

TURKISH TEXTILE INDUSTRY



İTHİB

İSTANBUL TEXTILE AND RAW MATERIALS
EXPORTERS' ASSOCIATION

TURKISH TEXTILE INDUSTRY

TURKISH TEXTILE AND APPAREL SECTORS

ITHiB

WE MAKE 15.6% OF EXPORTS IN TURKEY GENERAL



WE CREATE 6.2% OF GDP



WE REALIZE 14% OF MANUFACTURING INDUSTRY PRODUCTION



WE GENERATE 25.4% OF EMPLOYMENT IN MANUFACTURING INDUSTRY



EXPORTS

WE ARE THE 2ND BIGGEST EXPORTER SECTOR WITH 26 BILLION DOLLARS OF EXPORTS

FOREIGN TRADE SURPLUS

WITH 15,8 BILLION DOLLARS OF EXPORTS OUR SECTOR ACHIVES THE HIGHEST AMOUNT OF FOREIGN CURRENCY INFLOW TO TURKEY

EMPLOYMENT

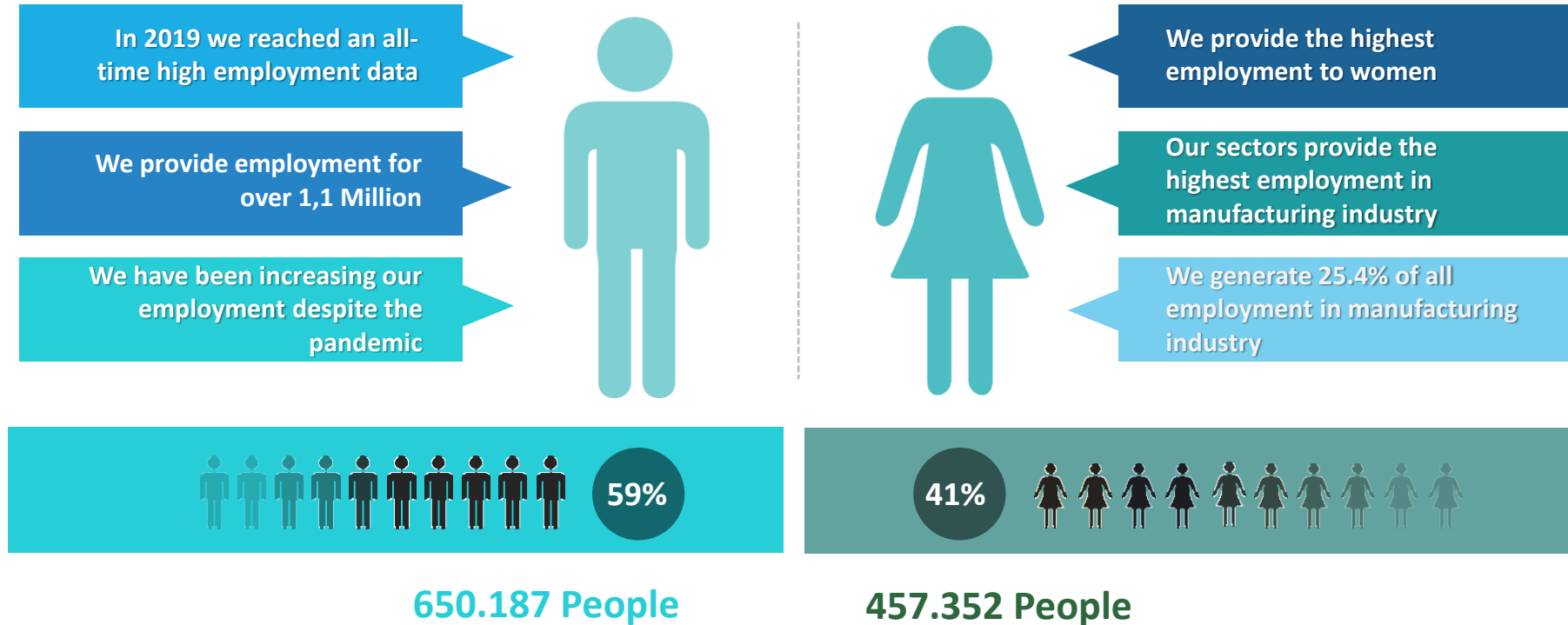
OUR SECTOR PROVIDES THE HIGHEST EMPLOYMENT WITH 1,1 MILLION WORKS IN MANUFACTURING INDUSTRY

PRODUCTION

TOGETHER WITH APPAREL SECTOR OUR SECTOR MAKES THE MOST PRODUCTION IN MANUFACTURING INDUSTRY WITH 301 BILLION TL MANUFACTURING VALUE

OUR TEXTILE AND APPAREL EMPLOYMENT

ITHIB



OUR STATUS IN GLOBAL FOREIGN TRADE

ITHiB

WE ARE THE 6TH IN GLOBAL TEXTILE AND APPAREL EXPORTS

WE ARE THE 3RD BIGGEST SUPPLIER OF THE EU

WE ARE THE WORLD'S BIGGEST DENIM PRODUCER

WE ARE THE WORLD'S 2ND BIGGEST SOCKS, 3RD BIGGEST KNITWEAR, 4TH BIGGEST HOME TEXTILE, 5TH BIGGEST FABRIC SUPPLIER

3.1%

We get 3.1% share of global textile and apparel exports

THE COMPETITIVE POWER OF TURKISH TEXTILE AND APPAREL INDUSTRY

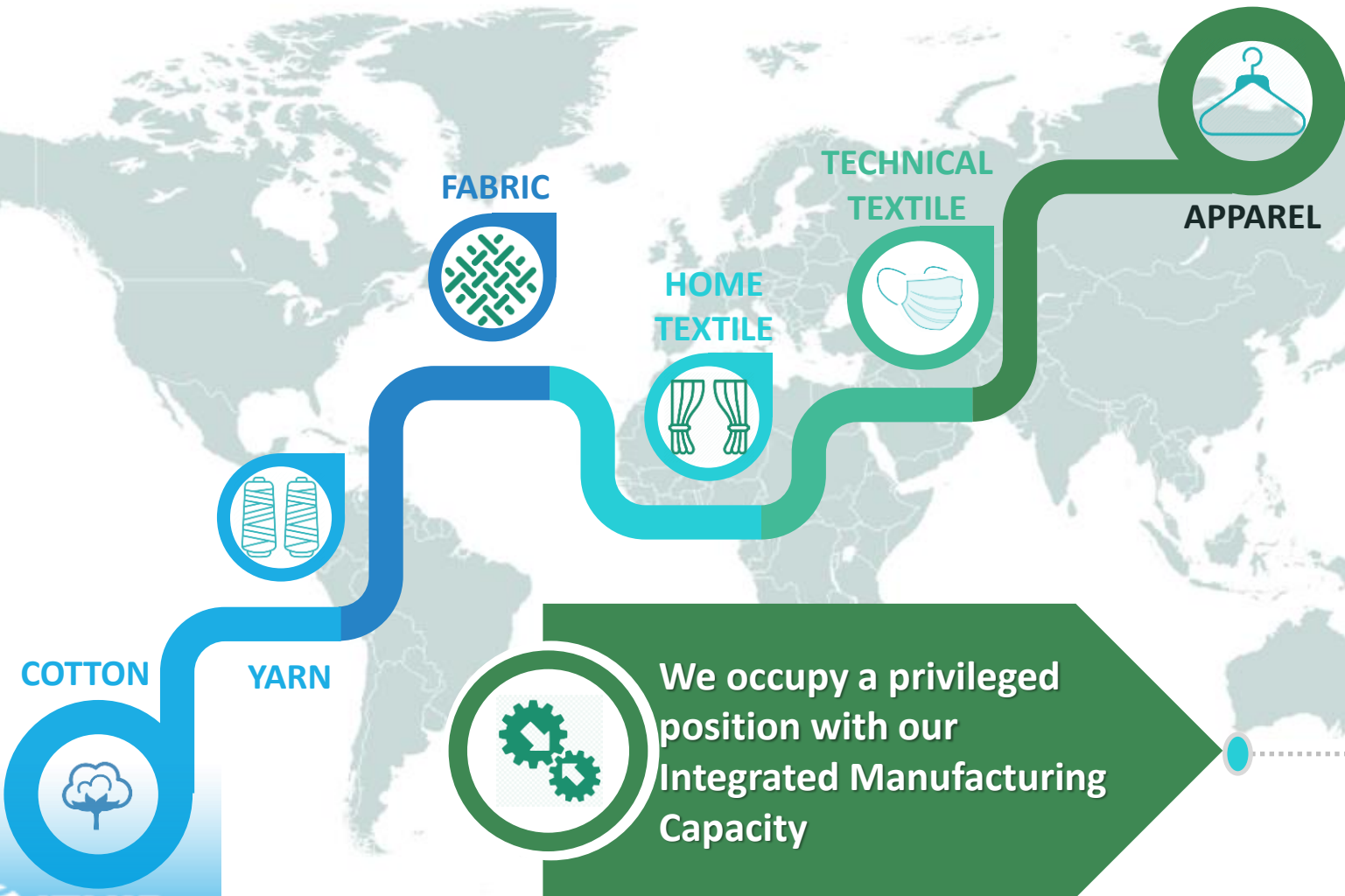
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- Our industry differentiate from their global competitors and is in a leading position thanks to especially the positive contribution of “**Made in Turkey**” label in Turkish textile and apparel products with its;
 - Europe’s largest vertically integrated textile and apparel manufacturing capacity
 - Sustainability,
 - Organic and Better Cotton (BCI),
 - Social responsibility,
 - Transparency,
 - Ethical trade,
 - Recycled production,
 - Fast supply process,
 - Fashion and design skills and flexibility in product development

TURKEY IS READY TO BE A PARTNER AND MAJOR SUPPLIER FOR THE EU MARKET WITH ITS POWERFUL PRODUCTION AND INVESTMENT CAPACITY

WE OCCUPY A PRIVILEGED POSITION IN PRODUCTION

ITHIB



 We occupy a privileged position with our Integrated Manufacturing Capacity

PRIVILEGED POSITION

We are one of the few countries in the World that can carry out all production stages of textile and apparel sectors from cotton production to apparel production. With our more than 20,000 producers we make one of the most sound contributions to the global supply process with fast delivery, sustainability, corporate social responsibility, and ethical trade.

WORLD TEXTILE AND APPAREL INDUSTRY EXPORTS

PROMINENT COUNTRIES IN THE WORLD TEXTILE AND APPAREL INDUSTRY EXPORT							
UNIT: MILLION \$	2016	2017	2018	2019	2020	CHANGE	SHARE
1 CHINA	252.536	255.113	263.443	257.652	277.694	7,8%	36,1%
2 EU COUNTRIES	164.611	178.605	196.178	193.664	179.092	-7,5%	23,3%
3 VIETNAM	28.668	31.766	36.582	39.252	40.411	3,0%	5,3%
4 BANGLADESH	34.502	36.554	40.683	42.344	37.371	-11,7%	4,9%
5 INDIA	33.688	35.478	35.355	33.771	27.917	-17,3%	3,6%
6 TURKEY	24.308	24.653	25.613	26.038	24.710	-5,1%	3,2%
7 U.S.A	22.635	24.884	26.189	25.208	21.999	-12,7%	2,9%
8 HONG KONG	22.757	21.283	20.414	17.971	13.166	-26,7%	1,7%
9 PAKISTAN	12.318	12.947	13.582	13.629	13.051	-4,2%	1,7%
10 UNITED KINGDOM	11.569	12.128	12.366	12.352	11.176	-9,5%	1,5%
TOP 10 COUNTRIES IN TOTAL	607.593	633.412	670.405	661.882	646.585	-2,3%	84,1%
OTHER COUNTRIES	127.887	136.622	144.070	141.560	122.508	-13,5%	15,9%
TOTAL EXPORT	735.481	770.034	814.475	803.442	769.093	-4,3%	100,0%

Source : ITC Trade Map - June 2021

TURKEY RANKS 6TH WITH ITS 3.2% SHARE IN WORLD TEXTILE AND APPAREL INDUSTRY EXPORTS.

DESPITE A 5.1% DECLINE COMPARED TO THE PREVIOUS YEAR, ITS EXPORT WAS VALUE OF 25 BILLION DOLLARS IN 2020.

WORLD TEXTILE AND RAW MATERIALS INDUSTRY EXPORTS

PROMINENT COUNTRIES IN THE WORLD TEXTILE INDUSTRY EXPORT

UNIT: MILLION \$	2016	2017	2018	2019	2020	CHANGE	SHARE
1 CHINA	104.742	109.550	118.470	119.414	153.108	28,2%	44,2%
2 EU COUNTRIES	61.583	65.422	70.342	66.555	62.990	-5,4%	18,2%
3 U.S.A	17.686	19.899	20.896	20.003	17.921	-10,4%	5,2%
4 INDIA	16.729	18.128	19.691	17.529	15.692	-10,5%	4,5%
5 TURKEY	9.524	9.865	10.307	9.958	9.721	-2,4%	2,8%
6 VIETNAM	6.258	7.370	8.430	9.214	9.705	5,3%	2,8%
7 SOUTH KOREA	11.346	11.392	11.625	10.714	9.071	-15,3%	2,6%
8 PAKISTAN	7.718	7.958	8.104	7.786	7.363	-5,4%	2,1%
9 TAIWAN	9.350	9.523	9.553	8.704	7.150	-17,9%	2,1%
10 JAPAN	7.133	7.075	7.281	7.165	6.063	-15,4%	1,8%
TOP 10 COUNTRIES IN TOTAL	252.068	266.181	284.699	277.042	298.783	7,8%	86,3%
OTHER COUNTRIES	52.630	56.406	57.613	55.161	47.318	-14,2%	13,7%
TOTAL EXPORT	304.698	322.586	342.312	332.202	346.101	4,2%	100,0%

Source : ITC Trade Map - June 2021

TURKEY LEFT THE SOUTH KOREA BEHIND AND RANKED 5TH WITH ITS 2.8% SHARE IN WORLD TEXTILE AND RAW MATERIALS INDUSTRY EXPORTS.

DESPITE A 2.4% DECLINE COMPARED TO THE PREVIOUS YEAR, ITS EXPORT WAS VALUE OF 10 BILLION DOLLARS IN 2020.

EUROPEAN UNION'S IMPORT OF TEXTILE AND RAW MATERIALS

EUROPEAN UNION'S IMPORT OF TEXTILE INDUSTRY								
COUNTRY	QUANTITY Unit: 1.000 Ton			VALUE Unit: Million Euro			Share	
	2019	2020	Change	2019	2020	Change	2019	2020
	1 CHINA	1.937	1.798	-7,2%	8.370	7.341	-12,3%	32,3%
2 TURKEY	918	905	-1,4%	3.919	3.613	-7,8%	15,1%	16,0%
3 PAKISTAN	448	441	-1,5%	2.054	1.958	-4,7%	7,9%	8,7%
4 INDIA	690	662	-4,0%	1.883	1.575	-16,4%	7,3%	7,0%
5 UNITED KINGDOM	332	318	-4,3%	1.846	1.534	-16,9%	7,1%	6,8%
6 U.S.A	129	117	-9,7%	957	814	-15,0%	3,7%	3,6%
7 SOUTH KOREA	349	299	-14,2%	966	731	-24,3%	3,7%	3,2%
8 SWITZERLAND	77	76	-2,2%	625	558	-10,7%	2,4%	2,5%
9 JAPAN	69	56	-18,5%	649	533	-17,8%	2,5%	2,4%
10 VIETNAM	94	92	-1,7%	261	234	-10,1%	1,0%	1,0%
EU IMPORT FROM EU	6.536	6.115	-6,4%	33.750	29.614	-12,3%	56,6%	56,8%
EU IMPORT FROM OUTSIDE THE EU	6.324	5.950	-5,9%	25.899	22.541	-13,0%	43,4%	43,2%
TOTAL IMPORT	12.860	12.065	-6,2%	59.650	52.155	-12,6%	100,0%	100,0%

Source: EUROSTAT - June 2021

TURKEY RANKS 2ND AMONG THE COUNTRIES WHERE TEXTILE AND RAW MATERIALS IMPORTS ARE MADE BY EUROPEAN UNION.

WITH A 16% SHARE, TURKEY'S EXPORT TO EUROPEAN UNION WAS VALUE OF 3,6 MILLION EURO AND QUANTITY OF 905 THOUSAND TONS IN 2020.

THE COUNTRIES WHERE HUNGARY IMPORTS THE MOST TEXTILE AND APPAREL

THE COUNTRIES WHERE HUNGARIA IMPORTS THE MOST TEXTILE AND APPAREL INDUSTRY								
UNIT: MILLION \$		2016	2017	2018	2019	2020	CHANGE	SHARE
1	GERMANY	599	593	626	587	610	3,8%	19,5%
2	CHINA	89	173	404	309	490	58,9%	15,7%
3	POLAND	171	224	263	341	368	7,9%	11,8%
4	TURKEY	94	148	142	261	334	27,6%	10,7%
5	SLOVAKIA	206	220	235	201	183	-8,7%	5,9%
6	AUSTRIA	193	204	213	192	157	-18,0%	5,0%
7	ITALY	210	240	233	177	150	-15,3%	4,8%
8	SPAIN	106	133	134	138	109	-21,1%	3,5%
9	FRANCE	135	134	117	96	87	-9,1%	2,8%
10	UNITED KINGDOM	78	85	90	89	70	-20,8%	2,3%
TOP 10 COUNTRIES IN TOTAL		1.883	2.155	2.456	2.391	2.559	7,0%	81,8%
OTHER COUNTRIES		527	593	614	577	571	-1,0%	18,2%
TOTAL IMPORT		2.410	2.748	3.071	2.968	3.130	5,5%	100,0%

Source : ITC Trade Map - June 2021

TURKEY IS RANKED 4TH AMONG THE COUNTRIES WHERE TEXTILE AND APPAREL IMPORTS ARE MADE.

WITH A 10,7% SHARE, HUNGARY IMPORTED FROM TURKEY WAS VALUE OF 334 MILLION DOLLARS IN 2020.

THE COUNTRIES WHERE HUNGARY IMPORTS THE MOST TEXTILE AND RAW MATERIALS

THE COUNTRIES WHERE HUNGARIA IMPORTS THE MOST TEXTILE INDUSTRY								
UNIT: MILLION \$		2016	2017	2018	2019	2020	CHANGE	SHARE
1	CHINA	57	81	102	189	430	127,6%	27,3%
2	GERMANY	384	370	372	346	336	-2,9%	21,3%
3	ITALY	158	169	158	134	112	-16,7%	7,1%
4	TURKEY	84	91	82	92	85	-7,4%	5,4%
5	POLAND	66	81	79	81	82	2,1%	5,2%
6	AUSTRIA	77	82	84	74	69	-7,1%	4,4%
7	HONG KONG	3	5	5	6	41	565,9%	2,6%
8	ROMANIA	46	48	50	44	36	-17,9%	2,3%
9	CZECH REPUBLIC	39	42	44	40	35	-11,2%	2,2%
10	SLOVAKIA	40	43	43	40	34	-12,9%	2,2%
TOP 10 COUNTRIES IN TOTAL		953	1.013	1.018	1.046	1.262	20,6%	80,0%
OTHER COUNTRIES		320	339	342	333	315	-5,3%	20,0%
TOTAL IMPORT		1.273	1.352	1.360	1.379	1.577	14,4%	100,0%

Source : ITC Trade Map - June 2021

TURKEY RANKS 4TH AMONG COUNTRIES FROM WHICH HUNGARY IMPORTS TEXTILES INDUSTRY

WITH A SHARE OF 5.4%, HUNGARY IMPORTED FROM TURKEY WAS VALUE OF 85 MILLION DOLLARS IN 2020.

HUNGARY'S MOST IMPORTED TEXTILE AND READY-MADE SUB-PRODUCTS

HUNGARY'S MOST IMPORTED TEXTILE AND APPAREL SUB-PRODUCTS					
UNIT: MILLION \$	PRODUCT GROUP	2019	2020	CHANGE	SHARE
TECHNICAL TEXTILES		938.358	989.765	5,5%	100%
1	GERMANY	245.058	233.097	-4,9%	23,6%
2	POLAND	86.784	93.027	7,2%	9,4%
3	ROMANIA	101.974	81.758	-19,8%	8,3%
	TURKEY (16th)	21.775	19.127	-12,2%	1,9%
KNITTED CLOTHING (HS CODE 61)		930.154	955.026	2,7%	100%
1	POLAND	169.365	199.500	17,8%	20,9%
2	TURKEY	121.544	168.723	38,8%	17,7%
3	GERMANY	132.034	156.845	18,8%	16,4%
WOVEN CLOTHING (HS CODE 62)		658.550	597.723	-9,2%	100%
1	GERMANY	109.028	116.757	7,1%	19,5%
2	POLAND	91.175	86.237	-5,4%	14,4%
3	TURKEY	48.127	79.937	66,1%	13,4%
WOVEN FABRIC		256.911	210.780	-18,0%	100%
1	CHINA	65.211	56.906	-12,7%	27,0%
2	GERMANY	40.788	36.551	-10,4%	17,3%
3	ITALY	33.015	24.344	-26,3%	11,5%
	TURKEY (4th)	30.728	19.315	-37,1%	9,2%

IN THE WOVEN CLOTHING PRODUCT GROUP, WHICH RANKS THIRD IN HUNGARY'S IMPORTS, TURKEY RANKS 3RD WITH 80 MILLION \$.

IN THE WOVEN FABRIC PRODUCT GROUP, WHICH RANKS 4TH IN HUNGARY'S IMPORTS, TURKEY RANKS 3RD WITH 19 MILLION \$.

THE TECHNICAL TEXTILE CONSTITUTES THE BIGGEST IMPORT ITEM OF HUNGARY IN 2020 WITH 990 MILLION \$ AND TURKEY RANKS 16TH WITH 19 MILLION \$

IN THE KNITTED CLOTHING PRODUCT GROUP, WHICH RANKS SECOND IN HUNGARY'S IMPORTS, TURKEY RANKS 2ND WITH 169 MILLION \$.

HOME TEXTILES		165.173	167.532	1,4%	100%
1	POLAND	49.380	51.265	3,8%	30,6%
2	GERMANY	29.427	34.541	17,4%	20,6%
3	CHINA	22.684	22.056	-2,8%	13,2%
	TURKEY (4th)	16.610	13.967	-15,9%	8,3%
YARN		145.636	116.373	-20,1%	100%
1	ITALY	36.228	28.390	-21,6%	24,4%
2	CHINA	24.928	23.147	-7,1%	19,9%
3	TURKEY	21.240	12.220	-42,5%	10,5%
KNITTED FABRIC		129.517	128.108	-1,1%	100%
1	GERMANY	47.167	40.634	-13,9%	31,7%
2	CHINA	32.775	38.052	16,1%	29,7%
3	TURKEY	13.254	19.630	48,1%	15,3%
FIBRE		62.401	74.809	19,9%	100%
1	Germany	28.610	30.737	7,4%	41,1%
2	Mexico	5.725	14.365	150,9%	19,2%
3	Japan	3.017	7.422	146,0%	9,9%
	TÜRKİYE(17th)	206	282	36,9%	0,4%

Source: ITC Trade Map - June 2021

GMO FREE COTTON PRODUCERS IN THE WORLD

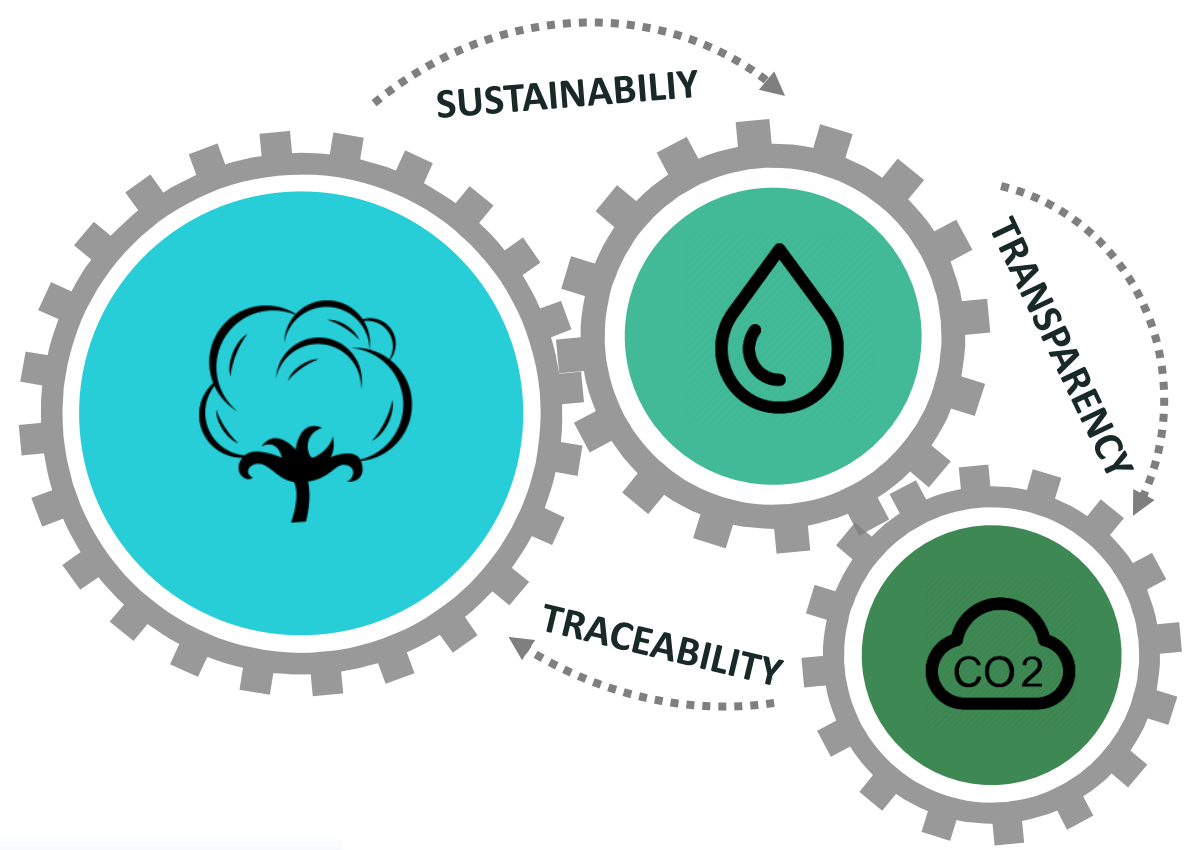
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- TURKEY**
950 Thousand Tons
- GREECE**
314 Thousand Tons
- SPAIN**
64 Thousand Tons

CIRCULAR ECONOMY

ITHIB

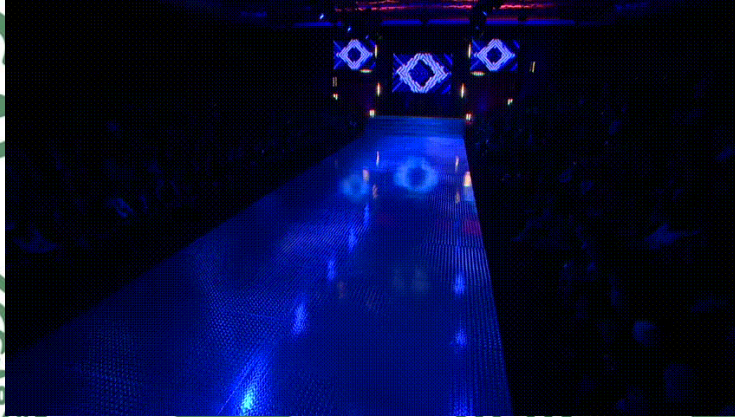


OUR PROJECTS

ITHiB

2021: THE YEAR OF SUSTAINABILITY

- IPA III project about monitor and reduce carbon emissions
- Sustainability Cluster in the Turkish Textile Industry
- Sustainability committee
- We have a request for regulation regarding the production of recycled textile products.





**AS TURKISH TEXTILE
AND APPAREL
INDUSTRY OUR MAIN
GOAL IS TO;**

***ESTABLISH A
STRONG STRATEGIC
PARTNERSHIP
WHICH SHALL
CONTINUOUSLY
DEVELOP MUTUAL
BENEFITS FOR BOTH
NATIONS***

THANK YOU



▶ *Better together...*



● SUSTAINABILITY



● TRACEABILITY



● TRANSPARENCY

