to carry our brand from İstanbul to both the West and the East.



Tapis aims to present a completely unique, different, and niche style. However, while doing this, we also want to keep up with the times without exaggeration. Therefore, our designers closely follow trends while researching the cultural texture of our country down to the finest detail when creating product designs.

**“We only use handwoven kilims and those dyed with natural dyes”**

The characteristics of the kilims we use for Tapis are as important as their appearances. When we examine the production stages

of kilims, we see that each kilim is categorized. For example, distinctions can be made based on weaving types such as handwoven and machine-woven kilims, or based on dyed yarns with natural or chemical dyes. In our designs, we only use handwoven kilims dyed with natural dyes. We source these kilims from the Grand Bazaar and, after acquiring them, we expose them to sunlight for a while in Antalya to enhance the colors and subject them to various tests. I can say that the interest we encounter abroad is almost greater

than the interest we encounter domestically. Our international operations have consistently grown with a lot of attention. Currently, our sales are active in four countries, and we anticipate that this number will increase. We have become a brand that attracts a lot of attention from tourists in Türkiye.”

**“Promotional campaign from Germany to Japan”**

Alp Samancı mentions that Tapis has been actively conducting online sales in Kuwait for about a year and a half. He explains their sales strategies as follows: “Last winter, we organized a pop-up store in Kuwait, which received considerable attention. Now, we reach consumers through our affiliated sales points. To establish a lasting presence in the Middle East, we are growing in Kuwait day by day. For approximately a year and a half, we have had affiliated sales points in Palestine and Israel. In Germany, through Karaköy Güllüoğlu, we are present in another pop-up store. The interest we encountered in Germany convinced us to run a permanent operation there. We are currently working on that. In Japan, we participated in many fairs with Karaköy Güllüoğlu. We actively participate in events there and operate an online operation together in Tokyo, where the interest we received pleased us a lot. We are working to establish an active sales point in Tokyo that will have a solid foundation. Our goal is to showcase the modern version of Turkish culture to the whole world and carry our brand from İstanbul to both the West and the East.”

# KNIT SHIRTING COLLECTION



## Where comfort meets elegance

As an experienced company in the intricate world of knit fabrics, we have established our presence in the knit shirt fabric sector. Merging our expertise in fabric design with advanced technology, our knit shirt fabrics stand out with both functional and stylish designs. Knit shirt fabrics, inherently more durable by nature, provide users with comfort throughout the day due to their wrinkle-resistant and non-iron characteristics.



QUICK-DRY



BREATHABLE



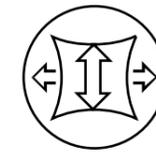
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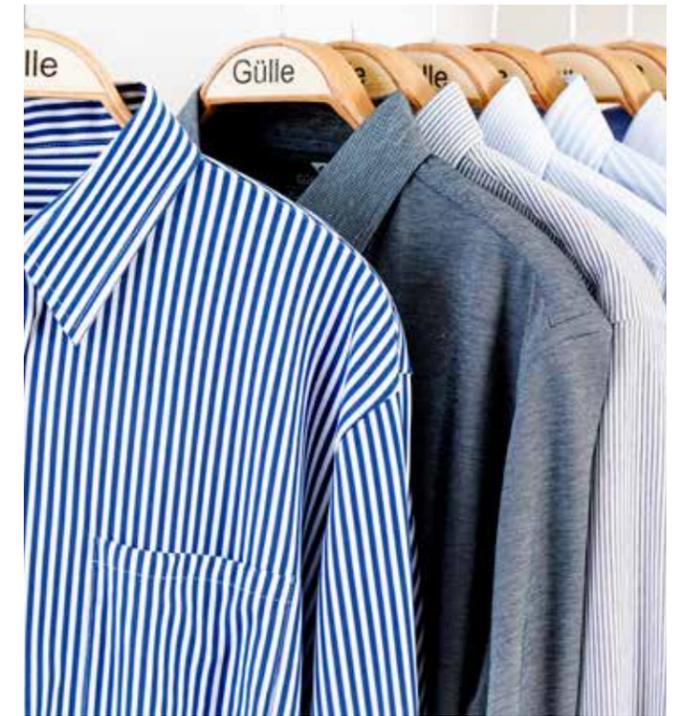
SOFT



NON-IRON



STRETCH



# THE SUSTAINABILITY ROADMAP OF THE LEATHER INDUSTRY



The Leather and Leather Products sector, which ranks fourth in Türkiye's list of value-added product exporting sectors, has shared its Sustainability Roadmap with the public. This roadmap aims to reduce the environmental impact of the leather and leather products sector and support human rights and labor standards.



**W**ith an export volume exceeding 2 billion dollars, the Turkish leather and leather goods sector aims to gain a competitive advantage in the global market and increase its market share through its prepared "Sustainability Roadmap." Mustafa Gültepe, the President of the Turkish Exporters Assembly (TİM), emphasized that the sector has become a brand in the global market, stating, "The increasing brand awareness of Turkish leather positively impacts our country's overall export profile." Reminding that leather and leather goods exports reached 2 billion dollars with an almost 19% increase in 2022, Gültepe highlighted that the fact that nearly 39% of this export was to European Union countries made the sustainability action plan more strategic. Emphasizing that major export markets, especially the European Union, and global economies are



transitioning to greener and more digital practices, Gültepe stated, “As radical changes affecting the future of our sector, such as the European Union border and agricultural regulation mechanism, the Green Deal, and the industrial plan, begin, our producers are making serious investments to be a preferred country.”

Güven Karaca, the Chairman of the Turkish Leather and Leather Goods Sector Board, also mentioned that the Sustainability Roadmap will provide information on specific and measurable goals for transforming the sector in terms of environmental, social, and governance aspects.

**Creating a sustainable future as the goal**

Due to the significant environmental impact of leather product manufacturing, the steps taken here are critical for future generations. Karaca, acknowledging this responsibility, shares his views as follows: “Our Ministry of Commerce’s Green Deal Action Plan includes two main action items for our leather sector. The first is the establishment of clean production regulations for the tanning sector, which consumes

a significant amount of water. The second is the organization of training programs related to clean production practices the our textile and leather and leather goods sectors. The ministries are actively working on these two issues. In recent years, as the leather and leather goods sector, we have taken and continue to take significant steps towards sustainability. Responsible resource usage reduces the sector’s impact on the environment and communities. Sustainable production and sensible resource consumption are crucial for reducing the environmental impact of the leather and leather goods sector and supporting workers’ rights and labor standards. As a sector, by adopting practices that promote responsible resource usage and environmental and human responsibility, we aim to create a more sustainable and ethical future. Our roadmap aligns our efforts with the United Nations Sustainable Development Goals, aiming to turn the vision of the ‘Türkiye Leather and Leather Goods Sector Board Sustainability Project’ into reality and guide us. Internalizing the concept of sustainability,

we aspire to redesign leather and leather product production and leave a better legacy for future generations. The goals outlined in our Sustainability Roadmap, to be reported in our annual sustainability report, will guide us in our pursuit of responsible production. In this roadmap, as the Sector Board, we have outlined a comprehensive set of actions and initiatives addressing the fundamental sustainability challenges in the leather and leather goods sector. Adopting a holistic approach to sustainability, we cover everything from establishing management systems to promoting responsible resource usage and traceability, developing cleaner technologies to improving waste management practices.”

The goals outlined in our Sustainability Roadmap, to be reported in our annual sustainability report, will guide us in our pursuit of responsible production.

**“We can pioneer responsible production”**

Karaca, stating that the Sustainability Roadmap is not a one-time effort but a continuous commitment for ongoing improvement, expressed, “By embracing a culture of learning and adaptation, we can be at the forefront of sustainable practices and lead in the production of responsible leather and leather products. Our member companies, by placing sustainability at the center of their activities, can ensure long-term economic viability while creating positive social and environmental impacts. Through collaboration, innovation, and shared responsibility, the Turkish Leather and Leather Goods Sector Board aspires to pave the way for a more sustainable future for the leather and leather product industry.”

2 Billion Dollar

The 2022 Export of the Turkish Leather and Leather Goods Sector

39.2%

The Share of the EU in Turkish Leather and Leather Goods Exports

**The Highlighted Topics in the Action Plan:**

**Reducing Poverty with Dignified Work**

The Leather and Leather Products Sector Board will prioritize sustainable economic development, fair trade practices, and social responsibility in the industry to reduce poverty and promote dignified work.

**Promoting Responsible Sourcing**

Encouraging responsible sourcing of raw materials to ensure that leather production does not contribute to land degradation, deforestation, or other environmental impacts associated with unsustainable agriculture.

**Enhancing General Well-being of the Workforce**

Creating work environments that prioritize the health and safety of employees in the sector. Improving the overall well-being of the workforce.

**Creating Awareness for Water Conservation**

Creating awareness about water conservation by prioritizing responsible water management practices. Encouraging measures to reduce water consumption and minimize pollution.

**Popularizing Renewable Energy**

Prioritizing energy efficiency to expand the use of renewable energy sources in the industry and reduce greenhouse gas emissions.

**Building Awareness for Responsible Production and Consumption**

Prioritizing sustainable consumption and production practices in the leather and leather products sector. Encouraging members to adopt sustainable practices that reduce the environmental impact of the leather industry, with a focus on climate action.

# SUSTAINABLE APPROACH IN THE APPAREL AND TEXTILE INDUSTRY

The International Ekoteks Symposium discussed the steps and trends in the green transformation of the Turkish apparel sector, which exports 60% of its products to the European Union and serves as a supplier for global brands.



The 15<sup>th</sup> International Ekoteks Symposium, organized by Ekoteks, a subsidiary of İHKİB (İstanbul Apparel Exporters' Association), took place on September 26, 2023, focusing on the theme of "A New Sustainability Approach in the Apparel and Textile Industry." The symposium delved into sustainable production, zero

waste, and green transformation through presentations by international academics, industry professionals, and representatives of global brands.

## The Turkish fashion industry is preparing for the EU Digital Single Market Strategy

Green transformation has been the main agenda of exports for

years in the Turkish apparel and textile sector, which ranks among the top three suppliers to the European Union. According to data from the Turkish Exporters Assembly, 60% of Türkiye's apparel exports and 42% of total exports are to EU countries. Therefore, Turkish exporters closely monitor the EU's steps towards green transfor-

Turkish exporters are closely following the steps of the EU's Green Deal and transforming their production processes accordingly.

mation. Manufacturers seeking to enhance competitiveness in the evolving world are increasing their environmental investments. The İstanbul Apparel and Apparel Exporters' Association (İHKİB) is taking a leading role in this transformation with its developed projects. Mustafa Gültepe, President of TİM and İHKİB, stated that apparel exporters were among the first to understand and take action on the importance of green and sustainable production. He mentioned that they lead the sector's digital and green transformation with IPA projects, and they have received 30 million euros in grant support from the EU for their projects, with an ongoing process for an additional 17 million euros. Gültepe explained that they use these funds to improve the fashion industry, increase digital development, and production capacity. They conduct intensive work to raise awareness in the sector, organizing training programs on corporate carbon footprint measurement and calculation, product life cycle, climate change, and greenhouse gas emissions. They strongly support the transformation of factories engaged in eco-friendly production. Gültepe emphasized that they must do all these for the future of the sector, as there is no other option.

Spring  
Near East:  
"Sustainability  
is seen as a  
competitive  
advantage for  
Türkiye."



The apparel and clothing sector, which shared its Sustainability Action Plan with the public last year, gathered the transformation agenda under six components and identified 40 actions. The fashion industry, which has implemented 13 of these actions, is considered one of the most prepared sectors for green transformation.

## The industrial journey towards green, circular, and digital transformation

Ekoteks Chairman of the Board, Nilgün Özdemir, believes that habits need to change in line with a sustainability approach to combat the climate crisis. Emphasizing the need for transformation throughout the supply chain, Özdemir states that it has

Türkiye's economic management included green and digital transformation among the seven priority structural reforms in the Medium-Term Program.



become essential for the industry to be greener, more circular, and more digital for technology-focused environmentally friendly production.

**The economic administration has put green and digital transformation on its radar**

The economic management has put green and digital trans-

formation on its radar. Nilgün Özdemir mentioned that among the seven priority structural reforms in the Medium-Term Program, which includes economic goals, they highly value the focus on supporting domestic production, prioritizing green and digital transformation with steps towards technological transformation.

**Public policies, support, and the European Green Deal**

It is emphasized that green transformation in the textile sector is inevitable due to Türkiye's presence in the EU supply chain. It is noted that efforts are underway in Ankara for clean production, sustainable, and circular products in the textile and apparel sectors to spread globally on a universal

scale. Future regulations related to the textile sector, such as the use of recycled fibers, easy recycling, repairability, microplastic emissions, and rules for waste export, were highlighted as potential measures to be implemented.

**Cotton receives sustainability certification**

Officials from the Ministry of



Agriculture and Forestry provided the following information about cotton production during the symposium: The production system has been transitioned to comply with good agricultural practices, and corresponding regulations have been implemented. According to the regulations of the Ministry of Trade, cotton must be under the umbrella of sustainability when exported abroad. The Ministry of Agriculture and Forestry has certified cotton under good agricultural practices and created the necessary regulations.

**Clean production practices in the textile sector**

In order to eliminate the pressure due to pollution concerns of the textile sector the Ministry of Industry and Technology has issued a circular titled "Clean Production Practices in the Textile Sector," aiming for green transformation and a circular economy in all facilities operating in the textile sector, regardless of their capacity limits. The longevity and recyclability of all textile

products may also be among the priorities in the coming period. AATCC President John Crocker stated that the purpose of the published regulations is to remove low-quality products from the market.

**Global brands set their sustainability goals**

Inditex Türkiye Sustainability Country Manager Yasemin Gürek stated that the group's roadmap begins with raw materials, saying: "We set goals for the use of materials that reduce impacts. In recent years, we have been working on the use of reduced-impact fibers such as organic cotton, European linen, recycled cotton, or viscose sourced from preferred sources. By 2030, we aim to use lower-impact materials in 100% of our textile products." Şafak Kıpık, the Chairman of the Board of Directors of Spring Near East, stated that sustainability is a competitive advantage for Türkiye's manufacturing industry and expressed that significant progress has been made in this regard.

# HALF OF LEATHER GOODS EXPORTS HEAD TO THE EU



The cobbler sector, a significant product group within leather and leather goods exports, is drawing attention with its increasing export performance. The largest partner for Türkiye in this sector is the European Union countries.

**A**part from shoes and clothing, leather goods such as bags, wallets, suitcases, and belts, which are used as fashion accessories, have their raw materials in the leathercraft industry, rooted in Türkiye's profound cultural heritage like weaving. Despite evolving into an industry with a wide range of products, including harness sets and saddles, beyond fashion, the craft has maintained its labor-intensive structure and continues to exist as a craft.

#### **Leather craftsmanship: A traditional industry in Türkiye**

The art of processing raw leather and crafting goods from it, known as leatherworking or "saraçlık" in Turkish, developed during the periods when Turks lived in Central Asia. The Turks' advanced skills in processing leather and leather products are attributed to their lifestyle, closely tied to animal husbandry, which naturally led to the extensive use of leather in various fields. Archaeological excavations in Central Asia also reveal evidence of the Turks' proficiency in the leathercraft sector.

The historical significance of Kazlıçeşme, recognized as the center of leather production in Türkiye, dates back to the era of Fatih Sultan Mehmet. In this period, to meet the army's needs in Yedikule, 33 slaughterhouses and 360 tanneries were built. It is known that Saraçhane-i Kebir was established in 1463 to process the produced leathers. The



The leathercraft industry has been increasing its variety and models within the framework of fashion trends.



**Top 10 Countries for Türkiye's Cobbler Exports (January-December 2023)**

- Italy
- Germany
- United Kingdom
- France
- Netherlands
- Ukraine
- United States
- Switzerland
- Greece
- Spain

saraçs continued production in this area until 1908 when a major fire forced them to move, with the majority relocating to the Mercan region. The leathercraft industry is not only growing with domestic demand but also expanding due to international demand. Consequently, the sector has been increasing its variety and models within the framework of fashion trends in recent years, investing in improving efficiency in production. The fact that a significant portion of production in the sector

is carried out by small-scale companies provides flexibility to the international market, enabling quick responses to foreign buyers. Türkiye's exports in leather and leather goods grew by 19% compared to the previous year, surpassing \$2 billion in 2022. Despite a rapid growth of 30.1% in 2021, the leather and leather goods sector's exports experienced a slight decline (9%) in the January-December 2023 period. The major export markets for the leather and leather goods sector include Germany, Italy, Iraq, France, Unit-

In 2023, Italy surpassed Germany to become the top importer of cobbler from Türkiye.



cobbler exports reaching \$320.2 million, showing a 32.2% increase. However, in 2023, cobbler exports declined by 14%. The primary reason for this decline is attributed to the economic slowdown in the European Union, which holds a 50% share in total exports.

**Italy, France, Switzerland, and Greece saw an increase in cobbler exports**

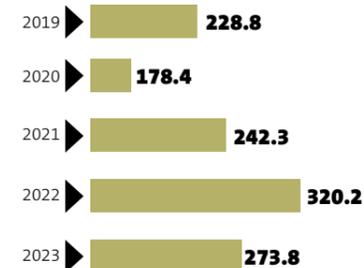
Cobbler exports decreased by 14.5% to \$273 million in the January-December period of 2023 compared to the same period last year. In 2023, Italy surpassed Germany to become the top importer of cobbler from Türkiye. Exports to Italy increased by 11.7% to approximately \$34.6 million in the January-December 2023 period, and Italy's share in Türkiye's cobbler exports was recorded at 12.7%. Meanwhile, exports to Germany decreased by 9.2% to \$30.1 million during the same period. In 2023, there was an increase in exports to France by 12.3%, to Switzerland by 19.1%, and to Greece by 5.9% in cobbler exports.

In the period of January-December 2023, the most exported subcategory in the cobbler sector, with a high rate of 84%, includes items such as bags, suitcases, and wallets, while other accessory exports like gloves and belts account for nearly 10%. Analyzing the export data for January-December 2023, it is evident that Italy dominates the export of products like bags and suitcases, whereas Germany stands out in the export of accessories like gloves and belts.

**The production is carried out for global brands**

In the haberdashery sector, there are approximately 3 thousand companies, and 40% of these companies engage in exports. The haberdashery sector produces about 50 types of products, ranging from saddles, bridles, and phone cases. Industry players supplying products to many globally renowned brands such as Louis Vuitton, Prada, Apple, and Patek Philippe export phone and tablet cases produced for Apple to different markets such as Europe, America, and Asia. Haberdashery products manufactured in Türkiye are exported to over 100 countries. With these characteristics, the Turkish haberdashery sector ranks among the top three most well-known sectors worldwide.

**5-Year Cobbler Export of Türkiye (million dollars)**



ed States, United Kingdom, Spain, Netherlands, Romania, Poland. Among the product groups in the leather and leather goods sector, the cobbler's category stands out as the second-largest exporter after shoes. The share of the cobbler product group in Türkiye's total leather and leather product exports reached 14.7%. In the January-December period of 2021, the total export in the cobbler sector increased by 35.8%, reaching \$242.3 million compared to the same period in 2020. A similar increase was observed in 2022, with



Burak Çelet

DESA CEO



## WE'RE A RARE LUXURY BRAND WITH AN INTEGRATED STRUCTURE

Choosing Italy for factory investment after Türkiye, DESA added new customers to its portfolio in the luxury segment in the first year. We talked with DESA CEO Burak Çelet about the branding journey of DESA, expecting the new investment to increase production volumes in Türkiye as well."

**A**fter more than fifty years of operation, what is the current global standing of DESA?

This year, we celebrate DESA's 52<sup>nd</sup> anniversary. DESA's starting point is leather goods. Since its establishment, we have been operating both domestically and internationally. We made our first export in 1972 by sending bags to the USA. Over the years, in line with demands, we completed our horizontal and vertical integration. We have left behind half a century during which Türkiye has shown significant change and development. Our retail side has grown rapidly. Turning points for us included leather garment manufacturing and the establishment of a tannery. We are a company with a very solid infrastructure. When we look at similar companies globally, very few are as

integrated as we are. Some of the world-famous luxury brands are still trying to achieve this level of integration. DESA has become one of the leading manufacturers of luxury leather goods globally. We serve a large customer base in national and international markets. DESA has diversified sources of income. We are not just a retailer domestically. Due to our partnership with Samsonite, in addition to retail sales abroad, we have branded exports and sales to end consumers through global digital marketplaces in many countries around the world. Along with this, we have production collaborations with some of the world's most important brands. We continue our retail operations with a total of 114 stores domestically. In 2023, we added five new stores to our chain, and by the end of the year, we will open four more stores. As DESA,



With our new factory in Italy, we have started collaborating with luxury segment customers who were not previously sourcing from Türkiye.

we are dynamically expanding our retail activities in developing regions and new areas. Besides being a quality producer, we are also recognized as a significant player on the international fashion scene. Our expansion with showrooms in major fashion centers such as Italy, France, Germany, and the UK indicates that we have achieved our branding goal.

**In addition to stores and showrooms, you started production in Italy in 2023. For which brands will you be producing in Italy?**

We completed a new factory investment in the Tuscany region of Italy, where important luxury brands' production and R&D facil-

ities are located, and started production in May 2023. Our reason for the factory investment in Italy was to reach high-end customers and engage in more value-added production. It seems like we have already achieved this goal. We have started working with some new customers in the luxury segment who did not previously source from Türkiye. We aim to strengthen our relationships and increase our sales volume with leather bag and leather goods production.

Seeing positive feedback from our customers in our Italian factory is highly motivating. We anticipate that each employee we employ in Italy will result in five additional

employments for us in Türkiye in 2024. Taking significant steps in value-added exports, DESA alone exports 70% of leather goods from Türkiye to Italy. Anticipating that the Italy investment can open new doors, we have already acquired a 60.000-square-meter new land in our existing facility in Düzce OSB. Therefore, if a new investment need arises, we will use this area. In the coming period, we are considering making a production plan with Samsonite based on Italy's increasing needs or as per the demand.

**Does production still continue at your tannery in Çorlu and your factory in İstanbul?**

Yes, we continue production at our leather production facility in Çorlu, Tekirdağ, and at our two factories in Düzce and İstanbul Sefaköy. In Çorlu, we strive to conduct highly environmentally friendly and sustainable production in our tannery, located on a 20.000-square-meter area. In our Çorlu tannery, we process 5,000 raw sheepskins and 8 tons of raw cowhide daily. We have documented our production using the most modern and environmentally friendly techniques in the world, receiving a gold certificate from the Leather Working Group, which is the most valid accreditation system in the leather industry. Our laboratory at the tannery also has

global accreditation. We are working on developing leather that is completely biodegradable with our new R&D studies. We have serious investments in sustainability and are striving to transform into a green brand.

In our factory in Düzce, we produce with 100% green energy. When our solar power plant investment in Çorlu is completed, 90% of the energy needs of this facility will be met with renewable sources. In our Düzce factory, approximately 20.000 bags are produced per month. In our İstanbul factory, approximately 1,000 garments, 2,000 wallets, and 8,000 bags are produced per month.

**After China joined the World Trade Organization (DTÖ), you had planned production; why did you give up?**

After China became a member of the World Trade Organization in 2001 and quotas on China were lifted in 2005, we foresaw that products would commoditize, prices would rapidly decline, the department store segment would face challenges in sourcing from Türkiye, and business would swiftly shift to the Far East. In 2005, I traveled to China, visited all regions, and met with local authorities and active companies in the leather sector. Our intention was to investigate whether an investment or partnership could be established there. We realized it was possible, but it was imperative for us to be physically present there. We had to either go and settle in China or realize this investment in Türkiye, targeting

higher-end customers. There were significant opportunities in Türkiye. We observed that there was more workforce in Anatolia compared to İstanbul. We decided to make this investment in Anatolia. People in İstanbul can change jobs very quickly, but when you train people in Anatolia, they can work with you for many years, and we achieved this in Düzce. I believe that we made the right decision by investing in Anatolia.

**Did you overcome the cheap competition from China through value-added production?**

Yes, our current export unit values reflect this. When we realized our investment in Düzce in 2005, we were the sole leather apparel supplier for Marks & Spencer worldwide. We were producing over 400.000 leather garments annually. According to market research, three out of every five women on Oxford Street in the UK were wearing our jackets. We held a 16% market share in leather outerwear.

Although we initially established the factory in Düzce as a leather apparel facility, over time, we also managed to satisfy leather handbag customers that emerged. Within a year of its establishment, we became capable of producing handbags for luxury brands. I can proudly say that our factory single-handedly accounted for 71% of Türkiye's handbag exports to Italy in 2019. While Türkiye's average export value per kilogram is \$1.4, ours in the industry is \$12. As DESA, we have an export value of \$116 per kilogram in



DESA accounts for 70% of Türkiye's leather goods exports to Italy.

the leather goods product group, and if we include apparel, it rises to \$368. DESA has a significant value-addition and we achieve this with our colleagues in Düzce.

**Can you tell us about your investments in Research and Development (R&D), innovation, and design?**

For many years, we have had a strong design team. We collaborate with creative directors with international experience. Our goal is to train young talents to eventually have our own creative directors from within our team. Leather is a highly specialized and technical product, so it's essential to start by designing the leather. Having our own tannery and laboratory is crucial in this regard. Our team collaborates interactively with the engineers in the tannery to produce the leather they envision. At our headquarters, we have three different product development units. The products developed are showcased in our

showroom here. Research and development (R&D) and innovation are at the heart of our business.

**How is the balance between exports and the domestic market evolving with the new investments?**

Normally, we have a very balanced revenue structure, but this can change depending on the country's conditions. We have a structure that is distributed 50% in the domestic market and 50% in exports. In 2023, the domestic market was more active. We expect that throughout the year, 60% of the revenue will come from the domestic market and 40% from international sales. Due to significant demand on the export side, we made new factory investments. All customers are requesting an increase in capacity. Customers who turned to the Far East market years ago are now coming back. There is particularly high demand from U.S. brands. Brands have begun to realize how

significant the challenges in the supply chain were during and after the pandemic. An opportunity has arisen for Türkiye, and I still believe we have a chance to capitalize on this opportunity.

**2023 was a challenging year, how did you navigate through it, and what are your forecasts for 2024?**

Throughout the first nine months of 2023, we continued to demonstrate significant growth performance, showing a remarkable increase compared to the same period in 2022. We achieved a net sales of 1.4 billion TL, marking a 57% increase from the same period last year. Of these sales, 63% were within the domestic market, and 37% were international. While domestic sales increased by 46% during the same period, international sales saw an impressive growth of 79%. In the third quarter of 2023, the growth in net sales was 25% compared to the same period in 2022, with the share of exports in net sales reaching 37%.

The export growth in the third quarter of 2023 surpassed domestic growth, reaching 67%. Our net profit in the first nine months of 2023 recorded a significant growth of 144% compared to the same period in 2022, reaching 412 million TL.

For 2024, I am cautiously optimistic. I believe that if there are no issues in terms of tourism and the surrounding geopolitical tensions do not escalate further, 2024 will be a good year. While anticipating increased global competition, we believe that in the luxury segment, where quality and social compliance standards take precedence, DESA holds significant competitive strength. In 2024, one of our growth areas internationally will be digital marketplaces.

# BRINGING TOGETHER FASHION PROFESSIONALS OF TODAY AND TOMORROW

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Aspiring to provide an education of the utmost international standards, İMA passionately embraces an internationally-oriented educational approach, addressing all aspects of fashion in its journey to raise creative, innovative, and risk-taking fashion professionals to contribute to the industry's global competitive landscape. While rooted in local insight yet globally dynamic in action, İMA effortlessly navigates the digitalizing era as an educational institution in its pioneering approach to education. With cutting-edge training programmes as Clo and Browzwear, where the three-dimensional digital design concept comes to life, İMA continues to cultivate the future's design professionals, aligning with the progress of information and communication technologies in the field of design.

Harnessing its wealth of expertise in Türkiye's essential industries of textile, ready-to-wear, and garment, the Academy wholeheartedly empowers companies to elevate their global competitiveness and increase ready-to-wear exports through strategic partnerships and impactful consultancy services.

- \* BAG DESIGN
- \* DIGITAL CLO 3D FASHION DESIGN PROGRAM
- \* 3D DIGITAL STYLING AND FIT ALTERATION WITH VSTITCHER (BROWZWEAR)
- \* PHOTOSHOP AND ILLUSTRATOR IN FASHION DESIGN
- \* FASHION MANAGEMENT
- \* VISUAL MERCHANDISING
- \* TEXTILE AND APPAREL CUSTOMER REPRESENTATIVE
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# TURKISH TEXTILE INDUSTRY'S NEW COMPETITIVE POWER: TECHNICAL TEXTILES



Türkiye has demonstrated its ambition in the rapidly growing global market by extending its deep-rooted experience in the textile industry to technical textiles. The countries that import the most technical textile products from Türkiye are Germany, the United States, and Italy.

**T**echnical textiles, the fastest-growing segment in the textile industry, are widely used in various fields today, ranging from medicine to logistics, protective clothing to agriculture and sports equipment, and from the packaging sector to construction and industry. Technical textiles, with their extensive product range, stand out as prominent sub-product groups in the Turkish textile sector.

In the last two decades, research and investments in the field of technical textiles have reached a significant level. Currently,

the diversity of textile materials, both in terms of fibers and structures that can be created, extends beyond traditional textile applications and finds widespread use in many sectors. This trend is supported by the development of new fiber materials, textile surfaces, and textile production technologies. The discovery of new application areas for technical textile products and the increase in market demand have been significant catalysts for the rapid development of the sector. Generally, special production processes are in place for technical textiles

Türkiye, a textile powerhouse, stands out among the leading countries in the technical textile sector. The top three countries that predominantly import Turkish textile products are Germany, the United States, and Italy.

since their mechanical, chemical, and acoustic properties are more critical than their appearance and design features.

#### It manufactures for every sector

Its broad range of applications is also increasing the global market volume. Global technical textile exports increased by 6.4% in 2021, reaching \$121.3 billion. In the last 10 years, technical textile exports have increased by \$27.4 billion. China became the world's largest exporter of technical textiles with a share of 28.7%. Looking at global technical textile imports in 2021, imports increased by 3.9% compared to the previous year, reaching \$115.5 billion, and the USA ranked first with a 14.2% share in global technical textile imports.

Türkiye stands out among the leading countries in technical textile production and export. In 2022, Türkiye's total technical textile exports increased by 0.8% to reach \$2.3 billion. During this period, the export of glass fiber, especially used in the construction sector, increased by 13.1% to \$154.2 million. The export of high-strength yarn increased by 22% to \$121.4 million, while the export of wick, hose, carrier column, and other technical items decreased by 1.6% to \$43.4 million. The export of metallized yarn and textiles increased by 35.7% to \$14.2 mil-

lion, and floor coverings exports increased by 195.8% to \$773,000.

#### Türkiye's global market share is increasing

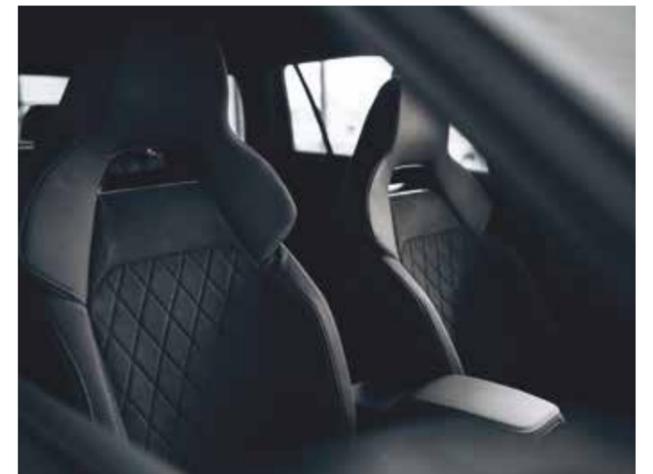
Türkiye ranks sixth in non-woven textiles exports, 25<sup>th</sup> in glass fiber and glass fiber textile exports, 20<sup>th</sup> in plastic-impregnated, coated, laminated, or plastic-laminated textile exports, 29<sup>th</sup> in wick, hose, carrier column, and other technical item exports, and 10<sup>th</sup> in high-strength yarn exports.

#### Exports of waddings and felts increased by 28.3% in 2023

In the January-November 2023

period, a decline is observed in technical textile exports in Türkiye, similar to other textile products. Technical textile exports for the first 11 months of the year decreased by 6.6% compared to the same period of the previous year, amounting to 2 billion dollars. Nonwoven products constituted 30.3% of the total exports in the January-November 2023 period. Türkiye's nonwoven exports decreased by 13.4% to reach 611 million dollars. The second most important product group in technical textile exports was bags and sacks produced using technical textiles, constituting

In 2022, Türkiye's total technical textile exports reached \$2.3 billion, reflecting a 0.8% increase.





Türkiye's extensive experience in the textile sector and advancements in the defense industry pave the way for the global export of technical textiles, especially those intended for military purposes.

13.9% of total exports. Türkiye's exports for this product group decreased by 21.6% to reach 183 million dollars. The third most important product group in technical textile exports was waddings and felts, constituting 8.3% of total technical textile exports. In the same period, waddings and felts were the product group that increased its exports, growing by 28.3% to reach 168 million dollars.

#### The U.S. became the second country in technical textile

In the January-November 2023 period, Germany remained the top country for Türkiye's technical textile exports. Türkiye's technical textile exports to Germany decreased by 19.4%, reaching 145.4 million dollars. Following Germany, the United States ranked second with exports of 141.3 million dollars, and Italy ranked third with exports of 134.2 million dollars. Among the top 10 countries to which Türkiye

exported the most technical textiles, two countries experienced an increase in exports in the January-November 2023 period. Türkiye's exports to Romania increased by 3.5%, reaching 89 million dollars, and exports to the Czech Republic increased by 2.8%, reaching 56 million dollars.

#### Adding value to home textiles

One of the areas where Türkiye excels in the global textile market is home technical textile products. It is possible to find curtains, bedspreads, and towels produced in Türkiye in the rooms of the world's largest hotel chains. Türkiye is enhancing its competitiveness by taking its experience in home textiles a step further, offering high-value, quality, and innovative products in technical textiles for domestic use.

#### It manufactures for the armies of states

In recent years, the majority of high-performance technical tex-

tile products have emerged as a result of the needs of the military and aerospace industries for products with characteristics such as lightweight, durability, and high strength, as well as the research and development (R&D) efforts carried out in this direction.

As a textile country, Türkiye also stands out with its national defense industry technology. Technical textiles, where these two areas come together, pave the way for Türkiye to export high-value-added products to the world. Turkish manufacturers produce technical textiles for the armies of various countries. The main areas of technical textile usage in the defense industry are shaped as personal protective equipment, load carriage, vehicle interiors, and shelter systems. General combat camouflage is a frequently chosen area by companies due to its millions of unit capacity and relatively easier production compared to

other products. These products need to have flame-retardant, high heat-resistant, lightweight, sweat control, odor-resistant, and features with additives like Kevlar, NOMEX, and PBI. Protective clothing is commonly used by police, security personnel, mountaineers, cavers, climbers, skiers, aircraft personnel (military and civilian), soldiers, sailors, submariners, foundry and glassworkers, firefighters, water sports enthusiasts, winter sports participants, commercial fishermen and underwater oil and gas equipment workers, healthcare workers, race drivers, astronauts, coal miners, and health warehouse workers. Protective clothing is expected to be comfortable, lightweight, compact, and durable.

#### Increased awareness with protective masks

One of the significant application areas for technical textile products is the healthcare

sector. Nonwoven fabrics, also known as nanowovens, are among the most commonly used materials in healthcare technical textiles. Nonwoven fabrics stand out with features such as ease of production, flexibility in use, and cost-effectiveness. This product group constitutes one of the major export areas for Türkiye as well. The importance of technical textiles in the healthcare sector became evident, especially with the outbreak of the COVID-19 pandemic. The pandemic elevated the importance of items like masks and protective garments to essential needs, increasing the visibility of technical textiles. Leveraging its textile production capacity and capabilities, Türkiye was able to supply masks to many countries during this period. Many textile manufacturers shifted their focus to the production of masks and protective garments during this time. Türkiye's capacity in

mask fabric production also created added value during this period. The fact that nonwoven fabric is a type of fabric that can be produced in Türkiye became one of the country's significant advantages during this period. The fabric, capable of producing one mask from one gram, can be produced at a monthly capacity of around 600 tons in Türkiye. In addition to masks used by healthcare workers, patients, and individuals seeking protection, there is a growing demand for protective clothing and gowns, mainly worn by healthcare professionals. The textile industry, equipped with sufficient infrastructure and raw materials for the production of textile products used in the healthcare sector, embarked on a significant effort in response to these developments. Nonwoven fabrics are also used in areas such as cosmetic baby diapers, sanitary pads, and single-use hygiene products.



Necat Altın

Zorlu Holding Textile Group President



## WE ARE DEVELOPING THE SALES CHANNELS OF OUR OWN BRANDS

We talked to Necat Altın, the President of Zorlu Holding Textile Group, which includes Zorluteks, the leading producer of home textiles in Europe, and Korteks, the largest integrated polyester yarn producer in Europe, about the transformation of the home textile sector.

### **Z**orlu Holding Textile Group holds a prominent position in which areas of the textile industry?

As Zorlu Holding Textile Group, our main business focus is the production and marketing of yarn, curtains, and home textile products. With our approximately 7,000 employees and production facilities covering a total area of 800.000 square meters, we are one of the leading producers of polyester yarn and home textiles globally. Zorluteks, the leading producer of home textiles in Europe, and Korteks, Europe's largest integrated polyester yarn producer, constitute our driving force. Within the Textile Group, we have a total of 14 production and marketing companies. With our R&D and innovation competence shaping the transformation in textiles,

we are an innovative business partner for global giants. As a reflection of this, we hold a competitive and pioneering position in technical textiles and smart textile products. We export our production strength, coupled with being the leading producer of home textiles in Europe and the largest integrated polyester yarn production center in Europe.

### **Can you provide information about Zorlu Textile Group's export volume, target markets, and the number of international stores? How many stores have you reached abroad?**

With our extensive sales and distribution network and a wide range of products, we export to 70 countries. Through exports to countries and regions such as Germany, the United States, Bel-



36 countries, Linens has eight stores in seven countries, and 72 stores domestically. Valeron has nearly 200 sales points in 41 countries, and in the United States, it conducts curtain and bedding sales through a total of 11 different sales channels. In the future, we aim to expand our franchise model in the Middle East and grow with our partners. We are also expanding our online channels, enhancing our multi-channel strategy, and increasing our footprint in retail. We will continue to develop important licensing agreements as one of Disney's five major players worldwide, contributing to our growth.

**We see that manufacturers in Türkiye are leveraging their expertise in home textiles for technical textiles. Do you have any new projects in the field of technical textiles?**

We are a highly innovative company and have been investing in technical textiles and smart textile products for many years. We have numerous smart textile products, such as self-cleaning blinds and fabric curtains, cooling blankets, air-purifying curtains, antibacterial bedding sets, LED-lighted curtains, and more. Technical textiles are at the core of these innovations, and we can rapidly develop products based on market and consumer needs. Many of the examples we offer are among the first in the world, and there truly is no limit in this field. We focus on user experience,

We are the innovative business partner of world giants with our R&D and innovation competence that leads the transformation in textiles.



share of technical textiles within our revenue to 75-80%.

**The EU is undergoing a significant transformation with the Green Deal, and this transformation is pushing Turkish manufacturers to become more sustainable as well. What initiatives is Zorlu Textile Group undertaking in this regard?**

Zorlu Holding Textile Group has formulated an action plan and roadmap for the green transformation in alignment with the Smart Life 2030 strategy. We are at the forefront in Türkiye and globally with our Ecodesign products, which have led to a reduction in the carbon footprint by a minimum of 50%. Through a groundbreaking investment of \$10 million, we have introduced a polymer recycling facility, pioneering the production of 100% polyester yarn from recycled PET bottles, a first in both Europe and Türkiye. This initiative aims to contribute to the reduction of approximately 110.000 non-biodegradable plastic bottles, considered consumer waste, for every ton of recycled yarn produced. Looking ahead, we aspire to significantly enhance the added value of our exports by swiftly adapting to initiatives like the Green Deal. To accomplish this, we actively engage with sustainability-focused indices and pursue international certifications. Our performance exceeds industry standards in various sustainability-focused indices, such as the FEM Higg Index and FSLM Higg Index.

gium, the United Kingdom, Italy, Spain, France, Poland, Portugal, Egypt, the United States, Canada, Mexico, South Africa, and many more, we are one of Türkiye's significant exporters in the textile sector. In 2022, our total textile group exports exceeded \$197 million.

In the field of home textiles, we aim to strengthen our presence in the Middle East, North Africa, and China. To increase product sales in China, we are transforming our purchasing office into

a marketing office. In Europe, we are evolving into an organization that directly interacts with customers, eliminating intermediaries. For this purpose, we have established a company in Germany that sells directly to retail. Additionally, to sell our own brands in Europe, we are strengthening our online channels.

Our brands Taç, Linens, and Valeron each have their own stores abroad. Taç has 110 stores and 750 sales points in

and feedback from research conducted for different sectors greatly enriches us. For example, we produce reinforced fabrics for companies manufacturing conveyor systems, functional workwear with features like flame resistance and anti-static properties for the white goods industry, and technical textiles for the advertising sector, including lighted fabric panels, tents, canopies, and sleeping bags. While continuing our product sales in these areas, we also

persist in developing new products that align with customer demands in this segment. Technical textiles offer high added value and enable rapid growth without limitations across various sectors. Currently, more than a third of textile products consumed globally are technical textiles, growing at about twice the rate of textiles produced for apparel. In our case, the share of technical textiles has surpassed one-third. Our long-term goal is to increase the

# Koza

enriches the

# Fashion Industry

with Creative Vision

Koza Young Fashion Designers Competition adds new talents to the Turkish fashion industry, bringing perspective to the design world.

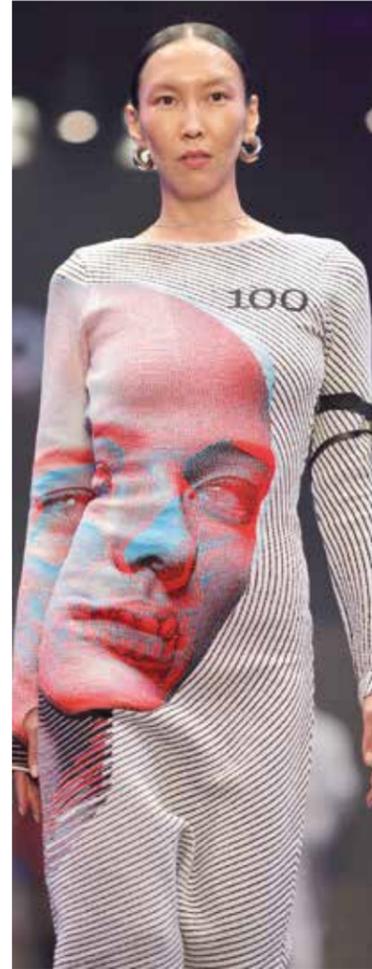


**T**he Koza Young Fashion Designers Competition, organized by the İstanbul Apparel Exporters' Association (İHKİB), continues to lead the evolution of the Turkish fashion industry in its 31<sup>st</sup> year, introducing new talents to the sector. This prestigious event, held annually, not only provides young designers with a platform to showcase their creativity but also brings fresh perspectives to the industry. Since its inception, the competition has been instrumental in capturing the attention of the fashion world with collections that push boundaries and embrace innovative perspectives. In its 31<sup>st</sup> edition this year, the competition once again demonstrated its success in

contributing to the fashion industry and providing a professional platform for young talents. Evaluated by a jury consisting of experienced professionals, including academicians, fashion designers, and business leaders, the designs of the 10 finalists were showcased in a spectacular fashion show. The evening concluded with the recognition and awards ceremony for the winning designers. The Turkish fashion industry places significant importance on the Koza Young Fashion Designers Competition. The sector, boasting a robust production infrastructure, acknowledges that it has not yet attained the position it deserves in the global market. The

competition is seen as a means to overcome this threshold with designs that challenge boundaries. The event not only offers young designers the opportunity to showcase their unique ideas and build a professional network but also serves as a source of inspiration for the fashion world, introducing fresh and innovative perspectives every year.

**The door opening to global success**  
The Koza Young Fashion Designers Competition has truly become a talent pool with the names it has introduced to the industry. Many designers who participated in the competition have made significant strides in their careers, becoming recognized figures both



Many designers who have received awards in the Koza Young Fashion Designers Competition create unique designs to further enhance the recognition of Turkish fashion brands worldwide.

**The jury consists of experienced professionals from diverse fields**

Last year's 31<sup>st</sup> edition of the competition saw fashion designers Nihan Peker and Özlem Kaya take on the mentorship role during the six-month production stages of the finalists' collections. Contestants, who had experienced a crucial phase in their professional careers, were selected by the jury members to compete in the final. Chaired by Nejdet Ayaydın, a member of the Board of Directors of the Istanbul Apparel Exporters' Association (İHKİB) and the Chairman of İHKİB Events Committee, the jury included renowned fashion designers.



nationally and internationally. Among these young designers, some have not only established their own brands but have also achieved global success through collaborations with major fashion houses. One standout feature of the Koza Young Fashion Designers Competition is its evaluation of not only design talent but also factors such as sustainability, innovation, and commercial potential. This approach encourages young designers to think not only in terms of aesthetics but also about the future of the industry.

The power of design could play a key role in achieving the targeted increase of apparel exports from the current \$21 billion to \$40 billion. Serving as a significant milestone in Türkiye's fashion scene for 31 years, the Koza Young Fashion Designers Competition continues to support young talents, contributing to the emergence of new names in the fashion world.

**Contributing to export with their designs**

The Turkish apparel sector ranks sixth globally, positioning itself

as the third-largest supplier to the European Union. Turkish fashion brands have a global presence with over 2,000 stores in more than 100 countries. Many designers who have received awards in the Koza Young Fashion Designers Competition create unique designs to further enhance the recognition of Turkish fashion brands worldwide. Through bringing together hundreds of designers, Koza continues to contribute value to the Turkish apparel sector's exports with innovative and

distinctive collections. Successful designers in the competition not only establish their own brands and engage in production but also have the opportunity to represent Turkish fashion in the international market. This, in turn, contributes to the broader global reach of Turkish design and enhances the competitive advantage of the Turkish apparel sector on the global stage.

**Scholarship support for successful individuals**

Muhammed İloğlu emerged as the winner of the 31<sup>st</sup> Koza

Young Fashion Designers Competition, with Damla Çarkçı securing the second position, and Elara Esmer claiming the third. The support for talented designers who made it to the finals, just like the winners, continues even after the competition. Contestants are provided with scholarship opportunities such as language education and professional training abroad. This enables young designers to enrich their perspectives and broaden their vision.





## YOUNG DESIGNERS ARE CARRYING TÜRKİYE CARPETS INTO THE FUTURE

The İstanbul Carpet Exporters' Association (İHİB) brings together the perspectives of young designers with the industry through the Carpet Design Competition, which it has been organizing for 16 years.

Anatolia, holding a significant place in human history, is considered a region where culture and art have shaped. The roots of weaving, such as carpets, also trace back to this geography. Carpets, like their producers, have served as ambassadors of heritage from the past to the present.

The İstanbul Carpet Exporters' Association (İHİB) develops various projects to ensure that this rich culture is not lost and is passed on to future generations. One of these successful projects is the carpet design competition. Held for 16 years, the competition brings together Türkiye's talented designers and every-

one devoted to carpets. Ahmet Hayri Diler, the President of İHİB, stated, "To sustain this rooted tradition from the past to the future, to be open to innovations, and to strengthen our industry nationally and internationally, we are working. The National Carpet Design Competition, organized for the 16<sup>th</sup> time this year, is a reflection of our belief in reaching our goal. Carpet design is an important element that reflects our culture, history, and art. Every design participating in our competition is a commitment to strengthen this rich heritage even further and pass it on to future generations. I hope this competition opens the way for young talents in our industry. Our designers will not only achieve individual success

but also shed light on the future of Turkish carpet weaving.

### All kinds of carpet weaving techniques were used in the competition

Like in previous years, a jury consisting of industry professionals, academics, and designers was formed this year to evaluate successful designs. Throughout the competition process, the jury conducted interviews with the participants and, through voting, selected eight finalists. The production processes of the designs of these eight finalists were completed with the support of İHİB. In this year's competition, works utilizing all kinds of carpet weaving techniques were produced, including techniques such as *cicim*, *sumak*, and *kilim*.

The award ceremony, held on November 15, 2023, determined and rewarded the top three finalists.

### Compelling stories inspired impressive designs

The winner of the competition was Özlem Daylan Bozoğlan with her design named "Nest." The enchanting beauty of the unique nests created by the bowerbird to attract its mate, the lyrebird, was depicted in the design. Various weaving techniques were used in the work where natural colors and threads came together. Esin Öykü Terzi secured the second place with her design "Nebula." Taking inspiration from nebulous structures in space, Nebula was created with bright, glittering, and transitional effects. Some parts of the carpet featured threads that accumulate energy in sunlight and artificial light, glowing in the dark. Büşra Çalışkan achieved the third place with her design titled "Migration," which tells the story of migratory birds.

# TÜRKİYE'S PRIMARY COMPETITOR IN THE HOSIERY INDUSTRY IS "CHEAP LABOR"



Despite facing competition from Asian countries with lower labor costs, Türkiye's hosiery exports are experiencing growth in key global markets such as the United States and Germany.

**T**ürkiye is the largest producer in the region, especially in the hosiery product group, including underwear and socks, and it is also among the world's most important production centers. Türkiye stands out as a significant player in the global hosiery export market. The sector's raw material strength and environ-

mentally friendly high-quality production set Türkiye apart from its competitors. When examining the world's top 10 hosiery exporting countries, it is observed that Far Eastern countries with cheap labor, such as China and Bangladesh, dominate the market. Türkiye ranks 4<sup>th</sup> on the list, while Germany is in 5<sup>th</sup> place, and the Netherlands

is in 6<sup>th</sup> the seventh position. According to the 2021 data, seven Far Eastern countries hold a 53.1% share in the global hosiery export market. The combined market share of Türkiye, Germany, and the Netherlands is only 10.3%. Despite this unfair competition, Türkiye has started to gain a higher share in the world's largest hosiery import markets in the last few years. Among the suppliers to the world's largest hosiery importer, the United States, Türkiye ranks 13<sup>th</sup> with a 1%. Türkiye achieved remarkable growth by increasing hosiery exports to the United States by 54% from 2018 to 2022. A similar growth is observed in the second-largest hosiery importer, the German market, where Türkiye holds the position of the third-largest supplier with a 12.1% share. From 2018 to 2022, Türkiye demonstrated a growth of nearly 35% in hosiery imports to Germany.

## Türkiye has made significant advancements

Türkiye accounts for more than 10% of the total apparel clothing exports in the hosiery product category. Cotton woven nightgowns and bathrobes produced in Türkiye for women and girls have garnered significant attention from global brands. Among



Among the most exported products are cotton knitted briefs and panties for men and boys, as well as cotton knitted nightgowns and pajamas for women and girls.



the most exported products are cotton knitted briefs and panties for men and boys, as well as cotton knitted nightgowns and pajamas for women and girls. Among the items that Türkiye exports the most in the underwear and nightwear category are knitted and woven bras, corsets, corset belts, suspenders, sock garters, and garters. In the Turkish hosiery sector,

natural and high-quality materials like cotton and silk are frequently preferred as the main raw materials in production. Cotton, in particular, is widely used in hosiery products, providing a comfortable hosiery experience thanks to being skin-friendly and breathable. Not only in cotton production but also in sericulture and silk production, Türkiye has made

significant advancements, leading to the frequent use of silk in hosiery products. Silk, with its soft texture and elegant sheen, is a preferred choice for those seeking luxury and sophistication in hosiery items, adding a touch of elegance to hosiery products.

**World's second largest socks supplier**

The largest share in Türkiye's

In the Turkish hosiery sector, natural and high-quality materials like cotton and silk are frequently preferred as the main raw materials in production.



hosiery products belongs to sock items. The socks industry is, one of the leading sub-industries of the Turkish apparel industry. It is observed that the most exported sock product from Türkiye is knitted or crocheted socks made of cotton. Türkiye achieved apparel export valued at \$19,3billion, with socks constituting 6.2% of this total in 2022.

With an 8% share, Türkiye is the world's second-largest exporter of socks. In 2022, compared to the previous year, Türkiye increased sock exports by 1.7%, reaching a value of 1.3 billion dollars. In 2022, Türkiye conducted exports to Germany, the world's second-largest sock buyer, with a 7% increase compared to the previous year, reaching a value

of 290 million dollars. Among the suppliers to France, Türkiye takes the first place with its 197 million dollars in exports for the year 2022. In the list of sock suppliers to the United States, Türkiye holds the eighth position with a 1.9% share. It is observed that the sock imports from Türkiye to the United States have increased by 158.2% in the last five years.

# THE VALUABLE TREASURE OF TURKISH TEXTILES HAND-KNITTED YARN



The hand-knitted yarn product group, which is a value-added product in the textile and raw materials sector and stands out with its export surplus, meets at least two-thirds of the world's hand-knitted yarn demand.

**D**espite all the challenges in the changing trade codes in the global economy, the Turkish textile sector continues to grow and develop. With its production power and capacity, the sector holds a significant competitive advantage in some product groups, continuing to be one of the largest suppliers to Europe and the world. The driving force behind this growth comes from the diversity of products.

While there have been market losses or export declines in some product groups recently, the Turkish textile sector stands out with hand-knitted yarn exports. Acting as the sector's hidden treasure, this product group achieved an 12.3% increase in exports in the January-December period of 2023, and it is expected to remain among the sector's important product groups in the future.

#### Exports increased by 11.4% in the first 10 months

Türkiye's hand-knitted yarn exports were recorded at \$231.7 million in 2019. Experiencing a significant export leap, it reached \$265.6 million in 2020 and further surged to \$357.1 million in 2021. However, in 2022, the export of this product group declined by 19.8%, settling at \$286.3 million. Looking at the data for December 2023, the export momentum of the product group continues. The export, which was recorded at \$284.7 million in the same period



Türkiye is one of the highest-quality producers in the hand-knitted yarn sector. At least two-thirds of the total global demand for hand-knitted yarn is supplied from Türkiye.

of 2022, increased by 12.3% in October 2023, reaching \$319.6 million.

#### The majority of exports are made to the USA

The United States is among Türkiye's prominent markets in hand-knitted yarn exports. In the January-December period of 2023, Türkiye exported \$115.8 million worth of hand-knitted yarn to the USA, holding a 36.2% share in Türkiye's hand-knitted yarn exports. This represented a 38.8% increase compared to the same period last year. With a 10.4% share, the United Kingdom is Türkiye's second-largest market for hand-knitted yarn exports, reaching \$33.4 million with a 25.1% increase. Germany, ranking third with a 5.8% share, saw a slight decrease of 0.2% in exports, totaling \$18.6 million.

Following these countries are the Belarus, Netherlands, Russia, Spain, Canada, Denmark, and France.

#### A product group with high added value

The hand-knitted yarn product group stands out as a category with high added value. Both the increasing export trend and the necessity of importing required raw materials indicate that this product holds a significant position in the industry. Additionally, the export value per kilogram for the hand-knitted yarn product group is at the level of \$8, surpassing the export value per kilogram for the textile and raw materials sector, which is at the level of \$4.5. From this perspective, hand-knitted yarn emerges as a product group with high added value in the industry.

#### “Advantage of sourcing fiber from the domestic market”

Mustafa Denizer, Board Member of the İstanbul Textile and Raw Materials Exporters' Association (İTHİB), provided information about Türkiye's competence and production power in hand-knitted yarn production. Denizer stated that the key reason for the success of hand-knitted yarn exports in Türkiye is the presence of Aksa, the world's largest acrylic fiber producer, in the country. Highlighting Aksa's dominance in the fiber industry for many years, Denizer said, “Aksa makes a significant contribution to Türkiye in the production of acrylic fiber used in hand-knitted yarn, knitwear, and carpet manufacturing. It also contributes to the gradual appreciation of these industries over time. In fact, the primary consumers of this fiber are the carpet and knitwear industries, respectively. The yarn sector follows them. Türkiye's nearly 50 years of experience in fiber production has led to the formation of a strong know-how. The ability to source fiber from the domestic market contributes to the success of the hand-knitted yarn sector.”

#### The world's largest supplier

Denizer highlights that the success achieved in this sector for years has paved the way for the advanced perception of “Made in Türkiye” in many parts of the world. He states, “Türkiye is known as one of the

The ability to source fiber from the domestic market gives a competitive advantage to the hand-knitted yarn group in the global market.

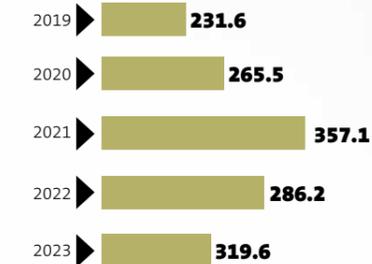
highest-quality producers in the hand-knitted yarn sector. At least two-thirds of the total global hand-knitted yarn demand is supplied from Türkiye. The geographical location for Western markets positively influences Türkiye's competitiveness because reaching anywhere from Turkish ports is quite easy. Türkiye has a significant advantage, especially in exporting to European countries.”

Denizer points out that there has been a significant demand for hand-knitted yarn as a hobby during the pandemic, mentioning that people are re-adopting the habit of hand-knitting during this period. He notes that the younger generation is also becoming interested in this field, emphasizing that this interest has positive reflections on hand-knitted yarn exports. Denizer concludes by stating that Türkiye already has more supply capacity, and the increase in demand is contributing to the success in exports.

#### “Türkiye, a leading hand-knitted yarn producer in every market”

Denizer, stating that the most important potential markets for Türkiye's hand-knitted yarn exports are North and South America, continued: “European countries are also among our significant markets in this field. Every country where hand-knitting is produced,

#### Türkiye's hand-knitted yarn exports (million dollars)



including Far East countries, falls into potential markets. Due to weather conditions, there is a high prevalence of knitwear and hand-knitting in Russia and Balkan countries. There are various types in the hand-knitted yarn sector, with differences related to wool blends and wool ratios. This also varies according to the habits and weather conditions of countries. There are also spring and summer hand-knitted yarns. Türkiye is a hand-knitted yarn producer that can reach all markets and is a leader in every market. We have plans to create various blends, produce fancy yarns, and increase added value by introducing dyed and printed products in the hand-knitted yarn sector.”

# WORLD LEADER IN WOVEN MACHINE MADE CARPETS



Türkiye has become a leading producer and exporter in the global market by transferring its weaving culture and craftsmanship from handwoven carpets to machine-made carpets. Machine-made carpets account for the lion's share of Türkiye's \$3 billion carpet exports.

**T**ürkiye's ancient craft of carpet weaving has evolved into a sector that includes machine-made carpets as an important product group, thanks to the influence of weaving culture and the development of industry. The global carpet trade is examined in three main groups, namely handwoven carpets, machine-made carpets, and tufted carpets, each characterized by different production techniques, investment tendencies, costs, consumer profiles, purposes of use, market structures, and capital intensities. Machine-made carpets operate with a production structure that can be categorized as capital-intensive and technical textiles. The distinguishing feature of ma-



In 2021, Türkiye reached the pinnacle of carpet exports, surpassing \$3 billion, with one-third of the exports going to the United States.



2.75 Billion Dollar

The total carpet exports of Türkiye (2023)

2.2 Billion Dollar

The machine made carpet exports of Türkiye (2023)

chine-made carpets, produced as a result of loops tied onto a thick base, is known to be the orientation of the loops in the warp direction, unlike handwoven carpets. In handwoven carpets, a knot is tied onto the warp with a separate thread, whereas in machine-made carpets, the pile surface is formed by the warp loops connecting with weft threads in a U-shape.

**Taking the lead from Belgium**  
Between 2000 and 2010, the machine-made carpet industry in Türkiye gained significant

momentum with new investments. Turkish manufacturers, acquiring the machines of the largest machine-made carpet producer of that time, Belgium, through the closure of factories, led to the shift of Belgium's role in the market to Türkiye. The number of looms, which was around 200 in the early 2000s, reached thousands in 2010 and further increased to 1,500 with investments made between 2010 and 2020. While the majority of machine-made carpet production in Türkiye is carried out by

Türkiye ranks second in global carpet exports with a 17% share. Türkiye's total carpet exports in 2023 amounted to 2.75 billion dollars.



machine-made carpet exports decreased by 15.6%. Total carpet exports declined to \$2.75 billion, while machine-made carpet exports dropped to \$2.2 billion.

**USA leads in Turkish exports**  
In the global machine-made carpet import market, with a value of \$8.4 billion, the top countries in terms of machine-made carpet imports are the USA, Germany, the United Kingdom, Japan, and France. Türkiye is the largest supplier to these countries. Türkiye's carpet exports experienced a decline in 2022 and 2023, attributed to the slowdown in global trade and the economic contraction in the USA and the EU. In 2021, Türkiye exported machine-made carpets worth over \$1 billion to the USA, but in 2022, the export volume dropped to \$714 million. The USA accounted for one-third of the total machine-made carpet exports. In the January-December period of 2023 also showed a 3% decrease in machine exports to the USA.

**Export to Saudi Arabia increased by 129,6%**  
Turkish carpet exporters are attempting to compensate for the loss in the US market by expanding their presence in Saudi Arabia. In 2023, machine-made carpet exports to Saudi Arabia increased by 129,6%, reaching \$270 million. In 2023, other countries where machine-made carpet exports increased include Germany, the UK, and Poland.

companies based in Gaziantep, other notable cities known for intensive machine-made carpet manufacturing include Kayseri and İstanbul.

**Surpassing the great wall of China, the only sector**  
While Türkiye's machine-made carpet exports have been on an upward trend for many years, it became one of the standout sectors during the pandemic. In 2021, Türkiye exceeded \$3 billion in carpet exports, with \$2.7 billion, or 90%, attributed to machine-made carpet exports.

In 2022, Türkiye made a woven machine carpet export of 2.2 billion dollars. Accordingly, its share in global machine carpet exports reached 42%. Türkiye ranks second in global carpet exports with a 17% share, following China. The economic slowdown policies implemented by major economies, which constitute Türkiye's most important export markets, as part of their efforts to combat high inflation in 2022, also affected Türkiye's carpet exports. In 2022, carpet exports decreased by 13,3%, and

# history | culture nature & industry together

# Bursa

Bursa, with its history, culture, architecture, and natural beauty, has held a significant position for Türkiye from the past to the present. Additionally, with its production capacity, Bursa contributes to the country's economy, positioning itself as the fourth largest city in Türkiye.



**B**ursa stands out as a city of rich cultural heritage, having been a residence for the Roman, Byzantine, Seljuk, and Ottoman Empires throughout its deep-rooted history. This city, a mosaic of culture with history oozing from every corner, has become an important tourism destination today, thanks to both its cultural landmarks and natural beauty. Furthermore, with its advanced industrial production, it significantly contributes to the

country's economy. The cradle of civilizations, Bursa and its surroundings have witnessed various settlements throughout different eras. Excavations in the region have revealed that the settlement in Bursa dates back to around 7,000 years. The excavations at Ilıpınar Mound identified a settlement area that existed around 5,200 years ago. It is observed that the Turks first arrived in the Bursa region after 1081. İznik served as the capital

of the Anatolian Seljuk State from 1081 to 1097. On April 6, 1326, with the surrender of Bursa by the Byzantine governor to Orhan Bey, Bursa officially came under the control of the Turks. During the early years of the Ottoman Empire, Bursa was a center of education with its madrasahs and lodges, scholars, and the hub of science and the Islamic world, along with its markets and trade, poets, and artists. The shift of the Ottoman capital to İstanbul after



Bursa not only makes a name for itself with its historical and natural beauty but also stands out as a significant city in the textile sector.



the conquest of Constantinople resulted in Bursa losing its political and cultural significance. However, even after the capital moved to Edirne and later İstanbul, the city continued to maintain its influence as a “spiritual capital.” Today, with a population approaching 4 million, industrial strength, and proximity to trade routes, Bursa holds the position of the fourth-largest city in Türkiye.

**Its geographical location is its greatest advantage**

Bursa, one of the driving forces

of Turkish industry, played a significant role in the country’s economic development since the establishment of foreign-owned silk factories in the 19<sup>th</sup> century and the construction of facilities such as the Merinos factory through both public investments and private sector industrial establishments from 1923 onwards. The city, where sectors such as textiles, automotive, machinery-metal manufacturing, agriculture-based industry, food, and furniture take the lead, also continues to produce emerging

sectors such as rail systems, aviation, defense, and high-tech products. Representing an active and guiding force in the development of the Turkish economy and providing new momentum, Bursa is home to the country’s largest exporting sector, the automotive industry. The city, with a strong position in agriculture-based industry, contributes 45.5% of its economic size to industry. The geographical location of Bursa, once located on the Silk Road, also provides a significant advantage for

With the establishment of the Merinos factory in 1938, Bursa further increased its importance in the sector, becoming one of the dynamic pillars of the textile industry.



its industry. Positioned as the gateway for the westward exit of the Anatolian Peninsula and the entry point from the west to Anatolia, Bursa holds a crucial position.

**A textile hub with a rich history**

Bursa not only makes a name for itself with its historical and natural beauty but also stands out as a significant city in the textile sector. With a deep-rooted textile history dating back 1500 years, Bursa holds the distinction of being the first city outside of China where silk

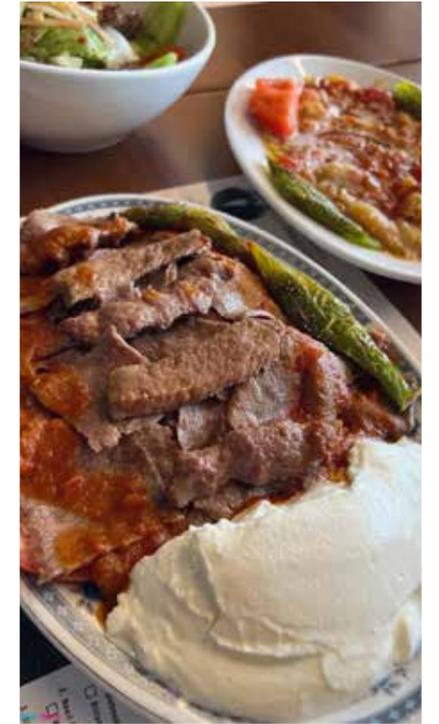
production took place. As the weaving center of the Ottoman Empire, Bursa carries a textile industry heritage that spans from the past to the present. In fact, during its heyday, even the fabrics for the robes of Russian tsars would come from Bursa. Koza Han, a crucial player in Bursa’s textile prominence, was commissioned by Sultan 2<sup>nd</sup> Bayezid in 1491. The han, where silkworm cocoons were sold, housed silk fabrics produced from these cocoons. This historical venue, once an important trade center and shopping area

throughout history, continues to thrive today, remaining the heart of the textile industry. With the establishment of the Merinos factory in 1938, Bursa further increased its importance in the sector, becoming one of the dynamic pillars of the textile industry. By the 1970s, polyester production facilities were established, bringing about a change in the raw materials used by weavers. Bursa has expanded its activities not only in silk weaving but also in the production of yarn and fabrics made from chemical fibers.

Bursa stands out as a cultural city, deeply rooted in history and once home to the Roman, Byzantine, Seljuk, and Ottoman Empires.



Bursa has played a significant role in Türkiye's development. In the first half of 2023, the city contributed \$653 million to the textile and raw materials sector.



Among the dishes synonymous with the city, İskender Kebab undoubtedly holds the highest reputation.

### The dynamo of Turkish textile with its exports

Bursa, with its production strength in various fields such as apparel, home textiles, and industrial textiles, is a leading city in Türkiye's textile sector, serving as the dynamo of Turkish textile exports. With a robust position in the international market and a strong industrial infrastructure, Bursa has played a significant role in Türkiye's development. In the first half of 2023, the city contributed \$653 million to the textile and raw materials sector. The apparel and clothing sec-

tor, ranking second in the city's exports, recorded an export value of \$919 million in the first half of the year. Recognized as one of the leading countries in home textiles, Türkiye, and Bursa specifically, stands out in towel, tulle, and bedsheet production. Continuing its growth momentum each year and achieving success on the global stage, Bursa, drawing strength from its textile heritage, has assumed a locomotive role in the industry.

**The center of winter tourism**  
In terms of winter tourism,

Uludağ, one of the foremost destinations in Türkiye, stands out as one of the world's most significant ski resorts, boasting excellent facilities and slopes. Uludağ holds great significance for Bursa, so much so that Evliya Çelebi in his travelogue cannot praise Uludağ enough. During his journey from Pınarbaşı to the Summit Peak, Evliya Çelebi likened the region's water sources, consisting of 1,060 springs, to the "water of immortality" and said, "In short, to say Bursa is to say water." Uludağ, rising from the Bursa

Plain to an altitude of 2543 meters, is the highest point in the Marmara Region. Glacial traces seen in the Aras Çağlayanı and peaks make Uludağ even more attractive to tourists. Additionally, Uludağ National Park hosts numerous visitors not only during the winter months but also in the summer with its rich picnic and camping areas.

### Gateway to tourism with its seas and lakes

Bursa, being located along the coast of the Sea of Marmara, is also open to sea tourism. With

approximately 135 kilometers of coastline south of the Sea of Marmara, Bursa features expansive natural beaches in the districts of Karacabey, Mudanya, and Gemlik, as well as beautiful shores along the İznik and Uluabat (Apolo-ont) lakes. There are long and wide natural beaches extending from Yeniköy to the Bayramdere (Malkara) section and Zeytinbağ section of Mudanya. These coastlines, with high-quality sand, include Kurşunlu, Bayramdere, Yeniköy-Mudanya section, as well as Mesudiye, Egerce, and Esence beaches.

### Gastronomy city with its unique cuisine...

Bursa boasts a rich culinary heritage, making it a city renowned for gastronomy. Among the dishes synonymous with the city, İskender Kebab undoubtedly holds the highest reputation. However, İnegöl Köfte, prepared in the same way for centuries, is also a widely favored dish in the region. Another dish that comes to mind when Bursa is mentioned is Pideli Köfte.

# THE TEXTILE AND APPAREL DISTRICTS OF İSTANBUL



These fashion hubs in İstanbul are also on the itinerary of tourists.



The textile and apparel districts in the fashion city İstanbul offer visitors the latest fashion designs and a wide range of products. The historical buildings, art galleries, and culinary stops in these districts provide visitors with a unique experience.

**T**he textile and apparel sector plays a significant role with its contribution to production, exports, and employment throughout Anatolia, reaching every region of Türkiye. It is known that the sector, which includes around 32,000 small and medium-sized enterprises (SMEs), provides employment for more than 1.2 million people. Although

the sector shows density in certain cities in terms of the number of businesses and production, İstanbul holds a central position as both a production and fashion hub in the apparel and textile sector. Some prominent neighborhoods in İstanbul create business volumes comparable to entire cities. Industry players concentrated in several neighborhoods of İstanbul

engage in exports worldwide. These fashion hubs in İstanbul are also on the itinerary of tourists. Osmanbey, renowned for many national brands, has been considered the fashion center of the apparel industry in İstanbul for half a century. The stores lining the streets of Osmanbey compete in storefront design. Laleli, shedding its identity as the center of

suitcase trade, has become an important fashion district with both manufacturing and design power. Merter, departing from its producer identity, contributes to İstanbul's journey as a fashion center with stylish store designs. Additionally, these neighborhoods, rich in textile wholesalers, stand out in the realm of clothing, particularly with their affordable prices.

**Join us on a journey through İstanbul's textile and apparel districts...**

**THE DISTRICT THAT PRODUCES NATIONAL BRANDS: OSMANBEY**

Osmanbey is recognized as the oldest district for textile and apparel, spanning from design to production. Today, the streets of Osmanbey host around 5,000



Laleli has reached a trade volume of 6 billion dollars with both attracting some of the world's leading brands in the apparel, textile, and hotel sectors and creating global brands.

companies of various sizes, serving as the starting point for many national brands that have gained international recognition. Additionally, 18 Osmanbey companies manage marketing and sales channels with 750 stores in 60 countries. Osmanbey is a hub for a wide range of materials, from fabrics to threads, buttons to zippers, with thousands of shops to explore. Comprising 18 streets, Osmanbey annually exports \$1.7 billion in four main categories of apparel: women's, men's, eveningwear, and children's clothing. Osmanbey accounts for 8% of Türkiye's apparel exports and 11% of Istanbul's total exports. The increasing business volume in the region has

led textile and apparel companies to expand towards neighboring districts such as Bomonti, Çağlayan, Kağıthane, Okmeydanı, and Feriköy. Osmanbey exports to more than 150 countries, attracting daily visits from one million people. Osmanbey is a district that closely follows global trends, creates its own unique fashion under its brand, designs, markets, and operates with fast turnaround times. Renowned for its fabric and product quality, Osmanbey continues to be a region that garners attention in the world of fashion.

**Nestled among luxury boutiques and art galleries**  
Osmanbey, being a neighbor to

Nişantaşı, where luxury boutiques and art galleries intertwine, offers significant advantages for visitors. Nişantaşı, located in the heart of Istanbul, is a district that blends history, culture, and art, symbolizing luxury and elegance. Shopping on Abdi İpekçi Avenue, visiting art galleries, exploring its historical texture, and indulging in delightful moments at its culinary stops make Nişantaşı an ideal place in Istanbul. Perhaps the most famous spot in Nişantaşı, Abdi İpekçi Avenue is renowned for hosting stores of globally acclaimed brands. Luxury boutiques, design labels, and chic cafes have turned Abdi İpekçi Avenue into an indispensable destination for shopping enthusiasts.

**THE VAST SHOWCASE CONSISTING OF THOUSANDS OF STORES; LALELİ**

The process of becoming a shopping and fashion center, which started with shuttle trade by Arab tourists in the 1980s and later by tourists from the former Eastern Bloc countries in the 1990s, has turned Laleli into a district where trade and tourism converge today. In addition to textiles, apparel, leather and leather products, accessories, and related industrial products, Laleli is now home to galleries and art centers. Laleli firms export to more than 60 countries. Laleli has reached a trade volume of 6 billion dollars with both attracting some of the world's leading brands in the

Merter, going beyond being solely a production-focused area, has started transforming its production centers into showrooms.

apparel, textile, and hotel sectors and creating global brands. The region, which houses over 7,000 predominantly manufacturing companies in the textile and garment-based main and ancillary industry-trade sectors, accommodates a fundamental sectoral diversity in textile-garment, including men's/women's/children's evening and casual wear, socks-underwear, denim, home textiles, fabric, leather clothing, shoes, accessories, jewelry, hotels, tourism agencies, restaurants, cafes, nightclubs, baths, spas, logistics, and financial institutions.

**At the center of culture and tourism**

Laleli, Istanbul's Historic Peninsula, known as one of the top six regions that attract the most tourists worldwide and within walking distance to museums and historical sites such as Hagia Sophia, Topkapi Palace, Sultanahmet, Grand Bazaar, Suleymaniye Mosque, Ibrahim Pasha Palace, Archaeology Museum, Turkish and Islamic Arts Museum, Mosaic Museum, and Chora Museum, captivates visitors with its cultural richness in the heart of the city's culture and tourism hub.

**TRANSFORMATION OF MANUFACTURING INTO GLAMOUR: MERTER**

Merter, undergoing rapid development, continues its success story in the textile and apparel industry, capturing the attention of both Türkiye and the world.

With its evolving infrastructure, increasing number of businesses, and international influence, Merter seems poised to play a significant role in the fashion world in the future. Located in the Güngören district of Istanbul, Merter has become a crucial trading center in the textile and apparel sector. In recent years, with rapid developments in the region, the number of textile businesses and establishments has significantly increased, reaching transaction volumes in the billions of dollars. Currently, with 9,000 establishments, Merter holds the distinction of being one of Türkiye's most important textile centers. The increase in the number of textile businesses in the region, from

the thousands to the tens of thousands, indicates that Merter is rapidly becoming a growing hub for business and commerce.

**Showrooms and new trends**

Merter, going beyond being solely a production-focused area, has started transforming its production centers into showrooms. This has allowed companies in the region to showcase and market their products more effectively. Merter is referred to as Türkiye's China, standing out as a center where you can find products of all qualities and price ranges. Its international recognition, especially in the Middle East and Arab countries, enhances the competitiveness of businesses in the region on the global stage.

Merter holds the distinction of being one of Türkiye's most important textile centers.



# THE HARMONIOUS BLEND OF HISTORY AND LUXURY ÇIRAĞAN PALACE



Çırağan Palace, one of İstanbul's historical landmarks, stands out not only for its architecture and historical significance but also for its dazzling interior decoration and meticulously selected textile products.

**D**ating back to the 18<sup>th</sup> century, Çırağan Palace emerged as the most prestigious structure along the Bosphorus. It became a favored destination for the seven sultans who ascended the throne during that century. Originally built as a waterfront mansion, Çırağan Palace underwent several demolitions and reconstructions, with the final completion by Sultan Abdülaziz in 1871. Constructed by the Balyan family, this palace does not adhere to the architectural styles of either Europe or Asia. It is considered a place where the subtleties of taste and aesthetics from around the world harmoniously come together. This wooden palace, built in an Antique Revival style unprecedented in Ottoman dynastic structures, featured a facade facing the Bosphorus supported by forty grand columns adorned with elaborate decorations. Destroyed in a fire in 1910 and reduced to ruins, Çırağan Palace was meticulously restored after 75 years, adhering to its original design, and once again stands as a splendid architectural gem along the Bosphorus, serving as a hotel.



While wandering through the palace, the special woven tapestries on the walls and majestic curtains create an atmosphere steeped in history.



Destroyed by a fire in 1910 and reduced to ruins, Çırağan Palace has been restored a century later, reclaiming its splendid days with a renewed architecture and decoration.

Çırağan Palace's grandeur extends beyond its architecture to encompass a historical journey and the fusion of luxury through its interior design, textile products, and accessories. The decorative elements used in the palace suites were inspired by items found in other palaces in İstanbul. The design of many custom-made pieces of furniture drew inspiration from Topkapı Palace, Dolmabahçe Palace, Beylerbeyi Palace, and Yıldız Palace. Reimagined in 2023, the hotel

entrance, lobby, rooms, suites, and two new restaurants of Çırağan Palace, inspired by its historical and period architecture, defy time with their awe-inspiring styles. Apart from the Sultan Suite, the other 10 palace suites consist of sophisticated, maisonette-style duplex suites enriched with a refined style and soft color palettes, emitting a sweet home warmth. The palace suites are adorned with ceramic vases, crystals, antique candelabras,

magnificent paintings, and many other captivating works of art.

**Impressive interior decoration and opulent textile details**

The design and textile products used in the interior decoration of Çırağan Palace offer visitors an extraordinary atmosphere that carries the traces of time. The evident elegance in different sections of the palace clearly indicates that every detail has been meticulously selected.

Çırağan Palace's interior design and textile products offer visitors a blend of historical journey and luxury.



magnificent venue combines its rich history and stunning interior decoration to offer an unforgettable experience. Palace suites are adorned with special decorative elements that capture attention, such as ceramic vases, crystal objects, antique candelabras, magnificent paintings, and many other captivating works of art. Reflecting the rich history and culture of the palace, these elements add a unique character and authenticity to each suite.

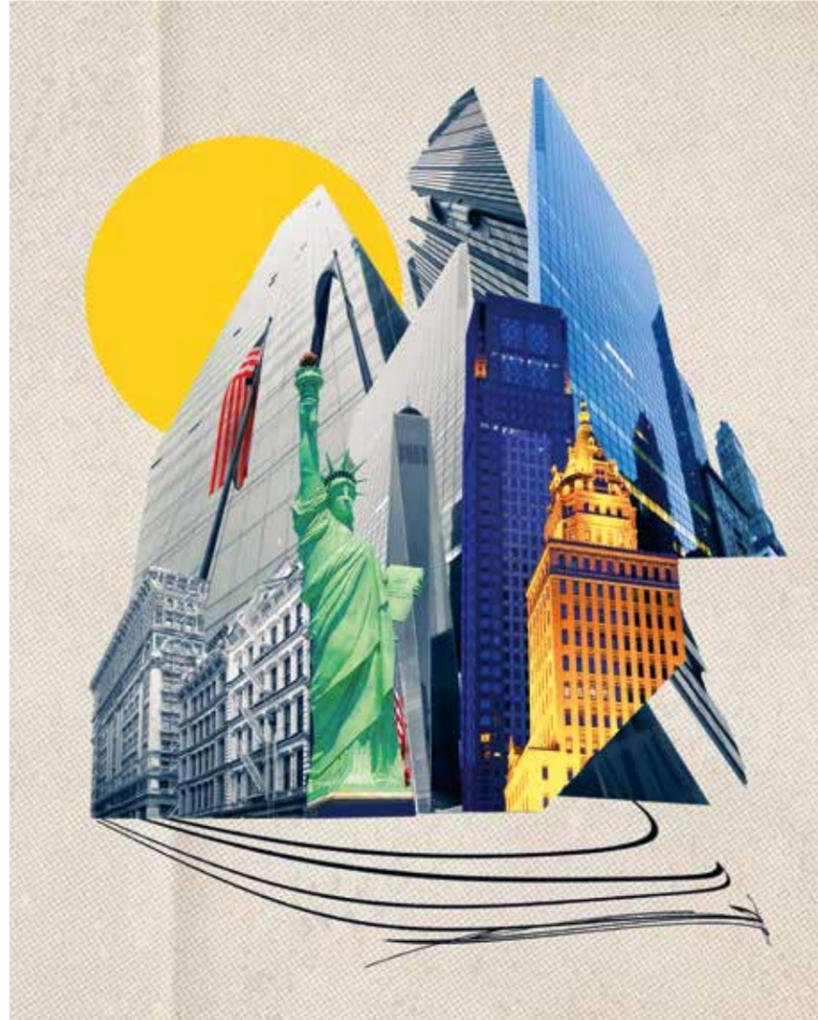
**Chairs inspired by Ebru Art**

In rooms and suites reflecting the modernized version of Ottoman heritage through the creative and aesthetic touches of Ottoman Art Specialist Serdar Gülgün, exquisite decorative objects stand out with their elegant grandeur and unique finesse. Striped corridors designed with inspiration from extravagant Ottoman tents, custom-made bed headboards adorned with çintemani, tulip, and patterns used in Ottoman art, mother-of-pearl-inlaid furniture, chairs inspired by Ebru art, marble bathrooms referencing the deep-rooted Turkish bath tradition, and many other layered design details harbor stories that perfectly complement the unique elegance of Çırağan Palace in the renovated rooms and suites. The distinctive fabrics, unique furniture, and accessories used in the top-level suite in the hotel building offer a living space where history and luxury converge.

The luxurious halls of the palace are adorned with antique furniture, dazzling chandeliers, and specially designed carpets. Each room is meticulously designed with patterns and color palettes that reflect the rich texture of the past. As you wander through the palace, the special woven tapestries on the walls and magnificent curtains create an atmosphere steeped in history.

**The splendid dance of silk fabrics**  
Among the textile products, the

use of silk fabrics, with their unique patterns and texture, adds a distinct layer of splendor to the palace. Custom-made curtains provide an elegant movement and touch in rooms with high ceilings. The design and textile products used in the interior decoration of Çırağan Palace offer visitors a historical journey and the convergence of luxury. Each detail serves as an artistic masterpiece, carrying the splendor of the palace's past into the present. This



## OPENING TO THE U.S. WITH I OF THE WORLD

Türkiye has placed a strong emphasis on promoting key sectors to boost its trade volume with the United States to \$100 billion. One of the most prominent events in this initiative is the I Of The World organization, particularly focused on the textile and apparel industry.

Organized for the third time from October 16-20, 2023, in collaboration between the İstanbul Textile and Apparel Exporters' Associations (İTHİB) and İstanbul Apparel Exporters' Associations (İHKİB),

the trade delegation featured the participation of 21 fabric manufacturers and 21 apparel manufacturers. The delegation, operating under the concept of "vertical sourcing" for the first time, played a significant role in



promoting the country's strongest sector not only in the U.S. but also across the Americas. The delegation highlighted the integrated production strength of the sector to buyers from different cities in the U.S. and sur-

More than 160 buyers from 104 companies located in the USA, Canada, Colombia and Mexico took part in the bilateral business meetings.



rounding countries, emphasizing the opportunity for U.S. buyers to source the entire supply chain from Türkiye.

The bilateral business meetings held on October 17-18 at Venue 417 trade fair area saw the participation of over 160 buyer firms from 104 companies based in the U.S., Canada, Colombia, and Mexico. The delegation conducted over 600 bilateral business meetings, with globally significant brands such as Aritzia, KITH, Fila USA, Nordstrom, PVH - Calvin Klein, Tory Burch, Madewell, Faherty Brand, Simons Canada, Sunrise Brands (Rebecca Minkoff, Current Elliott, Joie), Ralph Lauren, Haddad Brands (Nike, Converse, Hurley, Jordan, Tommy Hilfiger Kids),

and JAYA Apparel Group (Cinça Sept).

### We aim to grow our market share in the U.S.

Ahmet Öksüz, the President of İTHİB, stated that despite the Turkish textile and apparel sector's export exceeding \$30 billion, they haven't achieved a satisfactory share from the U.S. market. He expressed, "Our share from the U.S. market is not at the desired level yet. Just as Turkish textile products are indispensable for the EU market, we aim to strengthen our position in U.S. imports and become indispensable in the near future. Our goal is to raise our textile and apparel exports to the U.S., currently around \$1.8 billion, to the \$5 billion level."

### Top 10 reasons for U.S. buyers to prefer "Made in Türkiye"

1. Unique product quality
2. Strong brand reputation
3. Innovative fast fashion design
4. Competitive price-value ratio
5. Flexible production with minimum stock
6. Access to high-quality raw materials
7. Proximity to global markets
8. Skilled workforce and organizational capacity
9. Timely delivery and highest reliability
10. Commitment to social responsibility and sustainable production.

MEETING POINT FOR CARPET ENTHUSIASTS

# CFE 2023-CARPET & FLOORING EXPO



Istanbul aims to once again become the global meeting point for carpet trade with CFE 2023 - Carpet & Flooring Expo. The first edition of the expo, held in December 2023, was visited by 21,284 people from 103 countries.

Istanbul has regained its status as the global meeting point for carpet trade. Organized in collaboration with the İstanbul Carpet Exporters' Association (İHİB), South-east Anatolia Carpet Exporters' Association (GAHİB), and Tüyap Fair Group, the Carpet & Flooring Expo featured the participation of nearly 400 companies. The expo was attended by 21,284 visitors from 103 countries. With the presence of 50 companies from the U.S., Europe, Africa, and the Middle East, the expo attracted attention with its rich events.

**The second meeting will take place on January 7-10, 2025**

The carpet industry plays a significant role as a bridge that introduces Türkiye's cultural richness and art to the world. In this regard, the fair held in İstanbul should not be seen merely as a commercial event. The artistic and cultural activities during the fair were indicative of this.



CFE encourages international collaborations by bringing together industry professionals, designers and buyers.

CFE will take place at the İstanbul Expo Center from January 7 to 10, 2025.



Despite changes in weaving technologies, Ahmet Hayri Diler, the President of the İstanbul Carpet Exporters' Association (İHİB), emphasized that a carpet is a product with a historical story. He stated, "We have come together at this fair to share our stories and not only preserve our traditional handicrafts but also introduce our culture to the global market. Our carpet industry not only preserves traditional handicrafts but also breathes new life into the sector by combining them with modern design and technology. This expo encourages international collaborations by bringing together industry professionals, designers, and buyers. While Turkish

carpets are known worldwide for their quality and aesthetics, we aim to reach a broader audience with these features through the fair." Diler also announced the date for the next fair: "CFE will be a platform showcasing innovative approaches, and the next fair will take place at the İstanbul Expo Center from January 7 to 10, 2025."

**İstanbul is more appealing in every aspect**  
İstanbul was the global center for carpet trade until 1935. However, especially in the post-World War II period, Germany surpassed İstanbul with the fairs it organized. For many years, the world

carpet industry gathered at the Domotex Fair in Germany, with Türkiye being its largest participant, contributing approximately 30% of the fair. Therefore, the İstanbul Carpet Exporters' Association (İHİB) initially planned to organize the fair in collaboration with the Deutsche Messe group, to which Domotex is affiliated, holding the fair alternately in Türkiye and Germany. When prolonged negotiations did not yield results, a decision was made to organize a completely national expo in Türkiye. Ahmet Hayri Diler, emphasizing that Türkiye, a country with a rich carpet tradition, and İstanbul, which is more appealing in every aspect, are the most

suitable destinations for global carpet meetings, stated, "We believe that İstanbul stands out in every aspect. The fact that Turkish Airlines operates flights to İstanbul from many countries makes the city even more attractive. Germany was causing difficulties in terms of visas for participating companies and visitors, especially for those coming from producing countries like Iran, Pakistan, and India. Considering all these developments, we decided not to participate in the fair in Germany, and we joined forces with GAHİB to organize our own fair. We took action to restore İstanbul as the center of carpet trade. Despite being organized for

**World-renowned trend forecaster in İstanbul**

With approximately 45 years of experience in the fashion and design industry and renowned for her expertise in predicting future trends, Dutch trend forecaster Lidewij Edelkoort was one of the panel speakers at the fair. Edelkoort pointed out that carpet trends are moving towards an avant-garde style, adopting a more materialistic, sensory-focused, wild, and creative appearance. She emphasized that the curvilinear objects in architecture and decoration are reflected in carpet design, with three-dimensional, layered, and glossy designs taking center stage. With the rise of the wood trend, natural and handmade looks are emerging in carpets, emphasizing a return to tradition. As interest in natural and recycled materials increases, fibers derived from blends such as wool, linen, straw, and felt are highlighted. Rustic appearances and repetitive geometric shapes like mosaics are gaining popularity in carpet design. Designs inspired by history are adapted to modernism, with stone and marble appearances and fringes coming to the forefront, transforming carpets into works of art. While bold colors are present in carpet design trends, neutral tones such as bone, dark and natural colors, brown, blue, purple, gray, and black also become dominant.



Buyers and carpet manufacturers from all around the world came together in Istanbul.

A total of 329 companies, including 278 local firms, participated in our exhibition.



the first time, our fair received attention from many carpet-producing countries. Countries such as Iran, India, Pakistan, Morocco, and Turkmenistan participated in our fair. Buyers and carpet manufacturers from all around the world came together in Istanbul. A total of 329 companies, including 278 local firms, participated in our fair. We organized a fair that is open to innovations and in line with the conditions of the time. Our goal is to make Istanbul the center of world carpet trade in the short term."

**Türkiye is the number one in machine-woven carpets**  
Diler emphasized that Türkiye is a carpet country, stating, "We have an export volume of 2.75 billion dollars, making us the second-largest exporter in the world after China in the carpet industry. Our goal is to gain first place. In machine-woven carpets, we are currently the world's number one. We are one of the rare sectors that have increased exports at a time when overall exports in Türkiye have shown a decline."

**The expo dazzled with its events**  
Several events were organized as part of the fair. Assoc. Prof. Dr. Mustafa Genç delivered a speech highlighting the importance of weaving in Turkish culture, while Ali Rıza Tuna presented a session on the concept of space in historical Anatolian weavings. On the second day of the fair, Ben Evans and Matthew Bourne conducted a panel titled "Artists, Designers, and Weavers." Designer Fırat Neziroğlu gained significant attention with his speech

titled "The Unsustainability of Sustainability." Özgecan Üstgöl shed light on the future journey of traditional carpet design heritage with artificial intelligence. Naomi Scott-Dunne explained the rules of carpet design schemes. On the third day of the fair, Özgür Uşaklıgil and Ömer Türk organized a panel titled "A Design City: Gaziantep." Lucy Upward and Reto Aschwanden discussed the connection between the healthy living trend and ethical design. Ecem Dilan Köse pre-

sented "Creative Technologies and Cultural Heritage," while Phil Pond discussed "Future Trends in Floor Coverings for Homes, Offices, and Hotels." belief in reaching our goal. Carpet design is an important element that reflects our culture, history, and art. Every design participating in our competition is a commitment to strengthen this rich heritage even further and pass it on to future generations. I hope this competition opens the way for young talents in our industry.

# EQUALITY TOUCH ON MILLENNIA-OLD MOTIFS

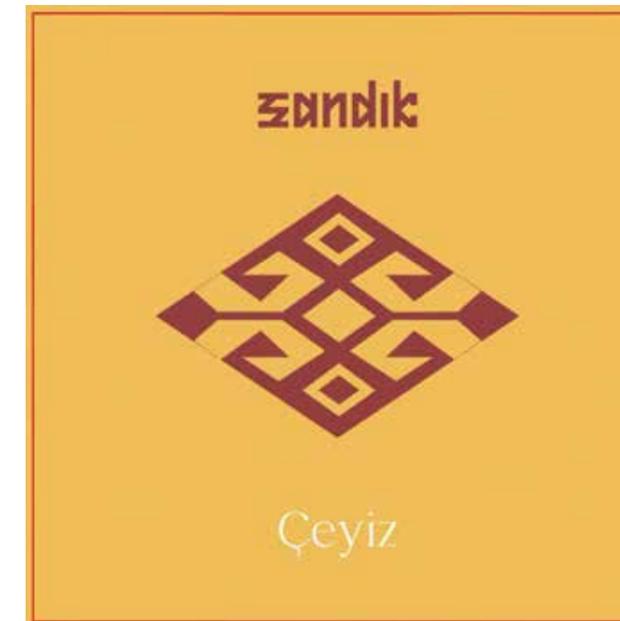
“The Symbols of Change” project draws attention to the patriarchal perspectives embedded in the motifs of carpets and kilims that have been passed down for thousands of years. Renewed with the powerful image of the modern woman, these motifs emphasize gender equality.



📷 Hands on hips / Fertility



📷 Standing tall / Success



📷 Ballot box / Dowry



📷 Cap / Education

In the project named “The Symbols of Change,” carpet and kilim motifs rooted in thousands of years of tradition have been altered in the pursuit of women’s equality.

Carpet weaving, known as one of the oldest professions of the Turks, has evolved throughout centuries to the present day. The Turks, who carried their weaving tradition from Central Asia to Anatolia, have been exemplifying this cultural heritage to the world for centuries. Carpets and kilims woven with mythological and traditional storytelling reflect a cultural language. Each motif carries a different message, intertwining visual and conceptual

elements, reflecting emotions tie knot by stitch.

### Motifs often contain feminine meanings

Turkish carpets, with their unique weaving technique, have become a global brand, owing much to the distinctive motifs they possess. These motifs, narrating the past and culture of the Turks with a simple and powerful expression, are known to carry separate meanings. Woven with a unique touch, carpets and

kilims convey messages from the weavers’ past, prayers, and sometimes expectations for the future. The aesthetic aspect of Turkish carpet and kilim motifs, combined with unique colors, creates a harmonious visual appeal. This unique heritage, predominantly woven by women, is often adorned with motifs containing feminine meanings.

### Changing roles for women

Cachéİstanbul brings hand-woven modern Turkish kilims,

carpets, and more by Anatolian women to contemporary users with a modern approach. This rich cultural heritage continues to live in garments, accessories, and even skateboards. Within the ancient tradition of carpet weaving and textile, there are some meanings that should not be carried into the present. Looking at gender roles, some motifs indicate the significant change in women’s roles from the past. While women were more confined to traditional

roles such as marriage, dowry preparation, and childbearing in a patriarchal society in the past, today, a different picture is drawn. Women active in every profession and field today serve as strong role models, shedding light on society while contributing to the country’s and community’s development. The Symbols of Change, a social responsibility project in collaboration with Rafineri and Cachéİstanbul, highlights this transformation.

### Patriarchal motifs gain new meanings with minor changes

Symbols used in Anatolian carpets and kilims are known to reflect the emotions, desires, and goals of the weaving women. The motifs carried by Turkish carpets and kilims bear the traces of various geographies, stories, and oral culture where Turks have lived. Motifs reflecting shared living culture with mythological narratives, nature-themed carpet and kilim motifs, transform into perfect visuals with the weavers’



The project was designed to change kilim symbols reflecting women's inner worlds in the same manner.

imagination. Geometric motifs, plant patterns, depictions of natural events, objects, and animal representations often populate Anatolian carpets and flat-woven rugs. Motifs based on Turkish traditions and religious symbols also adorn carpets and kilims. Owners of The Symbols of Change project, Rafneri and CachéIstanbul, emphasize that many carpet and kilim motifs lost their meaning beyond marriage and child rearing due to women being confined to domestic life for years. However, today, women's fight for equality shifts this perception. The project aims to draw attention to kilim symbols reflecting women's inner worlds and change them in the same way. Patriarchal symbols hidden in Turkish carpets and kilims were identified, and

with minor changes, new meanings were attributed to them.

#### **Weavers gain a different perspective**

Documentary-style shots with the dwindling number of weaver women, who are the main characters in production, tell the project's story even better. The shots emphasize that weaving women continue this culture, and motifs are updated according to people's lives and stories. Women who traditionally wove repetitive motifs gained a different perspective through this project, focusing on weaving more modern motifs.

#### **Three motifs were updated, highlighting the strong image of women**

Within the project, three motifs

were updated and adapted to the present day. For example, the motif representing the dowry chest of young girls ready for marriage, indicating their desire to get married, was transformed into the "cap" motif, reminiscent of education, with a few small additions. The "hair tie" motif, interpreted as a sign of the weaver's desire to marry and establish a home, conveying the message of lovers meeting and never parting forever, was reversed to become the "crown" motif, symbolizing leadership. The figure representing fertility, femininity, and motherhood, the "hands on hips," was transformed into the "standing tall" motif by raising its arms. The aim was for each revised motif to symbolize stronger women and gender equality.

INNOVATIONS IN  
**PRODUCT**  
DEVELOPMENT

**INNOVATION SPOTLIGHT**



## PREPARED A JOINT COLLECTION WITH ARTIFICIAL INTELLIGENCE

Şık Makas, recognized as the leading exporter of denim in Türkiye, has utilized artificial intelligence technology to create a five-piece collection. The company has also taken steps to prevent waste and reduce environmental impact by incorporating composite material-based stones into its production processes.

**E**stablished in 1939, Şık Makas, with roots dating back to that year, began its commercial journey in the textile sector. Over time, the company expanded its investments into retail, medical, technology, and energy sectors, becoming a group of companies. Initially producing men's suits, the company is now recognized as Türkiye's leading exporter of denim.

Headquartered in İstanbul, the company operates three integrated denim garment and washing factories in Çorlu, Tokat, and Egypt. It has a retail network with the Cross Jeans brand, primarily in European countries such as Germany, Poland, and the Czech Republic. In addition to its own brand, Cross Jeans, the company exports 20 million denim products annually to the world's largest retail companies.

The company believes that design and R&D activities are the keys to innovation and success in the textile industry. Under the umbrella of the "Cross Design Center," the company offers trend-appropriate, innovative, and sustainable collections. Over the past three years, the company has focused on a circular production approach in the development of its collections. The preparation of collections is carried out using the state-of-the-art technology tools.

In the most recent five-piece collection, the company collaborated with artificial intelligence. The statement from the company regarding this collaboration includes the following information: "For our latest collection, we utilized the Leonardo A.I. software as inspiration. We used the designs generated by artificial

intelligence based on the keywords we provided as inspiration data and created our own designs. Subsequently, we realized these designs to obtain physical samples. We photographed them using our in-house 360-degree imaging technology and prepared a special presentation with the help of A.I. tools.

As part of the CRS-Zero Waste project, the brand reduced waste and prevented excess by using composite material-based stones instead of pumice stone.

### Waste waters are being recycled

The statement emphasizes the existence of numerous projects within the organization that cover social, environmental, and economic aspects. It states: "At Cross Textiles, we invest in research and development projects to discover the most efficient and sustainable alternative to offset our high water consumption. With our wastewater recycling facility, which became operational in 2021, we ensure the continuity of preserving natural water sources. By treating our wastewater to the level of incoming water quality and recycling it back into processes, we reduce our water consumption. This approach proves that direct discharge of wastewater into channels is never our first preference, reaffirming that every waste should be managed responsibly.

Recyclable Water Treatment Unit: With unit investments for the wastewater treatment plant, we aim to reuse the reclaimed wastewater as process water. Following feasibility studies to optimize water consumption, our technical teams initiated the investment in a wastewater recycling facility



at our Çorlu factory in 2021. The wastewater recycling facility, established with the first application of Direct Nano Filtration technology in the textile sector in 2021, was piloted and expanded to full scale in 2022. Since its active operation starting in August 2022, 70.295 cubic meters of water has been recycled with a 40% efficiency by the end of 2022. The goal for 2023 is to maintain operational capacity, with a 70% efficiency in water usage.

### It preserves nature with composite-based stones

The company, aiming to minimize

environmental impact in production processes, has developed the 'CRS-Zero Waste' initiative to protect nature by discontinuing the use of natural pumice stone. By transitioning to composite material-based stones, the company has eliminated environmental impact and waste during the extraction and transportation of pumice stone. Consequently, these stones, which are resistant to wear, non-water polluting, and effectively offer endless reuse possibilities, have helped eliminate a significant portion of solid waste represented by pumice stone waste.

# BARUTÇU IS DEVELOPING FABRICS TO REDUCE JOINT PAIN



With the Multi-Functional Relaxing Knee Pad project, Barutçu Tekstil aims to produce pain-relieving knitted fabrics to minimize joint pain.

**E**stablished in Bursa, Barutçu Tekstil exports its produced fabrics to more than 20 countries. With an annual fabric production capacity of 12 million meters, the company supplies fabrics to export-oriented garment manufacturers within the country, as well as numerous customers, including global brands. One distinguishing feature of Barutçu Tekstil is its developed R&D projects. Currently, they are working on a highly innovative product: the Multi-Functional Relaxing Knee Pad. The starting point of the project is the susceptibility of the knee joint areas to various deformations, injuries, and sprains due to various reasons. This is because the knee area is one of the most

actively used joint regions in people's daily and work lives. With the project, functional features addressing problems in the joints are enhanced, and a specially treated knitted fabric that has pain-relieving and soothing effects is being developed for knee pads. Individuals with damaged joints are encouraged to use knee pads to reduce chronic pain that restricts their daily activities. The fabric developed for this project, tailored to the needs, is designed to enhance individuals' quality of life. As part of the project, new designs of cotton knitted fabric with high elastane content will be created using state-of-the-art knitting machines recently introduced to the company. The breathable knitted fabric, with its flexible and comfortable design, is intended for easy daily use. Due to its design and content structure, it aims to minimize joint pain in the human body. It is emphasized that improvements and innovations made at every stage of production will contribute to the company's lasting added value. This innovative product is expected to make a significant contribution to the Turkish textile sector. The company stated, 'It is aimed to hold a significant place in the Turkish economy with its production values, export potential, and contribution

"With the Multi-Functional Relaxing Knee Pad project, a special finishing process has been applied to develop a knee brace from knitted fabric with pain-relieving and soothing effects."

to employment.' Considering the application area of the product, it is anticipated to provide a significant advantage to the sector both in terms of improving the quality of life and economically/technically. It is expected that the share of the innovation idea within the turnover will be 3 percent.

### Developing ecological fabric with natural dyeing

Another innovative project by Barutçu Tekstil is the 'Development of Ecological Fabric through Natural Dyeing Instead of Synthetic Dyeing.' The aim is to create environmentally friendly, sustainable fabrics using natural dyeing methods that are ecological, biodegradable, and reduce carbon and water footprints. The company provided the following information regarding the project: 'To contribute to minimizing environmental pollution caused by excess production and consumption due to the 'fast fashion' trend in the textile industry, we aim to develop sustainable fabrics by enhancing natural dyeing methods with fabrics obtained from hemp fibers. The goal is to reduce water and carbon footprints, creating more ecological, environmentally friendly, biodegradable products that focus on preserving human health and nature.'

Within the scope of the project, the process will begin with weaving fabric from hemp fibers and using natural dyes obtained from special plant sources. The completion of the process will involve calculating carbon footprints, water footprints, processing times, and cost calculations based on the processing steps of the treated fabrics.

### "Back to nature!"

The company, under the slogan 'Back to Nature,' prepares all its products and collections drawing inspiration from nature. The company's goal for 2025 is to use recycled and other sustainably sourced, clearly identified environmentally friendly materials in the fabrics they produce.

"An environmentally friendly, sustainable fabric will be developed using natural dyeing methods, aiming to reduce the carbon footprint and water footprint while being ecological and biodegradable."





## INFUSING DENIM WITH ART

Ilmare Co., a company that combines art with denim, personalizes their denim products with hand-drawn illustrations. They have the capacity to produce up to 30,000 units of hand-painted printed items on a monthly basis.

ILMARE Co. was established 45 years ago as an art studio with a focus on ceramic and glass production and painting. In 2010, the company shifted its focus to denim clothing production, bringing its artistic talent into denim designs. Standing out with personalized designs, the company goes beyond being just a manufacturer of denim products (such as jeans, denim jackets, etc.) by producing wearable art. Therefore, in addition to a manufacturing workshop, the company also houses an art studio. The designs of printed products are created by the design team, while the manufacturing is carried out by the production team. The staff working in this studio is selected from individuals with artistic talents, particularly those skilled in using brushes. According to a statement from the company, "The hand-painted print section can produce approximately 30,000 products monthly, likely in a way that is unparalleled in the world. In this regard, it is probably a unique example in the world."

### Customized Mass Production

ILMARE Co., unlike a traditional denim manufacturer, shared the following information about its business processes: "We design, produce, and merge denim clothing with high fashion. The artwork on our products is entirely hand-painted by our artists. All our products are unique and, at the same time, suitable for mass production. We source the fabrics we use in our manufacturing from major fabric manufacturers in Türkiye, always prioritizing the supply of

As part of the CRS-Zero Waste project, the brand reduced waste and prevented excess by using composite material-based stones instead of pumice stone.

eco-friendly recycled fabrics from these suppliers. Additionally, in our denim sourcing, we have sustainability priorities within our capabilities. In particular, we give preference to raw materials that can be reused multiple times in our fabric choices and foil prints. In addition to the printing section, our paint waste is close to zero, and we have established a recyclable manufacturing process. We have an environmentally friendly water treatment facility. We work with water-based organic dyes. In our art studio, we transform the products we manufacture into wearable art through hand-painting and the use of various art techniques, producing them in large quantities with an industrial approach. We have a monthly capacity of 30,000 units. Despite being produced in mass quantities, our products are personalized due to the craftsmanship involved. All designs on the products are prepared by our own staff. From our customers, we learn details such as the country they will sell in, age group, and gender. Leveraging our 20 years of artistic experience in the industry, we present them with designs and take orders based on the offered products. On the other hand, since the foundation of our products is art and creativity, we have the opportunity to create an unlimited number of designs. Additionally, our products, being handcrafted, can be applied to the finished product after sewing."

### The largest buyers are European countries

With the motto 'We produce wearable art,' ILMARE Foreign Trade Company exports printed/unprinted denim products, primarily to various European countries, including Germany and the Netherlands. Among these companies is BADER, which has been in operation for 100 years. On the other hand, the printing department within the company also provides services to export

companies in Türkiye. The products exported to countries such as the United States, European countries, and Russia contribute high added value. The company, which manufactures and dyes products in the denim clothing sector, catering to leading brands worldwide, established its own brand 'WYD - Wear Your Dream' in 2021 and started branded sales in the international denim clothing market.



# TÜRKİYE HOLDS GLOBAL LEADERSHIP IN NUMEROUS PRODUCT CATEGORIES WITHIN THE

# APPAREL, TEXTILE, LEATHER, AND CARPET SECTORS



## Textile & Apparel and Textile

The Turkish apparel sector is the sixth-largest apparel exporter in the world and the third-largest supplier to the EU.

The Turkish textile sector is the world's fifth-largest textile exporter and the European Union's second-largest supplier.

Turkish yarn production has the leading capacity in Europe and one of the highest volumes in the world.

## Production



## Knitted Apparel

Türkiye is one of the leading knitted goods exporters in the world. Turkish Apparel is 2<sup>nd</sup> leading supplier in hosiery and leader in denim products.

According to 2022 export data, Türkiye, which ranks fourth in global towel exports, has a higher share of the global market pie than European countries.

## Towel



## Denim

Türkiye is among the top four countries in global denim fabric production. Türkiye is the largest denim fabric supplier to the European Union.

With a 35.8% share, Türkiye became the largest denim fabric supplier to the EU from outside the union.

Türkiye is a prominent nation in the production of various types of cotton, ranging from high-quality to organic varieties.

## Coton



## Active Wear

Türkiye has witnessed a significant 100% increase in the major sports apparel markets such as the USA, France, Germany, Japan, and the UK.

Türkiye increased its sports apparel exports to the UK by 155.7% over four years, reaching a market share of 8.2%. This makes Türkiye one of the top three suppliers to the UK.

## Underwear

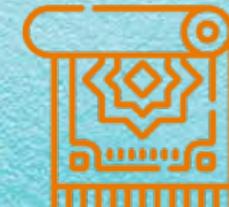


## Socks

Türkiye, the world's second-largest sock exporter, is the first choice of Europe's largest sock importers.

Türkiye holds a leading position globally in carpet exports, commanding a substantial 30.8% share of the market on its own.

## Carpet



## Shoes

With an annual production of 550 million pairs of shoes, Türkiye's footwear industry holds the position of the top producer in Europe and the 8<sup>th</sup> in the world.

## Fabric and Home Textiles



Türkiye is the world's fourth-largest exporter in fabric and home textiles.

# 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.



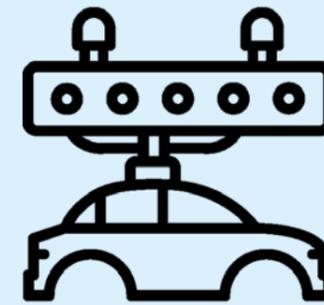
**78,257**

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



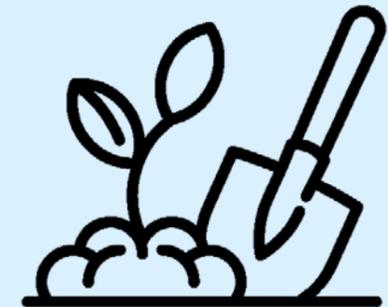
**51.4**  
million

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



## 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



**66**  
billion US dollars

## AGRICULTURE & FOOD

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**

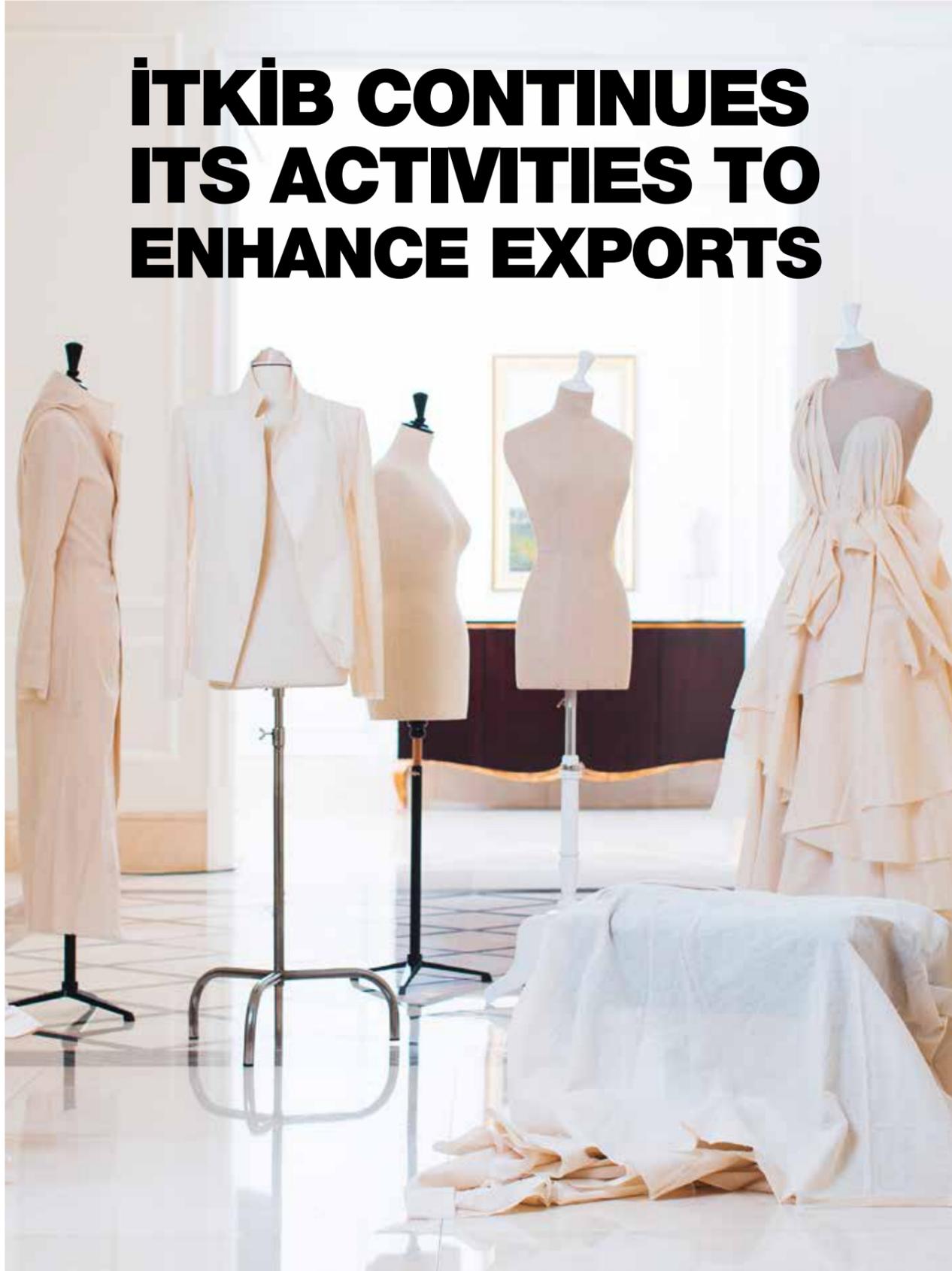
With a workforce of 33.3 million people, Türkiye constitutes the third-largest labor force pool in Europe.

**170**  
billion US dollars

## MACHINERY

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

# 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 Gen-

eral 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



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

participation of its members in international fairs and organizes over 31 international fair participations, 24 trade delegation and 10 procurement delegation 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**

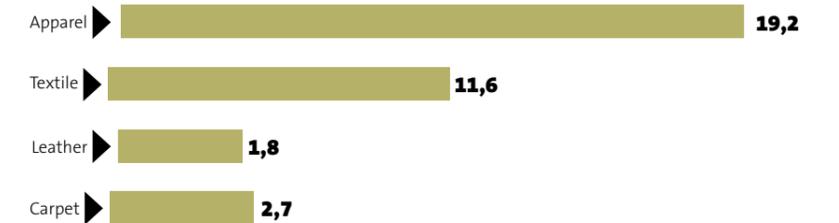
Solution-oriented, Accessible, Fair, Efficient, Unifying spirit, Reliable, Pioneer, Transparent

**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 2023 (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



# THE OLYMPICS OF CARPETS ICOC IS COMING TO İSTANBUL

İstanbul is gearing up to host the 15<sup>th</sup> International Conference on Oriental Carpets (ICOC XV) from June 6 to 9, 2024, in collaboration with the İstanbul Carpet Exporters' Association.



The Dealer's Fair and Academic Sessions during ICOC XV will be hosted at The Marmara Hotel in Taksim. For centuries, İstanbul has been a significant center for oriental rugs, and the city takes pride in welcoming ICOC XV by offering participants a unique experience enriched with its vast collections, museums, and millennia-old cultural heritage. Türkiye has been home to the tradition of weaving since the Neolithic period, a fact affirmed by numerous archaeological

findings. The continued practice of weaving by Anatolian women today highlights the richness of Anatolia's weaving culture. Türkiye, with its rich history where countless civilizations harmonized over many centuries, will be showcased during ICOC XV. Special pre- and post-tours are planned to explore Türkiye's cultural heritage and delve into rug collections in Anatolian museums. ICOC-15's theme, "Oriental Carpet Studies 2024: The Past and Future of Carpet Weaving and

Collecting," will focus on two main areas: "Historical Carpets and Textiles" and "Contemporary Art, Design, and New Production." ICOC XV is set to become a vital gathering for collectors, art enthusiasts, and scholars alike. The event aims to bridge the past and future of oriental carpets, presenting high-quality lectures, exhibitions, and hidden treasures. ICOC XV will also provide an opportunity for full immersion into Anatolia's weaving culture through pre- and post-conference tours guided by experts.

# ICOC XV 6-9 JUNE İSTANBUL

## 2024

Oriental Carpets Yesterday and Today,  
The Future of Tradition

EXHIBITONS  
ACADEMIC SESSIONS  
CARPET DEALERS FAIR  
TOURS



for further information contact :  
hali@itkib.org.tr





# TEXHIBITION ISTANBUL

FABRIC, YARN & TEXTILE ACCESSORIES FAIR

MEETING POINT OF TEXTILE INDUSTRY

6-8 MARCH 2024

11-13 SEPTEMBER 2024

ISTANBUL EXPO CENTER

[texhibitionist.com](http://texhibitionist.com)



REPUBLIC OF TÜRKİYE  
MINISTRY OF TRADE

**TİM** TÜRKİYE  
EXPORTERS  
ASSEMBLY

**İTHİB**



THIS FAIR IS ORGANIZED WITH THE AUDIT OF TOBB (THE UNION OF CHAMBERS AND  
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