

IHKIB

&

TURKISH APPAREL INDUSTRY



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Istanbul Textile and Apparel Exporters' Associations (ITKIB)

- ▶ ITKIB is one of the 13 General Secretariat of Exporters' Associations exist country-wide.



- ▶ With its share of 14% in Turkey's total exports and over 7.000 member exporter companies, ITKIB is a fundamental industrial organization of Turkey.

Istanbul Textile and Apparel Exporters' Associations - ITKIB

ITKIB consists of four exporters associations:



▶ Istanbul Apparel Exporters' Association

▶ 75% of total apparel exports of Turkey



▶ Istanbul Textile and Raw Materials Exporters' Association

▶ 50% of total textile exports of Turkey



▶ Istanbul Leather and Leather Products Exporters' Association

▶ 75% of total leather products exports of Turkey



▶ Istanbul Carpet Exporters' Association

▶ 22% of total carpet exports of Turkey

Istanbul Apparel Exporters' Association - IHKIB



IHKIB, with its active member exporter companies nearly 7 thousand, realizes 75% of total ready-made garments and apparel exports of Turkey.



Mission of IHKIB

- ▶ IHKIB's main goal is;
 - ▶ to enhance the apparel exports of Turkey
 - ▶ to promote Turkish apparel industry around the world.
 - ▶ to support its members in all kinds of trade related activities.
 - ▶ to promote common interests of the industry in both national and international platforms as well as in governmental levels.



Activities of IHKIB

Promotion

- ▶ Organizing national participation to international fairs, Pure London (United Kingdom), CPM Moscow (Russia), WWD Magic Las Vegas e.g.
- ▶ Arranging trade delegations for target markets.

Design

- ▶ Encourage and support design capacity of the industry
 - ▶ Held young designer contests for young talents each year
 - ▶ Organize trend seminars and conferences

Training

- ▶ Organizing training programmes about foreign trade, marketing, market research etc.
- ▶ Preparing sectoral market reports

Representation

- ▶ Representing the industry in national and international platforms



Educational and Training Activities



- ▶ Established vocational high schools
- ▶ Established vocational faculty department

- ▶ Organizing training programmes about foreign trade, marketing, market research etc.

- ▶ Arranging informative seminars and meetings



Research & Development



- ▶ Coordination and establishment research-development centers and educational facilities aiming to support R&D activities within the industry.
- ▶ Ekoteks Textile Laboratory is an independent laboratory founded by IHKIB and serving for the industry and the society:

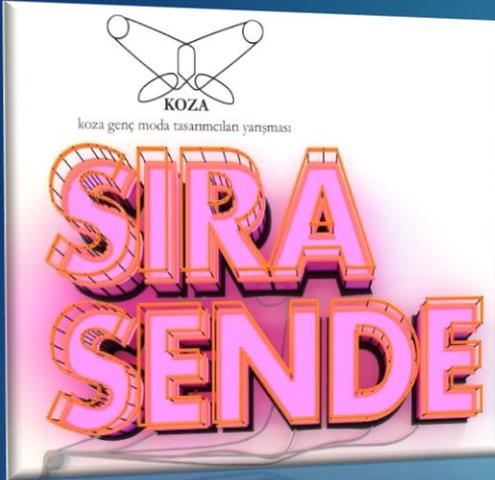


<http://www.ekoteks.com/en>

KOZA

Young Fashion Designers Contest

Starting from 1992, IHKIB promotes young talents to enter in fashion industry



Istanbul Mercedes-Benz Fashion Week

- ▶ Aimed to place *Istanbul* among 5 leading fashion cities of the world
- ▶ Istanbul is emerging as fashion center of the globalized world in terms of being a:
 - ▶ Platform for the recognition and introduction for Turkish designers and brands.
 - ▶ Meeting point for international buyers and suppliers.



International Fairs & Organizations

- ▶ PURE LONDON
- ▶ WWD MAGIC LAS VEGAS
- ▶ CPM MOSCOW



- ▶ WHO'S NEXT?
- ▶ CATEXPO FASHION
- ▶ KIEV FASHION SHOW

Istanbul Fashion Academy

IMA



- ▶ Founded as part of the Fashion and Textile Cluster Project financed by the European Union.

- ▶ Since 2008, IMA courses in fashion design, fashion product development and technology, fashion photography and media, fashion management and marketing in collaboration with the world's leading fashion schools London College of Fashion and Domus Academy (Italy).



TURKISH TEXTILE & APPAREL INDUSTRY IN FIGURES

General Outlook to Turkey's Economy

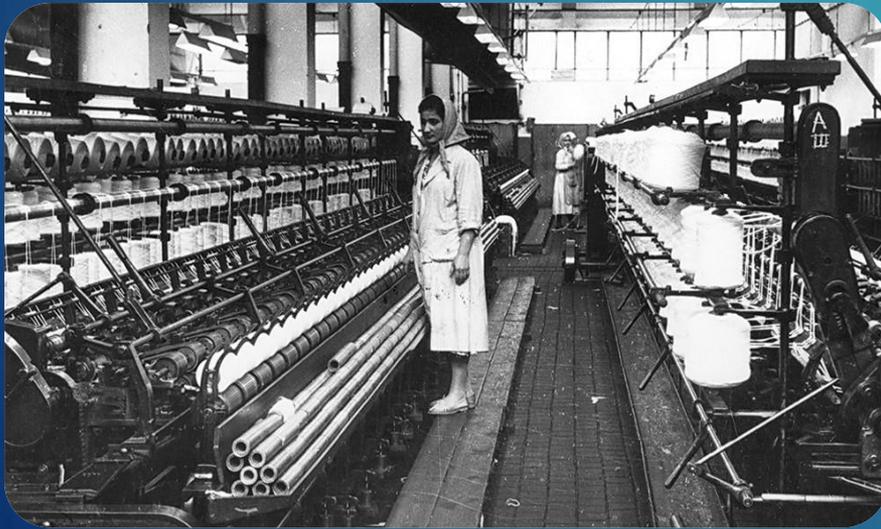
- ▶ Turkey is a unique country in terms of trade and foreign direct investment as it is a gateway to Europe, the Middle East, North Africa and Central Asia.
- ▶ Today, Turkey is the 18th largest economy in the world and 7th largest economy in Europe with a GDP of 718 billion dollars in 2015.
- ▶ Turkey is an active member of the G-20 which represents one of the world's most powerful economies.
- ▶ Turkey also has a strong government and is still an important strategic partner for the EU as a candidate country for full membership.

General Outlook to Turkey's Economy

- ▶ Turkey has a strong government supported by majority.
- ▶ Turkey is among the fast growth countries increasing by 4% in 2015 and 4,8% in the first half of 2016.
- ▶ Turkey has nearly 13 million young population, qualified and competitive labour force.
- ▶ Its liberal and reformist investment climate, highly developed infrastructure, advantageous geographic position, low tax rates and incentives and large domestic market, as well as customs union with the EU since 1996 provide ample opportunities for foreign investors.

Synopsis of the Turkish T&A Industry

Textile and apparel industry has always been the backbone for economic development of Turkey;



- ▶ The fundamental industry on the way to economic development
- ▶ Capital accumulation within the economy
- ▶ Contribution to other industries
- ▶ The first export industry of Turkey integrated to world economy
- ▶ Wide-ranging employment in every segments of the society
- ▶ Increase in income and welfare within the society depending on the wide ranging employment.
- ▶ Creation of value-added and productivity.

Turkish T&A Industry In Figures



The textile and apparel industry provides:

- × 2.5% of GDP
- × 6% of manufacturing production
- × 13% of manufacturing labor force
- × 12,4% of Turkish total export earnings

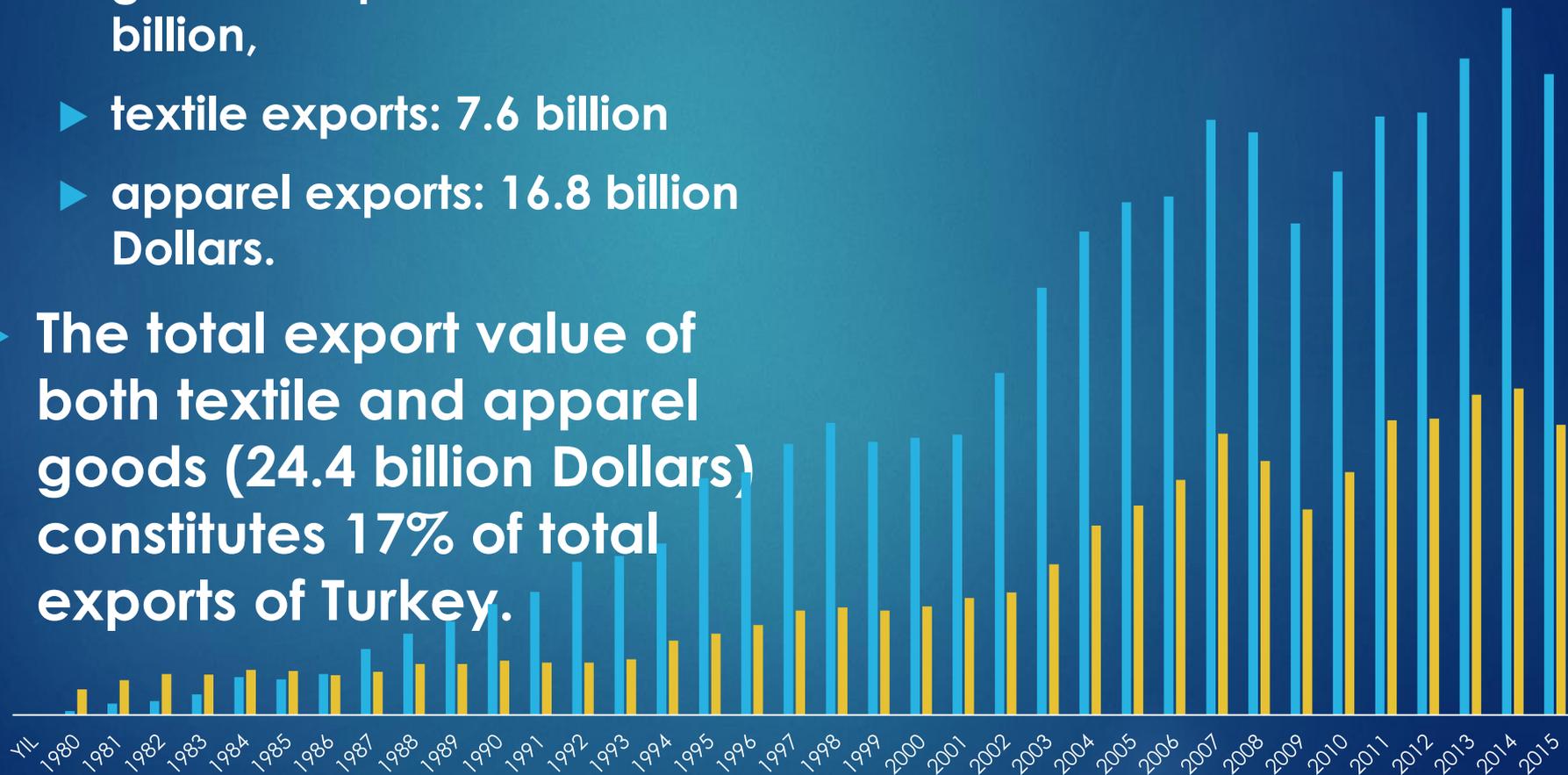
Turkish textile and apparel industry is the leader industry in manufacturing and employment in Turkish economy.

Export Values

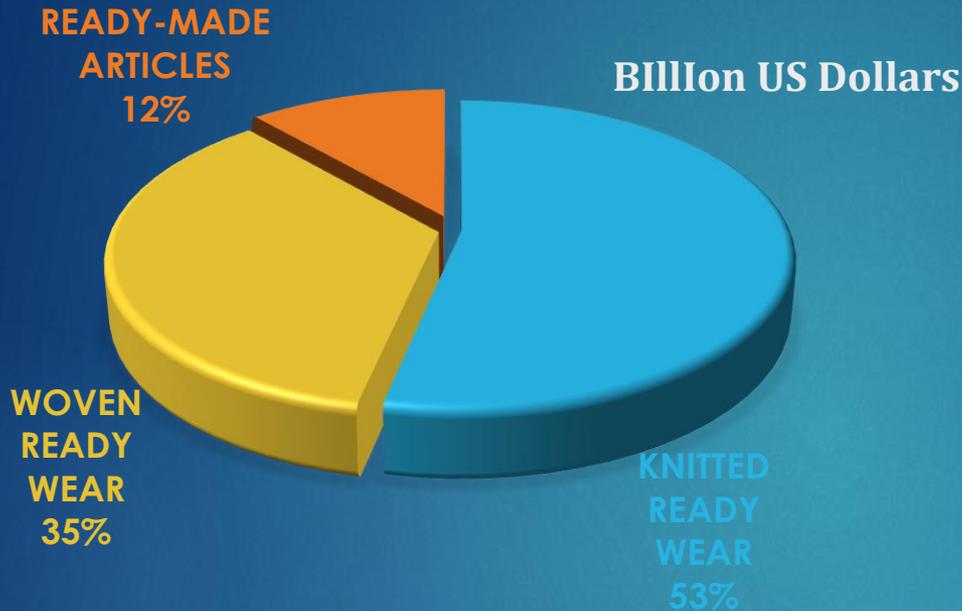
- ▶ In 2015, the export value of
 - ▶ general exports: 143.9 billion,
 - ▶ textile exports: 7.6 billion
 - ▶ apparel exports: 16.8 billion Dollars.
- ▶ The total export value of both textile and apparel goods (24.4 billion Dollars) constitutes 17% of total exports of Turkey.

Textile Exports: 7.6 Billion \$

Apparel Exports: 16.8 Billion \$



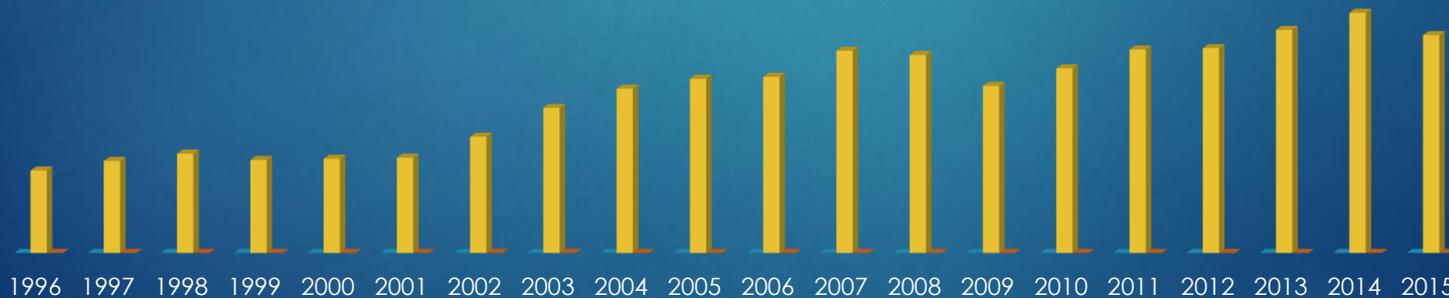
Turkish Apparel Exports – Products



In 2015:

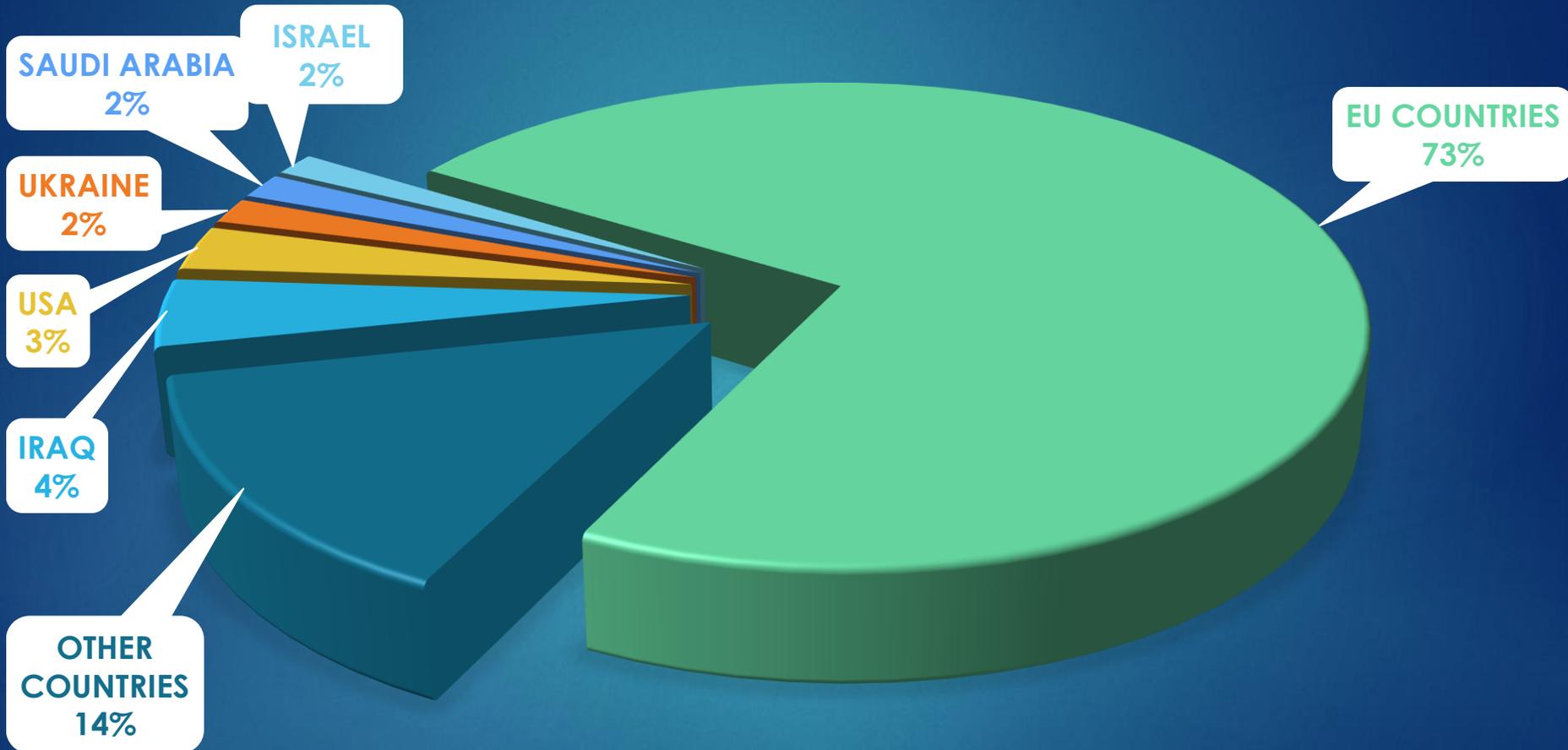
- × **Knitted Ready Wear exports:**
 - × 8.9 billion \$
 - × a share of 53%
- × **Woven Ready Wear exports:**
 - × 5.9 billion \$
 - × a share of 35%
- × **Ready Made Articles exports:**
 - × 1.9 billion \$
 - × a share of 12%

Export values in billion US Dollars

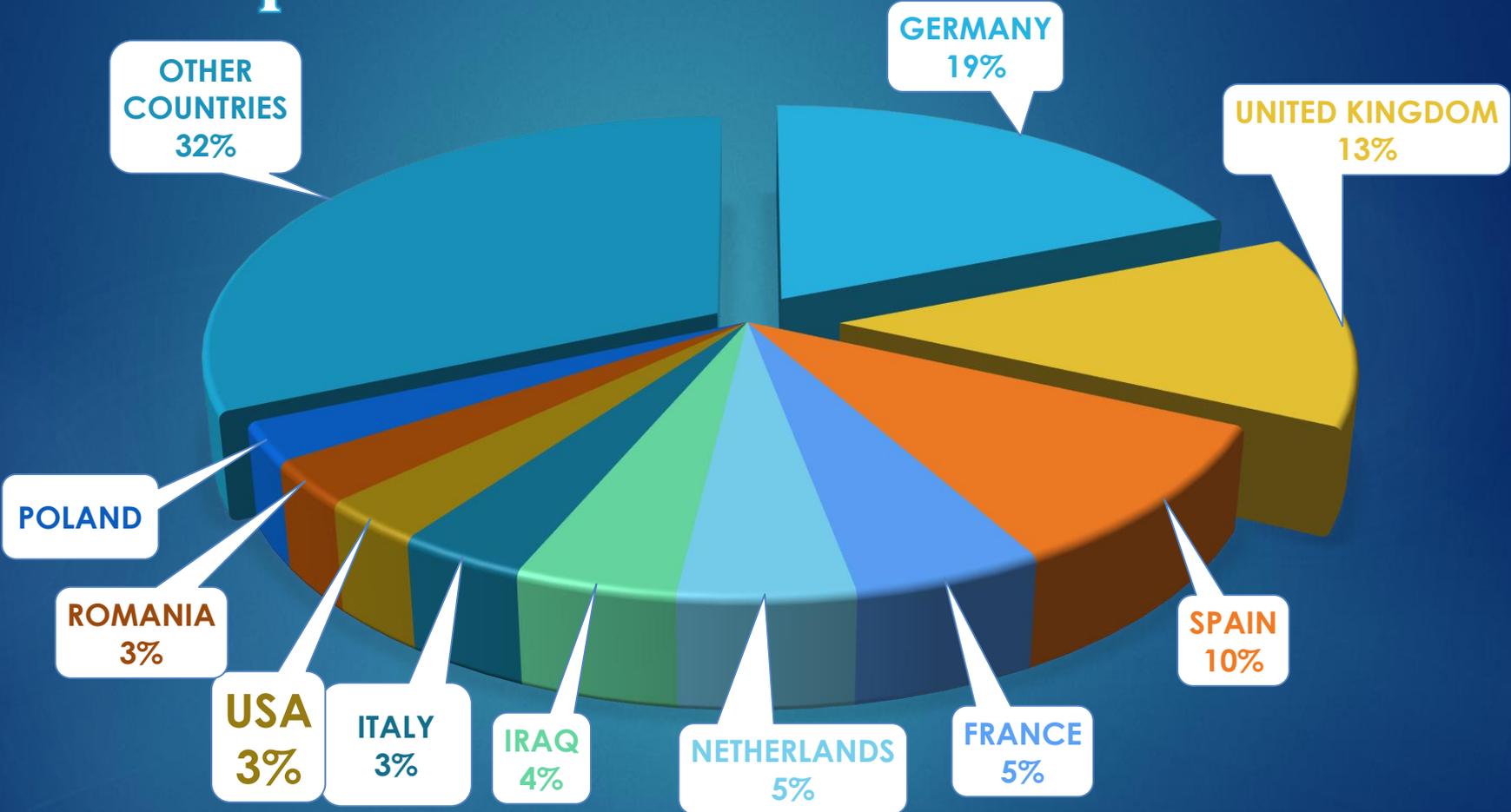


**In 2015,
16.8 bln. \$**

Turkish Apparel Exports – Markets



Turkish Apparel Exports – Top Ten Countries



Source: Ministry of Economy



THE PLACE OF TURKISH APPAREL INDUSTRY WITHIN THE GLOBAL VALUE CHAIN

Turkish Apparel Products in the World Market



Turkey is;

- The **7.** biggest apparel supplier in the world.
- The **3.** biggest apparel supplier in the EU market after China and Bangladesh.
- The **3.** biggest socks exporter in the world after China and Italy.
- The **3.** exporter in the world knitwear market after China and Bangladesh.

World Apparel Trade in 2015

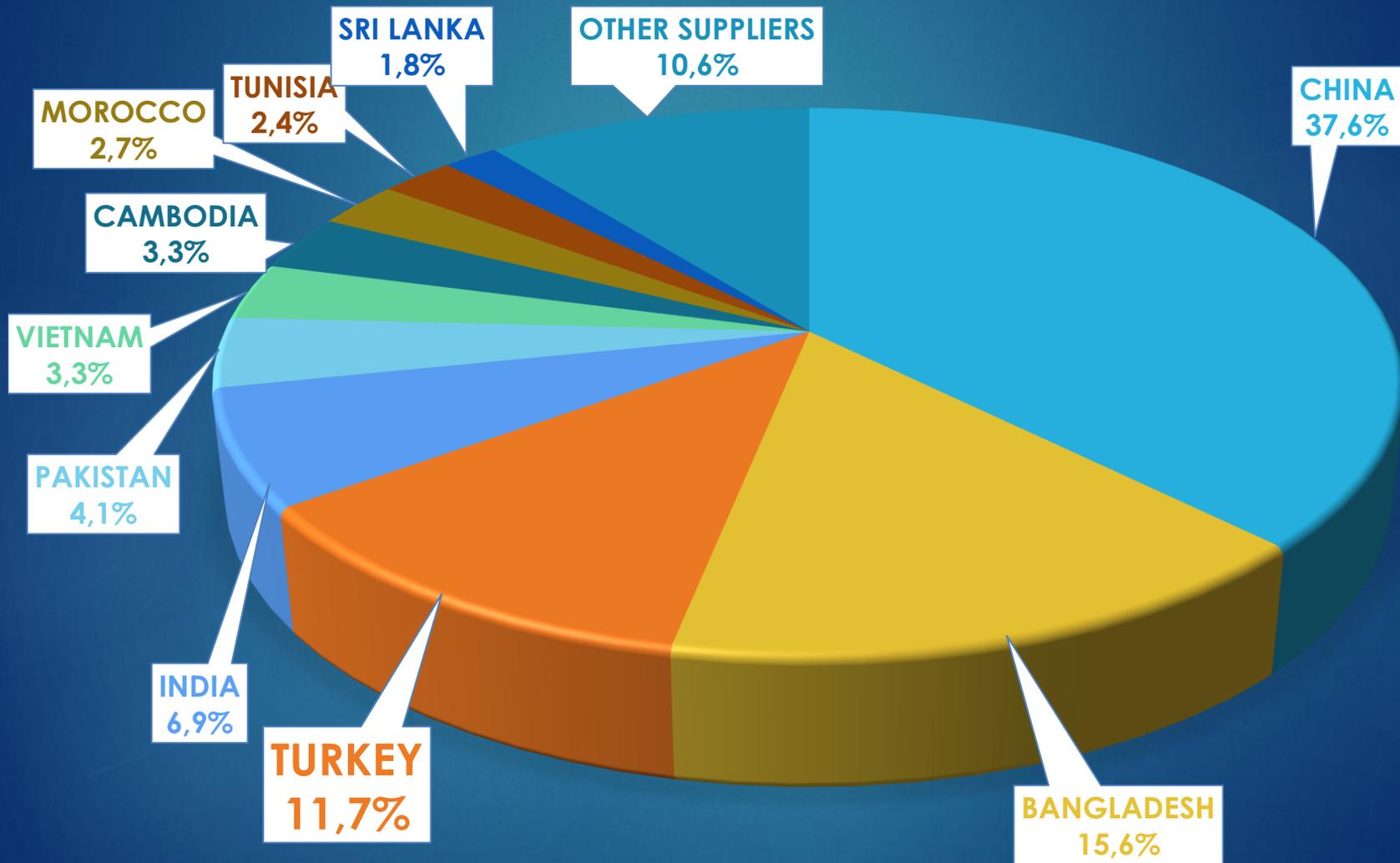
519 Billion US Dollars

Turkey ranks as the 7th biggest apparel exporter with an export value of 16,8 billion Dollars and a share of 3.2% in 2015.



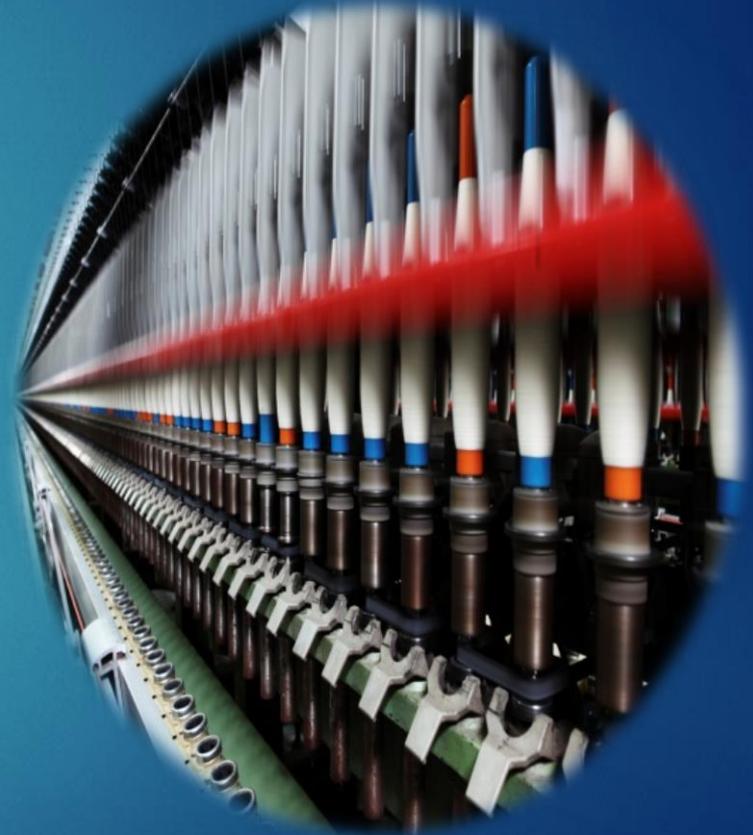
Turkey's Role in the EU's Apparel Market

90 bn Euro (2015)



Turkey – A Reliable Supplier

- ▶ Turkish economic performance in recent years,
- ▶ Investment in modern technology,
- ▶ Traditional accumulation of know-how,
- ▶ Skills, human power
- ▶ Design capacity



Competitive Advantages of Turkey

In apparel manufacturing:

- ❖ Qualified and Educated Human Sources
- ❖ Advanced Sub-Industry for Clothing Sector
- ❖ Product Diversification
- ❖ Fast Fashion with Full package
- ❖ Flexibility of production in small orders
- ❖ Creativity – Young Designers
- ❖ Compliance with the EU's Technical Regulation & Social Standards
- ❖ Easy access to world markets



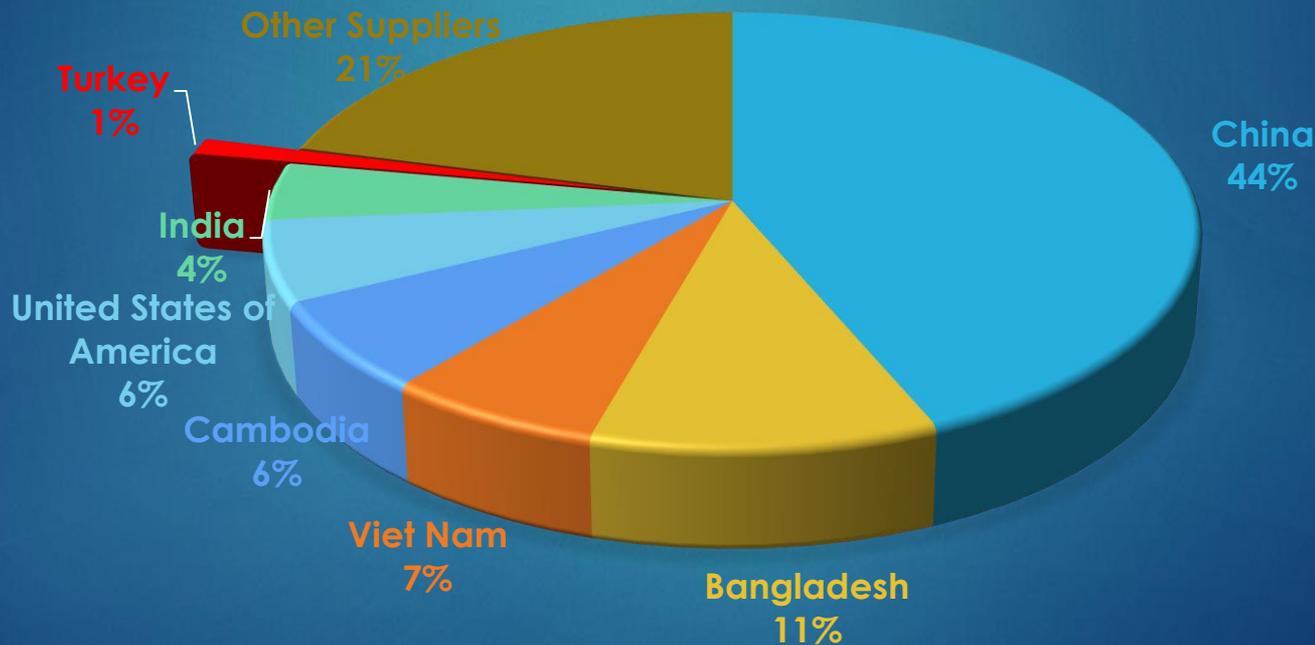


TRADE RELATIONS WITH CANADA

Apparel Imports Of Canada

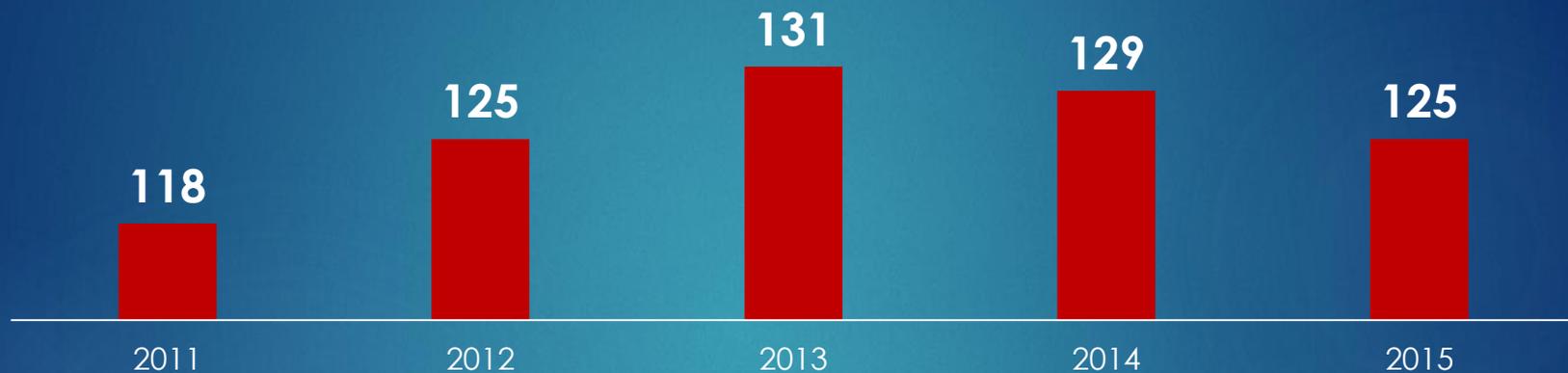
Canada Apparel Imports Total: 10,3 Billion \$

Canada Apparel Imports From Turkey:
125 Million \$

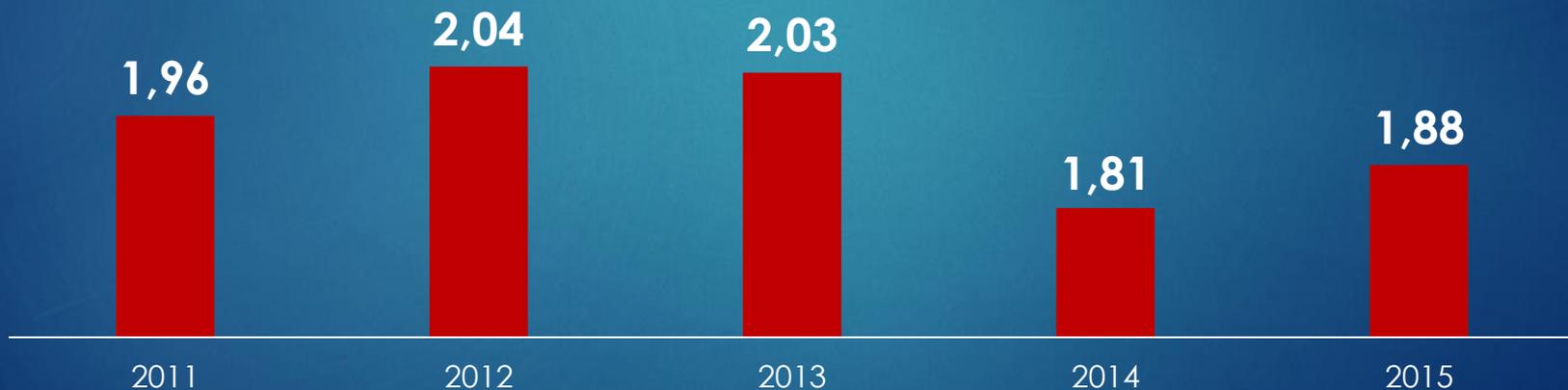


Apparel Trade of Turkey with Canada

Turkey's Apparel Export to Canada (Million \$)



Turkey's Apparel Import from Canada (Million \$)



Textile Trade of Turkey with Canada

Turkey's Textile Export to Canada
(Million \$)



Turkey's Textile Import from Canada
(Thousand \$)



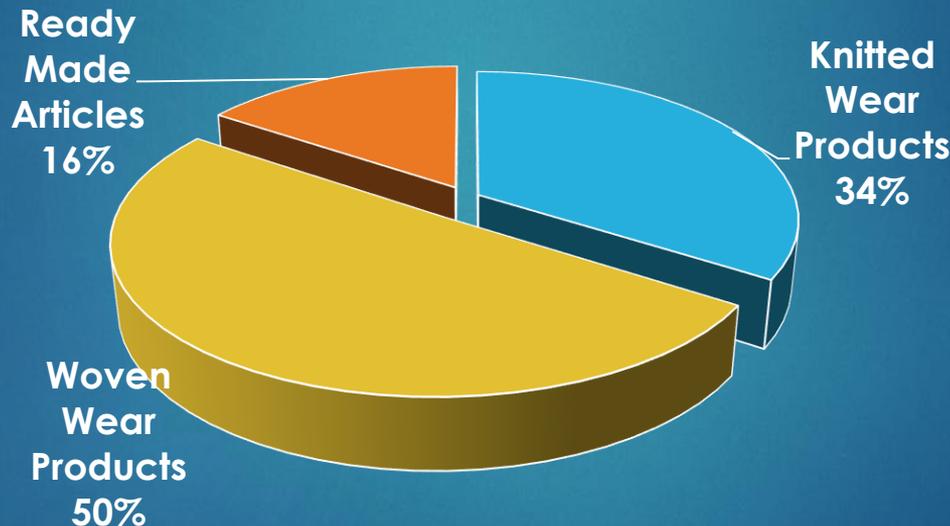
Apparel Exports of Turkey to Canada

The most exported product in ready made articles

CN Code: 6302 - Bedlinen, table linen, toilet linen and kitchen linen
Share in total apparel exports: 8%
Share in ready made articles exports: 51 %

The most exported product in knitted wear products

CN Code: 6109 - T-shirts, singlets and other vests
Share in total apparel exports: 9%
Share in knitted wear products exports: 27%



The most exported product in woven wear products

CN Code: 6203 - Men's suits, jackets, trousers etc & shorts
Share in total apparel exports: 18%
Share in woven wear products exports: 36%

ISTANBUL APPAREL EXPORTERS' ASSOCIATION-IHKIB



THANK YOU

ISTANBUL APPAREL EXPORTERS' ASSOCIATION

Address: Çobançeşme Mevkii, Sanayi Cad. Dış Ticaret Kompleksi B Blok Yenibosna
Bahçelievler / İstanbul / Turkey

Phone : +90 212 454 02 00

E-mail : info@itkib.org.tr

Fax : +90 212 454 02 01

Website : www.ihkib.org.tr



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