

Turkish Home Textile Sector

2018 & 2019



Uludag Exporters Association
R & D Dpt.
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The world's total textile exports, which was 256 billion dollars in 2015, fell to 245 billion dollars in 2016. This value, which was 259 billion dollars in 2017, rose to 272 billion dollars in 2018.

On the other hand, the world's total home textile exports, which were \$ 67 billion in 2017, amounted to USD 69 billion in 2018.

In 2018 Turkish textile exports raised from 8.1 billion dollars to 8.5 billion dollars. In addition, ready-to-wear exports were \$ 17.6 billion.

By the end of 2018, Turkish Home Textile exports realized as \$ 2.7 billion, and the sector's share is 4.5% in the total global home textile market. We take this share mainly with medium and upper segment products. This clearly shows that the significance of our home textile industry is in the world.

Turkish home textile is a growing, dynamic and developing sector both with its production and domestic and foreign trade volume. The home textile sector in Turkey has sustained its development as a branch of textile and garment industry. This venture, which began with the weaving industry in Anatolia, has become famous with weaving in a number of regions. These include the Buldan Fabric of Denizli, the Silk of Bursa and Çorum's Kargı Fabric, just to name a few. The factory constructed in İzmit, or the "Hereke Fabrika-i Hümayün", has throughout its 150 year history pioneered the production of many towel textile goods extending from silk weaving to carpets, from clothing to socks. With the jacquard workbenches, introduced from France in 1850, production of the fabrics for flooring and curtains today has become an important and indispensable part of home textile. After 1990, the home textile sector developed dramatically and Turkish home textile products have reached a position in which they can comfortably compete in world markets. The main reasons for this are a huge variety in fabric and design, production with latest technology, utilization of innovative and modern design and motifs, as well as a combination of the highest level quality and reasonable prices. Today in Turkey, all types of home textile goods are being manufactured and Turkish home textile production is progressing on the road to becoming one of the leading markets thanks to greater product variety and excellence in quality.

Turkey is one of the major centers setting the trends and fashion in the global home textiles industry and Turkey is one of the world's top three exporters of home textiles, with 4,5% global market share. Turkish home textiles possess some critically unique features. Primarily, the sector, having a very strong quality image abroad, has a machinery park with the latest technology and an infrastructure with a flexible working style and a highly qualified labor force which can produce a wide range of products. The "Turkish Home Textile Sector", unlike contracting manufacturers of only name brands - as in many divisions of textile; is one of the brilliant sectors with its design, product technology, R&D investments, production capacity and its worldwide brand names. Today, Turkey is exporting its own special collections to mature markets such as EU & USA and also exporting to rising markets such as CIS, Far East and The Middle East. In 2015, its export volume surpassed 2,7 billion dollars.

The sector offers highly quality production in a global market with its capacity, technology, quality and trend creating designs and is raising its market share by increasing promotion and marketing activities. Among the main factors providing success in the sector, is brand creation. Today, it is apparent that the companies which truly ascend in terms of their brands become more powerful in the international arena. Furthermore, adapting to high value-added quality products, participation in international fairs in order to introduce Turkish home textile products, consideration of intellectual property rights, human health, environment and total quality management issues also aid in increasing the competitiveness in the sector.

High scale companies acquire the highest level quality in all stages of production by integrating the production process from fiber and fabric manufacture to product design, painting, finishing and sewing. This process has brought the companies acting in the home textile sector to very key positions in Europe and worldwide.

All of these companies run at high capacity, using modern technology and a highly qualified labor-force with well-trained human resource representatives. The success that this industry has gained in international trade is a result of the hard work of small and medium sized firms as well as large, modern and vertically integrated companies.

The major centers of production are Istanbul, Denizli, Bursa, Izmir and Usak.

The most important events in terms of providing accessibility to foreign buyers are the various exhibitions and fairs. The trend of growth in the sector is increasing daily with intensified involvement of the sector in the fairs in a greater attempt to introduce itself and market its products.

2017-2018 COUNTRIES

TURKISH HOME TEXTILE EXPORTS - COUNTRIES					
	COUNTRY	2017	2018	CHANGE %	2018 SHARE %
		FOB USD	FOB USD	USD	
1	GERMANY	452.000.932	451.879.930	-0,03%	16,75%
2	UNITED STATES	291.533.560	293.699.612	0,74%	10,89%
3	UNITED KINGDOM	137.853.219	139.878.826	1,47%	5,18%
4	BULGARIA	166.680.620	138.697.461	-16,79%	5,14%
5	ITALY	124.748.262	130.680.572	4,76%	4,84%
6	FRANCE	140.603.392	125.545.840	-10,71%	4,65%
7	NETHERLANDS	111.970.574	102.132.368	-8,79%	3,79%
8	POLAND	80.995.126	75.388.521	-6,92%	2,79%
9	SPAIN	57.544.447	65.493.280	13,81%	2,43%
10	ROMANIA	53.911.170	63.743.672	18,24%	2,36%
11	ISRAEL	46.138.751	51.734.403	12,13%	1,92%
12	SAUDI ARABIA	48.542.616	51.096.162	5,26%	1,89%
13	BELGIUM	43.272.633	50.671.716	17,10%	1,88%
14	IRAQ	50.949.455	45.378.775	-10,93%	1,68%
15	AUSTRIA	46.490.948	44.489.376	-4,31%	1,65%
16	IRAN (ISLAMIC REP.)	79.130.804	44.179.970	-44,17%	1,64%
17	ALGERIA	38.280.616	43.247.104	12,97%	1,60%
18	RUSSIAN FEDERATION	21.595.623	42.373.813	96,21%	1,57%
19	UKRAINE	42.302.741	40.711.558	-3,76%	1,51%
20	SWITZERLAND	31.892.219	32.468.141	1,81%	1,20%
	FIRST 20 COUNTRIES TOTAL	2.066.437.706	2.033.491.098	-1,59%	75,37%
	TOTAL ALL COUNTRIES	2.703.981.458	2.697.877.849	-0,23%	100,00%

Source: Consolidation of Exporters' Associations Records

2017-2018 PRODUCT GROUPS

Product	2017	2018		
	FOB USD	FOB USD	CHANGE % FOB USD	2018 SHARE %
TOWEL	682.884.604	676.328.391	-0,96%	25,07%
BED SHEETS	530.389.884	517.923.642	-2,35%	19,20%
DRAPERY	322.323.278	336.751.261	4,48%	12,48%
OTHER HOME TEXTILE	302.646.923	296.723.762	-1,96%	11,00%
OTHER FURNISHING ARTICLES	176.081.761	197.686.101	12,27%	7,33%
BATHROBE	176.504.822	170.181.602	-3,58%	6,31%
UPHOLSTERY	131.737.128	125.643.310	-4,63%	4,66%
CURTAINS INTERIOR STORES READY CURTAIN	114.274.506	117.922.013	3,19%	4,37%
TULES AND OTHER NETWORK	62.465.761	50.561.681	-19,06%	1,87%
BLANKETS	52.511.975	50.401.678	-4,02%	1,87%
KNITTED CURTAIN	43.536.717	48.594.895	11,62%	1,80%
TABLE COVERS	34.632.886	36.484.734	5,35%	1,35%
BED SHEETS	33.384.611	36.373.589	8,95%	1,35%
LACE	40.668.374	33.241.327	-18,26%	1,23%
PILLOWS AND QUILTS	2.457.395	3.058.660	24,47%	0,11%
HANDMADE WALL CARPETS	19.634	1.203	-93,87%	0,00%
Total	2.706.520.259	2.697.877.849	-0,23%	100,00%

Source: Consolidation of Exporters' Associations Records

JANUARY-MARCH 2018-2019 COUNTRIES

TURKISH HOME TEXTILE EXPORTS - COUNTRIES				
	Country	January March 2018	January March 2019	Change %
		FOB USD	FOB USD	FOB USD
1	GERMANY	108.001.470	97.951.771	-9,31%
2	USA	66.250.114	69.578.175	5,02%
3	ITALY	38.053.771	36.047.175	-5,27%
4	UNITED KINGDOM	32.201.223	29.035.712	-9,83%
5	FRANCE	33.875.986	28.794.743	-15,00%
6	BULGARIA	42.169.792	25.352.856	-39,88%
7	NETHERLANDS	27.725.084	21.741.439	-21,58%
8	POLAND	21.842.290	18.332.158	-16,07%
9	BELARUS	7.042.201	17.671.157	150,93%
10	ISRAEL	15.117.371	14.338.526	-5,15%
11	SAUDI ARABIA	11.441.751	13.663.970	19,42%
12	RUSSIA	9.660.202	12.663.136	31,09%
13	SPAIN	17.460.230	12.274.155	-29,70%
14	ROMANIA	14.863.722	11.541.407	-22,35%
15	IRAQ	11.095.073	10.584.538	-4,60%
16	AUSTRIA	11.005.109	10.541.566	-4,21%
17	BELGIUM	14.119.127	10.115.543	-28,36%
18	ALGERIA	13.082.561	9.928.142	-24,11%
19	IRANIAN	14.543.305	8.611.073	-40,79%
20	UKRAINE	16.709.512	7.983.680	-52,22%
	FIRST 20 COUNTRIES	526.259.895	466.750.923	-11,31%
	TOTAL	689.824.016	618.295.371	-10,37%

Source: Consolidation of Exporters' Associations Records

JANUARY-MARCH 2018-2019 PRODUCT GROUPS

TURKISH HOME TEXTILE EXPORTS			
Product	January-March 2018	January-March 2019	Change %
	FOB USD	FOB USD	
TOWEL	168.976.564	158.566.485	-6,16%
BED SHEETS	117.052.238	110.338.712	-5,74%
CURTAIN FABRICS	91.156.894	75.717.755	-16,94%
OTHER HOME TEXTILE	83.697.752	68.929.262	-17,65%
OTHER FURNISHING ARTICLES	47.348.345	43.583.629	-7,95%
BATHROBE	43.464.749	40.869.490	-5,97%
CURTAINS INTERIOR STORES READY CURTAIN	31.383.693	30.185.655	-3,82%
UPHOLSTERY FABR.	31.509.658	27.516.281	-12,67%
KNITTED CURTAIN	11.627.218	13.244.566	13,91%
BLANKETS	12.992.801	12.977.192	-0,12%
TULES AND OTHER	14.859.474	11.671.195	-21,46%
BED SHEETS	9.835.933	9.713.366	-1,25%
TABLE COVERS	10.283.909	8.455.632	-17,78%
LACE	14.221.233	5.642.586	-60,32%
PILLOWS AND QUILTS	1.413.258	873.020	-38,23%
HANDMADE WALL CARPETS	298	10.546	3.440,08%
TOTAL	689.824.016	618.295.371	-10,37%

Source: Consolidation of Exporters' Associations Records

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