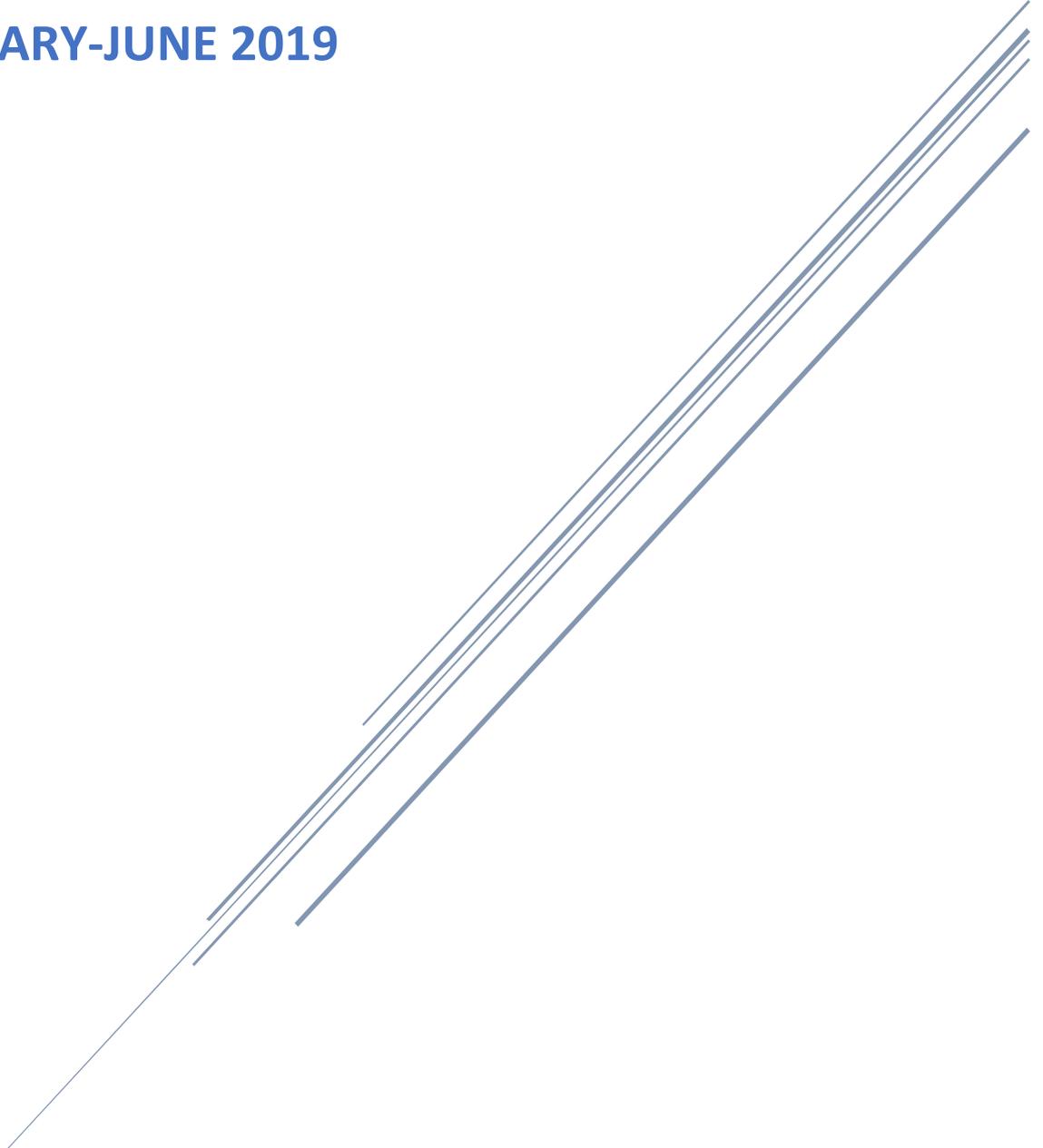


GENERAL OUTLOOK TO TURKEY'S APPAREL EXPORT

JANUARY-JUNE 2019



ITKIB APPAREL R&D DEPARTMENT

General Outlook to Turkey's Apparel Export

In January-June period of 2019, Turkey's general export has risen from 86.3 billion dollars to 88.2 billion dollars with an increase rate of 2.2%. In January-June 2019 period, Turkey's apparel export is recorded as 8.7 billion dollars with a decrease rate of 1%, compared to the same period of 2018.

In January-June period of 2019, the share in Turkey's total export of apparel export has been calculated as 9.9%. This share was 10.2% in the January-June period of 2018.

Turkey's Apparel Export Share within the General Export			
	2018	2019	2018/19
	January-June	January-June	Change %
<i>Unit: 1000 \$</i>			
Turkey's General Export	86.326.179	88.207.145	2,2
Turkey's Special Export	82.163.189	83.754.550	1,9
Apparel Export	8.811.680	8.727.607	-1,0
Apparel Export's Share %	10,2	9,9	
Industrial Export	66.806.882	67.986.046	1,8
Apparel Export's Share within Industrial Export %	13,2	12,8	
<i>Source: Exporters Associations Records</i>			

On the other hand, the share of apparel export within the industrial export has been 13.2% in January-June period of 2018 and 12.8% in 2019. Data shows that, the share of apparel sector both within the general export and in the industrial export has decreased for the first six months of 2018.

Leading Countries in Apparel Export

Germany, Spain and the UK are the first three countries in Turkish apparel export for the first six months of 2019. In the same period, Turkey exported 1.5 billion dollars of apparel to Germany with a decrease of 9.3%. Export to Spain is recorded as 1.1 billion dollars, with a decrease rate of 2.7% compared to the same period of 2018. Following Spain, apparel export to the United Kingdom is recorded as 946.4 million dollars with a decrease rate of 1.4%.

Netherlands is Turkey's fourth biggest market in apparel, with an export value of 516.9 million dollars, followed by France, whom Turkey exported 432.6 million dollars of apparel products for the first half of 2019. Respectively Iraq, the USA, Italy, Israel and Denmark are Turkey's leading markets in apparel export.

Leading Markets in Apparel Export 2017 - 2018 - 2019 January-June								
<i>Unit: 1000 \$</i>								
	2017 January-June	% Share	2018 January-June	% Share	2016/17 Change %	2019 January-June	% Share	2017/18 Change %
Germany	1.541.712	18,8	1.650.575	18,7	7,1	1.497.611	17,2	-9,3
Spain	909.402	11,1	1.149.906	13,0	26,4	1.119.209	12,8	-2,7
United Kingdom	944.213	11,5	960.089	10,9	1,7	946.409	10,8	-1,4
Netherlands	400.663	4,9	499.344	5,7	24,6	516.934	5,9	3,5
France	392.856	4,8	455.417	5,2	15,9	432.594	5,0	-5,0
Iraq	356.227	4,3	343.693	3,9	-3,5	330.633	3,8	-3,8
USA	251.881	3,1	282.694	3,2	12,2	299.147	3,4	5,8
Italy	279.587	3,4	301.934	3,4	8,0	298.907	3,4	-1,0
Israel	172.648	2,1	188.327	2,1	9,1	203.829	2,3	8,2
Denmark	169.360	2,1	193.960	2,2	14,5	195.488	2,2	0,8
Top 10 Countries	5.418.549	66,2	6.025.938	68,4	11,2	5.840.760	66,9	-3,1
Apparel Export	8.190.030	100	8.811.680	100	7,6	8.727.607	100	-1,0
Top 10 Countries Share %	66,2		68,4			66,9		

Source: Exporters Associations Records

Export to Netherlands, the USA, Israel and Denmark has increased between 0.8% and 8.2% in the first six months of 2019. However, export to six countries within the leading markets in apparel export have witnessed decrease rates between 1% and 9.3%.

Emerging Countries in Apparel Export

In the January-June period of 2019, within the leading countries which have increase rates over 20%, Saudi Arabia is the first country with an increase rate of 28% and export value of 179.2 million dollars. Following Saudi Arabia, apparel export to Iran has increased by 214.7% and recorded as 134.9 million dollars. The third emerging country in Turkey's apparel export is Libya, with an increase rate of 35.1%. With this increase rate, apparel export to Libya has increased from 87.3 million dollars to 137.5 million dollars.

Emerging Countries in Turkey's Apparel Export 2017 - 2018 - 2019 January-June					
<i>Unit: 1000 \$</i>		1 January - 30 June			
Countries	2017	2018	2017/18 Change %	2019	2018/19 Change %
Saudi Arabia	169.360	140.018	-17,3	179.178	28,0
Iran	61.973	42.865	-30,8	134.897	214,7
Libya	54.693	91.099	66,6	123.040	35,1
Slovakia	27.408	33.079	20,7	68.886	108,2
Kazakhstan	43.032	52.351	21,7	68.661	31,2
Egypt	40.650	56.129	38,1	68.066	21,3
Hungary	100.537	35.153	-65,0	58.295	65,8
Belarus	14.008	19.857	41,8	37.574	89,2
Albania	18.093	23.502	29,9	28.851	22,8
Tunusia	26.549	15.672	-41,0	20.528	31,0

Source: Exporters Associations Records

On the other hand, the 108.9% increase rate in export to Slovakia is noteworthy. In addition, export to Kazakhstan increased by 31.2% and export to Egypt increased by 21.3%. Other countries that have noteworthy increase rates and export value are Hungary, Belarus, Albania and China.

Apparel Export Based on Product Groups

For the first half of 2019, one of main product groups of apparel export increased by 2%. Export of knitted products, which is the most exported product group, decreased by 2% in January-June 2019 compared to the same period of 2018, reaching 4.4 billion dollars.

Apparel Export Based on Product Groups 2018 - 2019 January-June			
<i>Unit: 1000 \$</i>			
Product Groups	2018 January-June	2019 January-June	Change %
Knitted Products	4.450.279	4.362.647	-2,0
Woven Products	3.241.884	3.306.244	2,0
Made-Up Articles	1.021.103	959.023	-6,1

Source: Exporters Associations Records

The second largest group, export of woven products increased by 2% and recorded as 3.3 billion dollars. Export of made-up articles, including home textile products, decreased by 6.1% and recorded as 959 million dollars.

Leading Products in Turkish Apparel Export

When leading products in Turkish apparel export is examined in January-June period of 2019, the export of t-shirts, singlets and other vests is calculated as 1.6 billion dollars, with a decrease rate of 3.8%. Following these products, the export of woven suits, ensembles and dresses for women and girls has risen by 6.9% and recorded as 1.6 billion dollars.

Leading Products in Turkish Apparel Export					
<i>Units: 1.000 \$</i>					
HS Code	Content	2018 January-June	2019 January-June	Change %	2019 Share %
6109	T-shirts, singlets and other vests, knitted or crocheted	1.660.320	1.597.001	-3,8	18,3
6204	Woven suits, ensembles, jackets, dresses etc. for women/girls	1.456.809	1.557.919	6,9	17,9
6203	Woven suits, ensembles, jackets, dresses etc. for men/boys	717.164	714.185	-0,4	8,2
6104	Knitted suits, ensembles, jackets, dresses etc. for women/girls	638.944	673.580	5,4	7,7
6110	Knitted or crocheted jerseys, pullovers, cardigans and similar articles	608.269	576.885	-5,2	6,6
6302	Bed linen, table linen, toilet linen and kitchen linen	582.815	553.190	-5,1	6,3
6115	Hosiery; panty hose, tights, stockings, socks and other hosiery	502.766	488.178	-2,9	5,6
6206	Woven blouses, shirts and shirt-blouses for women/girls	419.196	355.556	-15,2	4,1
6205	Woven shirts; men's or boys'	295.938	291.566	-1,5	3,3
6106	Knitted blouses, shirts and shirt-blouses for women/girls	249.558	236.541	-5,2	2,7
Total Apparel Export		8.811.680	8.727.607	-1,0	100

Source: Exporters Associations Records

Except products with HS Code of 6204 and 6104, all leading products have witnessed decrease rates between 0.4% and 15.2%. Besides woven suits, ensembles and dresses for women and girls, the export of knitted suits, ensembles and dresses for women has increased by 5.4% compared to the same period of 2018.

ITKIB Apparel R&D Department

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