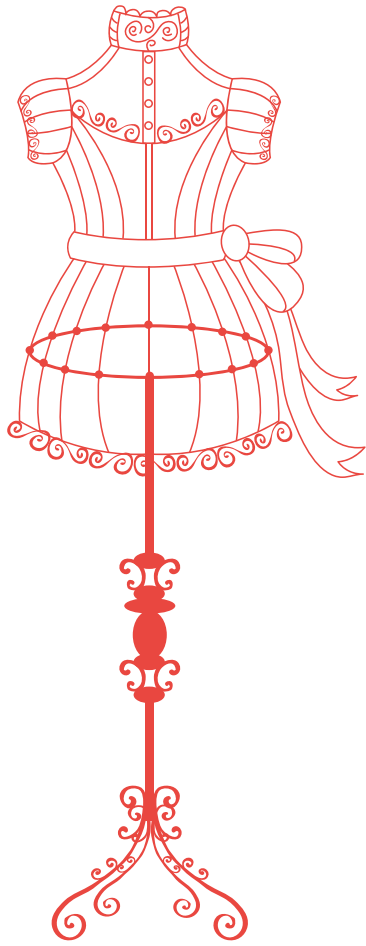




TURKISH APPAREL

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Meet the fashionable art



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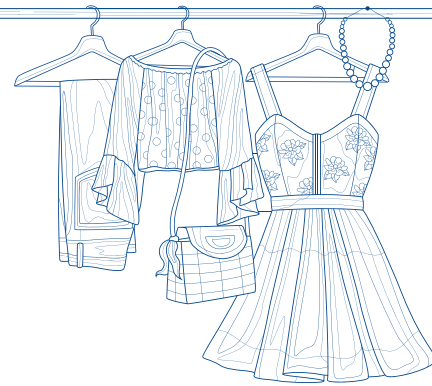
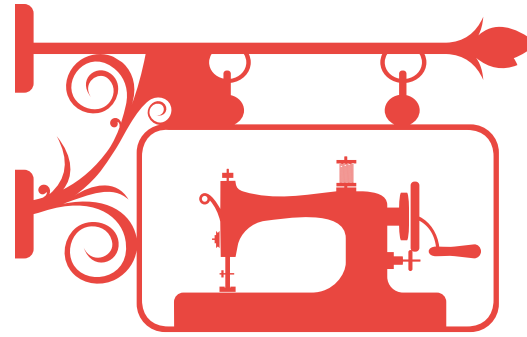
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Turkish Apparel is competitive by all means

Türkiye is far ahead from its competitors from different aspects, such as fabric, accessories, design, production capacity, environment and health conditions on production and also investment. When discussing Turkish Apparel, the central principles revolve around sustainability, agility, a profound comprehension of fashion, and an eco-friendly approach to production.



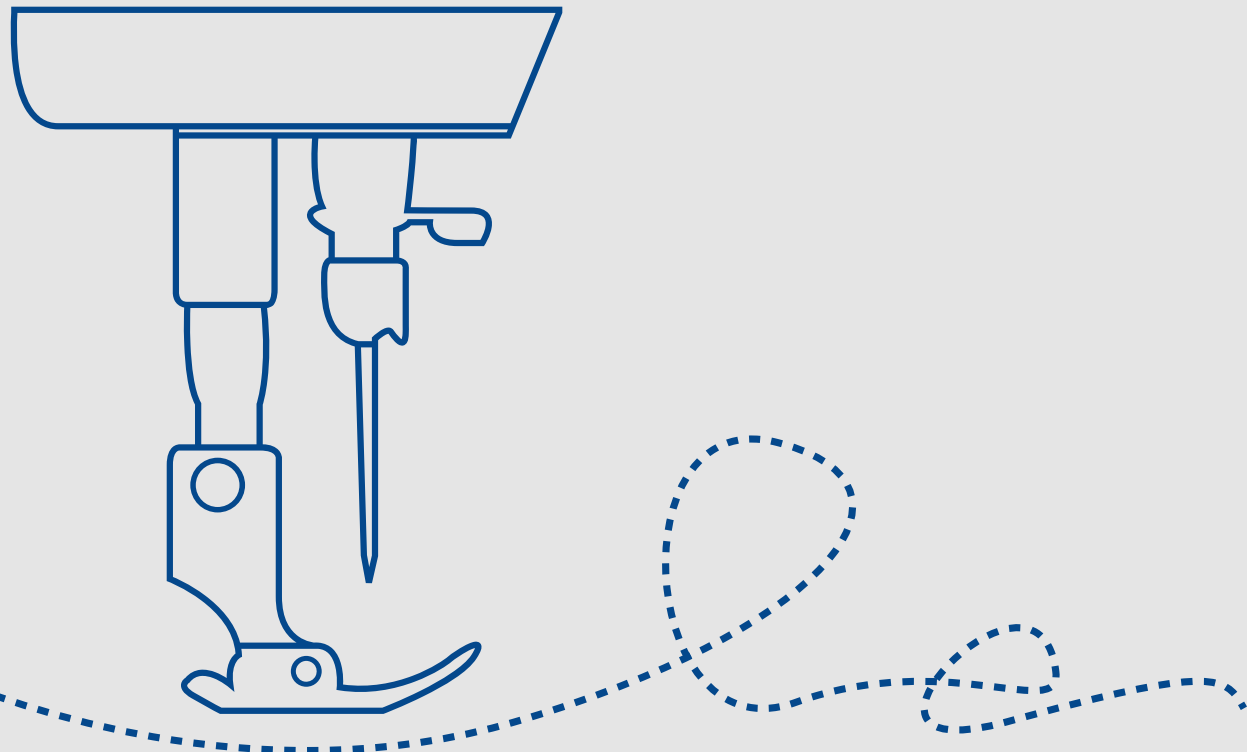
Thanks to its widespread and innovative manufacturing power, the apparel industry has always been a leading industry in Türkiye.



The Turkish apparel sector supplies procurement agencies operating on a global scale, while simultaneously offering its branded and quality products directly to consumers in its stores and outlets in many countries across the world.

Turkish Apparel is flexible and works on no-stock principle

The flexibility and elasticity in production in Turkish Apparel is remarkable. We can produce small quantities and big quantities at the same time. Turkish Apparel costumers enjoy the quick and lead delivery times while working with Turkish Apparel companies. Production starts immediately upon the reception of the customer order per our “no stock” motto.



Turkish Apparel can offer “slower fashion” of durable apparel goods with quick delivery times

Turkish apparel products are durable garments with long lasting lifetimes. With the pandemic, fast fashion is becoming slower and for “slower fashion”, Türkiye is the right place. Turkish Apparel’s competitive edge is rooted in creating long-lasting clothing items that blend style with greater marketability and smaller production quantities. This approach is expected to shape the future of the apparel business.



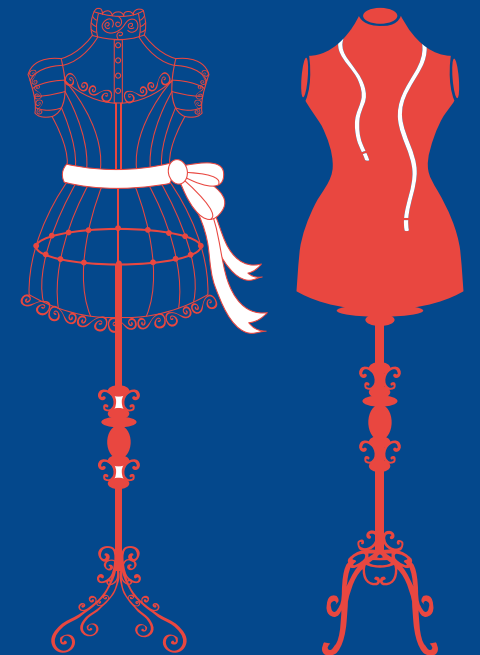
Turkish Apparel has high capability in every product category

Türkiye is also a country where a customer can find the producers of a very wide range of products from jerseys to knitted wear, from denim to socks and from t-shirts to outer wear.



The design and trendsetting abilities of Turkish Apparel move us to the forefront

The industry continually enhances its production capacity through following the best business models which are innovative and sustainable thanks to being committed to adopt global industry challenges with a dynamic approach.



Designs and collections are created through collaboration

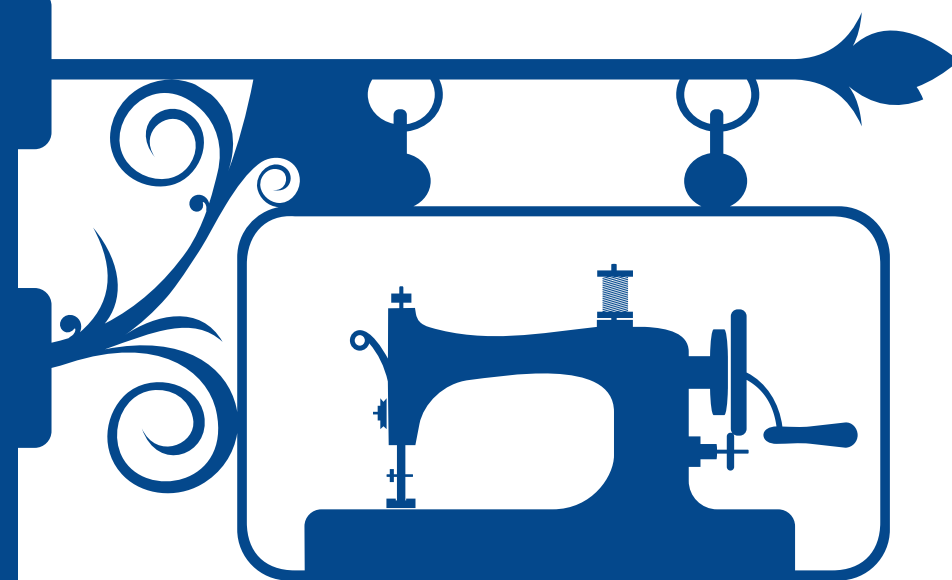
Turkish apparel companies design for global buyers and brands, who select designs from the offerings to create their collections. They may also contribute with their own ideas or Turkish apparel producer company may contribute to their own designs, and with a cooperative approach, collections are created.



All preliminary orders are coming to Türkiye from main buyers of the world.

İstanbul & Anatolia: Design and production center

For the apparel industry of Türkiye, Istanbul is the design, marketing and trading centre, and Anatolia is the production centre with different cities designed on apparel production utilizing large facilities and well-trained workforce. On the other hand, Türkiye isn't solely a sourcing destination; it is also home to numerous brands that operate thousands of stores and shops worldwide, particularly in Europe.

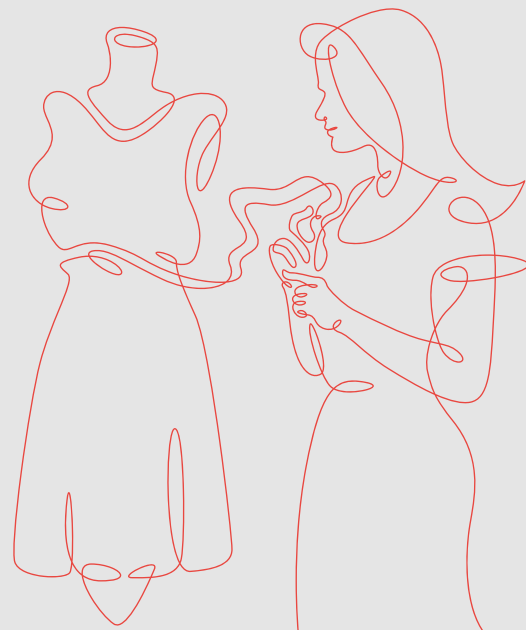




The industry, with its extensive and time-honored background, **possesses a significant reservoir of expertise in enhancing the value of garments.**

Turkish Apparel is an extension of a rich cultural and historical heritage into fashion

The advantages of quick delivery, design capability, sustainability, value added garment production based on quality, all of them are helping Turkish Apparel to be in fashion market rather than to produce basic products. The industry, with its extensive and time-honored background, possesses a significant reservoir of expertise in enhancing the value of garments.



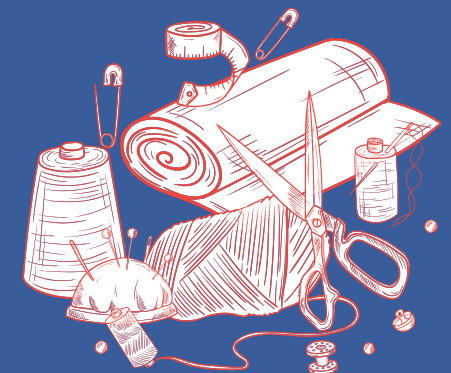
More creative with fashion and design talent developers

One of Türkiye's most competent fashion schools, IMA, conducts educational activities in all areas related to fashion with an innovative and modern approach, along with international collaborations.

In addition to IMA, there are dozens of vocational schools and faculties nationwide, offering professional education in fashion and textile design, ranging from undergraduate to postgraduate levels.

KOZA Young Fashion Designers Competition

The most significant platform that brings together young talents aspiring to build a career in fashion design with the industry. Over its 31-year history, it has created Türkiye's most influential fashion archive.

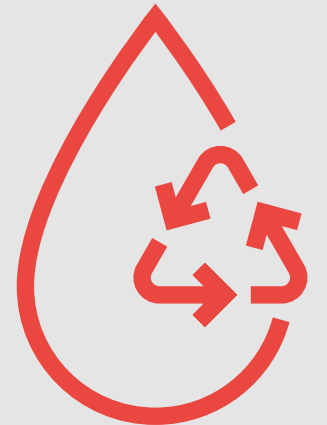


Water treatment, renewable energy and social standards

When we examine how Türkiye is investing in sustainability it is observed that there exist different angles and approaches on this subject. Ecologically we are trying to give less harm to the environment by using water treatment, collecting rainwater, wastewater retreatment and decrease water consumption. Also, Türkiye is not using any direct dyestuff for more than twenty years and azo dyes are not used in our sector.

Major companies are investing in renewable energy by using solar panels in their factories or windmills to decrease the level of energy used in factories. In Türkiye, recently built factories have different facilities regarding the environmental issues as well as health and safety conditions. In other words, we are designing our new factories in world's class; they are auditable and accredited all the time.

From the social rights and conditions side, it can be said that this topic has been considered by Turkish apparel sector for decades. This subject was in our agenda because of buyers' demands, however today we know that this is a "must" for our sector. And because of this, customers prefer to buy from Türkiye as they know that it is not easy for them to find all these together.



Ecologically we are trying to harm the environment as little as possible by using water treatment, **collecting rainwater, wastewater retreatment and decrease water consumption.**





It is not possible to trace and control sustainability without digitalization.

Digitalization and sustainability

The sustainability and the digitization are interrelated subjects, and they need to be considered together. A couple of years ago, the sustainability was a good thing to have, but today it is a “must” and not something optional. It is not possible to trace and control sustainability without digitalization. This is a relatively new aspect for the industry, and this has transformed the industry into a new shape. For instance, in denim production with the digitalization, the laser technology have begun to be used in designing processes and thanks to that, the water consumption in denim production has decreased so this is a good example to show the digitalization’s contribution on sustainability.

Digitalization in production and fashion

Apart from the designing, it is necessary to consider digitalization also from the production perspective. Türkiye has an extensively developed digital production system in apparel sector. These systems are integrated with each other. We can customize different systems according to our needs and these systems improve our production processes and make them more efficient.

That is why, Türkiye also emerges as a digital production hub for buyers because in Turkish apparel sector, the digitalization is used in a holistic way and production line and productivity is controlled digitally now.



Today, about 14% of Turkish Apparel is online and it is estimated that this ratio may grow up to 50%.

Digitalization and trade promotion

Türkiye is the second most developed country on digitalization in apparel production and this proves that Turkish apparel producers have invested more in digitalization.

Quick delivery also supports Online Business, which Turkish Apparel is familiar with.

Online business is becoming more important and growing to the contrary of offline business. Today, about 20% of Turkish Apparel is online and it is estimated that this ratio may grow up to 50%. Online business needs flexibility and doing business with rather smaller quantities. The experience of Turkish Apparel in producing quick and smaller quantities of many different styles and models at the same time supports online business.



Today, about 20% of Turkish Apparel is online and it is estimated that this ratio may grow up to 50%.

“Türkiye can offer fast and flexible supply chain solutions”

Türkiye is a competitive sourcing destination with a well-developed and integrated vertical industry. The country has a culture of speed and innovation that enables it to adapt to the changing needs of the global market. Türkiye can offer fast and flexible supply chain solutions to its customers, as well as stock management and call-off options. Türkiye is also a hub for design and innovation, with a focus on quality and premium products. Türkiye’s proximity to the EU, UK and USA markets provides it an advantage in terms of transit times and logistics. Türkiye is committed to sustainability and circular economy principles, and is investing in green technologies and practices.

Şafak Kipik

CEO
Spring Near East Mfg.Co.Ltd.

“The Türkiye garment industry is an important European sourcing hub”

The Türkiye garment industry is an important European sourcing hub for PVH Corp. due to its well-developed manufacturing base and strong logistics network, deep knowledge of apparel production, advanced quality standards, and commitment to improving environmental and social responsibility standards. We greatly appreciate our partnership with all our local suppliers and thank them for their commitment to helping drive our business strategy forward.

Burcu Kilincer Erdogan

Sr. Director, Apparel Sourcing Europe
Türkiye Country Lead
PVH Corp.

“Türkiye is a very rich country in terms of all kinds of resources”

Türkiye is a very rich country in terms of all kinds of resources. People are benevolent, warm-blooded and open to innovation. During the past 20 years; El Corte Ingles has settled a sourcing office in Türkiye and remain one of the most important source of trend, fashion and novelties for our collections. In Türkiye, we have found the proximity to source in a quick time to the Spanish market, products with the latest fashion trends, best quality standards and sustainable manufacturing process for our clients

Angelamaria Buitrago

Country Manager
El Corte Inglés Liaison Office Türkiye

Türkiye is also a hub for design and innovation, with a focus on quality and premium products.

In-season inventory management is always a competitive advantage for Turkish Apparel

Stock holding is a very important traditional competitive advantage of Turkish Apparel. In season inventory management ability of the industry is taking the attention of international buyers and brands recently. Türkiye can be a very good partner on this end, because production in small quantities and fast reactions is really an asset in Türkiye.

Value addition is the key in understanding the dynamics of Turkish Apparel.

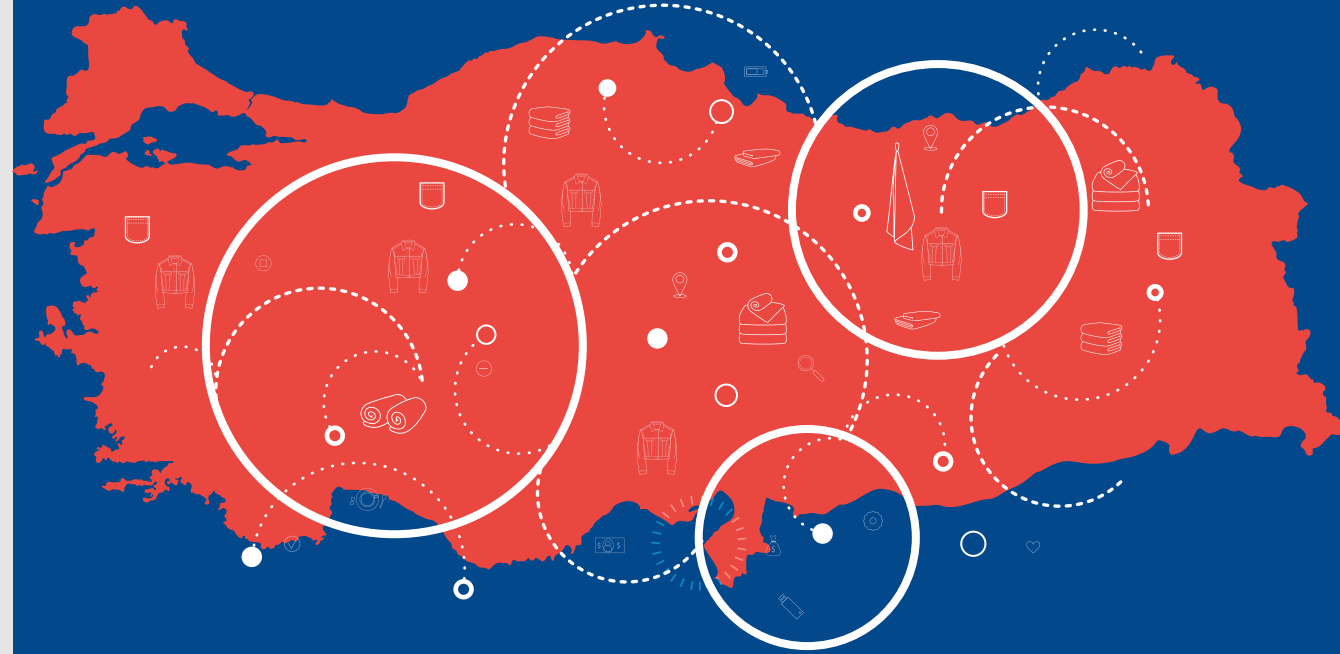
Initially, chain stores primarily emphasized price and speed. However, as global apparel discussions started including circularity, sustainability, durability, and similar concerns, the value added to garments gained significance. Consequently, brands such as Uniqlo introduced higher-end brands like Massimo Dutti, COS, and others.

“Partner chain ring” rather than “supply chain”

Rather than becoming a supply chain ring, Turkish Apparel wants to be “partner chain ring”. Becoming a partner chain ring gives more responsibilities, meaning not only shipping on time and to give the right price, but being also ready to take care of the end-customer satisfaction. A buyer is only a single company until the placement of the order, but after the placement of the order, the buyer becomes the production itself. To play the role properly, the producer has to be responsible from top to bottom of the quality understanding of the buyer.

B ACTIVE WEAR R A TOWEL N D DENIM G C HOSIERY N

The industry holds a leading position in the global market due to the “Made in Türkiye” label, supported by Europe’s largest vertically integrated apparel and textile manufacturing capacity. Additionally, we excel in sustainability, organic and better cotton production, social responsibility, transparency, ethical trade, recycled manufacturing, fast supply processes, and fashion and design expertise, all while maintaining flexibility in product development.



The industry is always enhancing its production capacity through following the **best business models** which are **innovative and sustainable** thanks to being committed to adopt global industry challenges with a dynamic approach.

Türkiye is new destination for active wear supply

Türkiye's dynamic growth in the active wear industry is catching global attention, making it a new preferred destination for importers. In the past five years, Türkiye has witnessed a significant 100% increase in the major sports apparel markets such as the USA, France, Germany, Japan, and the UK.

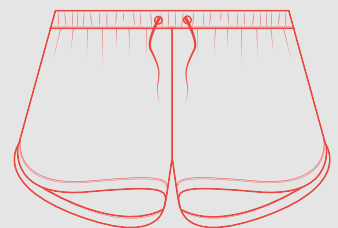
Active-wear product category has experienced a noticeable growth in Türkiye's apparel in recent years. This development has enhanced the country's capabilities in sports clothing production and its competitive position in the global market. While Türkiye's apparel exports achieved a 4.8% growth in 2022 compared to the previous year, the active-wear exports surpassed this increase with an 8.5% growth rate.

Turkish apparel is renowned for its high-quality fabrics, sewing techniques, and design abilities. This capability allowed the sector to quickly adapt to the increasing global demand for active-wear products, particularly in response to the pandemic.

Türkiye's self-sufficiency, proximity to raw material suppliers, and advanced manufacturing infrastructure have facilitated sports clothing production. This, in turn, enables the production of competitive-priced products.

Turkish sports clothing brands have started to establish a significant presence in European, American, and Middle Eastern markets by offering quality products at competitive prices.

Türkiye continues to invest in sustainability, innovation, and access to global markets to sustain its growth in the sports clothing and active-wear sector. With its quality, innovation, and environmental consciousness, Türkiye is moving towards becoming a recognized sports clothing manufacturer worldwide while maintaining this growth trend into the future.



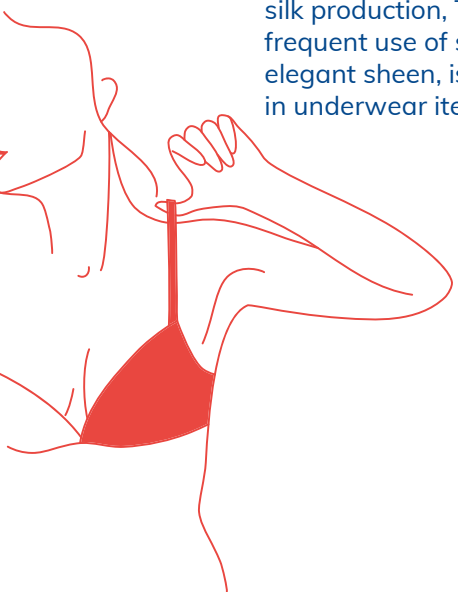
Türkiye exports the **most woven and knitted sports, skiing, and swimwear.**

Perfection in subtle details Turkish Lingerie

“Türkiye is the largest producer in the region, especially in the lingerie product group, including underwear and socks, and it is also among the world’s most important production centers.”

Türkiye stands out as a significant player in the global lingerie export market. The sector’s raw material strength and environmentally friendly high-quality production set Türkiye apart from its competitors. Among the items that Türkiye exports the most in the inner and nightwear category are knitted and woven bras, corsets, corset belts and garters.

In the Turkish lingerie and underwear sector, natural and high-quality materials like cotton and silk are frequently preferred as the main raw materials in production. Cotton, in particular, is widely used in underwear products, providing a comfortable underwear experience thanks to its skin-friendly and breathable properties. Not only in cotton production but also in sericulture and silk production, Türkiye has made significant advancements, leading to the frequent use of silk in underwear products. Silk, with its soft texture and elegant sheen, is a preferred choice for those seeking luxury and sophistication in underwear items, adding a touch of elegance to underwear products.



Cotton and silk offer consumers a broad range of choices in terms of both comfort and **style in various products within the Turkish hosiery industry.**

01

Türkiye accounts for more than 10% of the total apparel clothing exports in the hosiery product category.

Cotton woven nightgowns and bathrobes produced in Türkiye for women and girls have garnered significant attention from global brands. Among the most exported products are cotton knitted briefs and panties for men and boys, as well as cotton knitted nightgowns and pajamas for women and girls.



02

Germany, the world’s second-largest innerwear buyer, is Türkiye’s largest market for innerwear exports. Türkiye holds the position of the third-largest innerwear supplier to Germany with a 5.6% share.

Türkiye increased its exports to the United States, the world’s most important innerwear importer, by approximately 94% from 2018 to 2022, raising its market share to 0.6%.



03

With production facilities spread across the country, Türkiye is among Europe’s largest innerwear manufacturers and ranks 10th among the world’s most significant innerwear exporters.

Among the suppliers to the United Kingdom, the fourth-largest innerwear importer globally, Türkiye ranks 8th and has increased its exports by 13.8% from 2018 to 2022.



World's second largest socks supplier

The socks industry is, one of the leading sub-industries of the Turkish apparel and apparel industry.

Turkish socks exporters ranked seventh among the US's socks suppliers with a 2.1% share from the US market.

"Türkiye, the world's second-largest sock exporter, is the first choice of Europe's largest sock importers."



Turkish socks exporters ranked seventh among the US's socks suppliers with a 2.1% share from the US market.

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Türkiye, the world's second-largest sock exporter, is the first choice of Europe's largest sock importers.

DESIGN NEWS

OUTLOOK

“There are many advantages that make Türkiye a major supplier”

The rapidly evolving apparel industry in Türkiye has gained significant recognition worldwide by incorporating creativity into its core through development-focused efforts and strategic planning. The industry has been successfully raising its goals for years. The industry’s ability to encompass design, production, raw materials and adapt quickly to changes due to its agile structure is what makes us successful on a global scale. It envisions its future beyond existing standards, pushing forward with updated technologies. The apparel industry is actively developing activities and strategies to adapt to new competitive conditions, promote branding, ensure product variety, and embrace modern technological production in order to contribute to the local economy in Türkiye. Furthermore, it is crucial in converting research and innovation results into effective solutions. The adaptability of our sector to changes and trends, its strategic location, and its ability to maintain this advantageous position make it a preferred choice and contribute to Türkiye’s status as a major supplier. The emphasis on branding efforts over the years, being a driving force in manufacturing industry production and exports, providing quality raw materials, having a dynamic and young population, proximity to export markets, and the use of advanced technologies have placed Türkiye at the forefront.

Türkiye gains a significant advantage as a apparel industry that has transformed various cultural values and economic outputs from its geographical structure. Our culture, the fusion of experiences with research and innovations, and the transformations from trends and ideas to value make our country unique.

Belma Özdemir

**Co-President of the Fashion
Designers Association**

“The quality and production standards set Türkiye apart”

I believe that the key distinguishing factor of the Turkish apparel industry from its competitors is the exceptionally high quality and production standards it maintains.

Another advantage of the sector lies in the multitude of specialized production facilities spread across various regions in Türkiye. This extensive network of specialized production facilities sets the industry apart from its competitors.

Given our rich geography and history, Türkiye has embraced a mission to be a longstanding center for textile and weaving, dating back to ancient times. These lands, due to their natural features and the craftsmanship of our people, particularly constituted the textile hub of Anatolia. With contemporary interpretations developed over the years and evolving technology, we have now reached a point where textiles have transformed into something entirely different. One of the key factors that distinguishes us from other global players, especially in comparison to production in the Far East, is our robust production capacity, rooted in our history.

Nihan Peker

Co-President of the Fashion Designers Association

“Textile manufacturers have a rich history in Türkiye”

The key characteristics that set the Turkish Apparel sector apart from its competitors are the entrepreneurial spirit and skill of the Turkish people, coupled with a flexible, hardworking, and youthful mindset. When this perspective is combined with rejuvenated principles across all aspects, we can easily say that the Turkish Apparel is a powerhouse.

By combining traditional manufacturing methods with cutting-edge technologies and emphasizing sustainability and technology, the Apparel production systems possess the potential to become major global players. This potential is further fueled by the region's inherent commitment to health and sustainability, as well as its access to organic raw materials.

This beautiful geography that Türkiye is built upon has a chain of cultural values. It is impossible for this geography, which has been marked by dozens of civilizations such as the Hittites, Sumerians, Seljuks, and Ottomans, to move away from its cultural values. All of our approaches, whether we are aware of them or not, are a result of these cultural values.

Türkiye's textile manufacturers have a deep-rooted past, with their natural resources already providing materials that are suitable for clothing codes. Having both plant-based and animal-based resources, and processing, using, and wearing them for thousands of years, is one of Türkiye's most important advantages. One of our responsibilities in this era is to contribute to rebuilding this cultural accumulation with new cultural and technological codes that we will also contribute to in the future.

Arzu Kaprol

Fashion Designer

“The strong cultural mosaic makes Türkiye unrivaled in the apparel industry”

The biggest advantage that sets the Turkish Apparel sector apart from its competitors is its speed. Short production times are of paramount importance for many fast fashion brands. Türkiye's proximity to Europe is another advantage for the industry. Additionally, the Turkish Apparel sector offers a wide production palette. Many strong brands can have their products prepared from A to Z in Türkiye, spanning various categories.

Finally, I believe that our country's mentality of producing practical solutions is also highly important for global buyers.

The Apparel industry is one of the oldest and most prominent sectors in Türkiye. Being heirs to many significant civilizations, our colorful and powerful mosaic of history and culture makes Türkiye almost unparalleled in terms of equipment and quality in the Apparel sector.”

Atıl Kutoğlu
Fashion Designer



“Production reflects the richness of Türkiye's culture”

I believe that the platform created by brands that can elegantly translate Turkish culture into a refined design language is Türkiye's most significant advantage. Türkiye has a rapidly growing textile industry and, consequently, a swiftly rising fashion industry. To make Turkish fashion appealing to foreign buyers and to establish an international presence, I think it's crucial for more brands to modernize and incorporate Turkish values into their designs. The proliferation of such brands will undoubtedly create a significant advantage for Türkiye. There are some beautiful brands that have achieved this on their own and have been able to propel themselves onto international platforms. Even though individual designers may not wield significant economic power, they play a crucial role in reflecting a country's design language. I can particularly see the reflections of the rich genetic cultural wealth in the younger generation. We will soon hear many more Turkish names on the international fashion stage. I believe that highlighting production in Türkiye is of utmost importance in terms of reflecting the rich cultural heritage specific to Türkiye.

Bora Aksu
Fashion Designer



The new destination for the global fashion industry

The İstanbul Fashion Connection Apparel and Fashion Fair (IFCO), has become Europe's largest apparel and fashion fair in a short period of time by bringing together all product groups of the apparel and fashion industry under one roof.

The Core İstanbul brings new approaches to fashion Organized concurrently with the IFCO Fair, The Core İstanbul offers creative and collaborative solutions covering every aspect of the fashion industry, bringing together fashion designers with international buyers of apparel brands and providing opportunities for brands and designers to transform their collections into commercial ventures.

More Than Just a Fair

More than three hundred companies will meet with thousands of buyers from tens of countries, especially in women's and men's clothing, baby and children's clothing, denim and sportswear, evening dresses, wedding dresses, underwear, socks, leather and fur clothing, shoes.



Trends inspiring all sectors, from fabrics to textures, from clothing to colors, and related to fashion and other industries, are showcased in the trend area.



IFCO contributes to making the fair more interactive with seminars and programs presented by significant figures.

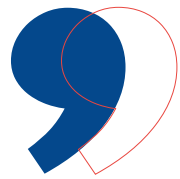
Istanbul Fashion Connection, an international event that will make an impact all over the world and where design, trends and brands will be presented in Istanbul, will bring together its export-oriented participants with buyer companies from all over the world, especially EU Countries, the UK, Russia, Ukraine and the USA.

İstanbul, the fashion capital of Türkiye

Türkiye is one of the leading countries in apparel design and this exhibition will introduce participants' own collections and designs to new locations and customers through buyers from all around the globe, which will be beneficial for all parties. İstanbul is the perfect location for this exhibition since it is one of the most accessible and attractive cities in the world. Visitors will meet thousands of established and upcoming designers; discover new collections and textiles, meet new business and solution partners.

İstanbul, the fashion capital of Türkiye, is the ideal center to bring together trends, fashion, design, brands, trade and collaborations together.

At the Istanbul Fashion Connection Exhibition you will find trend areas, seminars, workshops and fashion shows that will bring together design, interaction and experience especially in the topics of digital transformation, smart clothing, technical textiles and sustainability.



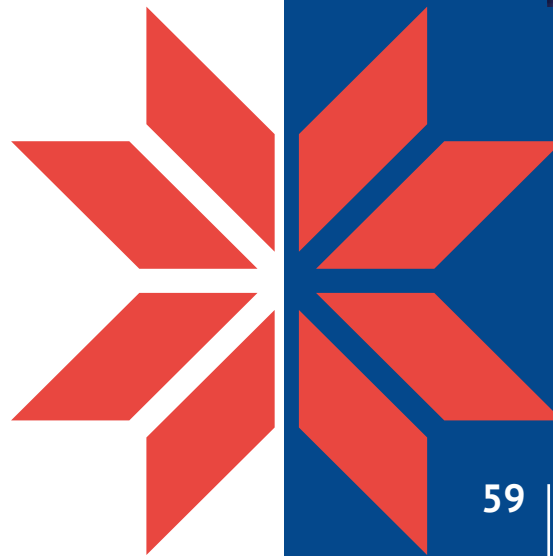
At the IFCO Fair, which showcases the strength of the Turkish apparel and clothing sector, seminars and programs will be organized by prominent figures in the industry. **Seminars will cover all developments in the fashion industry and convey the latest trends.**



The IFCO Fashion Show, featuring special collections from participating companies, will provide enjoyable moments for both domestic and international visitors.



Trends inspiring all sectors, from fabrics to textures, from clothing to colors, and related to fashion and other industries, are showcased in the trend area.



Contact information to reach Turkish exporters

Turkish exporters connect with buyers through online and offline platforms. Türkiye, strategically located in terms of logistics, also provides significant advantages to foreign buyers in terms of exports. There are multiple ways to reach Turkish exporters.

Türkiye Exporters Assembly (TİM)

TİM is the only umbrella organization of the Turkish exports, representing more than 103,000 exporters operating in 27 sectors registered under 61 Exporters' Associations.



The İstanbul Textile and Apparel Exporters' Associations General Secretariat (İTKİB)

The İstanbul Textile and Apparel Exporters' Associations General Secretariat (İTKİB), which represents the Apparel, Textile, Leather, and Carpet sectors, supports its members in increasing value-added exports and also assists foreign companies in finding the right manufacturers and products in Türkiye.



İstanbul Apparel Exporters' Association (İHKİB)

İstanbul Apparel Exporters' Association (İHKİB), which has been representing the Turkish Apparel.



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iHKiB

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iHKiB

TURKISH APPAREL FASHION

PRODUCTION DENIM

TOWEL **ACTIVE-WEAR** HOSIERY

SOCKS **SUSTAINABILITY**

DIGITALIZATION **TURKISH APPAREL**

FASHION **PRODUCTION**

DENIM TOWEL **ACTIVE-WEAR**

HOSIERY SOCKS **SUSTAINABILITY**

DIGITALIZATION **TURKISH APPAREL**

FASHION PRODUCTION DENIM

TOWEL **ACTIVE-WEAR** HOSIERY

SOCKS **SUSTAINABILITY** DIGITALIZATION

TURKISH APPAREL **FASHION** PRODUCTION

TRKISH APPAREL