



iHKiB
İSTANBUL READY - MADE
GARMENT EXPORTERS' ASSOCIATION

DENIM GARMENT EXPORTERS CLUSTER PROJECT INTRO PRESENTATION

EU Projects Department
January 2017

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PROJECT OVERVIEW



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Budget:

2.106 Million USD



Schedule:

3 Years / 2016-2019



Cluster:

18 companies



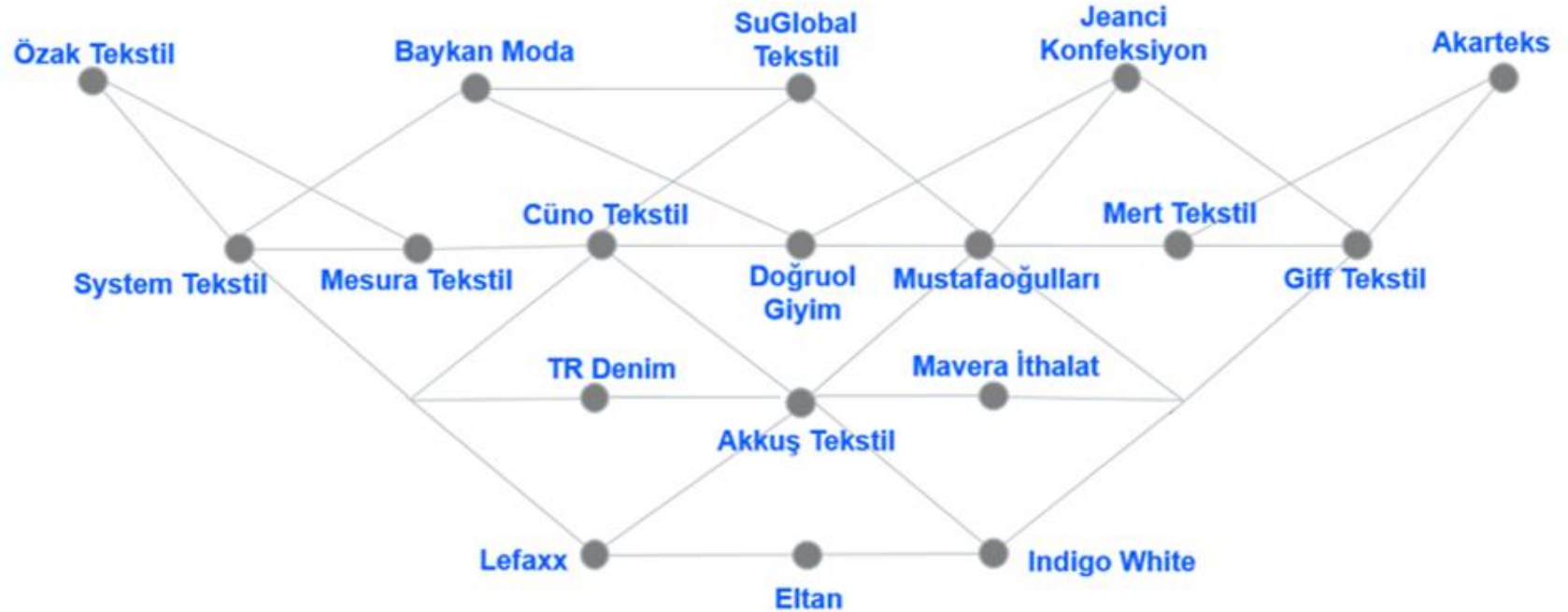
Target:

To empower the recognition of our cluster companies in targeted markets, to enhance our cluster companies' innovation ability and to increase export markets' diversity.



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OUR CLUSTER COMPANIES



4 OUR CLUSTER STRUCTURE



All of our 18 companies are export-oriented manufacturers and they commonly work with the Europe Market.



Companies can be defined as big factories and private label networks that mainly supply products to especially European brands.



Their products are mostly private label.



12 of our companies have their own washing R&D divisions in their plants and 6 of the total are outsourcing this process.



16 of our cluster companies have international quality of certifications called BSCI, CEDEX and Ekoteks. Other companies have customer audits regularly.

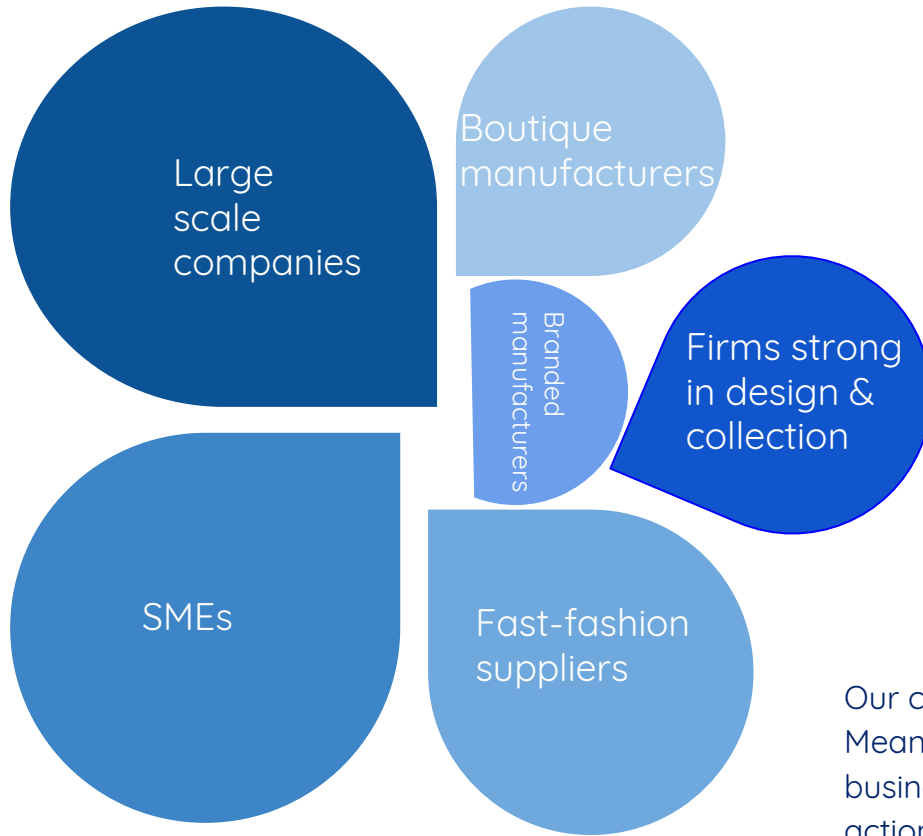


Commonly manufactured items; **man-woman denim pants.** Followingly; denim shirts, skirt ve jacket. Main items are: **Man-woman-Kids denim ready-made garment**



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COMPANIES WITHIN THE CLUSTER



Our cluster structure is heterogenous. Meaning that they differ in scale and business model. Therefore some sub-actions in the scope of cluster projects are planned to be diversified according to the characteristics of manufacturers.



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DENIM CLUSTER FACTS & FIGURES



5750 employees are employed in total. Considering all companies, there are **34** designers and **370** workers working in pattern office.



32 million items production capacity per year (*This does not refer the actual annual production, it refers only yearly capacity*).



12 firms' production is integrated. **6 firms'** manufacture is contract based.



13 companies have manufacture facility in İstanbul and **6** firms have facilities for manufacturing out of İstanbul.



Yearly average export is **230 million** USD dollar in total (*For the years of 2013, 2014, 2015*). Yearly average export is **12,6 million** USD dollar per company.



Out of 18 companies, **12** companies have washing R&D plants, **6** of total are outsourcing it.



Out of 18 companies, **10** companies have their own brands and only **4** of them are using their brands in export.

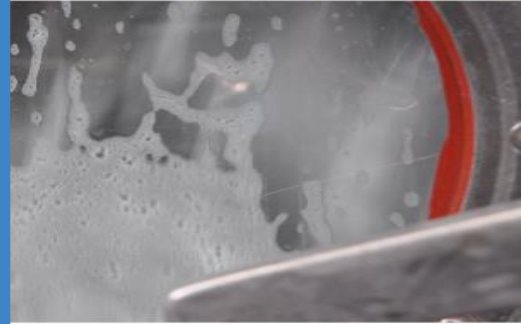


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DENIM SECTOR IN TURKEY

- ❖ Deni sector is a very valuable sector with its high added-value in the manufacturing process and its high share in the economy in Turkey.
- ❖ It sufficiently satisfies the need of the domestic market.
- ❖ According to 2015 data, Turkey's export is **3,4 billion** USD dollar and the import is **660 billion** USD dollar.
- ❖ The first three most exporting countries; **Spain, Germany ve the UK**
- ❖ The first three most importing countries; **Bangladesh, Egypt ve China**



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KEY SUCCESS FACTORS



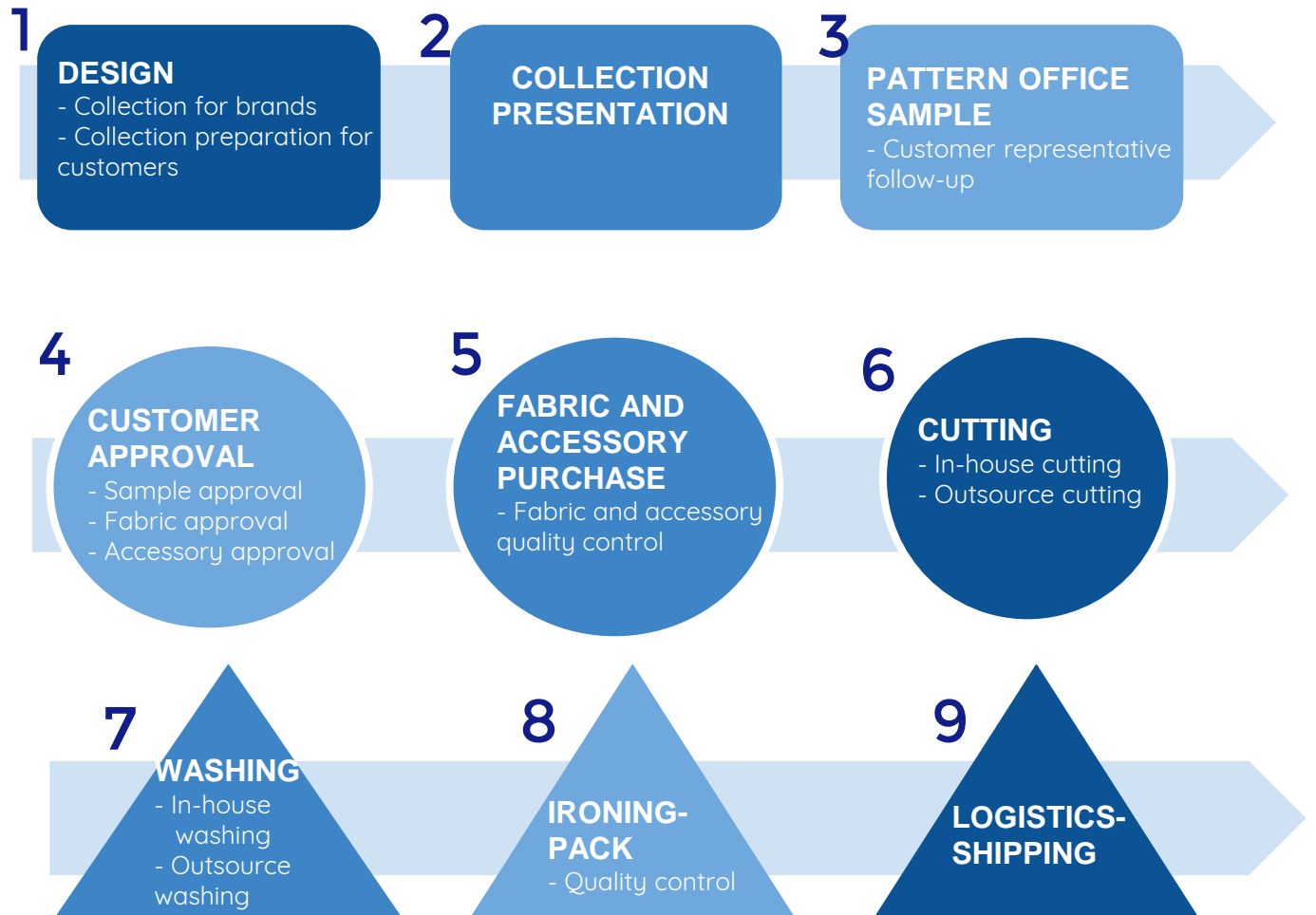
Türkiye'nin dünya denim sektöründeki yerini koruyabilmesi için;

- Integrated washing division and having a washing R&D part
- Machinery technology and sustainable processes
- Advanced pattern office and qualified pattern office team
- Experienced design team making collection
- Length of term
- Fabric R&D



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WORK AND PRODUCTION FLOW IN DENIM SECTOR



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THANK YOU!

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UR-GE

Turkey

Discover
the potential