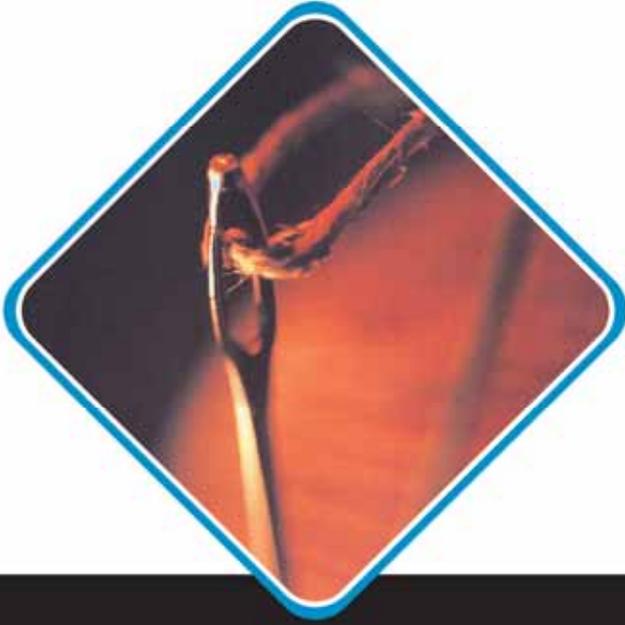




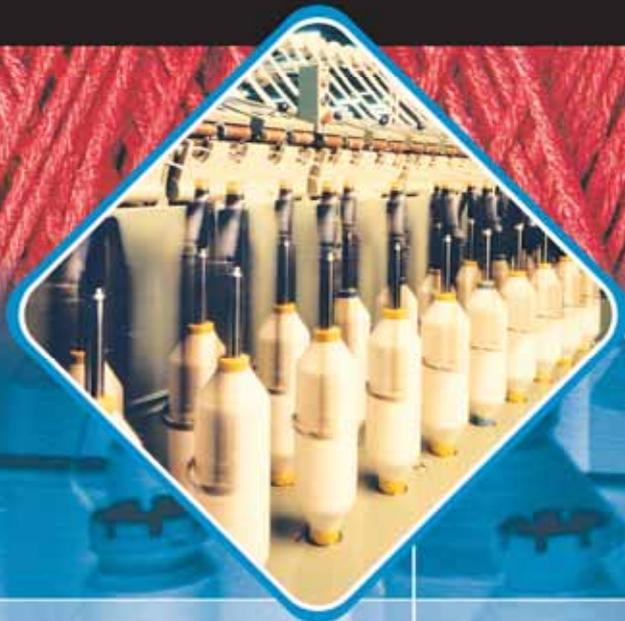
REPUBLIC OF TURKEY
MINISTRY OF ECONOMY



INDUSTRY



FIBERS & YARNS



TURKEY

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PRODUCTION

Textiles and clothing are among the most important sectors of Turkish economy in terms of manufacturing, employment and exports earnings. These sectors had a 19% share in total export volume of 2011. There are more than 35,000 textile and clothing companies in Turkey, 2,200 of which are active in fibers and yarns sector.

Turkey is one of the main actors in the world textile and clothing industry. The Turkish clothing industry is the seventh largest supplier in the world, and the second largest supplier in the EU. The Turkish textile industry is listed as the world's top ten exporters. The Turkish textile and clothing industry has a significant role in world trade, the capability to meet the high standards, and can compete in international markets in terms of high quality, design and a wide range of products.

Parallel to the developments in the Turkish textile and clothing industry, the Turkish fibers and yarns industry has developed in recent years, and as a consequence of the increase in demand for textile and clothing products from both domestic and foreign markets, the fibers and yarns production and exports have increased together with investments in the industry.

Cotton is the essential raw material for the country's textile and clothing industry, and Turkey is one of the important cotton growers in the world. Turkey ranked seventh in the production of cotton with a total amount of 954,000 tons in 2011. As one of the results of the Southeastern Anatolia Project (GAP), which is the largest project ever attempted in Turkey, cotton production in Turkey has begun to increase.

Due to the availability of huge amounts of raw cotton in Turkey, the cotton textile industry has progressed like the Turkish cotton yarns industry. Today, Turkey is one of the largest countries in the world in terms of its cotton yarn production capacity.

As well as the cotton textiles, the Turkish man-made textile sector is also a well-developed industry. Today, Turkey is very strong in all areas of synthetic fibers and yarns production and processing.

Turkey invented short staple spindles and open end rotors, which are regarded as the most advanced technology in the world. Therefore, in terms of installed capacities of short staple spindles and open-end rotors, Turkey ranks in top five in the world.

The mills are spread out all over Turkey, mostly in Istanbul, Bursa, Kahramanmaraş, Gaziantep, Adana, İzmir, Kayseri, Malatya, Tekirdağ, Uşak, Hatay and Denizli. Most of the large mills have integrated fibers production into clothing. Many Turkish fiber and yarn manufacturers have ecological labels for their products and environmental management systems in their plants.

EXPORTS

Turkish textile and clothing exports have continued to increase even after the expiration of the global textile quota system at the end of 2004, as agreed under the World Trade Organization Agreement on Textiles and Clothing (ATC). The sector continues to maintain and enhances its competitiveness despite the abolition of quotas. With its quality products, Turkey has been increasing its share in major markets, especially in the European market which has high standards and sophisticated customer needs.

Turkey's fibers and yarns exports decreased to US\$1.5 billion in 2009 as a result of the global financial crisis. The exports showed an enormous increase of 26% in 2010 and surpassed US\$1.9 billion. In 2011, the increase rate was 30% and the export of fibers and yarns reached US\$2.5 billion.

Turkey's Fibers and Yarns Exports (US\$ Million)

Product Code	Product Name	2009	2010	2011	2011/10 (%)	2011 Share (%)
5002-5005	Raw silk, silk waste and silk yarns	0,8	0,4	0,2	-45,0	0,0
5101-5105	Wool, animal hair and wool waste	14,5	24,8	35,3	42,7	1,4
5106-5110	Wool yarns	41,2	49,8	59,1	18,9	2,4
5201-5203	Cotton and cotton waste	113,1	137,2	268,7	95,8	10,9
5204-5207	Cotton Yarns	266,8	323,9	499,6	54,2	20,3
5301-5305	Flax, hemp, jute and other vegetable textile fibers	0,3	0,1	0,1	-35,7	0,0
5306-5308	Yarns of Flax, hemp, jute and other vegetable textile fibers	4,5	5,5	5,9	7,8	0,2
5401-5406	Synthetic and artificial filament yarns	330,9	464,6	542,8	16,8	22,1
5501-5507	Synthetic and artificial filament staple fibers	278,3	377,1	422,9	12,2	17,2
5508-5511	Yarns of synthetic and artificial filament staple fibers	377,5	423,5	529,9	25,1	21,6
5604-5606	Textile covered rubber thread and cord, metal and metallized yarns, twine, cordage, rope and cable	72,2	83,6	92,8	11,1	3,8
Total		1.500,1	1.890,5	2.457,4	30,0	100,0

Source: Ministry of Economy

The main export products in 2011 were synthetic and artificial filament yarns, yarns of synthetic and artificial filament staple fibers, cotton yarns, synthetic and artificial filament staple fibers. Italy (12,1%), USA (5,9%), Germany (5,9%), Russia (5,7%), the UK (5,6%), Iran (3,9%), China (3,8%), Spain (3,7%) and Belgium (3,6%) were the major export markets for Turkish fibers and yarns companies in 2011.

Major Export Markets in Fibers and Yarns (US \$ Million)

Countries	2009	2010	2011	2011/10 (%)	2011 Share (%)
Italy	182,66	221,1	298,08	34,8	12,1
USA	73,67	108,83	146,16	34,3	5,9
Germany	83,78	113,93	143,84	26,3	5,9
Russia	55,56	101,97	139,28	36,6	5,7
United Kingdom	61,55	98,49	138,44	40,6	5,6
Iran	60,78	55,55	95,22	71,4	3,9
China	44,94	73,49	93,57	27,3	3,8
Spain	48,24	69,43	91,41	31,7	3,7
Belgium	57	71,52	88,38	23,6	3,6
Bulgaria	43,47	68,29	82,33	20,6	3,4
Egypt	70,57	98,79	81,13	-17,9	3,3
Poland	49,67	61,34	76,04	24,0	3,1
Netherlands	40,68	53,33	72,56	36,1	3,0
Brazil	52	69,58	70,78	1,7	2,9
Portugal	43,03	47,66	69,13	45,0	2,8
Syria	68,85	72,54	63,51	-12,4	2,6
Belarus	16,61	30,09	58,32	93,8	2,4
Greece	39,94	35,51	47,4	33,5	1,9
France	34,29	34,52	45,38	31,5	1,8
Mersin Free Zone	13,02	8,19	44,85	447,6	1,8
Other	359,8	396,3	511,6	29,1	20,8
Total	1.500,07	1.890,43	2.457,40	30	100

Source: Ministry of Economy

USEFUL LINKS

- Istanbul Textile and Apparel Exporters' Associations
www.itkib.org.tr
- Aegean Exporters' Associations
www.egebirlik.org.tr
- Uludağ Exporters' Association
www.uib.org.tr
- Denizli Exporters' Association
www.denib.gov.tr
- Mediterranean Exporter Associations
www.akib.org.tr
- Southeast Anatolia Exporters' Associations
www.gaib.org.tr
- Turkish Textile Employers' Association
www.tekstilisveren.org



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