

**ITKiB**Hedef

July 2024 - Issue: 3  
Istanbul Textile and Apparel Exporters' Associations

# VISION

**IFCO**  **ISTANBUL  
FASHION  
CONNECTION**

**INTEREST AND  
PARTICIPATION IN  
IFCO IS INCREASING**



**TEXHIBITION**  
ISTANBUL

**THE NEW MEETING  
POINT OF THE  
TEXTILE WORLD**



ISTANBUL  
FASHION  
CONNECTION

WHERE  
FASHION  
CONNECTS

# EUROPE'S BIGGEST APPAREL & FASHION EXHIBITION

7-9 AUGUST 2024

5-8 FEBRUARY 2025

ISTANBUL EXPO CENTER



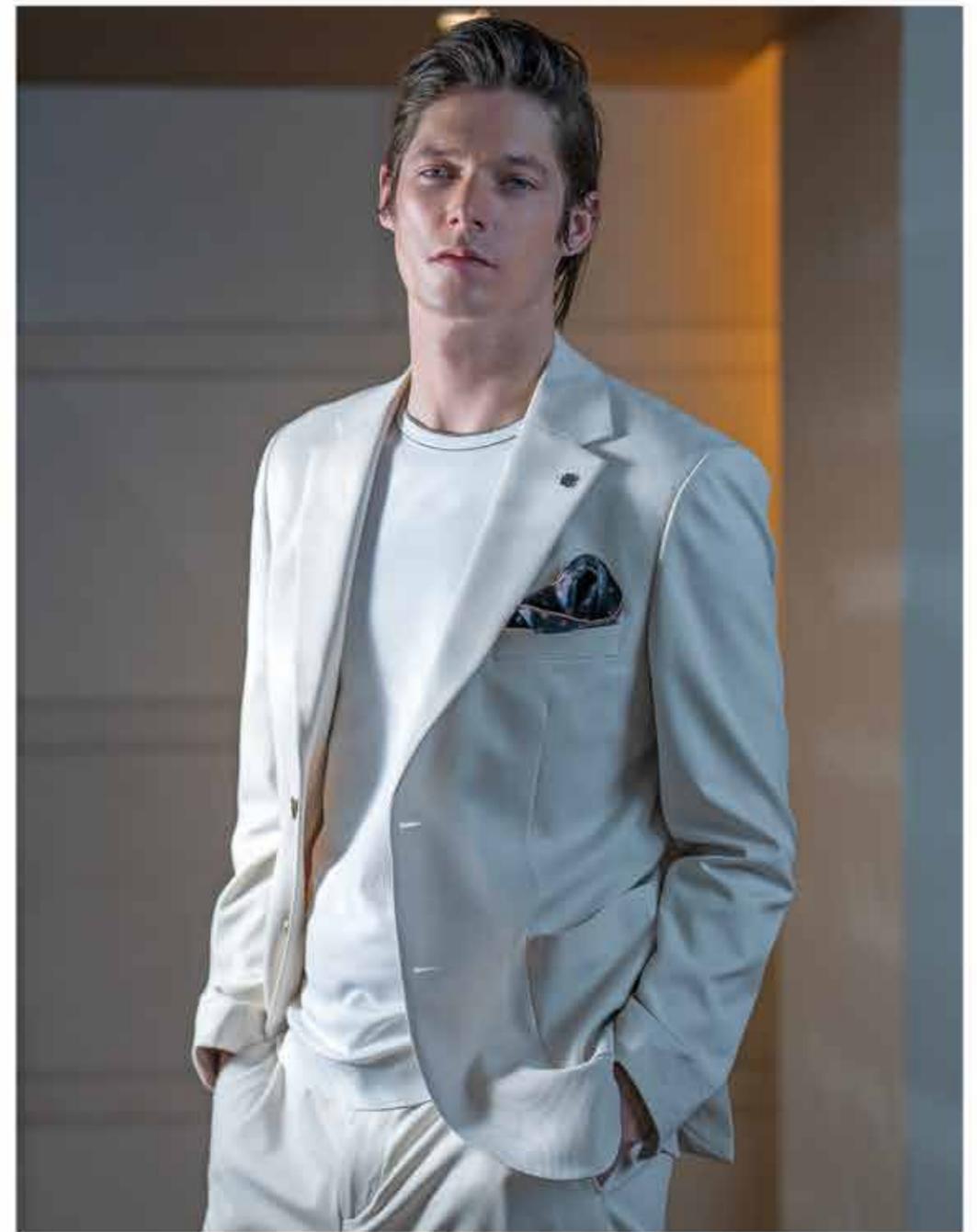
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## İHKİB SIGNS PARTNERSHIP AGREEMENT WITH US-BASED WRAP

İHKİB, representing 80% of Türkiye's apparel exports, has signed an agreement with Worldwide Responsible Accredited Production (WRAP).

The İstanbul Apparel Exporters' Association (İHKİB) has signed a memorandum of understanding with WRAP, a US-based non-profit organization, to enhance business relations between Türkiye and the United States. Under this agreement, a pilot project will be developed to identify leading Turkish apparel companies exporting to the US and encourage them to obtain WRAP certification. The goal of the project is to strengthen business relations between Türkiye and the US, thereby developing additional avenues for collaboration and enhancing the global competitiveness of Türkiye's apparel industry. The memorandum, signed by İHKİB International Relations and Sustainability Committee Chairman Selcuk Mehmet Kaya and WRAP President and CEO Avedis Seferian, is expected to guide Turkish apparel companies

through the certification process by providing free personal and virtual training sessions.

### Preparing Turkish exporters for the US market

Speaking on behalf of WRAP, Avedis Seferian stated that partnering with organizations like İHKİB expands their reach and contributes to the success of Turkish exporters. He noted that the partnership will facilitate İHKİB members, representing 80% of Türkiye's apparel exports, in finding new opportunities in emerging markets and staying informed about sectoral developments. Selcuk Mehmet Kaya emphasized that the partnership with WRAP aligns perfectly with İHKİB's mission to guide its members towards excellence, sustainability, and global competitiveness, and will contribute to the goal of increasing Turkish apparel exports in the lucrative US market.



## TURKISH TEXTILE INDUSTRY EXPANDS TO THE US WITH I OF THE WORLD

Organized in collaboration with İTHİB and İHKİB, the I Of The World New York Trade Mission took place from March 11-15, 2024. Thirty-nine Turkish companies conducted over 600 bilateral business meetings.

The I Of The World Trade Mission, aimed at the US, the largest importer globally in the textile and apparel sectors, was organized under the Trade Mission Supports included in the Circulars of the Ministry of Trade's Decision No. 5973 on Export Supports. With the participation of 18 fabric manufacturers, one garment accessories company, and 20 apparel manufacturers, the trade mission was held for the second time as a "vertical sourcing" event, aiming to increase the export potential of exporting companies. One of the mission's goals was to elevate the long-term market share of Turkish textile and apparel sectors in the US market. During the bilateral business meetings held at Venue 417 on March 13-14, 2024, representatives from over 170 buyer companies from the US, Canada, Colombia, and Mexico, including 115 companies based in various US states,

attended. The trade mission featured globally significant brands, with over 600 bilateral business meetings conducted in total. The business meetings were observed on-site by New York Trade Attachés Filiz Köseyener, Bilgehan Ramazan Caner, and Osman Nuri Gökbulut. İTHİB Board Member Mustafa Denizer commented on the event: "As the textile and apparel sectors, we are two interdependent sectors with an annual export level of 30 billion dollars. The US is one of our most important markets, and we aim to increase our share from this market. In recent years, our share in US imports has steadily increased to around 5%. We believe that our country has the potential to rank among the top three in the US fabric imports. Just as Turkish textile products are indispensable for the EU market today, we aim to become indispensable in the US imports by increasing our market share soon."

Cansu Bodur

İMA Fashion Design Programs Team Leader

# spring/summer 2025 women's wear macro trends

As seasons change, we observe trends evolving into a more inclusive and universally appealing approach with high empathy, affecting all individuals and the entire fashion industry in the long term, with less harm to the environment, being versatile, optimistic, and conformist. The trends for spring/summer 2025 follow this pattern. With the impact of events we are currently engaged in, there is a resurgence of business models emphasizing simplicity and benefiting from technological and innovative developments, recalling past values that make people feel good, and introducing new artistic influences. In today's fashion world where luxury and casual wear are being reshaped, we encounter a bold season that seeks and achieves more with experiences that intertwine physical and digital realms.

## Repair Codes

dicker&dane



neobotanical



Taking a step back from the changing world cycle and remotely observing the multi-crisis environment, there emerges a theme that elevates craft, cultural, historical, and natural values, with a mission to bring solutions and make one feel good when worn, seen, and used: Repair Codes. Brands embracing approaches that connect with pluralistic cultures and treat the planet fairly are expected to have more visibility.



adventures in ai

The influence of valuable time spent freely outdoors on fashion leads to a DNA in harmony with nature, with reduced harmful effects, using bio materials; supporting biophilic designs, and promoting circular fashion. Simultaneously, we sense a mode of collaboration, evoking a feeling of being on a slow journey. Modular design analyses in a conformist ap-

proach bring together minimal and performance-effective looks with styling techniques. With the rise of quiet luxury, we see daily garments creating enhanced value; nostalgic drapes inspired by archival collections, voluminous ruffled collars, delicate laces reminiscent of just



Paula Ulargui

unpacked chests, and retro-style references. Soft and locally influenced wallpaper patterns inspired by the 18<sup>th</sup> century, sets resembling pajamas, or rich and powerful items with patterned, embroidered, brocade surfaces, evoking an exotic journey embracing every geography.

# Expressive



sicky mag1

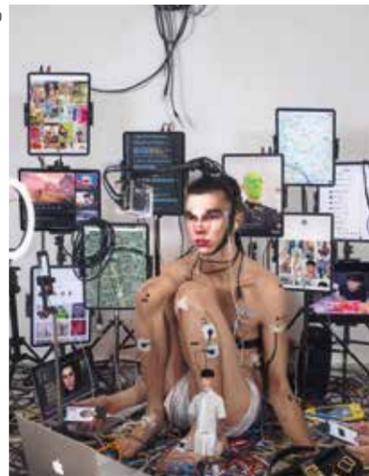


Edajogo

magda



Pop magazine



Holens



This theme embodies powerful, distinct forms with a motto of high-speed entertainment, presenting a combination of extra small and extra large scales, conceptualized as characters from another world or a vintage comic book. Rubber and molded plastic looks, ergonomic, protective fashion, elegant stretch fabrics may evoke pieces with a Y2K effect. Striking color blocking reminiscent of resort vibes, while reminding consumers of

colorful memories with comic books or retro games, exciting designs will create a feeling of replacing what's their own. These designs can capture this aesthetic with airy fabrics and materials in soft, organic, and voluminous forms reminiscent of a marshmallow effect. Tropical-inspired details in naive touches, clash with geometric patterns, along with cheerful and striking summer colors inspired by the sun, will create some of the best expressions of the warm season.

# New Classics

Roksanda



Recto



The New Classics theme, which you can incorporate into different wardrobes from gothic to military, avant-garde to minimal, in classic clothing forms, aims to evoke femininity at its highest notes alongside workwear and utility, couture-like cuts, and influences from menswear. In a rapidly changing world where many developments are occurring, the reaction of a generation that wants to protect itself against them can be a rebellious stance. Starting with this philosophy, deconstruction inspirations that are darker or break the mold give shirts and gabardine trousers a new dimension and a new identity. Skirt-like shorts, vests with parachute jacket effects, kimonos detailed in safari style, or sleeveless blouses with laser-like

appearances... Pieces featuring performance elements are seen in design, whether in feminine wear or in punk-influenced styles. Denim wear also receives its share from deconstruction style, accompanied by chains and trompe-l'oeil-effect X-ray prints in total denim looks. Moreover, to reflect an urban feminine spirit, it is possible to achieve a more mature and sophisticated look by combining sleek romantic pieces, innovative details, and sharp masculine utility styles. Classic earth tones reference the wilderness, while icy blues inspired by minerals, orange tones, beiges, and feminine touches, along with lemon balm tones, rosewood, and dirty peach tones, form the main color palette of the theme.

Likovska



# Futuristic Fantasy



Pop magazine

Osklen Japan



Heliot Emil



The expansion of the data age and technological advancements offer the perfect blend of enchanting nature and fantasy that artificial intelligence can uniquely design. Accompanied by the striking illusion of experimentation with art and technology, this provocative, futuristic-themed fantasy is enriched with creative bright colors. Attention-catching geometric embossed fabrics with technical and soft surfaces reveal the romantic aspect of the theme through 3D organic forms. The technological development of AI and AR applications, which personalize designs and reveal their experimental aspects, nourishes the user's imagination, guiding them towards surreal imaginings with a dreamlike feeling, mystical

figures and symbols, and urban IRL designs inspired by underwater creatures. The use of fluid fabrics where asymmetrical details meet experimentation, fantastical natural plants, and graphics passed through abstract and technological filters, layering and overlapping textures, exaggerated forms, and lingerie details will be the pieces that best reflect the theme. High-tech performance suits, contrast pairings, and the combination of formal wear with feminine sporty-chic knits characterize the formal clothing style; galactic colors creating artificial surface hues, warm pink tones, and light purple tones, supported by deep tones of nature such as dark plum, fiery red, and greens inspired by underwater plants.

ÜSTÜME

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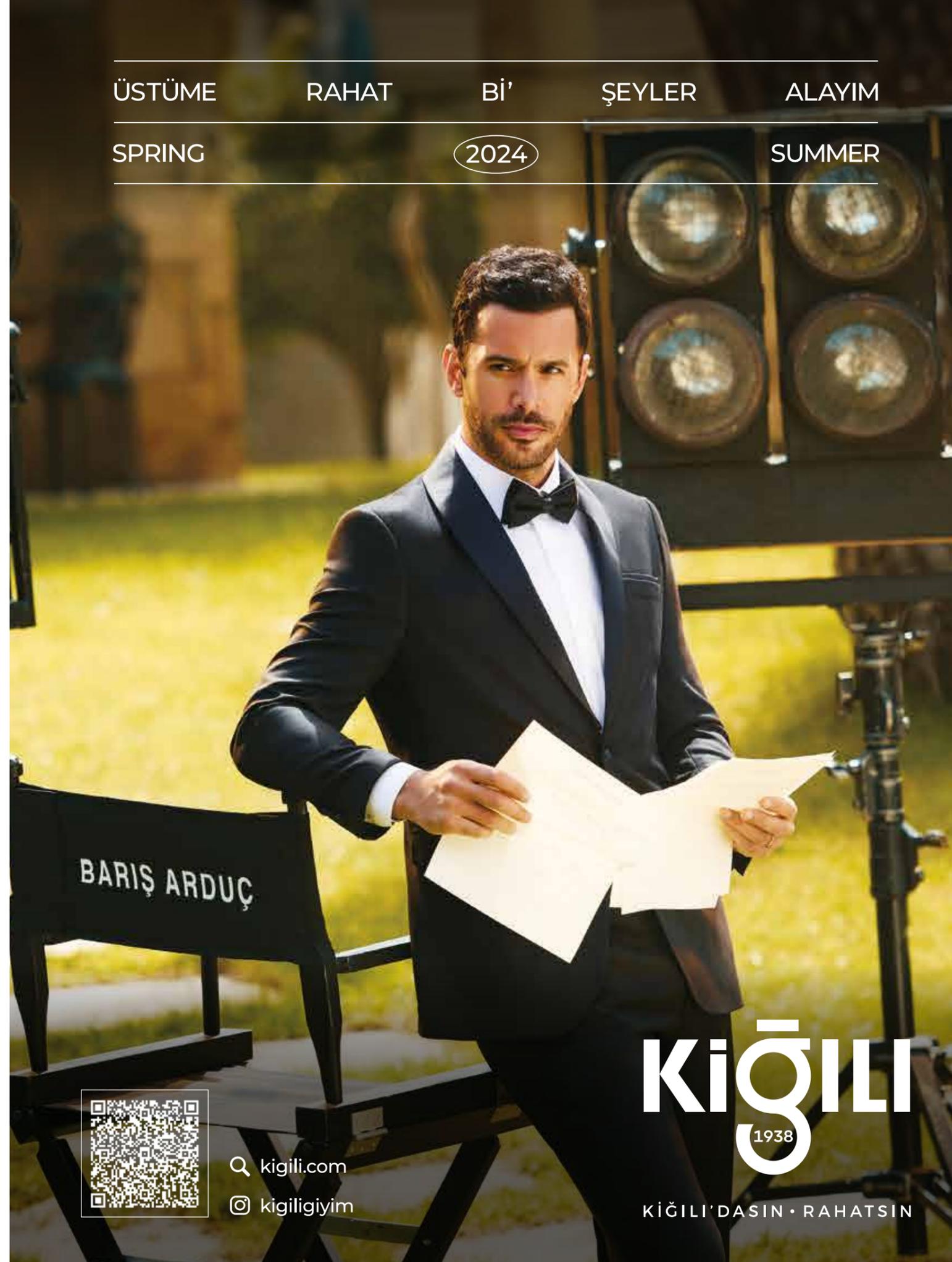
ŞEYLER

ALAYIM

SPRING

2024

SUMMER



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KİĞİLİ  
1938

KİĞİLİ'DASIN • RAHATSIN

Mert Çelebi

Instructor, İstanbul Fashion Academy

# spring/summer 2025

## men's wear macro trends

Mert Çelebi, one of the instructors at İstanbul Fashion Academy, penned down the macro trends for men's wear for spring/summer 2025 for ITKIB Hedef Vision magazine.

## Digital Waves



© Dries Van Noten



© Etro



© Taak

Our planet is covered with water, accounting for 70% of its surface. Our oceans, home to thousands of different species, captivate us with their rich underwater world. The "Digital Waves" concept for the Spring/Summer 2025 season focuses on humanity's desire for exploration, inviting us on a digital night dive powered by artificial intelligence. This concept, creating the season's most active and functional narratives, brings the magical world of the deep sea to life through textures, prints, and effects.

Abstract patterns created with indigo, fluid wave effects achieved with natural dyes, and alternative dyeing techniques that are chem-

ical-free and require minimal water are the cornerstones of this concept. In this concept, which offers new interpretations of aesthetic concerns in men's fashion, hyper-textures, dimensional patches, and embroideries stand out, allowing men to express their identities more uniquely. The key pieces of the concept include wide-cut trousers designed with tailoring techniques in relaxed fits, essential loose sweaters for seaside evenings, favorite semi-formal shirts for summer travels, and highly functional swim shorts.

Pragmatic references and design elements borrowed from sportswear bring innovative approaches to this theme. Cylindrical bags

made from innovative materials and beloved travel totes emerge as accessories that complete the sporty looks of the concept. Enhanced brightness, contrasting cords, stoppers, and smart zippers create an ultra-dynamic futuristic perception. While azure, aqua, and deep ocean blues, along with light tones of gray and blue, create a monochromatic night palette, exotic yellows, bright raspberry, and coral colors appearing in prints and accessories build an energetic summer story. The "Digital Waves" concept challenges us to reconsider our outlook on the future of our planet, offering a chance to explore fresh hopes born from the duo of design and technology.

# Modular Future

In the realm of loungewear, pieces crafted from premium quality materials suitable for both home and office use are poised to become indispensable elements of smart wardrobes. This concept, evoking the tranquility of Sunday mornings and stripped of all unnecessary details, offers a new minimalist interpretation of luxury. As the approach of careless luxury faces unprecedented scrutiny this new season, brands are meticulously redefining their notions of opulence.

The seeds of this new concept were planted in previous seasons with the idea of “silent luxury,” shifting luxury away from its traditional association with ostentatious details. Hidden details, meticulously integrated into designs, are reconstructing the evolving concept of luxury. Unexpected functional elements like Zegna’s smartly placed lapel collars on jacket bodies or Ferragamo’s diagonally stitched welt pockets are capturing attention.

The key pieces of this future luxury concept are shaped around the principle of timelessness. Jacket without lapels, relaxed shorts with elastic waistband details attached to the back, wide-cut trousers with built-in



Ami Alexandre Mattiussi



Steven Passaro

belts, and city-collar summer shirts with sleeves extending below the elbow are heralds of this new luxury. We also see the messages of slowing down and moving away from fast consumption reflected in color stories. The timeless narratives developed within a monochromatic color palette ranging from white to light gray are accompanied by mineral blacks, heightened reds, and corals that create strong contrasts. Extended-lifespan pieces like Tekla’s pastel-toned pajama stripes or Pangaia’s boldly colored sets inspired by nature are presented in timeless hues.

Ermenegildo Zegna



# Hyper-Nature



White Mountaineering



Sacai



Fendi

Centered on nature and creating fresh narratives for a more sustainable future, the “Hyper-Nature” concept embodies the richest touches of the summer of 2025. This concept celebrates the abundance of natural resources, designing with materials in their most unprocessed and raw forms. The stories reflecting the impact of advancing technologies on the textile industry also invite us to design, produce, and consume with utilitarian principles in mind. Relaxed silhouettes that allow for movement, surprising sharp finishes, and hidden functional accessories in the details create ultra-dynamic looks. Designs adaptable to various locations,

from the office to summer travels, make this concept appealing to those who love movement in their daily lives. The modular line of KOLOR, HedMayner’s signature wide cuts, and Sandro Paris’s effortless comfort approach perfectly encapsulate this concept. Modern suits with practical details create strong looks for everything from summer festivals to invitations. Reinforced stitches on flap pocket details, comfort-enhanced cargo shorts, ultra-flexible t-shirts, and the “shacket” (a blend of shirt and jacket) will dominate this summer season. The calming color palette dominated by botanical tones, with metallic details reminiscent of

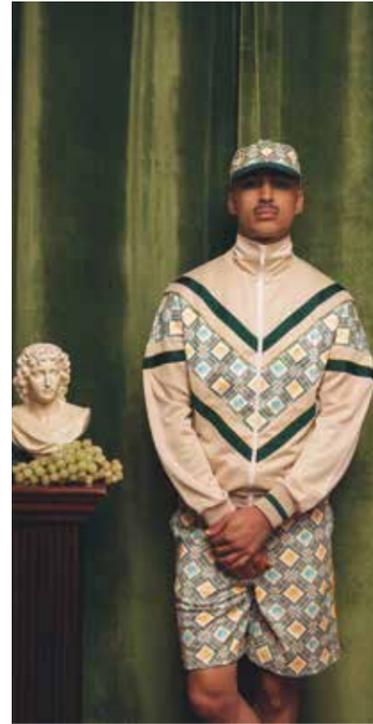
the city’s bright lights, creates striking effects. Warm and dark shades of brown, vibrant leaf greens, and dirty whites create vintage looks, while athletic designs influenced by space’s abstract and fluid prints in striking color palettes dominate the sub-themes of the concept. This narrative, reflecting nature’s translation into digital realms, creates natural illusions for a younger audience. Abstract prints with botanical influences applied to mesh and knits create exciting styles. With nature and the natural taking center stage, this concept’s main message is “a journey to a better future,” bringing a hyper-organic touch to the season.

# Retro Journey

📷 Dries Van Noten



📷 Drole de Monsieur



📷 Drole de Monsieur



📷 Drole de Monsieur



📷 Drole de Monsieur



**A**re we ready to take a break from our increasingly digital lives and embark on a journey through time? The “Retro Journey” concept for Spring/Summer 2025 invites us on a delightful adventure. Distanced from the concerns of globalization and focusing on localization and local values, this concept reinterprets motifs from different cultures using traditional methods. This

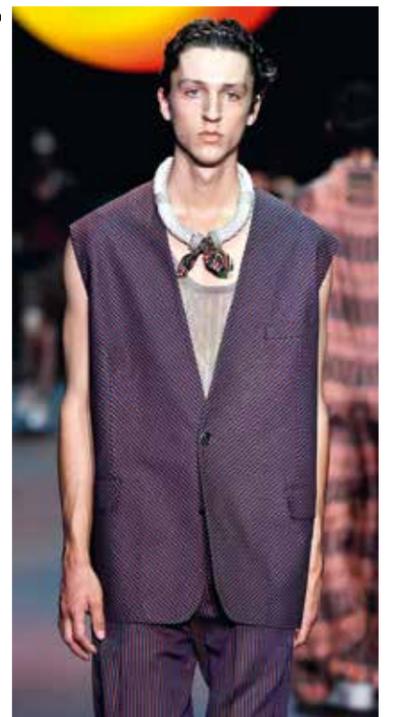
human-centric approach includes both the user and the creator in its stories, creating exciting hopes in the industry. Collaborative work disciplines with local artisans and independent producers lead to unique designs. From city gatherings to summer vacations, 1950s-inspired retro stories accompany the season. Nostalgic plaid patterns and expanded striped designs in paja-

ma sets are used in comfortable everyday designs, while classic styles emerge with striking color schemes. Confident designs in shades of stone, khaki, and navy aim to stay in wardrobes for years rather than just capturing the season. Warm amber, sunset, and playful cherry colors accompanying the color stories bring mood-boosting effects to everyday pieces.

Vintage references from street and workwear are reinterpreted in iconic club culture style. These characteristic looks, designed with marketability in mind, are set to be the boldest choices for summer evenings. Nicholas Daley’s strong modern retro aesthetic guides this concept. Geometric jacquard weaves, natural fibers, and orderly patterns are integral elements of the concept.

Deep “V” neck sweaters, folkloric-inspired shirts, extended-collar polo shirts, and high-waisted wide-leg pants bring nostalgic touches to men’s collections. In summary, retro stories promise to maintain their place in our wardrobes for a long time. Are we ready to make room in our lives for this rich concept that loudly celebrates the cultures and stories that define us?

📷 Eno



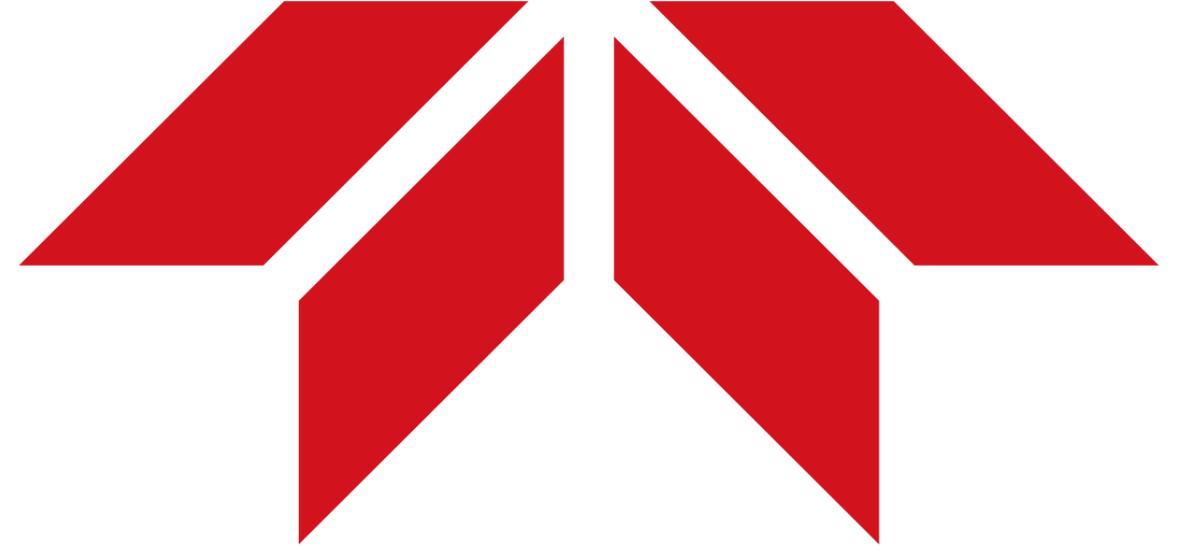
# JAKAMEN



STYLE  
YOUR STORY

# Interest & participation in

# IFCO is increasing



The fifth season of IFCO, Europe's largest apparel and fashion Exhibition held on February 7-10, is eagerly anticipated to be held on August 7-9. IFCO is gearing up to make its mark in the fashion world this season with not only new collaborations but also a fashion extravaganza.



The İstanbul Apparel and Fashion Exhibition (IFCO), organized by the İstanbul Apparel Exporters' Association (İHKİB), was held at the İstanbul Expo Center from February 7 to 10, attracting thousands of distinguished buyers from five continents, in addition to dozens of purchasing groups. With the participation of nearly 600 companies across 8 halls covering

an area of 100,000 square meters, the Exhibition set a record by exceeding 38,000 visitors. Expressing full support from the ministry for IFCO, Minister of Trade Ömer Bolat stated that they will continue to cover the expenses of incoming purchasing delegations. He emphasized, "In apparel, our roadmap is clear: we will focus more on design, branding, and fast delivery. Socks purchased for

\$1.35 from Türkiye are sold for \$25 in stores in New York, and a t-shirt leaving Türkiye for \$8 is sold for \$150 in Europe. This demonstrates the quality of products manufactured in Türkiye."

**"We are structuring our strategy according to long-term goals"**  
Mustafa Gültepe, the President of the Türkiye Exporters Assembly (TİM) and the İstanbul Apparel



545

Participating companies

38.545

Visitors

Exporters' Association (İHKİB), also stated that the demand for apparel in global markets has been slow for the past 1.5 years. He continued, "We anticipate that global markets will revive in the second half of the year. We interpret the interest shown in our Exhibition from abroad as the first signs of this revival. We are structuring our game plans and strategies according to long-term goals. In the long run, we aim to elevate Türkiye to higher ranks in the champions league of the fash-

ion industry with a \$40 billion export target. We are developing projects to increase our capacity for design-driven, innovative, and branded production. We are developing projects aimed at increasing awareness in the industry to turn the green transformation into an opportunity. Furthermore, based on this understanding, we announced our roadmap for compliance with the Green Deal a year ago."

**Supply chain proximity, green and digital focus to boost Turkish apparel exports**

Mustafa Paşahan, Vice President of İHKİB Board, stated that one of Türkiye's future goals is to "expand and explore more" in Europe, which holds many opportunities for the country. Speaking at the İstanbul Fashion Connection – IFCO event, Paşahan said that the immediate priority for the Turkish apparel sector is to penetrate further into European markets and to expand the market by turning Türkiye's eastern region into a hub for factory production. In 2023, total exports of apparels and textiles reached \$28.8 billion, with plans

All product groups came together under one roof at IFCO, which took place on a 100,000 square meter area.



Mustafa Gültepe, the President of TIM and İHKİB.



Mustafa Paşahan, Vice President of İHKİB Board.



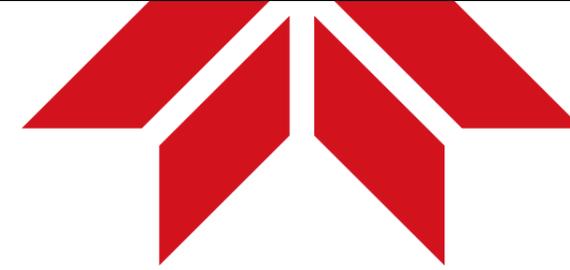
to increase this to \$40 billion in the medium term. Paşahan highlighted that of the approximately \$30 billion combined exports, the apparel category only holds a \$20 billion share. Despite positive figures, global brands are reluctant to pay premiums, and Türkiye has to compete with countries like Egypt, Bangladesh, and Vietnam. "We Can Be the Fashion Supplier of the Middle East" Recalling an assessment by former president of America's SEAMS Association, Ed Gribbin, Paşahan said: "Gribbin noted that in the event of

an escalation in the Israel-Gaza conflict in the Middle East, this situation could reflect on Türkiye and Jordan as major suppliers in the fashion field." Paşahan emphasized that Türkiye is ideally located just 3,5 hours away from most countries and has significant logistics and transportation businesses, with all major and important brands preferring production in Türkiye. He also underscored that the apparel industry plays the largest role in driving the country's economic growth and stability.



# The Core Istanbul & brands IFCO

THE NEW COLLECTIONS OF FASHION DESIGNERS ARE ALSO BEING EXHIBITED



Turkish designers, who are among the leading forces of the Turkish Apparel sector on the global stage, gathered at The Core İstanbul area within the IFCO Exhibition. They had the opportunity to present their impressive collections to foreign buyers, showcasing their special collections at the fairground. Collaborating with the Turkish Fashion Designers Association (MTD), The Core İstanbul section stood out with its unique decor, colors, and designs. Bringing together Türkiye's leading fashion designers with international buyers, The Core İstanbul received great attention

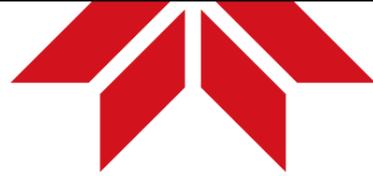
and appreciation from visitors throughout the fair. Among the Turkish fashion designers and brands showcasing their designs within The Core İstanbul were A Piece of Work, Arzu Kaprol, Be Oz, Çiğdem Akın, Dilek Hanif, Emre Erdemoğlu, Essin Baris, Eynaco, Lady Faith, Meltem Özbek, Mert Erkan, Murat Aytulum, Nej, Özlem Erkan, Selin Küçükşöz, SHYZ Wear, Siren Ertan İstanbul, SYGA, Şebnem Yıldız, TAGG, The Handloom, Tuba Ergin, Viola & Vesper, and Y Plus.

**Fashion designers gave IFCO full marks**  
Highlighting that IFCO Exhi-

bition has been continuously improving both in terms of timing and communication, Nejla Güvenç emphasized that they experienced one of the best seasons of the Exhibition this season, while Mert Erkan underscored that the purchasing delegations conducted in the first two days were very productive and that it was a Exhibition where warm sales could be made. Expressing her happiness at the growing success of IFCO in a period when interest in fairs is decreasing worldwide, Çiğdem Akın stated that she is eagerly looking forward to the new season Exhibition of IFCO.

# trend area

## THE AI SUPPORTED TREND AREA RECEIVES GREAT INTEREST



During the last season at the IFCO Exhibition, a series of significant seminar programs were held. Topics on the industry's agenda were discussed by experts in the field, and these seminars attracted considerable interest from participants.



## COMPANIES COUNTING DOWN THE DAYS TO PARTICIPATE IN THE AUGUST FAIR

Rafaello

### “THE MOST SUCCESSFUL SEASON OF IFCO FAIR”

I believe that the fifth edition of the IFCO Exhibition was the most successful season. We encountered a large crowd. Especially in the first two days, we had very intense visits. We had buyers from both the domestic market and from the USA, Russia, the EU, and the Middle East. We will continue to participate in the Exhibition in the upcoming seasons as well. It can be said that an increase in the number of American buyers attending the Exhibition would be very beneficial.

Ekrem Özalp

Tar Konfeksiyon

### “VISITOR QUALITY HAS IMPROVED”

We found this season's Exhibition to be very good in terms of both the number of participants and the quality of visitors. We had visitors from countries such as Poland, Italy, Middle Eastern countries, and Yemen. It met our expectations, and we plan to participate in the upcoming seasons of the fair.

Hilal Akıncı

Hilal Akıncı Kids

### “WE GAINED MANY NEW CUSTOMERS”

The Exhibition was much better this season in terms of both visitor numbers and participants compared to previous seasons. Buyers mainly came from countries such as the Middle East, Russia, Kazakhstan, and Kyrgyzstan. We also had a significant number of visitors from Europe this season. I believe it is a very important Exhibition for companies looking to appeal to the European market. We also received good orders during the Exhibition and gained many new customers.

Rahman Daşkesen

Sateen

### “WE ACHIEVED OUR GOALS AT THE EXHIBITION”

This year, we observed a higher participation in the fair. There was a significant presence both from domestic and international participants. Our interaction with visitors was also at a high level. It was a Exhibition where we achieved our goals, and we were very satisfied. We had visitors from Balkan countries, the Middle East, Lebanon, Italy, and many other countries worldwide, and we received good orders. The rate of new customers we gained from the Exhibition was around 25%. We definitely plan to participate in the upcoming seasons as well.

Mustafa Gökhan Gümüşsu

Miram Collection

### “WE EXCEEDED OUR EXPECTATIONS IN THE EVENING WEAR SECTOR”

The first two days of the Exhibition were very busy. IFCO is a highly successful Exhibition in terms of concept and organization. The potential of the customers was very high. We made contacts with buyers from Palestine, Saudi Arabia, Dubai, Greece, Italy, France, and various European countries. We received many orders beyond our expectations. We will participate in the upcoming seasons of the Exhibition as well.

Erkan Elmastaş

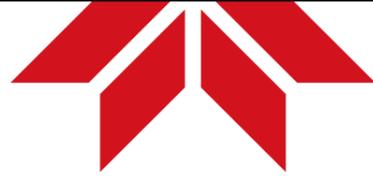
Invidia

### “WE WERE PLEASED WITH THE PRESENCE OF FOREIGN BUYERS”

We were particularly pleased with the presence of foreign buyers at the IFCO Exhibition. We can say that our expectations were met. There was much more intense participation compared to previous seasons. The orders we received during the Exhibition were mainly from Saudi Arabia, Palestine, Dubai, Italy, Qatar, and Ukraine. We want to participate in every season of IFCO in the future as well.

# seminars

THE AGENDA OF THE FASHION INDUSTRY WAS DISCUSSED IN SEMINARS



IFCO Exhibition, as in every season, offered a series of significant seminar programs this season as well. Participants showed great interest in seminars where industry experts discussed current topics in the sector throughout the fair.

# KNIT SHIRTING COLLECTION



**Where comfort meets elegance**

As an experienced company in the intricate world of knit fabrics, we have established our presence in the knit shirt fabric sector. Merging our expertise in fabric design with advanced technology, our knit shirt fabrics stand out with both functional and stylish designs. Knit shirt fabrics, inherently more durable by nature, provide users with comfort throughout the day due to their wrinkle-resistant and non-iron characteristics.



QUICK-DRY



BREATHABLE



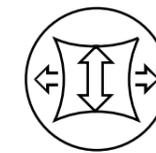
DURABLE



SOFT



NON-IRON



STRETCH

# TEXHIBITION

## ISTANBUL

The new  
meeting point  
of the

# textile world

The Texhibition İstanbul Yarn, Fabric, and Textile Accessories Exhibition, held from 6<sup>th</sup> to 8<sup>th</sup> of March, hosted over 30,000 professionals from more than 10 countries and 557 companies at the first fair of the season. The second edition of the fair will take place in İstanbul from 11<sup>th</sup> to 13<sup>th</sup> September 2024.



**T**he textile sector, one of Türkiye's leading industries in production and employment, which completed last year with a \$11.6 billion export, met at Texhibition İstanbul Yarn, Fabric, and Textile Accessories Exhibition, Europe's largest textile fair, for the fifth time this year. Hosted by the İstanbul Textile and Raw Materials Exporters' Association (İTHİB), the fair, held from March 6<sup>th</sup> to 8<sup>th</sup>, featured yarn and denim sections for the first time this year. It was announced that the new sections would continue in the upcoming seasons. Speaking at the opening of the fair, Minister of Trade Dr. Ömer Bolat emphasized the impor-

tance of the textile and apparel sector exports, stating that it reached approximately \$33 billion in 2023, covering 13% of the country's exports. Bolat stated that the Ministry will continue to support these fairs to further grow these sectors.

#### **"Increasing the quality of our production through green transformation"**

President of the Turkish Exporters' Assembly (TİM) Mustafa Gültepe emphasized the importance of the textile sector for Türkiye, stating, "Türkiye distinguishes itself from its competitors as a branded country with its quality production and speed. The significant interest shown

in the fifth Texhibition Exhibition reflects Türkiye's confidence in its production. We continue our efforts to crown this production quality with sustainable production and green transformation."

#### **"Texhibition became one of the most visited fairs worldwide"**

Texhibition İstanbul, organized by İstanbul Textile and Raw Materials Exporters' Association (İTHİB) Trade Exhibitions Inc., hosted over 30,000 professionals from more than 112 countries and 557 firms in a 35,000 square meter area this year. Ahmet Öksüz, President of İTHİB, highlighted that Texhibition İstanbul has quickly become one



The share of the textile industry in exports in the last four years increased from 2 percent to 3.5 percent.



**Innovation Hub-established brand**

The Innovation Hub trend area at the Texhibition Exhibition was created by Innovation Designer Arzu Kaprol and Fabric Designer Filiz Tunca. This area was designed to showcase innovative projects that will shape the future of textiles, featuring the innovative works of participating companies, innovation firms, technoparks, and international creative projects. Kaprol emphasized the importance of inspiring and valuable projects in the field for the future development of the Turkish textile industry, stating, "Innovative projects in every field such as fiber, material, technology, and creativity were gathered under the coordination of Fabric Designer Filiz Tunca. We featured approximately 28 different projects.

of the most visited fairs globally, stating, "Our main goal is to maintain our quality and achieve controlled growth to make our Exhibition one of the world's most prestigious fairs. Data shows that the world is not giving up on textiles, and by increasing branding and focusing on more exports, we will continue to make our sector more prominent. I believe that our Exhibition will not only be the meeting point of the global textile industry but also contribute to the development of brand perception. With

trend and innovation areas, seminars featuring experts in the field, and B2B programs, it will enhance companies' branding perceptions." The trend area of the Texhibition Exhibition was created by integrating standout qualities and creative themes of yarns, fabrics, and accessory products from participating companies. Designed by Texhibition Exhibition's Creative Director, Idil Tarzi, the areas provided valuable guidance for participants' product groups to be explored with theme stories

influencing the upcoming season and an inspiring architectural concept. Tarzi, emphasizing the priority of highlighting the need for a sustainable and environmentally friendly world with the trends of the Spring/Summer 25 season, said, "In our country, the textile and fashion sectors have also taken steps towards development and change in production chains for this purpose. At the fair, we grouped participants' products as luxury fibers, recyclable plants, and recycled synthetics."

**Blue&Black Texhibition**  
For the first time in a special area within the Texhibition İstanbul Exhibition, denim companies showcased Türkiye's strength in the denim sector. The trend area in the Blue&Black Texhibition section was curated by the founders of ALLDENIMS, Gönül Altunışık and Selvi Yiğci. The most attention-grabbing work in the trend area was a denim dress created from waste fabrics of denim manufacturers, serving as an example of sustainable fashion approach.



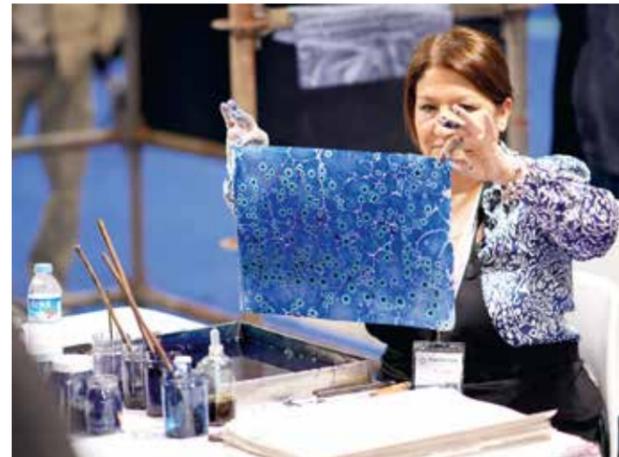
# seminars & workshops



## SHEDDING LIGHT ON THE INDUSTRY AGENDA

Texhibition İstanbul Exhibition shed light on the issues on the agenda of the textile industry with its comprehensive seminar programs featuring experts in their fields as speakers, and attracted the attention of visitors with workshops.

**T**exhibition shed light on the topics in the textile sector agenda with comprehensive seminar programs featuring expert speakers and attracted visitors' attention with workshops. On the first day of the fair, Pascaline Wilhelm, Founder of PWNEW and Trend Consultant, conducted a trend seminar titled "Fabric, Textile, and Color Trends."





**Barış Mert**  
Korteks

**“SUSTAINABILITY-FOCUSED PRODUCTS RECEIVED INTENSE INTEREST FROM VISITORS”**

At Texhibition İstanbul Exhibition, we showcased products produced with a focus on sustainability. Innovative products received intense interest from visitors. The Exhibition brings companies together with global brands and transforms into an export-oriented event where production, quality, trends, sustainability, and design are at the forefront.

**Tamer Nalbant**  
Arta Tekstil

**“WE SEIZED THE OPPORTUNITY TO FORGE NEW CONNECTIONS”**

This year marked our fourth participation in Texhibition İstanbul, where we seized the opportunity to forge new connections. It was particularly significant to have qualified visitors from Spain, the UK, the Netherlands, Ukraine, Romania, Morocco, Tunisia, Lebanon, and Egypt. The increasing number of visitors to the Exhibition each year contributes significantly to our business.

**Mert Metin**  
Merih Düğme

**“WE HAVE THE OPPORTUNITY TO SHOWCASE OURSELVES GLOBALLY”**

Comparing Texhibition Exhibition to the one we attended in France last month, I can say that Texhibition Exhibition was much better. Especially on the first day, there was a significant turnout. We hosted many visitors from Russia, the Balkans, and the Middle East. It's fantastic to have a Exhibition like this in İstanbul. We believe that by participating in this fair, we will have the opportunity to showcase ourselves globally.

**Betül Demirci**  
Çalık Denim

**“OPENING A DEDICATED AREA FOR DENIM IS VERY IMPORTANT”**

We believe that opening a dedicated area for the denim sector is crucial. We think that increasing the number of participants in the denim sector in the upcoming seasons would be beneficial. This way, we can also increase the number of visitors from EU countries. Most of our visitors were from the Turkic Republics. We had a Exhibition experience beyond our expectations.

**Muhammet Hanbaba**  
Omafıl

**“TEXHIBITION HAS BECOME A MORE BEAUTIFUL EXHIBITION WITH EACH PASSING DAY”**

The Exhibition went very well. There was a crowded visitor turnout, and we received a lot of interest. We made contacts with predominantly foreign customers. We had visitors from different countries such as Algeria, Saudi Arabia, France, Belarus, and Bangladesh, each with different potentials. The Texhibition İstanbul has become a more beautiful Exhibition with each passing day. We believe that the discussions here will turn into sales.”

**Ayşegül İsenlik**  
Karabulut Tekstil

**“IT WAS THE BUSIEST SEASON IN TERMS OF FOREIGN CUSTOMERS”**

It was a very busy fair, predominantly with foreign visitors. We made contacts with buyers from countries such as Lebanon, Macedonia, Iran, Mexico, and Russia. We can say that our expectations were met. People are now saying that the Texhibition Exhibition is better and more crowded than the Premiere Vision Exhibition. It was the busiest season in terms of foreign customers.

**Uğur Yurdakul**  
Naz Örmek Kumaş

**“WE HAD PRODUCTIVE MEETINGS”**

Comparing Texhibition Exhibition to the one we attended in France last month, I can say that Texhibition Exhibition was much better. Especially on the first day, there was a significant turnout. We hosted many visitors from Russia, the Balkans, and the Middle East. It's fantastic to have a Exhibition like this in İstanbul. We believe that by participating in this fair, we will have the opportunity to showcase ourselves globally.

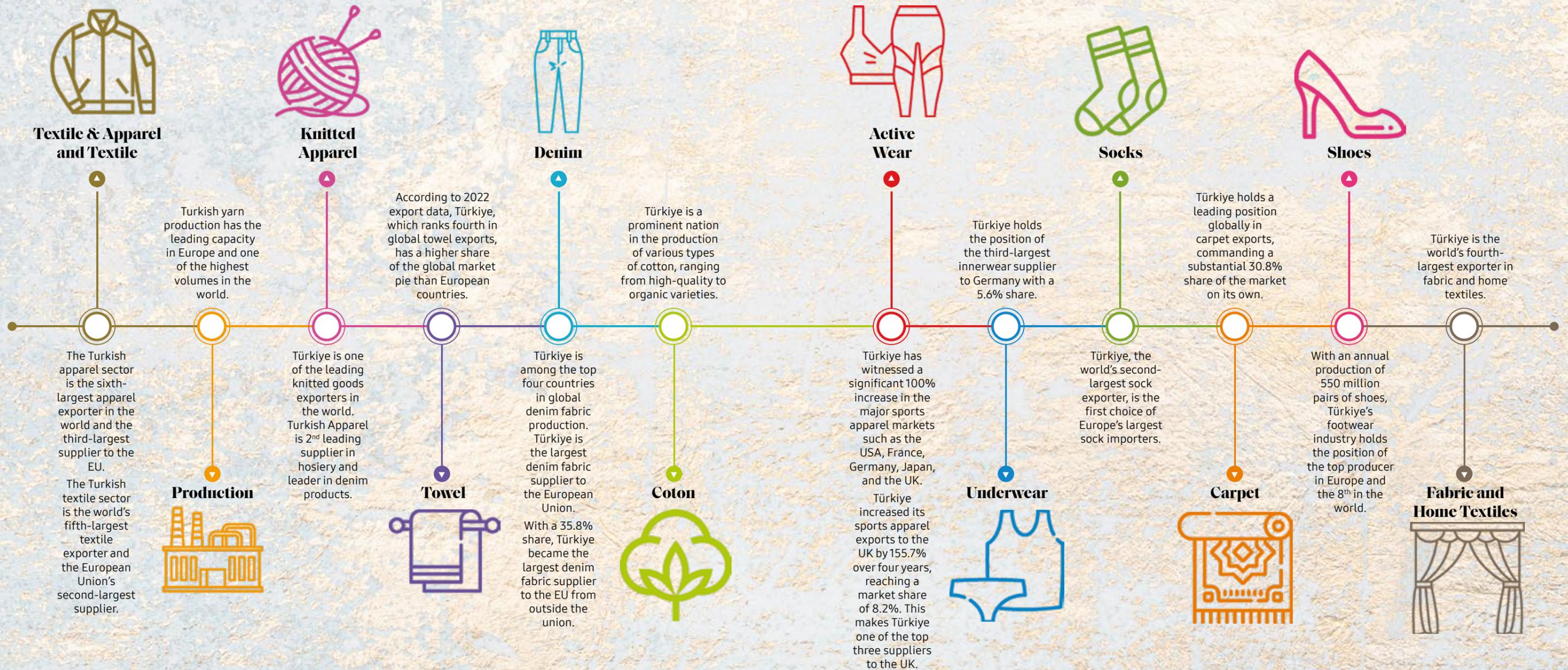
**Birsen Ergün**  
Saka Holding

**“THE EXHIBITION HAS POSITIVE CONTRIBUTIONS TO OUR COMPANY”**

Texhibition İstanbul Exhibition went well for us. We had discussions with buyers from many countries such as Morocco, Tunisia, Russia, Ukraine, Germany, and Pakistan. We believe that the meetings we had during the Exhibition will have good returns for the future. The Exhibition has positive contributions to our company, and we are able to gain many new customers. We are considering participating in the upcoming seasons as well.

# TÜRKİYE HOLDS GLOBAL LEADERSHIP IN NUMEROUS PRODUCT CATEGORIES WITHIN THE

# APPAREL, TEXTILE, LEATHER, AND CARPET SECTORS



# the largest

# DENIM

# apparel markets have turned

# their course to

# Türkiye

The Turkish Apparel sector, which achieves an annual denim clothing export of \$1.8 billion, symbolizes Türkiye's strength in the denim field. Spain, the USA, and Italy are increasing their purchases from Türkiye.



**T**he Türkiye Denim Apparel Export Report prepared by the İstanbul Apparel Exporters' Association (İHKİB) has been published. The report covering the period of 2019-2023 includes denim woven men's and women's trousers, men's and women's shirts, women's jackets, dresses, and skirts categories. While the tariff systems in countries that are members of the World Customs Organization (WCO) are common on a six-digit basis, the subsequent digits vary from country to country. Due to Türkiye's long-standing status as one of the world's leading denim apparel

and fabric producing countries, denim apparel products are separated within the scope of the Turkish Customs Tariff Statistical System into twelve digits. Thus, Türkiye's denim statistics can be kept separately. However, most countries' tariff systems do not include a separation for products made from denim fabric. Therefore, the prepared report mainly focuses on Türkiye's denim clothing export figures. Türkiye's denim clothing exports reached \$1.8 billion in 2021, decreased to \$1.75 billion in 2022, and further to \$1.6 billion in 2023. Since the Türkiye Apparel and clothing exports

also suffered losses last year, the share of denim products in total exports remained at 8.4%. While Türkiye Apparel and clothing exports decreased by 8.9% in 2023 compared to the previous year, the loss in denim exports was 7.9%.

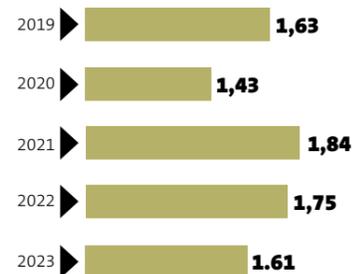
#### Denim clothing exports are increasing every year

Türkiye achieved its highest denim clothing exports in 2019 with \$1.63 billion, \$1.42 billion in 2020, and \$1.84 billion in 2021. However, denim exports have declined in parallel with the sector in the last two years. Export in 2022 decreased to \$1.75 billion and further to \$1.6



It is observed that the most exported denim clothing products from Türkiye are denim trousers and shorts for women and girls.

**Türkiye's denim clothing exports (billion dollars)**



billion in 2023. The share of denim clothing in total Türkiye Apparel exports also decreased from 8.9% in 2021 to 8.5% in 2023. The most important exported denim clothing item in Türkiye is denim trousers and shorts for women and girls. Despite a 2.6% decrease compared to 2019, nearly \$1 billion in exports were made in this product category in 2023, constituting the largest portion of total denim clothing exports with 54.4%. In the second place were denim trousers and shorts for men and boys, with a 2.2%

decrease to \$558.5 million in exports. This product group accounted for 34.6% of total denim clothing exports. The total exports of denim jackets, denim skirts, denim blouses, and shirts accounted for only 11%.

**72.5% of denim exports go to the EU**

In recent years, Germany was the largest market for Türkiye's denim clothing exports, but Spain has taken the top spot for some time. Last year, three countries among the top 10 where denim exports increased

were Spain, Italy, and Poland. The European Union countries (EU) became the largest and most important market for Türkiye's denim clothing exports. In 2023, 70.3% of Türkiye's total denim clothing exports went to EU countries. Exports to the EU decreased by 7.9% in 2023 compared to the previous year, reaching \$1.3 billion. The prominent EU countries for Türkiye's denim exports are Spain, Germany, the Netherlands, Denmark, and Italy. When the top 15 EU countries with the highest denim exports are examined, it is seen that exports

decreased to nine countries and increased to seven in 2023. During this period, Poland recorded the highest increase in exports at 109.4%, while Belgium recorded the highest decrease at 34%.

**Denim exports to the USA increased by 54.3%**

Although Türkiye's largest denim market, in recent years there has been an increase in denim product imports from Türkiye to the USA. Despite a 14.7% decrease in 2023, when the data from 2019 to 2023 is examined, it is seen that denim

exports to the USA increased by 54.3%. With this momentum, the USA, which is the largest denim market in the world, has led Turkish Türkiye exporters to focus more on this market.

**The fashion capital, Italy, prefers denim labeled Made in Türkiye**

Italy, considered the fashion capital, has also seen an increase in denim imports from Türkiye during the same period. Denim exports to Italy increased by 15.9% last year and by 2.4% over a five-year

When examining data from 2019 to 2023, Türkiye's denim exports to the USA increased by 54.3%.



İTHİB, 2021 yılı itibarıyla Sürdürülebilir Tekstiller UR-GE Projesi'ni hayata geçirdi.

period. The highest increase in exports over the five-year period was to Poland, with 175%. Türkiye's denim export unit value increased. As of the end of 2023, the export unit price in the Türkiye apparel and clothing sector in Türkiye was recorded as \$15.3/Kg, while this figure rose to \$22.6/Kg in denim clothing. This ratio also

represents the highest export unit price in denim clothing over the past five years, with a 3.1% increase in denim clothing export unit prices since 2019.

#### Unit export value increased in denim

As of the end of 2023, Türkiye's unit export price in the Türkiye apparel and clothing sector

was recorded at \$15.3/kg, while this figure rose to \$22.6/kg in denim clothing. This ratio also represents the highest export unit price in denim clothing over the past five years, with a 3.1% increase in denim clothing export unit prices since 2019. Türkiye Ranks as the 10<sup>th</sup> Largest Denim Supplier to the USA The denim jeans market size in

the United States, the world's largest denim market, is estimated to be 560 million units in 2022. This figure is expected to rise to 611 million units by the end of 2026. Due to the high consumption of denim, similar to Türkiye, denim clothing products are also separately defined under the U.S. tariff statistical system. According to



In 2023, 70.3% of Türkiye's total denim clothing exports were made to EU countries.

U.S. data, in 2023, a total of \$3.2 billion worth of denim clothing was imported, with Bangladesh being the largest importer of denim clothing. In 2023, denim clothing worth \$671 million was imported from Bangladesh, accounting for 20.9% of Bangladesh's total denim clothing imports. Türkiye ranks ninth among the countries with the highest denim clothing imports by the USA. According to OTEXA data, in 2023, imports from Türkiye decreased by 3.5% compared to the previous year, reaching \$75 million, and Türkiye's share in the USA's denim clothing imports is calculated as 2.3%. Last year, there was a decrease of \$1 billion in denim imports to the USA, and Türkiye was the least affected among the top 10 denim suppliers. While Bangladesh experienced a 31% decrease and Egypt nearly 29% decrease, Türkiye's loss was 3.5%.

#### Global Denim Market Reaches \$128.3 Billion

According to a study conducted by Vantage Market Research, the global denim jeans market reached a market size of \$128.3 billion by the end of 2022. It is estimated that between 2023 and 2030, the market will grow at an average annual rate of 4.3%, reaching a size of \$179.7 billion by the end of 2030. More than 50% of denim clothing production worldwide takes place in the Asian continent. China, India, Türkiye, Pakistan, and Bangladesh are among the largest producing countries. Among these countries, China is known for its traditional large-volume denim production, while Türkiye is known for its premium products, India for its product range between mid and premium segments, and Bangladesh and Pakistan for their affordable products in the global market.

# THE TEXTILE INDUSTRY HAS MADE SIGNIFICANT PROGRESS IN SUSTAINABILITY



Dr. Ahmet Temiroğlu  
Özen Mensucat General Manager

The textile industry is one of the leading sectors taking concrete steps in sustainability. Through sustainability efforts in the field of processing, where the industry utilizes intensive resources, the environmental damages are decreasing.

Today, people's living standards and the resulting new needs have significantly increased compared to 15-20 years ago. Technological advancements continue to rapidly respond to these needs. Natural resources, particularly energy and water consumption, are being depleted at the same pace, leading to increas-

ingly felt environmental issues worldwide. As scientific predictions made years ago come true one by one, temperatures rise, rainfall decreases, seasons change, water scarcity emerges, and air pollution surpasses expected levels. These problems not only affect our present but also threaten our future. In an effort to slow

down this negative trend, people have turned to sustainability. Sustainability seeks ways to minimize the damage to the environment and natural resources in all areas of work and life.

### The fundamental dynamics of sustainability efforts in the textile processing sector

The textile industry, one of the oldest industrial sectors in our country, can create environmental problems if necessary precautions are not taken. It is a sector that consumes a lot of water and energy and can produce waste materials as a result of its processes. However, in recent years, like in other sectors, both producers and consumers in the textile industry have become more conscious about the environment. The new generation of producers, who prioritize environmental protection and social responsibility, are trying to produce in a way that takes into account future generations by learning from the mistakes of previous generations.

### Customer pressure

Consumer demands for sustainable products and services are increasing day by day. While sustainability has become an important factor in consumers' purchasing decisions, they are not willing to pay extra for it. This indicates that sustainability processes in production are increasingly being accepted as a normal process rather than a luxury

factor for consumers. Both domestic and foreign Apparel brands, acting as customers of Turkish textile manufacturers, are putting increasing pressure on the industry in this regard. The majority of both customer and national and international regulatory pressures concern the textile processing sector. Therefore, the Turkish textile processing sector has made significant improvements in recent years in areas such as water and energy consumption, chimney emissions, and proper disposal of waste materials.

### Technological advancements in dyeing machines

Technology has led to many advancements in laboratory and production machines in the textile industry. Twenty years ago, "beam" type dyeing machines constituted the majority of the machine park in businesses, but gradually, a transition to "blowdye" type machines began, followed by the introduction of "overflow" machines in the industry. Nowadays, "HT jetflow" machines are predominantly used. Not only have advancements occurred in machines referred to as "drum dyeing type," but there have also been numerous developments in "pipe, beam" dyeing, and "coil" dyeing machines. These technological advancements, aimed at reducing water, energy, and process times, have shortened production processes and improved energy and water consump-



With the innovative motor technologies developed in the last 20 years, electric motors have transitioned from the IE2 efficiency class to the IE3 and IE4 classes.



Developments in dyestuff and chemical technology have provided many benefits in reducing water consumption and increasing energy efficiency.

tion. Transitioning from dyeing machines with a 1:20 flotte ratio (the amount of water in liters required per kilogram of fabric to be dyed) to blowdye machines with a 1:12 flotte ratio, and then to overflow machines with a 1:10 flotte ratio, has now led to dyeing being done with HT jetflow machines with flotte ratios as low as 1:4. Airflow dyeing machines, allowing dyeing at flotte ratios of 1:3, are also frequently preferred today, especially for synthetic fabrics. New types of machines have begun to be used to reduce flotte ratios for pipe machines, which are particularly preferred for dyeing delicate fabrics. Reducing flotte ratios in machines not only directly decreases water consumption but also creates many positive

indirect effects. The use of HT dyeing machines enables the dyeing of polyester fabrics without the use of carriers. Polyester dyeing with carriers is known as the dyeing method with the highest waste load in textile products. The use of HT dyeing machines and the reduction of carrier usage have significantly decreased the wastewater load.

#### Developments in electric motors

Another significant point in the advancements in machine technology is electric motors. Many electric motors are used in both dyeing and drying section machines that operate continuously for long periods. With innovative motor technologies developed in the last 20 years, there has been a transition from the IE2 efficiency

class to the IE3 and IE4 classes (IE1 - standard efficiency, IE2 - high efficiency, IE3 - premium efficiency, IE4 - super premium efficiency, IE5 - ultra super premium efficiency) in electric motors.

Today, energy-conscious businesses demand IE4 class motors in machine investments. Many businesses are revising their machines, which have mostly IE2 class motors that they have been using since the beginning of production. IE5 class motors are also gradually being introduced. Machine manufacturers and businesses have realized that the use of inverters is an indispensable need in electric motors with high electricity consumption, long operating times, and varying loads. The use of inverters has become widespread not only in dyeing or drying

section machines but also in many areas from water pumps to compressor systems.

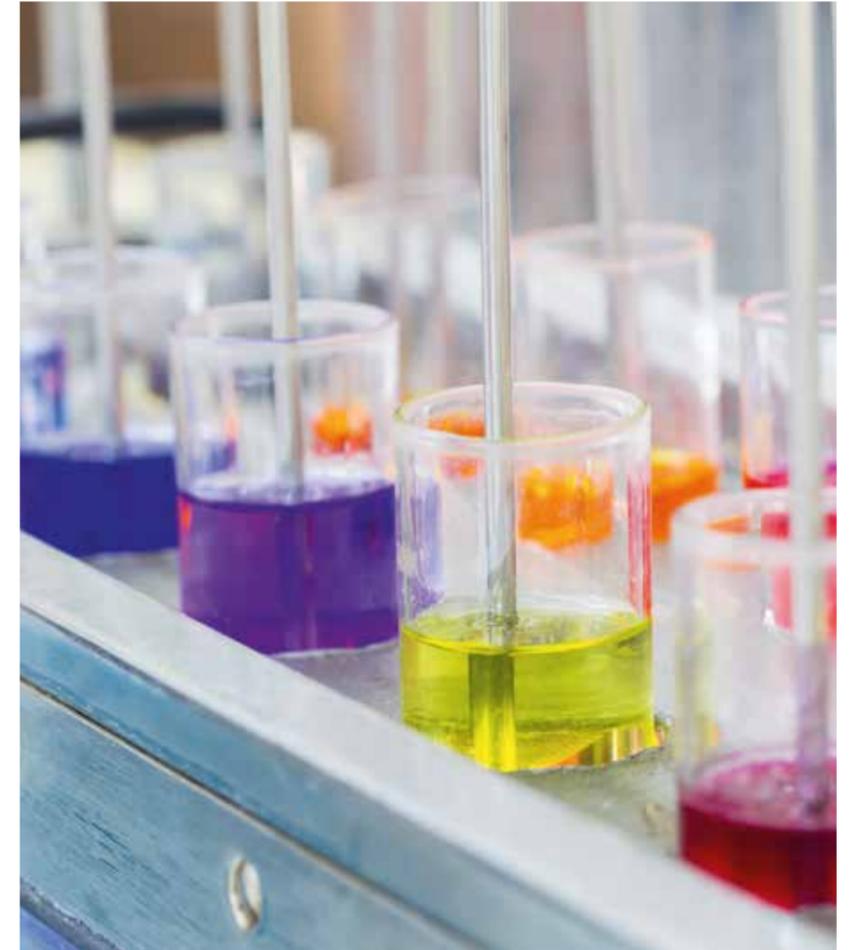
#### Developments in automation systems

Today, the use of automation systems is widespread in both dye and chemical substance transfers. The use of automation systems has ensured accurate chemical and dye measurements, resulting in increased quality and repeatability. Additionally, automation systems have enabled the precise delivery of chemicals at the right time, minimizing deviations from standard process times. The use of automation systems in production areas minimizes the contact of the workforce with these chemical substances, in accordance with the risk hierarchy of occupational health and safety. In recent years, the development

of Enterprise Resource Planning (ERP) systems has also facilitated increased efficiency in planning and job tracking. With smart recipe systems and algorithms, tailored treatment processes have been implemented for each color, recipe, customer, fabric, and fiber. These processes consider hundreds of parameters from fabric type to dye type to ensure optimum temperature, time, and chemical usage. This development has played a significant role in reducing water and energy consumption. Previously, washes for reactive dyeing were carried out using a few standard processes. With smart recipe systems, the most optimal washing conditions are determined considering all parameters, leading to savings in time, temperature, and water consumption, without relying on human input.

#### Many new products have been developed in natural

Developments in dyeing agents, chemicals, wastewater, and fiber technologies have brought many benefits in reducing water consumption and increasing energy efficiency. Particularly, dyes that bind to fabrics with higher affinity and require less water and energy for washing are widely used today. Since the discovery of reactive dyes in 1951, they have played a significant role in cotton dyeing. Besides monofunctional dyes, bifunctional reactive dyes and, in the last decade, polyfunctional dyes have been introduced into operations. The use of polyfunctional dyes has increased dye uptakes, resulting in a decrease in both the number of washing baths and washing temperatures. Chemical technology has also seen numerous advancements.



The Turkish textile finishing sector has made significant improvements in areas such as water and energy consumption, chimney emissions, and the proper disposal of waste materials in recent years.

Enzymes that allow pretreatment of cotton fabrics at lower temperatures, leveling agents and dispersants that enable faster and more uniform dyeing in reactive dyeing, and liquid reducing agents used instead of sodium hydrosulfite, which increases wastewater load during polyester dyeing, are some examples. Additionally, soaps that reduce washing temperatures, times, and the number of baths in reactive washing have been developed. There have also been significant developments in fiber raw materials. Many new products

have been developed in natural, regenerated, and synthetic fibers, aiming to make the production process more ecological and reintroduce used products into new life cycles through recycling. However, having more environmentally friendly dyes and chemicals and reducing wastewater load alone are not sufficient for our industry. In this regard, wastewater recovery systems, aiming to reclaim much of the water used, are available. Over the past 20 years, the discharge of inadequately treated wastewater has been

brought under control with the establishment of treatment plants in industrial zones, and systems that enable the recovery and reuse of process water are being developed for the textile sector, showcasing the progress made by our industry.

**Developed new methods**

The journey towards improvement involves trying and using many new methodologies to reduce water consumption, increase energy efficiency, and minimize environmental burden. Especially in reactive dyeing processes, which involve the

highest water consumption, salt-free dyeing results in significant efficiencies in water and energy during the most water-intensive stage of the process, washing. In addition to salt-free dyeing, the dyeing of cellulosic products with vegetable dyestuffs also reduces water and energy consumption and decreases wastewater load. Some companies have introduced supercritical carbon dioxide environments for polyester dyeing equipment, allowing polyester fabrics to be dyed without using any water and even processed into finished products without the

need for drying. Technologies such as foam application enable polyester fabrics to be dyed with very little water. Considerable progress has been made, particularly in cotton and polyester dyeing, with the printing and dyeing method. In this method, there are printers that work much faster than digital printers used in digital printing, which aim not to create patterns but to dye the fabric. Thus, fabrics can be dyed with less water. One of the methods using less water for dyeing fabrics is innovative piece dyeing machines. With these newly developed machines, cotton fabrics

can be dyed with reactive dyes, including washing, completing with only 7 liters per kilogram. Continuous washing in ultrasonic environments is an innovative method that increases washing efficiency and reduces water consumption. Nip fullard and spray application machines, which enable finishing applications to be carried out with less water, have also become more widespread today. Clean production practices planned by the Ministry of Environment, Urbanization, and Climate Change for the textile sector are also guiding the industry's sustainability efforts.



# denizli

**TEXTILE POWERHOUSE  
BLENDING HISTORY, CULTURE  
AND TOURISM**

Whether you're captivated by the enchanting travertines of Pamukkale, the historical wonders of Hierapolis and Laodicea, or the renowned high-quality textiles that have brought global fame to Denizli, this dynamic city offers something for everyone.

**L**ocated in southwestern Türkiye, Denizli is a city that successfully harmonizes its rich history, vibrant culture, and growing tourism sector with its traditional textile industry. Known for its thermal waters, ancient ruins, and high-quality textile products, Denizli stands out as a unique destination offering much to business visitors. Denizli's history is rooted in various civilizations, including the Phrygians, Greeks, and Romans. One of the city's most significant historical sites is the ancient city of Hierapolis, which is listed as a UNESCO World Heritage Site. Founded in the 2nd century BC, Hierapolis is famous for its well-preserved theater, extensive necropolis, and the sacred hot springs of Pamukkale. These hot springs have attracted visitors to the region for thousands of years. Pamukkale, one of the world's natural wonders, features stunning white terraces created



The strength of Denizli's textile industry lies in its ability to combine traditional craftsmanship with modern technology.



#### The Most Famous Fabric: BULDAN CLOTH

It is known that Turkish tribes who settled in Buldan in the past wove very durable clothing items from cotton and wool. Today, this weaving has gained worldwide fame as Buldan cloth. Textiles produced in Buldan, from the shawl of Barbaros Hayrettin Pasha to the shirt of Osman Gazi, from the shirt of Young Osman to the wedding dress of Yıldırım Bayezid's daughter, are exhibited in Topkapı Palace today. The fame of historical Buldan weaving continues today as it did in the past. In the district, Buldan cloth is preferred not only for home textile products such as towels, pestemals, tablecloths, and curtains but also for clothing items.

by mineral-rich thermal waters flowing down the mountainside. This breathtaking landscape is unique to Denizli and makes Pamukkale one of the most visited tourist attractions in Türkiye, drawing millions of tourists annually. Tourism in Denizli is not limited to Pamukkale. The region is also home to the ancient city of Laodicea, which boasts well-preserved churches and public buildings from the early Christian era. The red travertine springs of Karahayıt offer a unique spa experience. In addition to its historical and natural attractions, Denizli provides cultural experiences, such as the

annual International Pamukkale Music and Culture Festival. The city's vibrant markets and bazaars, like the Kaleiçi Bazaar, are perfect stops for those looking to experience local life and traditional crafts.

#### The backbone of the economy: The home textile sector

Denizli is known as Türkiye's "Textile Capital." The city's textile industry continues today with a weaving tradition that dates back to ancient times. Denizli is a global leader recognized for its high-quality towels, bathrobes, bed linens, and other textile products. Ranked among Türkiye's top 10 economies and one

of the country's oldest trade centers, this dynamic city in the Southern Aegean boasts over \$4 billion in annual exports, making it one of Türkiye's strongest industrial cities. The textile and apparel sector is among the most important industries, with a global reputation for towel, bathrobe, and bed linen production. Approximately one-third of the city's total exports come from the textile and apparel sector.

The strength of Denizli's textile industry lies in its ability to combine traditional craftsmanship with modern technology. Many of the city's textile manufacturers are family-owned businesses

that have been passed down through generations. These companies continue to invest in state-of-the-art machinery and sustainable production methods, adapting to the changing demands of the global market. The fact that the majority of exports from the region go to developed countries such as the United Kingdom, Germany, the United States, and Italy is a testament to the high quality of production. Denizli is the production hub for the country's towel, bathrobe, and bed linen product groups. Denizli-based companies hold a 73% share in towel exports, 65% in bathrobe exports, and 53% in bed linen exports.

#### Mouth-Watering Delicacies of Denizli

Let's talk about the cuisine of the city. Denizli, with its array of unique flavors, boasts a kitchen that can whet anyone's appetite. If you visit Denizli, you will have the chance to taste some exquisite dishes. The city's cuisine is notable for its dishes made with mushrooms and Aegean herbs. Denizli's cuisine, which shares many dishes with the broader Aegean region, offers a variety of foods with different names and tastes, such as flour soup, tirit, millet bread, kaçamak, Denizli pickles, sıyrırma, and keşkek. Denizli's cuisine, with its rich variety of flavors, is a must-try for anyone visiting the city.

# FASHION AND SHOPPING STREETS OF İSTANBUL



Nişantaşı, a special district that brings together luxury, fashion, and art in the heart of İstanbul, is a destination worth exploring.



With its thousands of years of historical and cultural heritage, İstanbul is making steady progress towards becoming the fashion capital of today, meeting all the needs of fashion enthusiasts with its stylish shopping streets.

**T**hroughout history, İstanbul has been known for its cultural and historical riches, while also standing out as a city where the heart of fashion beats. Hosting popular locations for local and foreign fashion lovers, from Nişantaşı to Bağdat Avenue and İstiklal Avenue.

**Blending traditional with modern, an eclectic fashion sense**  
As a city that has hosted many

civilizations throughout history, İstanbul stands as an important center that has enriched fashion for centuries with its cultural wealth. The historical structures from the Byzantine, Ottoman, and Republican eras, traditional handicrafts, and rich cultural heritage continue to nourish fashion in İstanbul. The cosmopolitan nature of the city, bringing together different cultures, offers a diverse shopping experience for both

local and foreign visitors alike. During the Ottoman era, İstanbul's fashion sense, shaped around the palace, became a focal point of interest with the adoption of Western-style clothing and the proliferation of fashion trends during the Republic period. İstanbul, taking confident steps towards becoming a different fashion capital with its eclectic fashion sense blending traditional with

modern, carries the traces of the past into the present. The city's famous shopping streets and organized fashion events reinforce its strong position, increasing its international recognition.

## THE ADDRESS OF LUXURY AND ELEGANCE: NIŞANTAŞI

Nişantaşı, a special district that brings together luxury, fashion, and art in the heart of İstanbul, stands out as one of the most

prestigious shopping areas in the city. With luxury boutiques, stores of famous brands, and stylish cafes, Nişantaşı is a destination worth exploring and a favorite spot for fashion enthusiasts. Frequented by famous names in the fashion world for shopping and social events, Nişantaşı also hosts many fashion designers and fashion houses. Boutiques located on famous streets like Abdi İpekçi Avenue and Teşvikiye



Avenue offer product alternatives in line with the latest fashion trends. Appealing to both local and foreign tourists, Nişantaşı stands out with its elegance and sophistication.

**Exclusive boutiques**

Nişantaşı stands out as a fashion center where world-renowned luxury brands and Türkiye’s most prestigious fashion designers’ boutiques are located.

Abdi İpekçi Avenue is renowned and can be compared to Paris’s Champs-Élysées or New York’s Fifth Avenue. In addition to global brands like Louis Vuitton, Chanel, and Prada, it also hosts boutiques of local designers. For fashion professionals, this area offers the opportunity to closely follow the latest trends and innovations. Additionally, while strolling the streets of the neighborhood, various concept stores

and antique shops can also be discovered.

**The pulse of art and culture**

Nişantaşı is not only about shopping but also rich in terms of art and culture. The neighborhood hosts many art galleries and cultural centers. The exhibitions organized by galleries appeal to visitors interested in art, while the events held in cultural centers enrich the neighborhood’s intellectual atmosphere. Especially the galleries along Teşvikiye Avenue present some of the finest examples of contemporary art.

**Nişantaşı’s culinary destinations**

From restaurants offering examples of world cuisines to cafes and patisseries, Nişantaşı, which is also a very rich neighborhood in terms of gastronomy, hosts a wide range of options for those who want to experience both. Brasseries and cafes in the neighborhood are ideal places for business meetings or friendly gatherings.

**ON THE ASIAN SIDE, ELEGANCE SPREADS FROM BAĞDAT AVENUE**

Bağdat Avenue, stretching across İstanbul’s Asian side, is one of the city’s most prestigious and vibrant areas. This avenue, filled with luxury stores, ex-

The unique atmosphere and offerings of Bağdat Avenue make it a destination that every visitor to İstanbul should explore.

clusive restaurants, chic cafes, and entertainment venues, is an ideal destination, especially for shopping enthusiasts and gastronomy enthusiasts. Bağdat Avenue is known as a shopping street that offers a variety of chic fashion trends. The international brands and luxury boutiques lined along the avenue, along with local design stores and stylish cafes, make Bağdat Avenue attractive for shopping enthusiasts. A popular spot for tourists, Bağdat Avenue offers a pleasant shopping experience with its wide and green walkways.

**Inspiring shop windows**

Bağdat Avenue is one of İstanbul’s leading fashion-influencing areas. The shops here offer the latest fashion trends and stylish designs to visitors. The boutiques and stores along the avenue attract the attention of fashion-conscious visitors by keeping their pulse on fashion. Additionally, the elegant atmosphere and stylish shop windows of the avenue provide an inspiring environment for those closely following fashion.

**Different taste options day and night**

Bağdat Avenue offers a wide



range of options for gastronomy enthusiasts as well. Restaurants, cafes, and patisseries offering examples from world cuisines cater to every palate. From Italian cuisine to Asian cuisine, from fast food to gourmet meals, there are many options available. Especially in areas like Caddebostan and Suadiye, quality restaurants and chic cafes stand out. Bağdat Avenue not only offers vibrant days but also lively nights. Bars,

clubs, and entertainment venues along the avenue come alive in the evening, offering enjoyable moments to visitors.

**A serene avenue**

What makes Bağdat Avenue more appealing than two prestigious streets on the European side is its parallel coastline, providing a perfect area for outdoor activities such as walking, running, and cycling. Sports clubs



and yoga studios located on the avenue offer various opportunities for those embracing a healthy lifestyle. Bağdat Avenue is known for providing a tranquil life within the city.

**İSTIKLAL, İSTANBUL'S MOST ICONIC STREET**

One of Istanbul's most famous and iconic streets, İstiklal Avenue, located in the heart of Beyoğlu, is a magnet attracting millions of domestic and foreign tourists every year.

Offering a wide range of shopping and cultural experiences with its historical buildings, stores of famous brands, bookstores, art galleries, and restaurants, İstiklal Avenue is intensely popular among both domestic and foreign tourists. The historical tram running along İstiklal Avenue offers visitors a nostalgic journey. İstiklal Avenue reflects both the past and the modern face of the city. Exploring this enchanting avenue offers an unforgettable

experience for those who want to feel the spirit of Istanbul. İstiklal Avenue is like an open-air museum with its rich historical texture and cultural heritage. Historical buildings, passages, and churches from the Ottoman and Republican eras offer visitors a historical journey at every corner. Structures such as Galatasaray High School, Çiçek Pasajı, Saint Antoine Church, and Pera Museum reveal the avenue's rich history. For culture and art enthusiasts, art galleries, theaters, and cinemas located on the avenue offer a program full of various events.

**Traditional passages and modern malls side by side**

İstiklal Avenue is also a paradise for shopping enthusiasts. Many shops, boutiques, and shopping centers along the avenue offer a wide range of products to suit every taste and budget. From stores of global brands to bou-

tiques of local designers, different shopping experiences can be had from vintage shops to modern shopping centers. Especially historical shopping points such as Atlas Passage and Aleppo Passage offer both shopping and a nostalgic atmosphere.

**The heart of art**

Being the most intense place for different accommodation alternatives as well as Istanbul's luxurious hotels, İstiklal Avenue has made it the center of art and cultural events. Stretching from Taksim Square to Galata Tower, this avenue hosts various festivals, exhibitions, and concerts throughout the year. International events such as the Istanbul Theater Festival, Istanbul Film Festival, and Istanbul Biennial enrich the avenue's artistic atmosphere. The theaters, cinemas, and performance centers located on the avenue are constantly filled with various artistic events.



**Urban Bites: Flavors from the Streets**

İstiklal Avenue also caters to gastronomy enthusiasts with a rich selection. Restaurants, cafes, and patisseries offering examples from Turkish cuisine as well as world cuisines cater to every palate. Famous Beyoğlu chocolates and Turkish delights can be tasted at patisseries along the avenue. Additionally, many restaurants on the avenue offer both traditional Turkish flavors and the finest examples of international cuisines. For those

seeking street food flavors, there are also plenty of rich alternatives.

**The street that never sleeps**

When it comes to nightlife in Istanbul, everyone thinks of İstiklal Avenue. It's the liveliest nightlife area in Istanbul. Bars, clubs, and taverns located in the back streets of the avenue come to life in the evening, offering visitors fun moments. The vibrant nightlife, filled with live music performances, DJ sets, and various events, caters to visitors of all ages and tastes.



Zeynep Tosun  
Fashion Designer



## “TURKISH HANDICRAFT, MY STARTING POINT”

Zeynep Tosun, who has successfully represented Turkish fashion both in our country and abroad for many years, has been noted for uniquely incorporating handicraft into her collections. Tosun also draws on the skilled hands of Turkish women for her craftsmanship.



**You have been standing out with your pret-a-porter and capsule collections as well as your haute couture work since founding your brand in 2008. In which area of fashion design do you feel most creative? Is haute couture still a preferred field?**

As a designer, I actually feel creative in every field where design is involved. However, the area where I feel most creative is where I create products in my

own way, without the goal of sales. This typically involves areas with a high level of craftsmanship. Apparel is a bit more restrictive because it requires a focus on production. Nevertheless, being able to be creative in that space is very enjoyable. Haute couture is still preferred, though less so compared to apparel, there is a niche market for unique garments. In this field, we can truly work without the aim of sales.

**As a designer who combines ethnic roots with modern design, how do you draw inspiration from this land?**

I frequently use our ethnic heritage and handicrafts in my designs. In the field of apparel, we face some challenges in this regard, but we still strive to reflect it. I draw inspiration from this land by constantly being with the people here, reading extensively, observing a lot, and traveling widely. This applies to every designer. I love experimenting with handicrafts in various ways. I use different materials like a completely unique bead or wood instead of a bead. By keeping our minds open, we aim to innovate rather than just staying within the limits of what we see. Turkish handicraft is my starting point. I am constantly trying to find answers to how I will advance them and how I will combine them with what I see outside of Anatolia. I believe this is what drives us forward.

**Could you discuss the initiatives Zeynep Tosun brand has undertaken to rejuvenate local female employment with each product it creates?**

We place great importance on craftsmanship. If everyone has a strong point, mine is definitely craftsmanship. Therefore, we work very closely with women and develop beautiful works together. Employing women and ensuring they are paid properly is very important. This is a sensitive

The ZT collection we aim for is essentially about taking inspiration from Anatolia and projecting it into the future through a woman's perspective.



issue that we work on extensively. We want women to receive Exhibition wages. If we have a goal of meeting certain price points, we work on what we can change in the design, what we can simplify. We do not negotiate with women. We are designers, and by altering the design, we can find a shorter path. Mutual trust is very important here. Even though we do not have a Exhibition Trade certification, we implement this.

The point we pay attention to is that the hourly wage for women is 40% higher than the minimum wage. Women continue to do this work because we implement a Exhibition wage policy. We also have projects with the UN in this regard. We are still at the very beginning of the work we want to do. We want women to earn good wages and pass on these skills to their children. The children can either do this

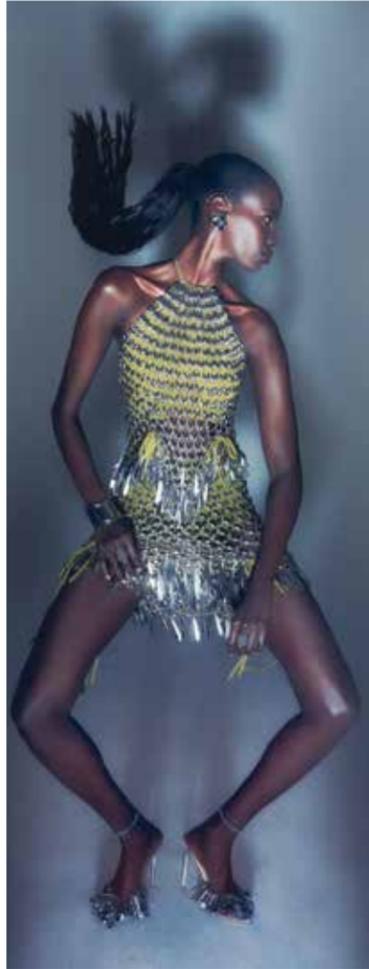
work or become designers if they wish. If children want to become designers like us, they can do handcraft-based work with their mothers and other working women. This can turn into a brand. In this way, we can achieve local development. That is when we will reach our desired point.

**What position does the Zeynep Tosun brand hold in the global market? Many foreign celebrity names prefer your designs, what are you doing to increase your visibility?**

I used to organize fashion shows and PR campaigns abroad, but we're not doing that anymore due to economic challenges. We had to cut back on those initiatives. However, we're currently in a time when consumers who seek to dress uniquely are reaching out to our brand. When they hear about us at international sales points, they contact us. We continue our operations with the visibility gained from promotions we conduct abroad from Türkiye and our presence in international sales outlets.

**As one of the figures successfully representing Türkiye in international fairs, how do you generally observe the interest in the Turkish fashion industry abroad? Do you think Türkiye has become one of the game changers in fashion?**

In my opinion, Turkish fashion is heading in a very positive direction. We have seen the emergence of many brands, which have



also established sales outlets in various locations. They position themselves alongside some very strong brands. However, I haven't yet seen a brand that has truly become a game changer, as it requires a significant amount of effort to achieve that status. Nevertheless, we have many brands that are actively participating in the industry. From designer labels to larger production brands, I believe we are in a quite favorable position. As long as our economy allows, I think we can progress even further.

**We see a dominance of black and**

**white, along with the prevalence of leopard prints in our SS24 collection. Additionally, pieces adorned with metal accessories exude an extraordinary and cool vibe, which is quite captivating. How would you describe this collection? What can we expect in terms of the ZT look in future seasons?**

Since we come from haute couture, it takes me some time to adjust to Apparel. I create what I want to wear in Apparel. Unfortunately, we have to reduce handcrafted pieces a bit because prices in Apparel have started to skyrocket. We focus on figuring out

the most sensible way forward and what unique things we can produce. In the upcoming season, ZT will continue to cater to the sophisticated and cool woman on the street. I believe we are a very urban brand. We aim to be a brand that stands out in the city, with a style that is both distinctive and bold, appealing to those with an eclectic taste. Hopefully, we'll present some beautiful collections in the future.

**Your recent collections, Sirius and From Anatolia to Sirius and Rebirth in Sirius, are said to reflect the inspiration of Sirius. It's believed that even Göbeklitepe, the oldest structure in Anatolia, was built with an understanding far ahead of its time, aligning with the Sirius constellation. How did you envision the ZT woman in these collections?**

The ZT collection we aim for is essentially about taking inspiration from Anatolia and projecting it into the future through a woman's perspective. Therefore, we try to reflect our ethnic elements into our collections through patterns and handcrafted details. This season, we chose the sky because, for me, the sky represents the future, hope, and progress. We attempted to merge this with Anatolian culture. We drew inspiration from motifs and patterns derived from Anatolia and the sky. We incorporated these into our designs, sometimes in small details, and sometimes in larger motifs. In our Apparel collections, we strive to

I frequently incorporate our ethnic heritage and handcrafted elements into my designs. By being constantly surrounded by people from these lands, by reading extensively, observing keenly, and traveling extensively, I draw my inspiration.

make ethnic patterns more accessible by toning them down a bit. For me, it's been a significant and enjoyable transformation.

**You collaborate with many other brands to produce collections that appeal to a wide audience in addition to ZT designs. Will there be any new brand collaborations in the future?**

This summer, our Zeynep Tosun x Trendyol collection "Party Wear" and "Daily Wear" is relaunching. At the same time, I'm working on a jewelry collection with Lucky Culture, and we'll be releasing a new collection with them as well. In fact, we have plans for collaborations with many other brands. We're trying to find the time for them. We're really focused on doing the right job at the right time. I may postpone some things a bit because I'm quite perfectionistic, but we have some great projects in the pipeline. What matters to me is designing something. Whether it's clothing, pillows, or cars, it doesn't matter... I believe a designer has a golden bracelet, and a trained eye can design anything. So, I'm very open to all kinds of collaborations.

**Lastly, what does sustainability, a topic currently prevalent in the industry, mean to you?**

Sustainability is a very interesting concept to me. It's used for marketing purposes, but there are also brands that truly engage in sustainable practices. Even a tiny brand engaging in sustainable



**It is very important that women are employed and paid the right wages.**

practices might market themselves as "sustainable." That's why consumers need to be very well-informed about this issue. I know a lot about it because I'm involved in it, but I assume nobody knows about it. There are things that even surprise me, things I never knew or saw. A lot of things are hidden from us. That's why consumers need to be very conscious. For example, we are sustainable in terms of production. We pay Exhibition wages to women. We have some sustainability efforts in packaging. Since transitioning to Apparel, we've started using cardboard boxes. I

can no longer use the packages made from surplus fabrics. We have some great sustainability projects. We haven't used any animal products for five years. In our own office, we have significant recycling efforts. Plastic can only be recycled twice at maximum, so using natural materials is crucial. When a big brand claims to have a sustainable collection, I know that only their labels are made from sustainable materials. You need to be very careful with such statements. Although there are brands capable of doing this, being a completely sustainable brand is very difficult.



## FIRST QUARTER EXPORT PERFORMANCE

Türkiye's exports reached \$63.7 billion in the January-March period of 2024, breaking the first-quarter record of all time. While the exports of the Textile, Apparel, and Leather sectors decreased, the Carpet sector's exports grew significantly.

**R**ecent adverse conditions in the global economy, such as contraction and high inflation, are also affecting global trade. The demand stagnation in Türkiye's target export markets, particularly in the EU and the USA, is reflected in the sectors' exports. Despite all these developments, Türkiye achieved a record level in

the first quarter with \$63.7 billion in exports. While the exports of the Textile, Apparel, and Leather sectors decreased, the Carpet sector showed significant growth in the first quarter. Mustafa Gültepe, Chairman of the Türkiye Exporters Assembly (TİM), stated that despite the records in the first two months,

exports shrank by 4.1% in March. Emphasizing that they closed the first quarter 3.6% above the same period of the previous year despite the decline in March, Gültepe continued: "According to the General Trade System (GTS) records, we completed March with \$22.58 billion in exports. In the January-March period, we broke

In the first quarter of 2024, the capacity utilization rate in the manufacturing industry was 76.2%, while it was 75.4% in Apparel and 71.7% in Textiles.

the first-quarter record of all time with \$63.7 billion in exports. Last month, eight of our sectors increased their exports. Automotive retained its top position with \$3.2 billion. The other top five sectors were chemicals with \$3 billion, Apparel with \$1.6 billion, steel with \$1.5 billion, and electrical-electronics with \$1.47 billion. According to TİM data based on the location of firms' headquarters, 43 out of our 81 provinces managed to increase their exports. The top five provinces with the highest exports were İstanbul, Kocaeli, Bursa, İzmir, and Ankara. Balıkesir, Edirne, Erzincan, and Kocaeli reached the highest export values in their history. The Black Sea, Eastern Anatolia, Mediterranean, and Central Anatolia regions increased their exports. The provinces that increased their unit export value the most were Yalova, Nevşehir, and Isparta, and the sectors were olive and olive oil, hazelnut, and dried fruits. A total of 1,421 companies exported for the first time. The countries we exported to the most were Germany, Italy, the USA, Iraq, and the United Kingdom. There was a significant increase in exports to Latin America. The euro/dollar parity continued to have a positive effect on our exports. Last month, the parity difference contributed \$161 million to our exports. Our unit export value was \$1.41."

### Apparel exports in the first quarter amounted to \$4.5 billion

In the first quarter of 2024, the capacity utilization rate in the ma-

nufacturing industry was 76.2%, while it was 75.4% in Apparel and 71.7% in Textiles. Compared to the end of 2023, the capacity utilization rate in Apparel increased by 1.5 points, while it decreased by 0.2 points in Textiles. The Apparel and apparel sector's exports in the first quarter of 2024 decreased by 12.5% compared to the same period of the previous year, falling to \$4.54 billion. The sector's exports to EU countries decreased by 8.3% during this period, with Germany, the Netherlands, Spain, the UK, France, the USA, Italy, Poland, and Iraq being the most exported count-

ries. Among the top nine countries with the highest exports in the January-March period, only the exports to the Netherlands, Poland, and Iraq increased. In terms of product groups, \$2.2 billion worth of exports were made in the knitted group, \$1.7 billion in the woven group, and \$484.1 million in the ready-made goods group. It was noted that the only product group that increased its exports in the first quarter in the Apparel sector was sportswear. The Apparel and apparel sector maintained its position as the third sector with the highest exports in the January-March

Türkiye's unit export value was 1.41 dollars.





In the first quarter of 2024, the capacity utilization rate in the manufacturing industry was 76.2%, while it was 75.4% in Apparel and 71.7% in Textiles.



The exports of the carpet sector in the first quarter of 2024 increased by 23.9% compared to the same period of the previous year, rising to \$746 million.

period, following the automotive and chemical sectors.

**The textile sector increases yarn and fiber exports**

The exports of the textile and raw materials sector in the first quarter of 2024 decreased by 4.6% compared to the same period of the previous year,

amounting to \$2.898 billion. The sector's exports to EU countries decreased by 3% during this period, with Italy, Germany, the USA, Spain, the UK, Morocco, Egypt, and Iran being the most exported countries. Among the top eight countries with the highest exports in the January-March period, only exports to

Italy and Germany decreased. In terms of product groups, woven fabric exports decreased by 5.1%, technical textile exports by 3.1%, knitted fabric exports by 8.7%, home textiles exports by 11%, and apparel sub-industry exports by 1.7% in the first quarter. Yarn exports increased by 6.9%, and fiber exports increased by 4%.

**Leather and leather products exported \$409 million**

The exports of the leather and leather products sector in the first quarter of 2024 decreased by 28% compared to the same period of the previous year, amounting to \$409 million. The sector's exports to EU countries decreased by 17.2% during this period, with Germany, Iraq, Italy, the UK, France, Poland, Spain, Romania, Kazakhstan, and the USA being the most exported countries.

Among the top 10 countries with the highest exports in the January-March period, only exports to Iraq increased. In terms of product groups, footwear exports decreased by 28.5%, semi-processed/finished leather and processed fur exports by 11.6%, saddlery exports by 31.6%, leather and fur clothing exports by 35.1%, and raw leather and fur exports by 86.2% in the first quarter.

**Carpet exports increased by 23.9%**

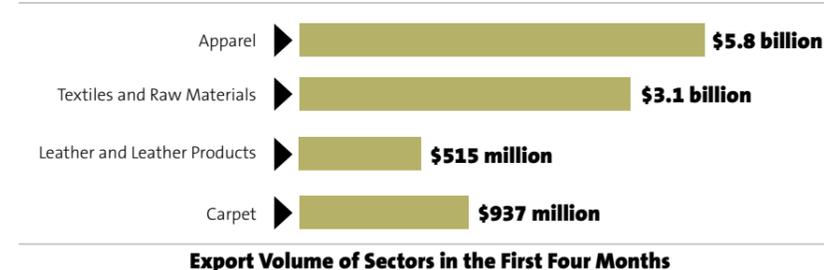
The exports of the carpet sector in the first quarter of 2024 increased by 23.9% compared to the same period of the previous year, rising to \$746 million. The sector's exports to EU countries increased by 10.3% during this period, with the USA, Saudi Arabia, the UK, Iraq, Germany, the United Arab Emirates, Libya, Kuwait, Israel,

**Continued Losses in April**

Türkiye completed April with a 0.1% increase in exports, reaching \$19.3 billion. Exports in the January-April period amounted to \$82.9 billion. In the Apparel sector, there was a 17.8% decrease in April, with monthly exports amounting to \$1.23 billion. The exports of textiles and raw materials also decreased by 7.5%, with April exports falling to \$700 million. The leather and leather products sector was also among the sectors that experienced a significant decline in the same period. April exports decreased by 27.4%, amounting to approximately \$106 million. Despite significant growth in the first quarter, carpet exports decreased by 11.9% in April, with carpet exports amounting to approximately \$191 million in April.

and Kazakhstan being the most exported countries. Among the top 10 countries with the highest exports in the January-March period, only exports to Germany and Kuwait decreased. In terms of product groups, machine-made carpet exports increased by 21.5%, tufted carpet exports by 37.2%,

and hand-made carpet exports by 17.8% in the first quarter. While American countries have long been at the top of carpet exports, Middle Eastern countries took the lead in Türkiye's carpet exports as of February. Carpet exports to Middle Eastern countries increased by 34.3% in the first quarter.



# ANATOLIA BECOMES A PRODUCTION HUB WITH INVESTMENTS

The Textile, Apparel, Leather, and Carpet sectors continue to strengthen with investments in Anatolia. In 2023, these sectors invested nearly 45 billion TL in various cities of Anatolia, creating new employment for more than 72,000 people.



The Textile, Apparel, Leather and Leather Products, and Carpet sectors continue to revitalize Anatolia and strengthen production with their investments. Despite adverse factors, these sectors, which maintain their investment appetite and provide significant support to the Turkish economy, continued to invest in 2023 despite the earthquakes described as the disaster of the century. Large-scale investments were made in many cities of Anatolia. The total investments of the four sectors in 2023 approached 45 billion TL. The employment created by these investments exceeded 72,000 people.

## Apparel sector's investments exceeded 5 billion TL

The investments of the Apparel and apparel sector in Anatolia exceeded 5 billion 622 million TL in the January-August period of 2023. With these investments, additional employment rose to 56,687. The sector made the most investments in Çankırı. Investments of 844.5 million TL provided additional employment for 594 people in Çankırı. Following Çankırı, the cities with the highest investments were Diyarbakır with 598.2 million TL, Batman with 312.1 million TL, and İstanbul with 287.9 million TL. These cities were followed by Malatya, Ordu, Mardin, İzmir, Kırşehir, and Yozgat. When looking at the overall year of 2023, the top 10 cities with the most investments based on the number of investing firms were: İstanbul with 105 investments, Mardin with 95 investments, Malatya with 92 investments, Batman with 87 investments, Diyarbakır with 76 investments, Şırnak with 37 investments, Adıyaman with 35 investments, Bitlis with 32 investments, Şanlıurfa with 28 investments, and Kahramanmaraş with 20 investments.

## Textile investments reached 37 billion TL

The textile and raw materials sector also made significant strides in investment. In the January-August period of 2023, investments in the sector

Cities	Fixed investment (million TL)	Employment (person)
Çankırı	844	594
<b>Diyarbakır</b>	<b>598</b>	<b>9.050</b>
Batman	312	5.914
<b>İstanbul</b>	<b>287</b>	<b>1.477</b>
Malatya	280	7.339
<b>Ordu</b>	<b>238</b>	<b>1.935</b>
Mardin	238	5.685
<b>İzmir</b>	<b>223</b>	<b>1.032</b>
Kırşehir	213	200
<b>Yozgat</b>	<b>204</b>	<b>727</b>
TOTAL	5.622	56.687

Top 10 Provinces with the Most Apparel Investments



The total investments of the four sectors in 2023 approached 45 billion TL. The employment created by these investments exceeded 72 thousand people.



Anatolian investments of the leather and leather products sector in the January-August period of 2023 It increased to 2 billion TL.

exceeded 37 billion TL. These investments created employment for 11,880 people. The textile and raw materials sector made the largest amount of investment in Kahramanmaraş. Investments in Kahramanmaraş exceeded 13.3 billion TL, with additional employment rising to 3,599. Investments of 5.6 billion TL were made in Gaziantep, 2.8 billion TL in Bursa, and 1.9 billion TL in Niğde. These

cities were followed by Uşak, Denizli, Diyarbakır, Elâzığ, İstanbul, and Kırklareli. When looking at the overall year of 2023, the top 10 provinces with the most investments based on the number of investing firms were: Bursa with 82 investments, İstanbul with 56 investments, Kahramanmaraş with 49 investments, Gaziantep with 40 investments, Denizli with 33 investments, Tekirdağ with 27

investments, Uşak with 21 investments, Kayseri and İzmir with 13 investments each, and Adana with 10 investments.

**Investments in the leather and leather products sector reached 2 billion TL**

Investments in the leather and leather products sector in Anatolia exceeded 2 billion TL in the January-August period of 2023. These investments created additional employment for 3,960 people. The sector made the most investments in İstanbul. Investments of 617 million TL provided additional employment for 418 people in İstanbul. Following İstanbul, the cities with the highest investments were Bolu with 497 million TL, Gaziantep with 153 million TL, and Trabzon with 87 million TL. These cities were followed by Bursa, Şanlıurfa, İzmir, Niğde, Hatay, and Sinop. When looking at the overall year of 2023, the top 10 provinces with the most investments based on the number of investing firms were: İstanbul with 29 invest-

ments, Bolu with 16 investments, Şanlıurfa with 15 investments, Gaziantep with 13 investments, Hatay with 10 investments, Mardin and Bursa with 9 investments each, Tokat with 6 investments, and Konya and Niğde with 5 investments each.

**Investments in the carpet sector exceeded 271 million TL**

Investments in the carpet sector exceeded 271.2 million TL in the January-August period of 2023. These investments created employment for 287 people. The carpet sector made the largest amount of investment in Gaziantep. Investments in Gaziantep exceeded 154 million TL, with additional employment rising to 89. Investments of 59 million TL were made in Tekirdağ, 30 million TL in Kırklareli, 24 million TL in Isparta, and 1.8 million TL in Diyarbakır. When looking at the overall year of 2023, the provinces with the most investments based on the number of investing firms were: Gaziantep with 12 invest-

ments, Tekirdağ and Isparta with 3 investments each, and Kırklareli, Diyarbakır, İstanbul, and Uşak with 1 investment each.

**Textile is the second most investing sector in Anatolia**

The Anadolu 500 survey, conducted by Economist Magazine and excluding Türkiye's three largest cities (İstanbul, Ankara, and İzmir) to determine the top 500 compa-

nies, was published at the end of 2023. In 2022, the total revenue growth of Anadolu 500 companies increased by 119% compared to the previous year, reaching 1.9 trillion TL. In the pandemic year of 2020, global trade decreased by 9% compared to the previous year according to United Nations Conference on Trade and Development (UNCTAD) data. However, 2021 was a year in

Cities	Fixed investment (million TL)	Employment (person)
Kahramanmaraş	13.393	3.599
<b>Gaziantep</b>	<b>5.641</b>	<b>1.256</b>
Bursa	2.855	1.743
<b>Niğde</b>	<b>1.973</b>	<b>235</b>
Uşak	1.735	333
<b>Denizli</b>	<b>1.734</b>	<b>394</b>
Diyarbakır	1.580	315
<b>Elâzığ</b>	<b>1.118</b>	<b>287</b>
İstanbul	913	495
<b>Kırklareli</b>	<b>900</b>	<b>260</b>
TOTAL	37.037	11.880

Top 10 Provinces with the Most Textile and Raw Materials Investments

Cities	Fixed investment (million TL)	Employment (person)
İstanbul	617	418
<b>Bolu</b>	<b>497</b>	<b>240</b>
Gaziantep	153	134
<b>Trabzon</b>	<b>87</b>	<b>30</b>
Bursa	71	179
<b>Şanlıurfa</b>	<b>66</b>	<b>505</b>
İzmir	64	48
<b>Niğde</b>	<b>53</b>	<b>26</b>
Hatay	49	91
<b>Sinop</b>	<b>47</b>	<b>90</b>
TOTAL	2.004	3.960

Top 10 Provinces with the Most leather and leather Products Investments



The textile sector was the second most represented sector in the list, with 95 companies making it to the Anadolu 500 list, just like last year.



In the pandemic year of 2020, global trade decreased by 9% compared to the previous year according to United Nations Conference on Trade and Development (UNCTAD) data.

which global trade revived. During this period, Türkiye's exports increased by 32.8% to 225 billion 291 million dollars, while imports increased by 23.6% to 271 billion 424 million dollars. In 2022, both the supply chain problems from China to the west and the trade gap created by the Russia-Ukraine War in the region created a new opportunity for Turkish companies. However, rising labor and energy costs due to

high inflation domestically weakened the export performance of Anadolu 500 companies. There was a significant decline in the share of Anadolu 500 companies' exports in Türkiye's total exports. In 2022, Anadolu 500 exports increased by 13.9% to 24 billion 775 million dollars. In the same period, the share of Anadolu 500 companies in total exports fell from 14.7% to 9.7%. Anadolu 500 companies, which

provided jobs for 303,922 people by surpassing the 300,000 employment threshold in 2021, experienced some employment loss in 2022. The total employment of Anadolu 500 companies fell below 300,000 to 291,285 during this period. The textile sector was the second most represented sector in the list, with 95 companies making it to the Anadolu 500 list, just like last year.

**Sectors invest in the provinces they export the most**

In 2023, the Apparel sector achieved exports worth 19.2 billion dollars. On a provincial basis, İstanbul ranked first with an export volume of 13.4 billion dollars. İstanbul was followed by Bursa with 1.5 billion dollars, İzmir with 1.3 billion dollars, Denizli with 1.1 billion dollars, and Tekirdağ with 224.5 million dollars. Other provinces with the highest apparel exports were Düzce, Gaziantep, Adana, Ankara, and Mardin. It is noteworthy that İstanbul, Bursa, İzmir, and

Mardin, which are among the top 10 provinces in apparel investments, are also in the top 10 provinces for exports. The textile and raw materials sector, which closed the year with 9.5 billion dollars in exports, saw İstanbul leading the provinces with the highest exports at 4 billion dollars. It was followed by Gaziantep with 1.4 billion dollars, Bursa with 1.2 billion dollars, Kahramanmaraş with 612.4 million dollars, and Adana with 509.9 million dollars. Other provinces with the highest textile exports were İzmir, Denizli, Kayseri, Tekirdağ, and Uşak. İstanbul, Gaziantep, Bursa, Kahramanmaraş, Denizli, and Uşak were in both the top 10 investment and top 10 export provinces lists. The leather and leather products sector, which achieved exports worth 1.8 billion dollars in 2023, saw İstanbul ranking first with an export volume of 1.1 billion dollars. İstanbul was followed by Gaziantep with 175.4 million dollars, İzmir with 152.2 million dollars, Ankara with 112.2 million

dollars, and Bursa with 52.1 million dollars. Other provinces with the highest leather and leather products exports were Konya, Tekirdağ, Uşak, Adana, and Şırnak. İstanbul, Gaziantep, İzmir, and Bursa, which are among the top 10 provinces in leather investments, are also in the top 10 provinces for exports. The carpet sector, which closed 2022 with 2.7 billion dollars in exports, saw Gaziantep leading the provinces

with the highest exports at 1.8 billion dollars. It was followed by İstanbul with 667.9 million dollars, Uşak with 67.2 million dollars, Kayseri with 21.4 million dollars, and Bursa with 19.2 million dollars. Other provinces with the highest carpet exports were Denizli, Isparta, Ankara, Düzce, and İzmir. Gaziantep and Isparta were in both the top 10 investment and top 10 export provinces lists.

Cities	Fixed investment (million TL)	Employment (person)
Gaziantep	154	89
<b>Tekirdağ</b>	<b>59</b>	<b>40</b>
Kırklareli	30	123
<b>Isparta</b>	<b>24</b>	<b>5</b>
Diyarbakır	1	30
<b>TOPLAM</b>	<b>271</b>	<b>287</b>

Top 10 Provinces with the Most Carpet Investments

Investments in the carpet sector increased to 271.2 million TL in the January-August period of 2023.



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Onur Duru

Bossa General Manager



## BOSSA EXPANDS ITS EXPORT MAP WITH ITS SUSTAINABLE COLLECTION

With its newly opened yarn factory, Bossa has reached the capacity to produce all its yarn needs in-house. Bossa continues to be one of the most important suppliers of world brands with its remarkable works in the fields of sustainability, R&D, and product development.

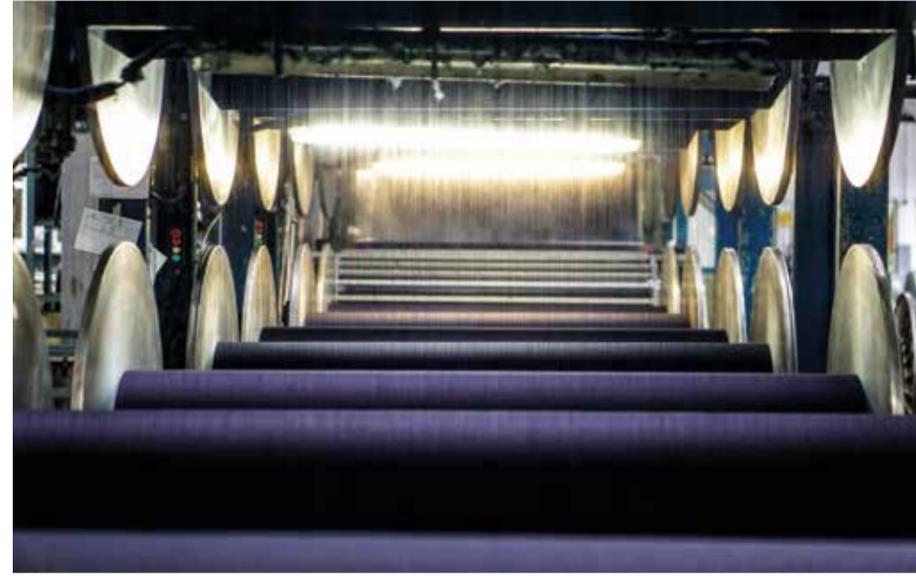
**A**s one of Türkiye's largest integrated textile companies, Bossa has been operating for over 70 years. Could you provide a brief overview of Bossa's areas of activity?

Bossa, with its facility in Adana established in 1951, is one of Türkiye's largest integrated denim and sportswear textile companies. For 73 years, we have been offering high-quality products and services to the market with our product range in denim and our high production capacity, dyeing, and finishing processes. We maintain our leadership position in the sector with our distinctive, high-quality, and innovative product composition, customer-oriented special service, fast service, high satisfaction, extensive marketing network structured with effective pricing policies, correct market

positioning, and competitive prices.

**You have a new yarn factory. What will this investment bring to the brand?**

We aim to increase Bossa's annual production capacity to 60 million meters per year within a few years. In line with this goal, our new yarn facility with a capacity of 40 tons/day was commissioned in May. With our new yarn factory investment, we will meet all our yarn needs with our own production and gain a cost advantage in production. Additionally, to meet our energy needs at lower costs, a solar power plant (SPP) with a capacity of 5,300 KWp has been installed on the roofs of the new factory buildings. The electricity energy obtained from the rooftop SPP will be used for our company's own needs.



**Could you talk about Bossa's collaborations with brands that shape global fashion and its overseas activities?**

Having been awarded the TUR-QUALITY® certificate in 2006, Bossa is progressing on the path to increasing its brand value that represents Turkish textiles abroad. Bossa stands out with its trend-setting role in the industry and collaborations with significant, fashion-forward global brands in its production areas. Our product development and R&D efforts, along with our innovative and pioneering structure that captures market trends, make us a prominent player in the industry. We accelerate these efforts with our investments and strong team. The key elements behind this success are our qualified human resources, extensive sales network, product quality, rich collections, advanced production, and information systems technology. Bossa has an R&D center. We

are one of the first textile companies in Türkiye to receive this certification. In the scope of R&D, we collaborate with universities and continue our work without slowing down. In product development, we evaluate customer demands and analyze our customers to develop new products for them. Additionally, we launch new collections twice a year, for fall-winter and spring-summer. We employ around 30 R&D personnel and engineers in various fields. In R&D, we develop new and high-quality products every day. At Bossa, nearly 10 new products are released every day. I can say that our innovative structure and quality production are the reasons why world brands prefer us.

**Bossa is one of the brands that carries out significant work in sustainability. What can you say about your activities in this area and your 'Re-set' collection?**

Our company, which has

achieved many firsts in denim production, stands out especially with its environmental sustainability efforts. With our completely ecological Re-Set collection that we launched in 2006, we have become one of the pioneering organizations in the textile field both in Türkiye and globally. Leading the industry in sustainability, our company is making confident strides towards becoming a zero-waste company with the projects it has undertaken and plans to undertake. Bossa, achieving many firsts in sustainability, has invested in a recycling facility and started operating it at full capacity. When it comes to the environment, another element that comes to mind is water. With the thought that 'Water is life,' we are also working on water conservation. With the efforts we have made under our 'Saveblue' concept, we have reached higher levels of savings. Our company, which is sensitive to energy and

water consumption, has taken a significant step in sustainability by combining this concept with the use of natural fibers. We achieve 92% water savings in the dyeing of products under the 'Saveblue' concept. Additionally, in this dyeing process, we achieve a 99% reduction in wastewater. In terms of energy, we have a cogeneration plant in our facility. Another major and important project we have commissioned is the solar energy system. These systems have been implemented as both roof and land investments. Currently, we meet 50% of our total energy needs. With the investments we plan to make, we aim to meet 100% of our energy needs."

**Demand contraction, the impact of global inflation on costs, and geopolitical risks negatively affect the sector. What strategies is Bossa focusing on during this period?**

We are focusing on certain

strategies to maintain our competitive advantage during this challenging time at Bossa. The first of these is efficient and high-quality production and services. We continuously increase efficiency and maintain the highest quality standards in the production of our products and services. By offering our customers high-quality products and services, we aim to meet their expectations and increase their satisfaction. Another strategy is innovative trend products. By intensifying our research and development activities, we develop innovative products that meet changing market demands and trends. In this way, we gain a competitive advantage by offering our customers unique and valuable products that differ from our competitors. We have representatives in 30 countries, primarily in Europe, and we work with nearly 60 countries. With the increase in sustainable fabrics, we are expanding to differ-

ent regions. We work with many globally renowned brands and export more than half of our total production. We evaluate new market opportunities and focus on expanding markets. This helps us balance uncertainties in the domestic market and adapt to changing conditions in the global market. By adhering to sustainability principles, we reduce our environmental impact and continue to do our part with all our strength. Thus, we earn the trust of our customers and stakeholders and contribute to long-term success. By adopting these strategies, we aim to maintain our competitive advantage in an environment where cost balance is disrupted and exchange rates are not at expected levels both globally and in the domestic market. As the Bossa family, we continue to do our part to be more successful, more productive, and more environmentally friendly."



## TÜRKIYE IS THE WORLD'S 4<sup>TH</sup> LARGEST HOME TEXTILES SUPPLIER

Türkiye maintains its strong and stable position in the home textiles sector. In 2023, Türkiye exported home textiles worth \$1.9 billion, ranking as the fourth-largest supplier globally.



The global export of curtains and bed covers was \$5.7 billion, while blanket exports reached \$5.9 billion, with Türkiye becoming the fifth largest exporter in both areas.

**G**lobal home textiles exports decreased by 4.8% in 2022, amounting to \$62.4 billion. In 2021, global home textiles exports increased by 28.2%, reaching a \$9 billion rise over the past five years. Global home textiles exports were \$53.8 billion in 2018, \$53.6 billion in 2019, \$51.1 billion in 2020, and \$65.5 billion

in 2021.

China holds the position as the world's largest home textiles exporter, with a 50.9% share. In 2022, China's home textiles exports decreased by 4.7%, reaching a value of \$31.8 billion. Pakistan is the world's second-largest home textiles exporter with an 8% share and \$4.9 billion in exports. India ranks as the third-largest home textiles exporter, with a 7.7% share and \$4.8 billion in exports. Türkiye is the world's fourth-largest home textiles exporter, with a 3.7% share of global home textiles exports. In 2018, Türkiye exported home textiles worth \$1.875 billion, \$1.889 billion in 2019, and \$1.855 billion in 2020. In 2021, Türkiye's home textiles exports increased by 30.1%, reaching approximately \$2.4 billion. However, exports decreased by 4% in 2022, falling to \$2.3 billion. In 2023, exports further declined by 14.4%, dropping to \$1.9 billion. Following Türkiye in the ranking of the countries with the highest home textiles exports are Germany, Poland, Bangladesh, the Netherlands, Vietnam, and Mexico.

### Mostly bed sheets are exported

When the world home textile exports are examined by sub-product groups, it is observed that the product group with the highest export, with a share of 21.9%, is bed sheets. Bed sheet exports decreased by 5.7% to reach \$13.7 billion. China, Pakistan, and India were prominent countries in the export of this product group,

with Türkiye ranking fourth in exports. In 2022, Pillows, duvets, and sleeping bags, with a share of 21.9%, were positioned as the second most exported product group. The export of pillows, duvets, and sleeping bags reached \$13.6 billion in 2022, decreasing by 9%. China, India, and Poland were prominent countries in the export of this product group, with Türkiye ranking ninth. The third most exported home textile product group, towels and cleaning cloths, saw an increase of 1.8% in 2022, reaching \$9 billion in value. Türkiye stood out as the fourth largest exporter in this product group. The global export of curtains and bed covers was \$5.7 billion, while blanket exports reached \$5.9 billion, with Türkiye becoming the fifth largest exporter in both areas. Other household items achieved \$4.3 billion in exports, with Türkiye ranking third in exports. The global export of knitted bathrobes was \$3.6 billion, with Türkiye ranking sixth. Woven bathrobes reached an export volume of \$2.1 billion, with Türkiye rising to second place in this field. Nets and embroideries achieved exports worth \$1.6 billion, with Türkiye ranking fourth. Bedspreads reached an export potential of \$1.4 billion, making Türkiye the third largest exporter of bedspreads. Tablecloth exports amounted to \$39 million, with Türkiye ranking seventh. Hand-crafted wall carpets achieved exports of \$25 million, with Türkiye ranked 16<sup>th</sup> in the global rankings.



**Türkiye's most significant product group is towels and cleaning cloths**

When Türkiye's home textile exports in 2023 are examined by sub-product groups, it is seen that the most important product group, with a share of 31.3%, is towels and cleaning cloths. Türkiye's exports of towels and cleaning cloths decreased by 15.7% to reach \$590.7 million in this period. Bed sheet exports shrank by 20.4% to reach a potential of \$461.1 million. Woven bathrobes decreased by 10.7% to \$170.9 million, while other household items saw an increase of 8.1% to \$160 million in exports. Curtain and bedspread exports decreased by 14.5% to \$138.6 million, while pillow, duvet, and sleeping bag exports decreased by 17.2% to \$120.7

million. Curtains and embroideries saw a 13% decrease to \$67.2 million, blankets decreased by 15.7% to \$56 million, bedspreads shrank by 9.3% to \$46.5 million, and knitted bathrobes decreased by 12.8% to \$43.2 million in export volume. Tablecloth exports decreased by 2.8% to \$33 million, while handcrafted wall carpets exports decreased by 77% to \$13,000.

**Germany stands out in Türkiye's home textile exports**

Germany became the most important country for Türkiye's home textile exports. Germany's share in Türkiye's exports rose to 18.8% in 2023. Germany's exports decreased by 16.6% to reach \$355 million in 2023. Home textile exports to the United States also

decreased by 20% to reach \$246 million. France saw a 5.3% increase in exports to \$143.1 million, while Italy's exports decreased by 16.2% to \$98.7 million. Export to the UK decreased by 18.4% to \$77 million. The Netherlands experienced a 34.7% decrease in exports, reaching \$65.4 million. Spain ranked eighth in Türkiye's home textile exports, with exports decreasing by 6.4% to \$53.4 million. Romania's exports decreased by 3.3% to reach \$45.7 million. Austria's exports decreased by 11% to \$43.9 million. Of Türkiye's \$1.8 billion home textile exports in 2023, 53.8% were to EU countries. Germany has long been the top destination for Türkiye's home textile exports. Home textile exports to Germany were \$401 million in 2018, \$429 million

in 2019, \$436 million in 2020, \$465 million in 2021, and \$433 million in 2022. Meanwhile, exports to the United States during the same period were \$240 million, \$243 million, \$262 million, \$396 million, and \$340 million, while exports to France ranged around \$117 million, \$101 million, \$91 million, \$145 million, and \$153 million.

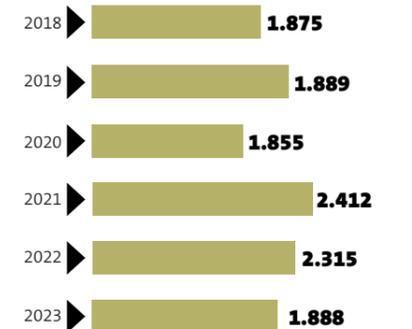
**Global home textile imports reached \$54.5 billion**

Global home textile imports decreased by 1.5% in 2022, reaching a value of \$54.5 billion. The United States is the world's largest home textile importer with a 32.7% share. In 2022, the United States' home textile imports declined by 7.7% to \$16.9 billion. Germany ranked second with imports worth \$3.9 billion, followed

by Japan with \$3.1 billion. The ranking continued with France at \$2.5 billion, the United Kingdom at \$2.4 billion, Canada at \$1.5 billion, and the Netherlands and Austria both at \$1.4 billion. Italy and Spain followed with \$1.2 billion each.

In 2022, Türkiye's home textile imports decreased by 2.4% to \$71 million. China, with a 29.1% share, remained Türkiye's largest home textile supplier. Türkiye's imports from China increased by 10.4% to \$21 million. Bulgaria ranked second with a 13.4% share, while Italy ranked third with a 5.3% share. Pillows, quilts, and sleeping bags, with a 37.2% share, were the most imported home textile sub-product group in Türkiye in 2022, recording an increase of 6.9% to \$26 million.

**Türkiye's home textile exports (million dollars)**



# HOMETEX

## BROUGHT TOGETHER THE HOME TEXTILE SECTOR IN İSTANBUL



HOMETEX hosted more than 175,000 visitors from 80 countries. The fair, with its trend areas and 'Dialogs' programs, shaped fashion and trends, while also boosting the sector's exports with commercial connections made.

Organized by KFA Fuarçılık, a subsidiary of the Bursa Chamber of Commerce and Industry (BTSO), in collaboration with the Turkish Home Textile Industrialists and Businessmen Association (TETSİAD), HOMETEX took place in İstanbul from May 21st to 24<sup>th</sup>. The Exhibition gathered thousands of domestic and foreign companies, with around 700 exhibitors participating across 11 halls, covering an area of approximately 200,000 square meters. HOMETEX, which garnered significant attention from both participants and visitors, saw over 175,000 visits. While professionals from approximately 80 countries attended the fair, the productive business meetings held throughout the event contributed to the development of both the sector and the country's economy. With potential



The collaboration between the two brands created a tremendous impact at Paris Fashion Week, with Dior skillfully incorporating Kutnu fabric into its designs.



buyers from numerous countries including Europe, Australia, the Middle East, Africa, Asia, the United States, and Turkish Republics, the Exhibition is expected to make a significant contribution to the sector's exports.

**Setting the direction for fashion and innovation**

The Exhibition showcased innovative products and designs from companies ranging from curtains and curtain accessories to upholstery fabrics, towels, bathroom products, carpets, floor coverings, bedroom, kitchen, and

dining room textiles, as well as wall coverings. Expert names conducted special trend presentations at the fair, and important figures met with visitors in seminars organized around different themes. 'HOMETEX Dialogs' events covered topics such as 2025-2026 home textile trends, value-added production, trend analysis, artificial intelligence in home textiles, sustainability-biomaterials, and supply chain. Trend areas consisting of carefully prepared designs from select brands met visitors under the theme 'Bring To Future'.

**The sector's value-added product group**

Hasan Hüseyin Bayram, President of TETSİAD, emphasized that the HOMETEX Exhibition not only contributes to the sector in terms of brand value, visibility, and commercial contributions but also has a cultural mission that will benefit Türkiye's promotion. He stated, "The Turkish home textile industry, which exports approximately \$3.5 billion annually to 180 countries, is one of the leading and pioneering sectors in terms of providing

the highest added value to our country by exceeding \$9 per kilogram of export value and comparing its world market share. Our fair, supported by all stakeholders in a great alliance with TETSİAD's hosting, has been completed with satisfaction exceeding expectations for both participants and visitors."

**Innovative products and designs showcased by companies**

At the fair, innovative products and designs from companies ranging from curtains and cur-

tain accessories to upholstery fabrics, towels, bathroom products, carpets, floor coverings, bedroom, kitchen, and dining room textiles, as well as wall coverings, were showcased. 'HOMETEX Dialogs' events covered topics such as 2025-2026 home textile trends, value-added production, trend analysis, artificial intelligence in home textiles, sustainability-biomaterials, and supply chain. Trend areas consisting of carefully prepared designs from select brands met visitors under the theme 'Bring To Future'.



# “TÜRKİYE HAS MADE SIGNIFICANT PROGRESS IN THE FIELD OF COTTON”



Fuat Tanman, Chairman of İPUD, stated that Turkish cotton farmers, who are very successful in high-yield production, can also adapt to sustainability transformations when the necessary infrastructure investments are made.

## What were the purposes behind the establishment of the Good Cotton Practices Association (İPUD) in Türkiye? Could you briefly tell us about your activities?

The Good Cotton Practices Association (İPUD) was established in 2013. For 11 years, it has been striving for better and more sustainable cotton production in Türkiye. It brings together everyone in the supply chain, from cotton cultivation to the apparel sector. Its aim is to support cotton production that is socially and environmentally responsible and economical-

ly sustainable. In 2014, İPUD formed a strategic partnership with the Better Cotton Initiative (BCI). This partnership aimed to implement and adopt the Better Cotton standard in Türkiye. “Better Cotton,” which we refer to as “İyi Pamuk” in Turkish, is an international sustainable cotton standard that ensures the welfare of farmers, workers, and the environment. For our association, these activities are more of a voluntary and comprehensive transformation movement rather than just a standard. Another project of ours is Decent Work (DW). This proj-

Leading companies in the apparel and textile sectors aim to source 100% of their cotton from sustainable sources by 2025. This promotes the adoption of more environmentally friendly and ethical production methods.

ect, which has been ongoing in Şanlıurfa since 2017, aims to improve decent work conditions in cotton fields developed with international brands. Our interventions in this project include developing methods for proper recruitment at the field level, designing sectoral approaches to improve working conditions in cotton fields, forming collaborations, and preventing children from entering the labor force in cotton fields. We have expanded the scope of this project in the current cotton season. We have taken steps to organize field-level training programs for children and worker families with child and women-friendly mobile areas and psychosocial support tools. Last season, we launched a new capacity-building project focusing on climate change and soil health, targeting agricultural engineers and farmers. Additionally, we are conducting trials to collect data from the field more accurately using digital tools. Our work in this area will continue. Interested parties can follow our projects on our social media accounts.

## “What is “Better Cotton”? What are the differences between the production processes, efficiency, and sustainability of standard cotton and Better Cotton?”

The Better Cotton Standard includes detailed criteria based



**Fuat Tanman**  
Chairman of the Board of Directors of the  
Good Cotton Practices Association

on the core principles of sustainable agricultural production, such as water conservation, soil health, pesticide and integrated pest management, biodiversity conservation, fiber quality, and decent work conditions. It is a well-structured system for farmers who want to be involved in sustainable cotton production processes. It starts with minimum criteria and aims for the farmer to progress and gradually adopt more sustainable practices over time. Therefore, compared to conventional production, it includes environmentally, socially, and eco-

nomically sustainable practices in the production processes. **What is the global and domestic scale of Better Cotton? What percentage of current production is Better Cotton? How can we increase this volume in our country?**

The Better Cotton Standard, implemented in 22 countries and by 2.2 million farmers worldwide, is the most widespread sustainable cotton standard in the trade. According to the BC annual report, 5.4 million tons of Better Cotton were produced in the 2022-23 season. Significant progress has been



In 2023, global demand from Better Cotton member brands reached 2.48 million tons, and demand from yarn manufacturers reached 3.168 million tons.

made in the Better Cotton sector in recent years. As of the 2022-23 season, approximately 10% of Türkiye's production was Better Cotton. Major companies in the apparel and textile sectors aim to source 100% of their cotton from sustainable sources by 2025. This encourages the adoption of more environmentally friendly and ethical production methods. While important steps have been taken in sustainable cotton production, there is still progress to be made. Advancing in sustainability as a country will increase the added value of cotton fiber and other products. This will reduce our dependency on foreign sources and increase the share of local raw materials in our textile and apparel exports. This will help keep the value generated from exports within our country. Türkiye should establish its own "national sustainable cotton standard" similar to countries that achieve high-yield

production using advanced methods in cotton production. Additionally, encouraging our producers who comply with the national standard through additional support policies can accelerate the transformation.

#### **In which regions and by how many farmers is Better Cotton produced in Türkiye?**

In the 2023-24 season, 2,439 farmers were granted a Better Cotton license. Our farmers are concentrated in Aydın, Diyarbakır, Manisa, Urfa, and İzmir provinces. Our constantly updated production data is published on our website. The number of farmers producing Better Cotton is increasing year by year. In 2013, there were 278 Better Cotton farmers; in 2014, there were 533; in 2015, there were 441; in 2016, there were 342; in 2017, there were 792; in 2018, there were 962; in 2019, there were 3,299; in 2020, there were 1,986; in 2021, there were 2,018; and in 2022, there were 2,417.

#### **How does the growing importance of sustainability for both the industry and consumers shape interest in Better Cotton? In your opinion, how aware are cotton producers in Türkiye of this issue?**

In 2023, global demand from Better Cotton member brands reached 2.48 million tons, and demand from yarn manufacturers reached 3.168 million tons. In 2023, demand from yarn manufacturers in Türkiye was 175,031 tons, with approximately 57,664 tons sourced from Türkiye.

We believe that Turkish cotton farmers, who are very successful in high-yield production, can also adapt to sustainability transformation when the necessary infrastructure investments are made. In this context, every agricultural policy, from support policies to agricultural education and extension policies, should be centered around sustainability. Farmers producing according to sustainability standards should be supported technically, infrastructurally, and financially. Additionally, many issues, such as infrastructure investments for efficient water use in agriculture, the widespread use of technology and sustainable energy, and the implementation of systems to prevent environmental damage caused by chemical waste like pesticide containers, should be quickly brought into the implementation phase.

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# İMA IS RAISING FUTURE FASHION PIONEERS FOR THE INDUSTRY

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**As a board member of the International Association of Fashion Schools (IFFTI) and a strategic partner with the University of the Arts London, London College of Fashion in the academic field, aspiring to provide an education of the utmost international standards, İMA passionately embraces an internationally-oriented educational approach, addressing all aspects of fashion in its journey to raise creative, innovative, and risk-taking fashion professionals to contribute to the industry's global competitive landscape.**

**While rooted in local insight yet globally dynamic in action, İMA effortlessly navigates the digitalizing era as an educational institution in its pioneering approach to education.**

**With cutting-edge training programmes as Clo and Browzwear, where the three-dimensional digital design concept comes to life, İMA continues to train the future's design professionals, aligning with the progress of information and communication technologies in the field of design.**

**Harnessing its wealth of expertise in Türkiye's essential industries of textile, ready-to-wear, and garment, the Academy wholeheartedly empowers and supports companies to strength their positions in the industry, to elevate their global competitiveness and increase ready-to-wear exports through strategic partnerships and impactful consultancy services.**

**İMA**



Known as the "zero point of history" and dating back to 12,000 BC, Göbeklitepe was first uncovered in 1995. What emerged was not just a "history," but information that profoundly shook the understanding of settled society, the history of religions, and social history.

## INTO THE UNKNOWN OF HISTORY: GÖBEKLİTEPE AND KARAHANTEPE

While the archaeological world is trying to solve the mysteries of Göbeklitepe, Karahantepe, recently unearthed in the nearby region, is shattering many established truths about humanity.

► Gizem İris-Melis Alpay

**O**ur knowledge about Göbeklitepe, one of the most significant archaeological discoveries and still shrouded in mystery, is quite limited. Recent studies suggest that Karahantepe, discovered in 1997, might have been established earlier than Göbeklitepe. This raises the possibility that

Karahantepe could soon replace Göbeklitepe as the oldest known Neolithic site in the world. Karahantepe is overturning many long-held beliefs about human history. So, what does Göbeklitepe tell us, and will Karahantepe fundamentally change the known history of the world? Before the people of Göbeklitepe

discovered activities necessary to sustain their daily lives and meet their essential needs, they built massive stones and used them for worship. The construction of these stones, the largest of which weighs over 16 tons, is the most significant indication of how important faith has been from ancient times to the present. The central point of these signs is Göbeklitepe, located 11 kilometers northeast of Şanlıurfa. While it was thought that people lived in caves during the periods Göbeklitepe dates to, it revealed that the civilization of that time was much more advanced than previously estimated. Known as the "zero point of history" and dating back to 12,000 BC, Göbeklitepe was first uncovered in 1995. What emerged was

not just a "history," but information that profoundly shook the understanding of settled society, the history of religions, and social history. It is a temple that is 7,500 years older than the pyramids and 6,000 years older and more monumental than Stonehenge in England. Besides its historical significance, its monumental architecture also impresses scientists. Undoubtedly, architecture existed long before settled life. We can clearly see this in the Göbeklitepe excavations. The processing, use, and shapes of the stones used in the structures are far ahead of their time.

### The world's first worship center?

Every object and piece discovered at the Neolithic excavation

site is the first of its kind in its field. The 20 temples uncovered at Göbeklitepe, dating back to 10,000 years ago, show that this region is currently the oldest and largest worship center in history. These temples, which were buried by humans a thousand years after they were built, are now being unearthed again. So far, six of these temples have been revealed. People of that time would gather at certain times of the year, worship in these temples, and offer sacrifices and offerings to their deities. The most intriguing artifacts discovered at the excavation site are the T-shaped monoliths. These block stones, ranging in height from 3 to 6 meters, feature animal drawings, stylized human figures, or symbols of the tribes that came to the worship center. In addition to these T-shaped monoliths, animal reliefs are carved into the walls of the caves. Some scientists believe that these scenes might be the first examples of "pictographic writing." A major question in the studies was how these giant stones were trans-

The ancestors of wheat, an essential food and cultural plant of Anatolia, were also encountered during these excavations. Findings indicate that the residents of Göbeklitepe 12,000 years ago drank beer.



ported here. Archaeologist Klaus Schmidt, who led the excavation until his death, suggested after an experiment on moving the stones under assumed primitive conditions that the people of that time had much more advanced capabilities than the scientific world had proposed.

**Göbeklitepe changed everything**

The ancestors of wheat, an essential food and cultural plant of Anatolia, were also encountered during these excavations. Findings indicate that the residents of Göbeklitepe 12,000 years ago drank beer. Limestone beer barrels were found during the excavations. Based on these findings, archaeologist Klaus suggested that humanity started agriculture not for bread but for beer, and this first happened in Urfa. More importantly, the theory long taught in history classes that “settled life began with agriculture” was debunked. Stanford University Professor Ian Hodder, who has led excavations in Çatal-

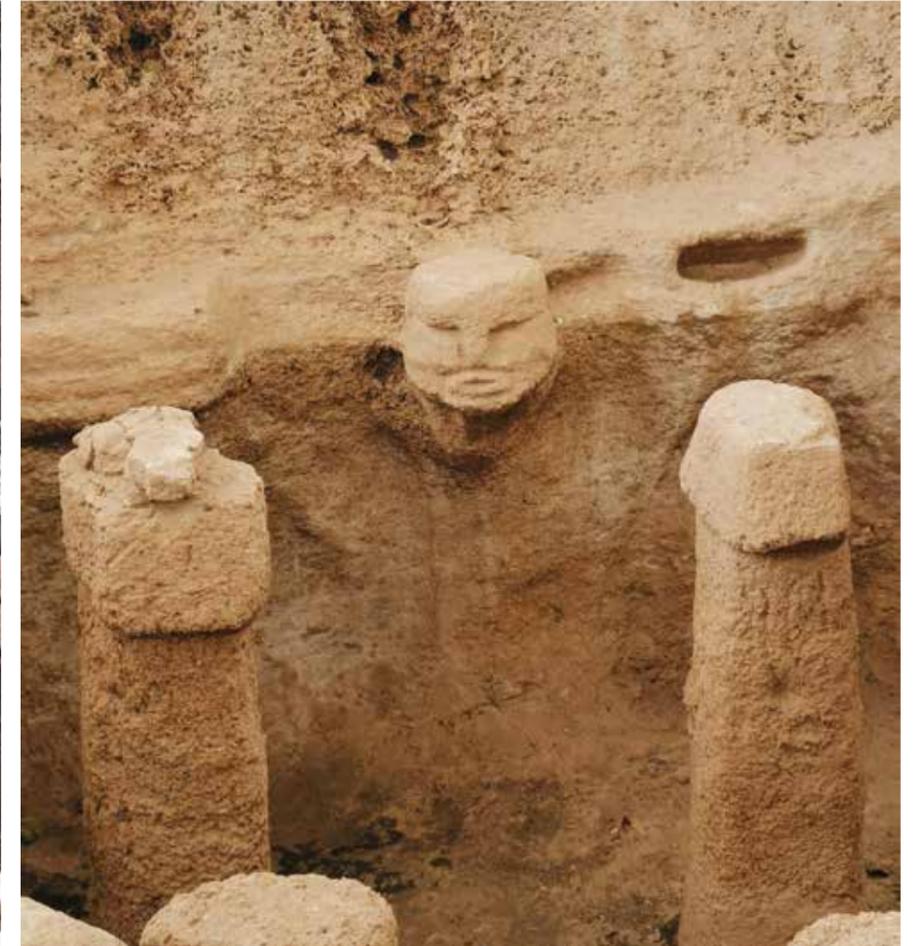
höyük since 1993, said, “Everyone thought such monumental sites could only be built by complex and hierarchical civilizations after the discovery of agriculture. But Göbeklitepe changed everything. It is very intricate, complex, and belongs to the pre-agricultural period. This alone makes it the most important archaeological discovery made in a long time.” According to Klaus, the desire to worship brought people together continuously, resulting in a settled life. So, it was not agriculture

but the desire to worship that led to settled life.

**Skull ritual in Göbeklitepe**

Every day, a new mystery is being unraveled in Göbeklitepe, believed to be the worship center of the Neolithic age. Today, scientists in Göbeklitepe, Şanlıurfa, are seeking answers to how people lived, worshipped, and what they believed thousands of years ago. The most recent findings at the worship center somewhat answer these

questions. During recent excavations in Göbeklitepe, thousands of human bones from the Neolithic period were found in fragmented form. Among these bones, three skull fragments had holes and traces of ochre paint. In a paper published by the American Association for the Advancement of Science (AAAS) in the journal Science Advances, it was revealed that these people were first skinned, then their flesh was removed, and holes were carved into the bones with



Four distinct areas have been identified in Karahantepe, but excavations are currently conducted in only one area, and much remains to be excavated.

**Entered the UNESCO World Heritage List**

Drawing worldwide attention with its findings, Göbeklitepe was added to the UNESCO World Heritage List on July 2, 2018. Following the protective roofing and environmental arrangements, the official opening of Göbeklitepe was made by President Recep Tayyip Erdoğan on March 8, 2019. Declaring 2019 as the “Year of Göbeklitepe” increased the interest of both local and foreign tourists in Göbeklitepe, which has become a major stop on Southeastern Anatolia tours. Since its opening, the site has been visited by 2,551,535 people.



Excavations also revealed structures contemporary with Göbeklitepe, building walls, various statues, and flint tools. Archaeologists state that the flint tools indicate the region was used for approximately 1,500 years.

**The First Painted Statue Found In Göbeklitepe**

During the excavation works in Göbeklitepe, a wild boar statue was discovered. This artifact is the first painted statue from its period to the present day. Within the scope of the Taş Tepeler project, which sheds light on prehistory and has led to very important discoveries on a global scale, the latest excavations in nine archaeological sites in 2023 revealed human and animal statues.

In the excavations conducted by the Ministry of Culture and Tourism, a life-sized wild boar statue made of limestone was found in Göbeklitepe's Structure D. The statue, with remnants of red, white, and black pigments on its surface, is the first painted statue discovery from its period to the present day. The wild boar statue discovered in Göbeklitepe was found on a bench decorated with an H-shaped symbol, a crescent, two snakes, and what are thought to be three human faces or masks.

interprets this as, "They believed that the power of the deceased spirits passed on to the living." In 2012, studies revealed that there was no burial tradition 12,000 years ago. In Göbeklitepe, which hosts the world's oldest temples, the dead were left in the open to be eaten by birds of prey. It was believed that the soul of the deceased would then ascend to the sky. It is thought that the figures of humans being

eaten by birds depicted in the reliefs also point to this belief.

**Will Karahantepe change the known history of the World?**

Karahantepe, an archaeological site located 60 kilometers east of Şanlıurfa, is one of the Neolithic settlements and, like Göbeklitepe, is situated around the Harran Plain. The area is known locally as "Keçili tepe" (Goat Hill). Recent archaeological studies suggest

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Providing Important Data About the Beginning of Settled Life Karahantepe, first discovered by archaeologist and academic Prof. Dr. Bahattin Çelik in 1997, began excavation work in 2019. To date, nearly 250 T-shaped pillars have been unearthed. Excavations also revealed structures contemporary with Göbeklitepe, building walls, various statues, and flint tools. Archaeologists state that the flint tools indicate the region was used for approximately 1,500 years. Comparing Göbeklitepe and Karahantepe, animal symbolism is predominantly seen in Göbeklitepe, while human figures are more prominent in Karahantepe. One of the largest statues discovered in Karahantepe is a 2.3-meter-tall human statue. The ribs on the statue's body are very clearly depicted, showcasing a realistic construction. Besides the structures, wild seeds of wheat, barley, and legumes were found in Karahantepe. These findings suggest that prehistoric human life was in harmony with

nature, with strong symbolic aspects and engineering skills in their constructions. Remains are encountered everywhere excavations are conducted, indicating a dense settlement during its active period. Four distinct areas have been identified in Karahantepe, but excavations are currently conducted in only one area, and much remains to be excavated. Archaeologists estimate that the work could

take 100 to 150 years. Excavations in Karahantepe are still ongoing, and since it is not yet officially open to visitors, there is no entrance fee. Entry is allowed with permission, and visitors are guided by an official. Karahantepe is currently protected by the governorship, and once the excavations are complete, it will be transferred to the Ministry of Culture and Tourism and opened with an entrance fee.

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Müjde Unustası  
Arkas Art Director



## A COLLECTION REVIVING ANATOLIAN CARPET WEAVING

Restoring the Historic Mattheys Mansion, Arkas Art Presents a Selection from its Carpet Collection to Rekindle Interest in Izmir.

**M**attheys Mansion, which once hosted Mustafa Kemal Atatürk and where, in the words of its former owner Hortense Wood, the future of the republic was discussed, has been revived on the occasion of the 100<sup>th</sup> anniversary of the Republic. Within the mansion, Arkas Art in Bornova presents a selection from the Arkas carpet collection, comprised of valuable carpets, with the aim of conveying its contributions to the promotion of Western Anatolian carpet weaving to the world. The selection features Anatolian carpets produced between the 16<sup>th</sup>

and 19<sup>th</sup> centuries in the Western and Central Anatolian regions, including Uşak, Çanakkale, Bergama, Konya, Karapınar, Akhisar, Gördes, Kula, and Milas.

**Firstly, we would like to hear the story of Mattheys Mansion, which hosts the Arkas rug collection. What secrets lie in the mansion's history?**

Mattheys Mansion, one of the prominent historical and architectural landmarks of Bornova, was built as a summer residence in 1780 by John Maltass. It is also known from the diaries of Hortense Wood that Mustafa Kemal



Atatürk and İsmet İnönü visited the mansion in 1922. Restoration works initiated by Arkas Holding began in 2018 at Arkas Sanat Bornova Mattheys Mansion. Following meticulous research in the archives, the restoration was completed in 2023 with utmost fidelity to the original, and the mansion was opened to the public in April 2023.

**What does Mattheys Mansion offer to art enthusiasts now?**

The Arkas rug collection includes over 600 rugs ranging from the late 1400s to the 20<sup>th</sup> century. At Arkas Sanat Bornova Mat-

theys Mansion, a selection of rugs dating from the 16<sup>th</sup> to the 19<sup>th</sup> centuries from Western and Central Anatolia is exhibited. The mansion hosts the Arkas rug collection, which is among the world's significant rug collections, showcasing Classic Period Anatolian rugs produced between the 16<sup>th</sup> and 19<sup>th</sup> centuries. The selection includes rugs from regions such as Uşak, known as Holbein, Bellini, Lotto, Star Uşak, Medallion Uşak, and Transylvania rugs, as well as rugs from Bergama, Konya, Çanakkale, Akhisar, Milas, Gördes, Kula, and Fethiye. While all exhibited

rugs are valuable, I recommend visiting the Uşak rugs in Room 1, which are contextualized with a text relating them to European painting, the "Great Patterned Holbein Rug" (Env. 562 Western Anatolia - circa 1465), the oldest piece in our exhibition in Room 4, and the Mamluk rug in Room 6.

**How do you think this exhibition contributes to reviving the nearly forgotten art of hand rug-making?**

Through Arkas Sanat Bornova Mattheys Mansion, we aim to preserve the exquisite examples of rug art, which are products of a tradition spanning thousands of years, and to pass them on to future generations, sharing the Arkas rug collection with a wide audience. With this awareness, we have an workshop area where visitors can learn about Anatolian rugs and weaving traditions. Here, we share in detail the journey of rug-making from spinning wool, a process that begins, to finished rugs through videos and diagrams, aiming to raise awareness about hand rug-making.

**Arkas, through Lucien Arkas's special emphasis on art and collecting, has made significant contributions to successful exhibitions in Türkiye. What can you say about Arkas's vision for art? Will you have any new projects?**

Lucien Arkas's Arkas collection, developed over the years according to his own interests and

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tastes, provides us with a rich exhibition repertoire. We host exhibitions of internationally recognized artists in collaboration with significant institutions and collectors from Türkiye and around the world. While we value the exhibition experience in our temporary exhibitions at Arkas Art Center, we also aim to present strong content to our visitors. In addition, at Arkas Deniz Tarihi Merkezi, Arkas Sanat Urla, and Arkas Sanat Bornova Mattheys Mansion, visitors from all groups can see different parts of the collection. Our new projects are shaping up

to further advance the distance we have covered in the art field. On one hand, we are working intensively on projects to open up historically significant locations for cultural use through appropriate restoration projects, while on the other hand, we emphasize giving artistic functions suitable for the structure of the locations. We are working intensively on projects such as Ayşe Mayda Mansion in Göztepe, Arkas Art Alaçatı, and the project to be implemented in Vali Rahmi Bey Mansion in Buca. With their potential to include both historical narratives and contemporary

practices, these locations aim to make an additional contribution to the art scene in İzmir.

**Turkish rug-making can be considered a reflection of intercultural interaction. What do you say about this?**

Rug-making is a journey that spans thousands of years, extending from Central Asia to the Anatolian lands through migrations. Cultural transformation and the traces of relocation can be read through motifs and rugs. Anatolia, with its rich cultural heritage extending from ancient civilizations such as Byzantium, Seljuks, Timur, to Safavids, has melted in a pot of cultural accumulation. We can observe the traces of this interaction in rugs, from technical characteristics to motifs, concretely. Rugs produced in Anatolia have reached far beyond these lands, sometimes as diplomatic gifts crowning diplomatic relations, sometimes as valuable commercial products carried to different geographies. In the West, they have been depicted as prestige symbols from literature to fine arts. With Arkas Sanat Bornova, we aim to bring back to the agenda Anatolian rug-making, which has unfortunately left behind its glorious days of the past, by sharing the best examples with visitors, intending to endear them. With the hope that rug-making will regain its former glory in our country, we invite visitors of all ages to see these rugs at Arkas Sanat Bornova.

# THE TURKISH FASHION INDUSTRY IS INCREASING ITS MARKET SHARE IN THE US



Exports to the US, one of the most important target markets for the Turkish textile and apparel sector, continue to rise. Exporters are signing partnerships to expand further on the continent.

The Turkish apparel sector has surpassed \$1 billion in exports to the US in recent years and is forming partnerships to increase this volume to \$5 billion. The textile sector, on the other hand, continues to promote Turkish products with the IofThe World trade delegation to surpass the \$1 billion mark. The US maintains its position as the world's leading importer of

apparel and clothing with a 21% share in global apparel imports. Türkiye ranks 16<sup>th</sup> among apparel suppliers with a 1.3% share in 2023. Aside from 2023, the Turkish apparel sector's exports to the country were on an upward trend. In 2019, apparel exports were \$888 million, rising to \$1.37 billion in 2022. Although exports fell to \$1.23 billion in 2023, the main reason was a 20.2% drop in

2023 was a year in which Turkish apparel exporters distinguished themselves from East Asian countries. China, Vietnam, and Bangladesh experienced export losses of over 20%.

WRAP (Worldwide Responsible Accredited Production). İHKİB Board Member, Head of Foreign Relations and Sustainability Committee, Selçuk Mehmet Kaya, said, "We are the world's sixth-largest exporter. The US, the world's largest apparel importer, holds great potential for our fashion industry. We could only capture a \$1.5 billion share of this large market. As İHKİB, we aim to increase our market share in the US to at least \$5 billion. In line with this goal, we are developing our collaborations with our counterparts in the US. We have long-standing joint efforts with USFIA (United States Fashion Industry Association) and AAFA (American Apparel & Footwear Association). Most recently, we signed a strategic cooperation agreement with the US-based audit firm WRAP."

## Türkiye is the 16<sup>th</sup> largest apparel supplier to the US

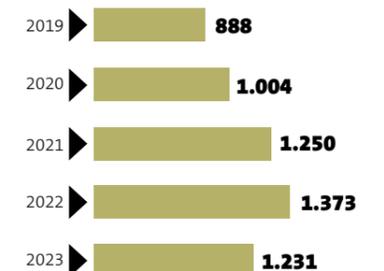
2023 was a year in which Turkish apparel exporters distinguished themselves from East Asian countries. Among the major apparel and clothing suppliers of the continent, China with a 26.2% share experienced a 22.3% decline, the second-largest supplier Vietnam saw a 21.5% loss, and the third-largest supplier Bangladesh faced a 23% decline. Türkiye's 10% loss indicated significant potential in the American market.

## 4% of women's clothing exports are to the US

When examining the perfor-

mance of Turkish apparel exports by product groups, women's clothing products stand out with \$5.469 billion in exports. 4% of this product group, amounting to \$220 million, is exported to the US. \$128 million, or 3.9%, of Türkiye's \$3.292 billion knitwear exports are also to the US. For the T-shirt product group, \$81 million of the \$2.556 billion in exports are to the US, and \$88 million of the \$2.311 billion in men's clothing exports are to the US. \$38 million of the \$1.188 billion in sock exports, \$48 million of the \$752 million in underwear exports, and \$9 million of the \$482 million in outerwear exports are to the US. \$10 million of Türkiye's \$418 million in sportswear exports, \$6 million of the \$284 million in baby clothing exports, \$252 million of the \$2.089 billion in ready-made goods exports, and \$1 million of the \$127 million in accessory exports are also to the US.

## Türkiye's apparel exports to the US (million dollars)





# TEXTILE EXPORTS TO THE US ARE RISING AGAIN

Exports to the US, which has quickly become one of the top three export markets for the Turkish textile sector, are on the rise, led by technical textiles and yarn product groups.

In 2020, the Turkish textile and raw materials sector exported goods worth \$628 million to the US. Although the total exports reached the \$1 billion mark in 2022, exports fell to \$724 million in 2023 due to the con-

traction in US imports. Despite this decline, the US has quickly become the third largest market for Turkish exporters, following Italy and Germany. The US accounted for 6.2% of the Turkish textile sector's exports. In the

first four months of 2024, textile exports to the US turned upward again, increasing by 10% to \$233 million. During this period, the product groups with the highest increase in exports were technical textiles and yarn products.

## Exports to the US increased in many product groups

When examining the Turkish textile sector's exports to the US by sub-product groups, it is seen that in 2023, \$246 million worth

of home textiles, \$163 million worth of yarn, \$154 million worth of technical textiles, \$102 million worth of woven fabrics, \$37 million worth of apparel sub-industry products, \$32 million worth of fiber, and \$16 million worth of knitted fabrics were exported. The US became the second largest market for Türkiye's technical textiles exports in 2023, with a 7% share of total exports. Technical textile exports to the US decreased by

11.7% to \$154 million during this period. The US was also the third largest market for Türkiye's yarn exports. With a 7.8% share of yarn exports, \$163 million worth of yarn was exported to the US, a 14.4% decrease. However, yarn exports to the US in December increased by 21.7% to \$14.3 million. In home textile exports, the US reached a volume of \$246 million with a 13% share. Exports of home textiles to the US decreased by 20% compared to the previous year. In fiber exports, the US reached a volume of \$32 million with a 2.6% share. While fiber exports to the US decreased by 42.4%, a significant increase of 109.5% was recorded in December, reaching \$3.3 million. In apparel sub-industry exports, the US ranked third with a 6.1% share. Exports of apparel sub-industry products to the US increased by 75.6% compared to the previous year, exceeding \$37 million. The export increase in December was 44.8%.

## The US is the world's largest textile importer

The US, with \$36.2 billion in textile imports, holds the position of the world's largest importer. In 2022, the US's textile imports from Türkiye increased by 11.9%. With a 2.9% share of the US's textile imports, Türkiye became

Türkiye has become the country's eighth largest supplier with a 2.9 percent share of the USA's textile industry imports.



**Turkish Textile And Apparel Sector Expands To The US With I Of The World**

Aiming at the US, the largest global importer of textiles and apparel, İTHİB and İHKİB are organizing the I Of The World - New York Trade Delegation. The delegation, held on October 16-20, included 21 fabric manufacturers and 21 apparel manufacturers. The trade delegation aimed to increase the export potential of exporting companies and raise Türkiye's market share in the US in the long term. Additionally, buyers from different cities within the US and surrounding countries had the opportunity to see Türkiye's integrated production power in the textile and apparel sector. The event provided US buyers with the opportunity to source the entire supply chain from Türkiye.

İTHİB President Ahmet Öksüz said about the event, "As textiles and apparel, we are two important sectors that export over \$30 billion, complementing each other. The US is a very large market, and we want to get a bigger share of this market. The share we get from the US market is not yet at the desired level. Today, Turkish textile products are indispensable for the EU market, and we aim to quickly rise in the ranks and become indispensable in US imports as well. Our goal is to reach \$5 billion in textile and apparel exports to the US."

**5.1%**

Türkiye's share in US fabric imports

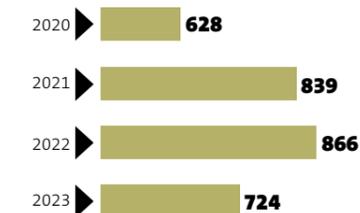
the country's eighth largest supplier.

**Türkiye is the seventh largest supplier of fabrics to the US**  
Türkiye became the seventh largest supplier of fabrics to the US and has been steadily increasing its share of fabric imports. In 2021, Türkiye held a 3.6% share of the US's fabric imports, maintaining a 4.4% share in woven fabrics and a 1.8% share in knitted fabrics. In 2022, Türkiye's share in the

US's fabric imports rose to 4.3%. During this period, Türkiye's share in woven fabric imports was 5.8%, while its share in knitted fabric imports was 1.3%. In 2023, Türkiye's share in the US's fabric imports increased to 5.1%. During this period, Türkiye's share in woven fabric imports rose to 6.4%, and its share in knitted fabric imports increased to 2.1%. The US's fabric imports from Türkiye were \$121 million in 2021, rising to \$165 million in 2022. In the

January-November period of 2023, it was recorded at \$135 million. Türkiye's woven fabric imports to the US were \$101 million in 2021, \$149 million in 2022, and \$118 million in the January-November period of 2023. Knitted fabric imports were \$19 million in 2021, \$16 million in 2022, and \$17 million in the January-November period of 2023. It is known that the Turkish textile sector has the potential to rank among the top three in the US's fabric imports.

**Türkiye's textile sector exports to the US (million dollars)**



# TÜRKİYE'S MEGAYACHT EXPERTISE INSPIRES TEXTILE INDUSTRY



Türkiye has extended its prowess in megayacht production to yacht decoration and textiles. Offering a range of options from bed linens and tablecloths to towels and bathrobes, Turkish textiles enhance the style of megayachts with world-renowned quality and diversity.

► Neslihan Böle Arslan

**M**egayachts, with minimum lengths starting at 30 meters, are impressive designs even at first glance. Stepping inside these yachts is like entering a palace, where the decor adds to their allure. The seating and living areas, furniture, and decorative objects transform megayachts into luxurious homes. The textiles used within these floating residences add a touch of elegance and style. Bed linens, decorative pillows, beds, towels, bathrobes, and tablecloths are now designed as special collections for yachts. Turkish textiles, known for their high quality and diverse product range, stand out as a prime market. The synergy between Türkiye's success in megayacht production and its robust textile industry is fueling the growth of the yacht textiles market.



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#### This year megayacht production pushes capacity limits

Despite occasional fluctuations, Türkiye has ranked third in the world for megayacht production for over a decade and boasts significant potential in this sector. Recent data indicates that this potential may continue to grow. Türkiye's premier megayacht hub, Antalya Free Zone AŞ (ASBAŞ), reported that 29 yachts and boats were launched in the first quarter of this year. Of these, 20 were delivered to their owners, while nine are undergoing sea trials. The total revenue from the sale of these 29 yachts amounts to 29 million dollars. Moreover, ASBAŞ

General Manager Zeki Gürses noted that, post-pandemic, global demand for Turkish yachts surged, forcing yacht companies to turn down many orders due to lack of capacity. Last year, the region's yacht sector generated 125 million dollars from the production of 30 luxury yachts and boats.

Antalya Free Zone is not the sole site for yacht production in Türkiye. The country boasts over 80 shipyards, primarily in Tuzla, Yalova, and Marmaris, all contributing to the success of yacht production. The pandemic-driven search for safe holiday options has significantly boosted megayacht production.

#### Promising prospects for high-value ship and yacht exports

Türkiye also shows promise in the export of high-value ships and yachts. In the first five months of this year, Türkiye's ship and yacht exports increased by 26.3% compared to the same period last year. The country exported ships and yachts worth 577 million 86 thousand dollars to 125 countries, accounting for 0.6% of Türkiye's total exports. In the January-May 2022 period, ships and yachts were exported from 26 Turkish cities, with İstanbul leading the way with exports worth 297 million 400 thousand dollars.

Following İstanbul, Yalova exported 204 million 955 thousand dollars worth of ships and yachts, İzmir 30 million 329 thousand dollars, Bursa 21 million 26 thousand dollars, and Ankara 9 million 972 thousand dollars. During this period, the largest export market was Norway, with 215 million 362 thousand dollars in exports. This growth reflects Türkiye's increasing capacity and influence in the global megayacht market, showcasing the country's ability to integrate its traditional strengths in textiles with cutting-edge yacht design and production.

#### Türkiye's custom-made excellence

Türkiye stands as a prominent name in the "custom-made" design sector and ranks among the top 10 countries worldwide in the export of special-purpose ships and megayachts. Posi-

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spurred activity in the home textiles sector. Yachts, distinguished by their unique designs and decorations, have created their own niche in fashion. The increase in luxury yacht and megayacht production has led to the emergence of a "yacht textile" subcategory. This group includes both new brands and existing textile brands offering special designs. Yacht textiles, which include bed linens, quilts, towels, bathrobes, slippers, pestemals, pillowcases, and tablecloths, are similar to home textiles but are made from more durable and functional materials suitable for boat decor. Nautical-themed items featuring anchors, ropes, sailboats, helms, shells, and corals, in marine colors like white, navy, and red, are particularly popular.

#### Durable materials in yacht textiles

Yacht textiles undergo a more complex production and service process compared to other textiles due to the varying dimensions, structures, and atmospheres of yacht interiors. Therefore, designs must be tailored to both the yacht and the owner's taste. Custom-made yachts demand equally personalized interiors. Despite the challenging process of producing and fitting yacht textiles to complete the owner's vision, the result is a unique masterpiece. The primary requirements for yacht textiles are durability and quality. Additionally, elite and elegant designs enhance the joy of yachting.

tioned third globally in megayacht production, following Italy and the Netherlands, Türkiye is steadily strengthening its presence in international markets. According to the Global Order Book, Türkiye has maintained its top position for years in yacht order statistics. As of February 2020, Türkiye reached a total of 3,71 thousand meters in terms of megayacht length, representing the combined length of yachts ordered from Turkish shipyards. Leading shipyards in Antalya, İstanbul, and Bodrum continue to launch breathtaking yachts.

#### High potential in design

Competing with Italy, the world

leader in production quality, Türkiye is making significant strides in yacht design. Initially attractive to domestic and foreign investors for its low labor costs and quality, the sector has increasingly demonstrated its design capabilities. Enhancing the design aspect of Turkish yacht manufacturing is crucial for creating high added value. Renowned designers like Rıza Tansu and Tanju Kalaycıoğlu, along with emerging young designers, bring hope and innovation to the industry.

#### A fashion of its own

Türkiye's momentum in megayacht production has also

# THE STORY OF TÜRKİYE'S BRANDS:

## LC WAIKIKI AND KIĞILI

LC Waikiki CEO Mustafa Küçük and Kiğılı Chairman Abdullah Kiğılı shared their journey from family businesses to becoming global brands.

The “Transformation in Family Businesses Panel,” organized by İHKİB Academy, was held on June 5. Moderated by Dr. Yılmaz Sönmez, Founder of Ortak Akıl Consulting, the panel featured prominent figures from the Turkish apparel industry and founders of two major global brands: Kiğılı Chairman Abdullah Kiğılı and LC Waikiki CEO Mustafa Küçük. The event, opened by TİM & İHKİB Chairman Mustafa Gültepe, focused on the transformation and branding strategies of family businesses.

### Local brands represent the Turkish fashion industry in over 100 countries

Gültepe emphasized that the panelists were the architects of two major brands that are a source of pride for the apparel industry. He stated that these two legendary figures in the fashion industry also represent very successful examples of family businesses. Gültepe continued: “Abdullah Kiğılı is the architect of the Kiğılı brand, which was founded 85 years ago. He is a pioneer who built a brand from scratch with determina-

tion, stubbornness, and perseverance. Kiğılı is now one of the leading brands in men’s fashion in our country and represents our fashion industry successfully abroad. We know that Mustafa Küçük’s vision played a significant role in bringing LC Waikiki, a brand born in France, to Türkiye and transforming it into a global brand.” Sharing information about the apparel industry, Gültepe said: “Our textile and apparel industry has led our country’s industrialization and export-driven growth. Almost entirely comprised of family businesses, our fashion industry has achieved great success in 50 years. Today, we are a brand in production. We are the sixth largest supplier in the world and the third largest in the EU. We have a strong production infrastructure and

knowledge. We are making significant progress in design and branding every year. Our brands, including LC Waikiki and Kiğılı, represent our fashion industry in over 100 countries with more than 3,000 stores.”

### “Families need to transform over time and the company needs to institutionalize”

Sönmez highlighted that family businesses undergo significant transformation as new generations take over. He pointed out that family businesses, which make up 50% of all businesses globally and 90% of businesses in the USA and Türkiye, face major issues such as vision conflicts. “Delaying institutionalization, leadership problems, and delays in passing the baton are among the most critical issues for family businesses. While strong family members used to grow the business, today, leaders making decisions alone has become a significant problem. Young generations who have received the best education experience adaptation issues when they start working in family businesses. Separation is also important in family businesses when necessary. For example, we know that Adidas and Puma were born out of such a separation. Examining the growth strategy, profitability, and understanding new values in family businesses is crucial. Families need to transform over time, and the

company needs to institutionalize. Management deficiencies, delays in transformation, and internal family conflicts lead to the downfall of family businesses. Preventive measures need to be taken before problems arise. Family constitutions play the biggest role in the transformation process.”

### “When I opened the first Kiğılı store on İstiklal Street, they said ‘We will fail!’”

The roots of Kiğılı, one of Türkiye’s most important brands, trace back to Sultanhamam, the heart of the textile industry. Abdullah Kiğılı transformed Kiğılı from a small fabric shop with five employees into a giant brand. He shared that his father started in the fabric business in Malatya and moved to İstanbul in 1952 due to health issues, leading Abdullah Kiğılı to take over the family business. Aspiring to become a civil engineer, Kiğılı learned the intricacies of the business in just six months and became one of the most important fabric merchants in Sultanhamam within two years. His biggest dream was to open a shop on İstiklal Street, but his family opposed the idea, fearing it would harm Kiğılı’s reputation due to İstiklal Street’s nightlife. However, in 1969, at the age of 26, Abdullah Kiğılı secretly opened the first Kiğılı store on Mis Street, İstiklal. His family reacted by saying, “Our business will fail!”



Moderated by Dr. Yılmaz Sönmez, Founder of Ortak Akıl Consulting, the panel featured prominent figures from the Turkish apparel industry and founders of two major global brands: Kiğılı Chairman Abdullah Kiğılı and LC Waikiki CEO Mustafa Küçük.



With a visionary approach, Abdullah Kiğılı started displaying shirts in addition to fabrics in the store. During a time when the apparel industry was not yet developed, Kiğılı shirts attracted great attention. Abdullah Kiğılı innovated the sector by including jackets and pants. He also recounted his memory with Osman Boyner, the founder of one of Türkiye's first apparel factories: "I was a small trader when Osman Boyner wanted to meet me. I was very surprised. He told me he was establishing the Beymen clothing factory and wanted to give me a dealership. I sold the first Beymen suit at the Kiğılı store on İstiklal Street. Demand grew so much that we could not keep up. I partnered with Osman Boyner for seven years. In 1980, I left the partnership and established my own clothing factory. Over the past 45 years, we have expanded, reached every corner of Türkiye, and arrived where we are today."

**"We wrote our family constitution in two years"**

Abdullah Kiğılı noted that many family businesses in Türkiye fail after the third generation due to the lack of a family constitution. "When my father passed away, I was left alone in the company. My daughters did not want to be involved in the business, but I started working with my sons-in-law. My grandchildren also received a very good education. Three of my six grandchildren started working in the company. With the help of consultants, we wrote our family constitution in two years. We defined our core values, vision, and mission.

I have never been arrogant, always knew my place, and shared throughout my life. It took me 40 years to establish a place in people's minds through branding."

**"Professional management is very important in family businesses"**

Mustafa Küçük described LC Waikiki as a start-up company. Initially working for a company in the iron and steel sector, Küçük was offered to lead the textile division, provided he received a small share, a sustainable salary, and autonomy in his work. In 1988, they began

Local brands represent Turkish fashion industry in over 100 countries with more than 3,000 stores.

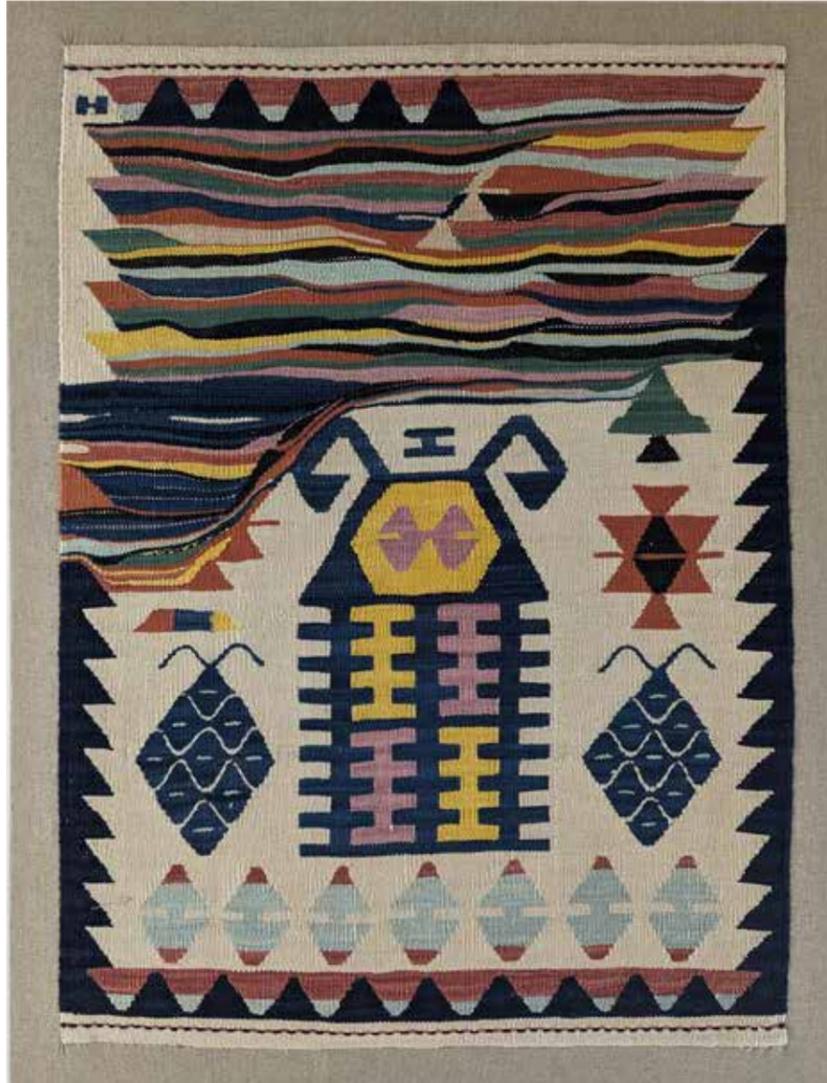
operations in a small workshop in Zeytinburnu, collaborating with the French brand LC Waikiki. Küçük explained that they facilitated the establishment of start-ups to meet the needs for fast supply such as printing, embroidery, and dyeing, which led to the formation of the Taha Group. After some time, the Taha Group became a partner in the LC Waikiki brand, involving family members in the business. Predicting potential problems, Küçük decided to remove all family members from the business, offering them capital for new projects. This approach led to the establishment of Küçükler Holding, where each family member operates in different sectors within their own companies. Despite resistance from his family, Küçük persisted, believing it was necessary to ensure future family harmony. "Now, everyone is grateful, and we have achieved unexpected successes. We faced very difficult times but learned from each challenge and continued on our path. I told my children they needed to find their own jobs and only allowed them to intern at the company. Professional management is very important in family businesses. Each family has different dynamics, so individuals need to be analyzed, and the family's culture needs to be understood."



**"When planning for the future, we must first consider our industry"**

Emphasizing the importance of predicting the future of the industry in which the company operates, Küçük continued: "When planning for the future, we must first consider our industry. These considerations should be included in the family constitution. In this period of increasing protectionist activities worldwide, the company's vision and mission are very important. Birth rates are declining globally and in our country, making it harder to find employees. Adding trade

balance changes, the industry's direction is shifting. The sector is transforming with technology and digitalization, changing business priorities. Investment areas should be determined, and a strategy should be formed accordingly. The leader sets the bar in the company. The family business leader must continuously maintain the company's cash balance. Humility in lifestyle is also crucial. Our biggest struggle in family businesses is against jealousy. As the family grows, maintaining this balance becomes more important, and the leader is expected to ensure this balance."



## WORLD-RENOWNED ANTIQUE CARPET COLLECTORS GATHER IN İSTANBUL

İstanbul hosted the 15<sup>th</sup> International Conference on Oriental Carpets (ICOC) from June 6 to June 9. The conference, held at The Marmara Taksim, featured the “Women Behind the Weave” exhibition in the ballroom, the proceeds of which will be donated to establish a weaving workshop in Hatay.

Organized by the İstanbul Carpet Exporters’ Association (İHİB), with the support of the Ministry of Culture and Tourism, the Ministry of Trade, and sponsored by the İstanbul Textile and Raw Materials Exporters’ Association (İTHİB) and Arkas Sanat Bornova, the 15<sup>th</sup> International Conference on Oriental Carpets (ICOC İstanbul) brought together world-renowned carpet, kilim, and textile experts, art historians, academics, and collectors. Exhibitions featuring priceless carpets, kilims, and textiles were also on display during the event.

### Diler: ICOC İstanbul is a significant opportunity for Türkiye, the land of carpets

Ahmet Hayri Diler, Chairman of the Board of Directors of the İstanbul Carpet Exporters’ Association (İHİB), who is responsible for organizing the event in Türkiye, stated, “We consider carpet, kilim, and textile not merely as commercial commodities but as works of art akin to paintings and sculptures. We view weaving as one of the greatest cultural treasures of these lands, and ICOC İstanbul presents a great opportunity for us to once again demonstrate to the world that Anatolia is the homeland of carpet, kilim, and textile art and to ensure the transmission of our traditional art to the future.”

The exhibition “Colors of Anatolia: Kilims from Private Collections” at Tophane-i Amire showcases kilims and objects from collections around the world.

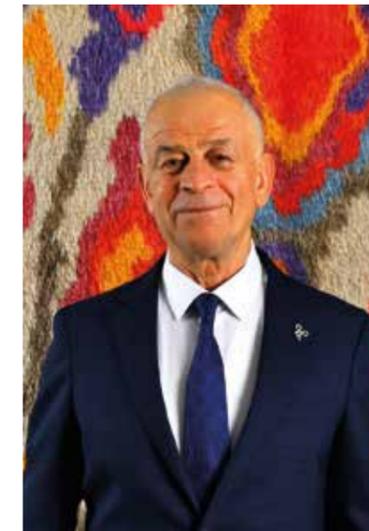
### Oruç: The future of weaving tradition is being discussed for the first time

Serra Oruç, Member of the Board of Directors of İHİB and Chairperson of the ICOC İstanbul Local Committee, emphasized that ICOC will, for the first time, also focus on the future. She stated, “The aim of the biennial international conference is to enhance awareness of collecting, and to demonstrate that carpets and kilims are cultural and artistic treasures. In the gathering to be held in İstanbul, we aim to open a new window by adopting a timeline from the past to the future. We want to discuss the future of the weaving tradition. Researchers from all around the world attending the conference have prepared their papers with this focus. We are excited to contribute to both the academic environment and the industry.”

### Carpet, kilim, and textile experts and collectors convene

The opening speech of the ICOC İstanbul conference will be delivered by Prof. Walter Denny, an expert in Islamic Arts and Middle Eastern History. After sharing his observations on recent history and the present, the renowned academic will discuss the future of carpet studies. During the sessions on June 7-8, leading academics and experts in the field will present papers on the history, present, and future of textile art.

Ahmet Hayri Diler, Chairman of the Board of Directors of the İHİB.



Serra Oruç, Member of the Board of Directors of İHİB.



The papers, categorized by geographical origin, cover topics such as structural analysis, technique, design, production, origin, dating, documented evidence, scientific tests, collections/collectors, fake/replica productions, conservation, and restoration.

### From Uşak to London, Berlin, İstanbul...

Throughout the conference at The Marmara Taksim, the İTHİB’s “Weaving Atlas” exhibition, as well as the “Women Behind the Weave” exhibition, returning to its homeland after London and Berlin, will be showcased. Organized by the Christopher Farr brand, the exhibition consists of contempo-

rary carpets and kilims produced by women weavers in Uşak. The proceeds from the exhibited textiles will be used to establish a weaving workshop in Hatay, one of the areas most affected by the earthquakes on February 6. Christopher Farr Founder Matthew Bourne will share the story of the project with participants on June 7 during the conference.

### Ancient carpets in the palace, contemporary textiles in the gallery

This year’s program of the International Conference on Oriental Carpets includes main exhibitions at the Turkish and Islamic Arts Museum, Dolmabahçe Palace Art



Art Gallery presents carpets and textiles from the palace collections for the first time within this historical context. The exhibition "Colors of Anatolia: Kilims from Private Collections" at Tophane-i Amire showcases kilims and objects from collections around the world. This exhibition, which plays a significant role in reflecting the value given to carpets and kilims by private collectors in Türkiye and encouraging new collectors, features works borrowed from many collectors, including Ali Rıza Tuna, Işıl Akbaygil, Peter Scholten, Thomas Herr, Tim Hayes, and Ziya Bozoğlu. These two exhibitions, which will open to visitors during the conference, will be available for viewing for one month.

#### Oral history of Anatolia: Carpets, kilims, textiles

The exhibition "Turkish Carpets: The Art Knotted With Love" featuring a selection of 45 works from the Turkish and Islamic Arts Museum collection dating from the 13<sup>th</sup> to the 17<sup>th</sup> century, aims to provide a new dialogue space for carpet experts and enthusiasts.

The exhibition "Syrian and Lebanese Textiles of the Ottoman Era" at the Turkish and Islamic Arts Museum Hypodrome Hall features items borrowed from the Anas Al Akhoann and Sandre Blake collection, including embroidered prayer rugs, examples of period clothing, pillowcases, and tablecloths. The exhibition showcases the skills, arts, and expertise of weavers in Syria, Beirut, Aleppo, Damascus, and surrounding areas from 1850 to 1930. The exhibitions at the Turkish and Islamic Arts Museum will open on June 8 and will be available for viewing for two months.

#### Josephine Powell revisited

American photographer, collector, and traveler Josephine Powell is known for her research, particularly on textiles. A significant portion of Powell's more than 30,000 images, taken during her travels in Türkiye from 1974 to 1994, focus on village and nomadic culture, including examples of carpets, kilims, and cicims. The collection also includes themes related to these textiles and 30 volumes of field notes.

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The exhibition "Josephine Powell Anatolian Kilims Collection" at the Vehbi Koç Foundation Büyükdere Evi features valuable textile images and records spanning a cultural geography from Central Asia to Türkiye. The collection, consisting of 400 textile works and over 1,000 wooden and metal objects resulting from this effort, will once again be presented to the audience during the 15<sup>th</sup> International Conference on Oriental Carpets after years.

#### Pop-up exhibition by Belkıs Balpınar

The exhibition at the Anna Laudel Gallery in Gümüşsuyu bears the signature of Belkıs Balpınar. As a pioneer in the field of textile arts, internationally acclaimed artist Belkıs Balpınar distinguishes herself through her innovative and unconventional weaving techniques. The exhibition "Shifting Perspectives" serves as a bright showcase of her artistic mastery, where she artfully weaves science and cosmology together, drawing inspiration from Einstein's theory of relativity. Josephine Powell revisited



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# WHY TÜRKİYE?



**240**  
billion US dollars

Foreign Direct Investment (FDI) inflows to Türkiye have reached levels of 240 billion US dollars during the period of 2003-2021.



**78,257**

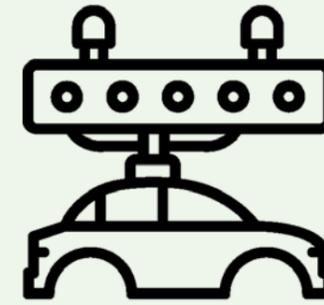
The number of internationally funded companies in Türkiye has reached 78,257 as of the first half of 2022.



**51.4**  
million

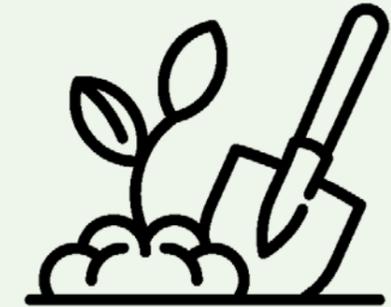
The number of international tourists visiting Türkiye has increased from 13 million in 2002 to 51.4 million in 2022.

## SECTORAL OPPORTUNITIES



### AUTOMOTIVE

Ranked as the 14<sup>th</sup> largest automotive producer in the world  
Annual production: 1.5 million units  
Market: 13 billion US dollars  
Exports: 25.5 billion US dollars



### AGRICULTURE & FOOD

**66**  
billion US dollars

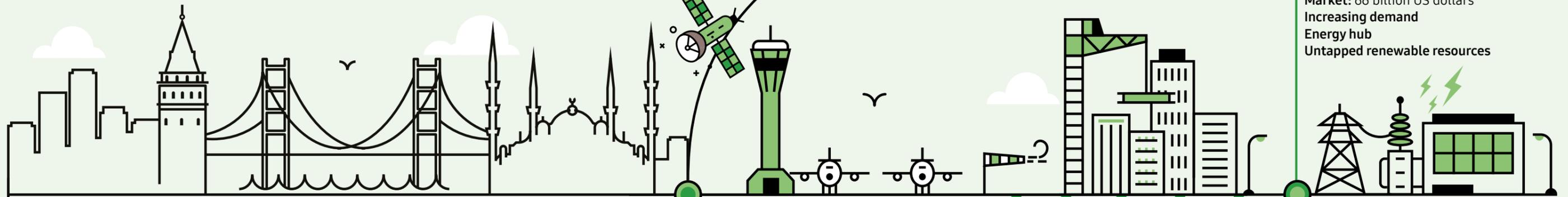
Market: 103 billion US dollars  
Exports: 19 billion US dollars  
Exports to approximately 200 countries

### 342 destinations

Turkish Airlines operates flights to 342 destinations in 121 countries.

### ENERGY

Market: 66 billion US dollars  
Increasing demand  
Energy hub  
Untapped renewable resources



**27%**

Türkiye became the most preferred FDI destination among developing European countries in 2021, with a 27% increase in total FDI projects.

**1.3 billion** **50 million**

Türkiye provides easy access to a market of 1.3 billion people and a value of 28 trillion US dollars, covering Europe, the Middle East, North Africa, and Central Asia, all within a 4-hour flight distance.

Türkiye ranks as the 11<sup>th</sup> largest economy in terms of GDP per capita among countries with a population exceeding 50 million.

**2023**

It is expected that the population of Türkiye will reach 86.9 million in 2023 and 100.3 million by 2040. In 2020, Türkiye had the youngest population compared to EU member countries, with more than half of its population being below the age of 32.7.

**33.3 million**

With a workforce of 33.3 million people, Türkiye constitutes the third-largest labor force pool in Europe.

**170**  
billion US dollars

### MACHINERY

Europe's largest TV and white goods producer  
Market: 34 billion US dollars  
Exports: 28 billion US dollars

# İTKİB CONTINUES ITS ACTIVITIES TO ENHANCE EXPORTS



İTKİB continues its activities to develop trade by collecting and disseminating all kinds of trade-related information to its members.



As of 2009, 61 Exporters associations are operating in 27 different sectors/sub-sectors in Türkiye.

**E**xporters Associations are organizations that have been providing services in various sectors in various cities of Türkiye since 1937, aiming to increase, support, and coordinate exports to contribute to economic development. 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. İTKİB continues its activities to develop trade by collecting and disseminating all kinds of trade-related information to its members. It informs its members about collaboration opportunities with foreign companies and import demands. It organizes national participation in international fairs related to the Apparel, Textile, Leather, and Carpet sectors. It supports the

participation of its members in international fairs and organizes over 31 international fair participations, 24 trade delegation and 10 procurement delegation annually. İTKİB organizes trade delegations to foreign countries and buying missions in Türkiye to develop relationships between domestic and foreign companies. It prepares market research reports, sector analyses, and country profiles to provide its members with valuable information.

# Contact information to reach Turkish exporters

Turkish exporters, with their superior competitiveness, product diversity, and fast and high-quality production networks, carry out exports to many countries around the world. They 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.

## İSTANBUL TEXTILE AND APPAREL EXPORTERS' ASSOCIATIONS (İTKİB)



**Address:** Dış Ticaret Kompleksi B-Blok Çobançeşme Mevkii Sanayi Cad. Yenibosna / İstanbul

**Phone:** 0 212 454 02 00

**Fax:** 0 212 454 02 01

**e-mail:** info@itkib.org.tr

## THE MINISTRY OF TRADE OF THE REPUBLIC OF TÜRKİYE



**Address:** Dumlupınar Bulvarı No: 151 Eskişehir Yolu 9. Km 06800 Çankaya / Ankara

**Ministry Switchboard:** + 90 312 449 10 00

**Ministry General Correspondence Fax:** +90 312 449 18 18

## EXPORTERS ASSOCIATIONS

İstanbul Apparel Exporters' Association



İstanbul Textile and Raw Materials Exporters' Association



İstanbul Leather and Leather Products Exporters' Association



İstanbul Carpet Exporters' Association



## FOREIGN REPRESENTATIONS OF THE MINISTRY OF TRADE OF THE REPUBLIC OF TÜRKİYE



## THE TURKISH TEXTILE SECTOR'S STARTUP ECOSYSTEM IS GROWING



Although machine usage is increasing, traditional production in the textile sector is still quite high. Innovative solutions that increase efficiency in the sector show that the Turkish textile sector will stand out in the global market in the future.

Being one of the most established and pioneering sectors in Türkiye's industrialization, the textile and apparel industry has focused on R&D investments to blend its experience with technology. Entering a period of innovative transformation with the development of R&D centers and startups, the sector is seeking ways to increase its competitiveness in the global market. According to the Minis-

try of Industry and Technology's April 2024 data, among the 1,307 R&D centers nationwide, the textile sector ranks among the top five with 78 centers. Besides textile and apparel companies shifting their investments to this area, the number of startups developing projects in this field is also quite high. Recent developments in the entrepreneurial ecosystem are promising for the sustainability of the sector.

## SUSTAINABLE INVENTION: POMACE-BASED LEATHER

Other Leather is a project that discusses the concept of sustainability and focuses on circularity in terms of social and cultural design aspects.

The "Other Leather: Pomace-Based Leather Project," which won the first prize in the FutureTech section of the Futuretex İstanbul Competition, focuses on sustainability and circularity. Pomace is the residue left after olives are pressed, still rich in oil, and is used as fertilizer or animal feed. The project, developed by architect Melis Baloğlu and fashion designer and academic Elif Tekcan, uses circular design methods to produce various surface designs and concept products with a biomaterial based on pomace. These products are made from 100% natural materials. The multi-part concept designs can easily have their worn-out parts replaced. The old parts are also suitable for composting and fertilizing. This extends the life of the design object while ensuring its transformation. Thanks to pomace, a waste material from the Aegean region, the sustainability of the design objects increases. Melis Baloğlu and Elif Tekcan stated that the Other Leather project discusses the concept of sustainability and focuses on circularity in terms of social, cultural, and design aspects. "It is a project that values a region's waste, thereby respecting the local culture. The textile industry, due to its large-scale production and consumption cycle, operates on a completely different scale. We believe that more local, slower, socially and culturally sustain-



able projects can create cracks in the existing system and make change possible, and we strive to support projects that endorse this claim. The transformation of materials into products will be possible after long R&D processes. Our work is still in the R&D phase, progressing with the knowledge and support of sectoral connections gained through the competition," they said.

## SMART DRYSUIT TO KEEP ATHLETES WARM

Currently, the development has been completed as a prototype with several different options.

**B**ilge Koyuncu, the developer of the Smart Drysuit project, which won third place at Futuretex, developed a project to solve the problem of athletes getting cold. Koyuncu said that the project idea was formed by analyzing the needs of athletes while windsurfing. He describes the development of the project as follows: "I had the opportunity to observe what is needed for wetsuits and drysuits, what athletes demand, and what is really important from both a professional perspective and from people interested in it as a hobby. Actually, the problem was right in front of me, and customer needs were clear. I just produced a project by conducting a needs analysis based on user experiences with engineering applications. The project initially involved a combination of textiles and electronics. During the production phase, I had the opportunity to measure the limiting applications. Currently, the development has been completed as a prototype with several different options. We are in the stage of negotiating with angel investors for the start-up product to transition to mass production in minimum quantities. We received support requests regarding production from my managers at Amazon and global leaders who supported me throughout the process. We positioned it as a brand under our DeepTech-Engineering R&D company,



which was established in the technology development zone. Since we successfully completed the most challenging version of textile-based heating systems, we can use them in any area that requires heating. As we currently have an ongoing patent application process and academic publication processes, I hope to develop products for different application areas in the future."

## FUTURISTIC DESIGN PUSHING THE LIMITS

"We can say that this design is an intelligent surface coating material and appeals to a wide range of applications."



**T**he Biotexcover Project, developed by textile engineer Semih Özkür and academic Janset Öztemür, allows for light, color, and texture changes according to changing environmental conditions, inspired by nature. Semih Özkür, who stated that they initially took inspiration from the cuttlefish, mentioned that the chameleon and the Morpho Butterfly, which can achieve structural color changes, were also among their sources of inspiration. He shared the following information: "These creatures have micro-crystals in

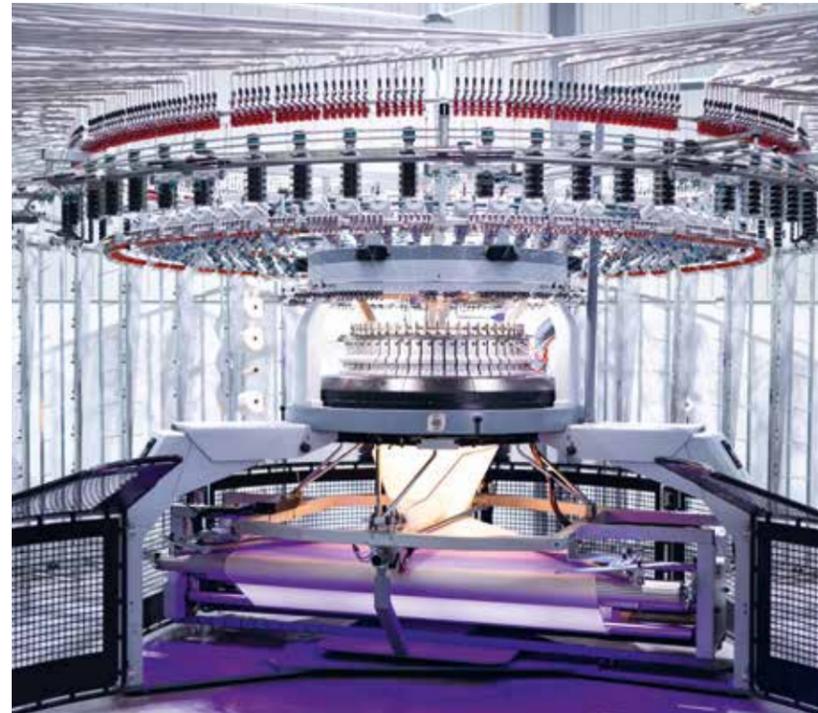
their bodies that reflect, absorb, or diffract color waves. When these creatures want to change color, they position these crystals appropriately to process the light in their environment. Cuttlefish are the most advanced and have a sophisticated brain and nervous system that can control these processes within milliseconds. At this point, we can say that the textile surface in our design is inspired by the bodies of these creatures, while the artificial intelligence and electronic textile elements used for the control mechanism are inspired by

the creatures' brain and nervous system. We see this project as an R&D endeavor. Our primary personal goal is to contribute to the production of know-how in this field. But specifically speaking about the designed product, we can say that this design is an intelligent surface coating material and appeals to a wide range of applications. We believe that the ability of our design to be used in many different areas, from industrial sectors like defense to user-experience-focused fields, will increase its market viability."

## TUVIS WILL HELP COMPANIES REDUCE FABRIC WASTE

“We aim to reduce inefficiency in the textile sector by developing artificial intelligence that can detect fabric defects better than humans.”

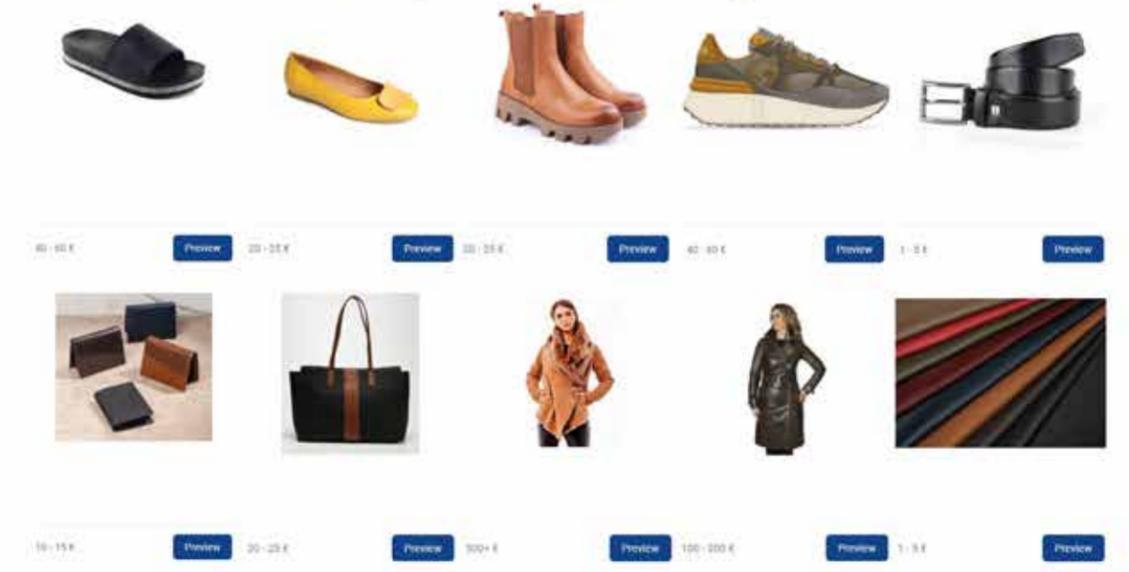
The local startup Tuvis, which was launched to find solutions to the problems in fabric production in the textile sector, developed a project to digitalize the textile sector. Eyüp Görkem Bayram, the founder of Tuvis, explained the journey of Tuvis in detecting fabric defects using machine learning: “Even today, fabrics produced worldwide are inspected by human eyes, and it is impossible to check all defects. Tuvis is a deep-tech initiative that enables the detection of fabric defects in woven fabric production using artificial intelligence and computer vision technologies. According to research, more than 40% of fabric defects in the sector are currently undetectable. Moreover, 80% of the losses before reaching the end-user occur at the first production stage. A fabric defect noticed at the final stage results in the produced fabric being discarded. Tuvis provides solutions to companies by detecting and reporting these defects at an early stage. Our goal is to reduce inefficiency in the textile sector by developing artificial intelligence that can detect fabric defects better than humans. Our aim is to digitalize the textile sector from top to bottom and eliminate waste in the third most polluting industry in the world. Additionally, our product Smartex LOOP, which we introduced at the ITMA 2023 Exhibition in Milan, ensures traceability at the



fabric roll level with non-removable tags attached to the fabric. Under the Smartex umbrella, we are expanding our engineer-dominated team in Türkiye to strengthen our services in Türkiye and nearby markets. We currently serve in more than 15 countries. We aim to continue growing in the Asian market and lead the digitalization of the textile sector globally.”



**turkishleather.com**  
 aims to bring together Turkish manufacturers in the footwear, leather and fur garments and tannery sectors with buyers from all over the world.  
 It offers buyers the opportunity to easily access the product they are interested in with the "detailed filtering" option on the platform and to reach the companies they are interested in both through the system and via Whatsapp.





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