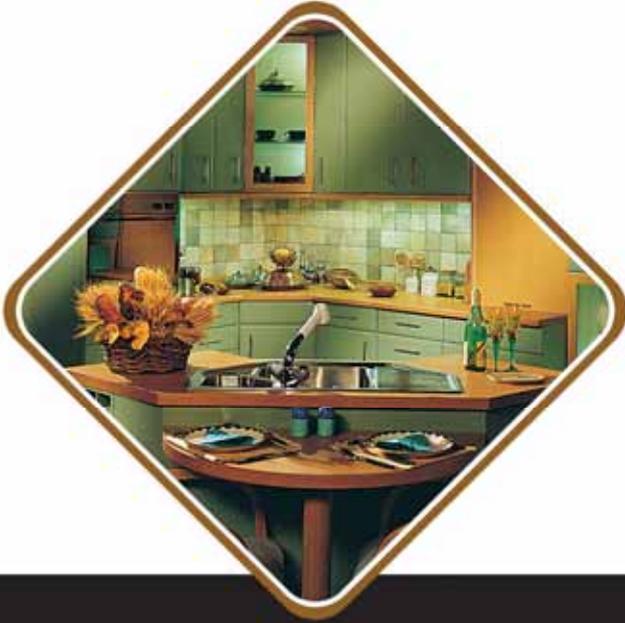




REPUBLIC OF TURKEY  
MINISTRY OF ECONOMY



INDUSTRY



FURNITURE



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## FURNITURE INDUSTRY IN TURKEY

Furniture production in Turkey dates back to the 19th century and was done in small workshops as artisan production. However, by the rapid globalization and all other aspects, present furniture industry is becoming a fashion sector.

In Turkey, furniture is produced both in workshops and industrial-scale manufacturing units. Furniture production is highly fragmented among a large number of small workshops. These small workshops play an important role in producing hand carved and handmade furniture. Workshops are flexible establishments in nature and have enough capacity and labor force to expand their production line in order to supply large orders.

Large-scale furniture firms produce standard models by using automated mass-production techniques and most of their production is oriented towards export.

In accordance to data from Turkish Statistical Institute (TurkStat), in 2009 furniture production was realized as 6.4 billion Turkish Liras. According to the recent General Census of Industry and Business Establishments (2008), the furniture sector employs 150,427 people and the industry has 34,438 companies manufacturing various furniture.

Moreover, capacity data of The Union of Chambers of Commerce and Commodity Exchanges of Turkey (TOBB) reports 40 companies who have over 250 employees and 155 companies who have over 100 employees. Besides, Istanbul Chamber of Industry's list of the top 500 industrial establishments of Turkey includes six furniture companies.

According to the list, these six companies are; Boytaş Mobilya San. ve Tic. A.Ş., Merkez Çelik San. ve Tic. A.Ş., Merinos Halı Sanayi ve Tic. A.Ş., İstikbal Mobilya San. ve Tic. A.Ş., Major SKT Oto Donanım San. ve Tic. A.Ş. and Teknik Malzeme Tic. ve San. A.Ş.

Furniture production in Turkey is concentrated mainly in İstanbul, Ankara, Bursa (İnegöl), Kayseri, İzmir and Adana. The most important furniture production districts are İstanbul and the region of Bolu-Düzce, which is famous for its production of wood products.

The well-known furniture-manufacturing district in Turkey, called "Siteler", is located in Ankara. The number of registered small and medium sized enterprises in "Siteler" is over 10,000. In Ankara, there are many labor-intensive small enterprises manufacturing classical-handmade furniture and there are about 10 major furniture manufacturers who have mass-production capabilities.

The wood industry is developing rapidly in the Bursa-İnegöl area, the third most important furniture production region, which is surrounded by forest areas. The furniture industry of the İnegöl area is small sized but has great potential to improve itself. Another important furniture region is Kayseri, which has large capacity for the production of sofa beds, couch beds and seven of the twenty two largest manufacturers of Turkey are established here. İzmir also has a furniture production districts called "Karabağlar and Kısıkköy" which supply furniture to the Aegean Region.

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## PRODUCTION

In Turkey, furniture production can be classified in accordance with materials used as wooden furniture (massive and veneered), metal furniture and others. Wooden furniture has a major share in total furniture production. As it is known for good quality furniture, the types of wood used and plywood inputs have to be taken into consideration. The main types of wood used in the manufacture of massive furniture in Turkey are ash, beech, oak, pine, linden and mahogany. In veneered furniture, oak, beech, walnut and mahogany are used.

Turkish furniture factories use the latest technologies in producing furniture, which is always up to world standards. Since 1990 the application of advanced technology and the use of CNC benches in the Turkish furniture industry have been increasing. Today, all of the large enterprises in the furniture sector use CNC benches. Most companies are equipped with modern machinery which allows the production of good, export-quality products. Quality control starts from the stage when the raw material is produced and continues till the end of the packaging process. Most of the companies have already obtained ISO 9000 certificates and other required quality certificates. The large scale firms comply with world standards in their packaging processes. In packaging PE, PP, foam, poly-urethane and cardboard boxes are used. Many of the large companies have special packaging sections.

As with many other consumer products, furniture production is sensitive to changes in fashion. Since furniture design is an important aspect of marketing, Turkish designers are constantly following consumer preferences in foreign markets and introduce new designs and make model variations and improvements.

Turkish furniture manufacturers and exporters are aware of the fact that market trends and consumer behavior play an important role in the development and design of new products. Since Turkey has a strong textile industry, Turkish furniture manufacturers have the advantage of being able to use and to monitor a wide range of colorful new fabric collections as upholstery.

## EXPORTS

Turkey's furniture exports have had an upward trend in recent years. In the last ten years, exports of Turkish furniture increased from US \$ 192,1 million in 2001 to US \$ 1,607.3 million in 2011. This is mainly due to improvements in capacity, quality and design. The export figure for 2011 was US \$ 1,607 million, representing an increase of 18 % with respect to the previous year. Main export products were: wooden furniture (excl. for offices, kitchens and bedrooms, and seats), wooden furniture for bedrooms (excl. seats) and seats for motor vehicles. In 2011, Turkey ranked third in the world exports of seats convertible into beds which also traditional items which are showing the large family, hospitality and past nomadic characteristics of our nation.

In 2011, Turkey exported furniture to 172 countries throughout the world. The main markets for furniture exports were Iraq, Germany, Azerbaijan, Iran and France. In recent years, Turkish furniture companies have been establishing showrooms and depots in increasing numbers in most of these countries. The Turkish contracting sector is one of the major sectors exporting services. Turkish contractor companies who have undertaken construction work abroad have completed many housing complexes, tourism projects, hospitals and health center projects, most of which were decorated with Turkish furniture.

Turkish furniture is designed and made from the highest quality materials to ensure comfort, performance and attractive appearance for a very long life. Different styles are produced such as classical, traditional and contemporary. With its designers and architects combined with its flexible production capacity, the Turkish furniture industry is able to satisfy the requirements of all individual markets all over the world.

Today, with all these aspects of the furniture industry, Turkey is among the most promising furniture suppliers in the world.

***Furniture Exports of Turkey by Years***  
(Value: US\$ 1,000)

Years	Value
2005	684,553
2006	764,715
2007	1,032,658
2008	1,332,922
2009	1,153,520
2010	1,363,062
2011	1,607,296

Source: TurkStat

***Furniture Exports of Turkey by Product and Countries (Value: US \$ 1,000)***

HS No	Product Name	2009	2010	2011	Share of Countries 2011 (%)
940110	Seats for aircraft	660	427	701	France(35) Iraq(17) Ireland(14) Germany(9) Georgia(6)
940120	Seats for motor vehicles	72.013	113.989	143.119	Germany(29) France(11) Russian Fed.(9) Austria(8) Netherlands(6)
940130	Swivel seats with variable height adjustments (excl. Medical, surgical, dental or veterinary chairs)	40.058	46.662	29.976	Iraq(23) Turkmenistan(22) Azerbaijan(8) Russian Fed.(5) Germany(4)
940140	Seats, convertible into beds (excl. Garden seats and camping equipment, and medical, dental furniture)	133.515	125.507	141.489	Iraq(22) Germany(14) Italy(8) Iran(7) USA(7)
940151	Seats of bamboo or rattan	91	97	145	Iraq(33) Turkmenistan(22) Ukraine(12) Saudi Arabia(8) TRNC(6)
940159	Seats of cane, osier or similar materials (excl. Of bamboo or rattan)	844	1.263	446	Iraq(44) Iran(12) USA(7) Azerbaijan(7) TRNC (6)

940161	Upholstered seats, with wooden frames (excl. Convertible into beds)	61.349	75.813	88.052	Iraq(29) Iran(12) Netherlands(9) Azerbaijan(7) Germany(4)
940169	Seats, with wooden frames (excl. Upholstered)	25.086	25.568	28.688	Iraq(29) Iran(9) Saudi Arabia(9) Turkmenistan(7) Azerbaijan(6)
940171	Upholstered seats, with metal frames (excl. Seats for aircraft or motor vehicles, and medical, furniture)	6.517	6.881	8.289	Azerbaijan(11) Turkmenistan(10) Georgia(6) Iraq(6) Netherlands(6)
940179	Seats, with metal frames (excl. Upholstered, swivel seats with variable height and medical, furniture)	10.045	13.343	16.272	Iraq(9) Germany(9) Italy(7) Belgium(7) Turkmenistan(6)
940180	Seats n.e.s.	64.103	76.268	88.545	Iraq(20) Germany(9) Iran(8) Netherlands(7) France(4)
940190	Parts of seats, n.e.s.	44.828	55.946	86.483	Iran(21) Germany(20) France(9) Rep. of South Africa(6) Brazil(6)
940210	Dentists', barbers' or similar chairs having rotating as well as both reclining and elevating movement, and parts thereof, n.e.s.	2.369	3.165	2.868	Germany(20) Rep. of South Africa(15) Azerbaijan(10) Iran(10) UK(7)
940290	Operating tables, examination tables, and other medical, furniture (excl. Dentists' or similar chairs, incl. Trolley-stretchers)	15.310	18.305	23.757	Iraq(9) Georgia(7) Germany(7) Ukraine(6) Nigeria(5)
940310	Metal furniture for offices (excl. Seats)	50.338	46.930	56.311	France(20) Germany(15) Netherlands(10) Iraq(10) Belgium(6)
940320	Metal furniture (excl. For offices, seats and medical, surgical, dental or veterinary furniture)	57.320	71.151	74.427	Germany(12) Iraq(11) France(10) Turkmenistan(7) Azerbaijan(5)
940330	Wooden furniture for offices (excl. Seats)	43.694	46.423	52.642	Iraq(14) Turkmenistan(13) Germany(6) Azerbaijan(6) Saudi Arabia(6)
940340	Wooden furniture for kitchens (excl. Seats)	22.373	22.092	21.261	Iraq(29) Turkmenistan(12) UK(8)

					Azerbaijan(7) Qatar(5)
940350	Wooden furniture for bedrooms (excl. Seats)	142.840	191.208	247.655	Iraq(31) Azerbaijan(12) Germany(6) Iran(5) Netherlands(4)
940360	Wooden furniture (excl. For offices, kitchens and bedrooms, and seats)	192.943	240.065	283.990	Iraq(22) Azerbaijan(12) Turkmenistan(8) Saudi Arabia(7) Iran(6)
940370	Furniture of plastics (excl. Medical, dental, surgical or veterinary, and seats)	20.570	25.283	30.988	Iraq(9) Italy(7) Georgia(4) Azerbaijan(4) Spain(4)
940381	Furniture of bamboo or rattan (excl. Seats and medical, surgical, dental or veterinary furniture)	35	127	53	Iraq(53) TRNC(18) Kuwait(4) Oman(4) Uzbekistan(3)
940389	Furniture of cane, osier or similar materials (excl. Of bamboo, rattan, metal, wood and plastics, and seats)	19.316	19.839	14.901	Azerbaijan(11) Iraq(10) Iran(10) France(10) UK(9)
940390	Parts of furniture, n.e.s. (excl. Of seats and medical, surgical, dental or veterinary furniture)	80.324	87.173	112.604	Germany(13) Iraq(9) Iran(9) Russian Fed.(8) France(6)
940410	Mattress supports for bed frames (excl. Spring interiors for seats)	3.237	5.164	3.296	Iraq(16) Germany(11) Turkmenistan(11) Georgia(5) USA(5)
940421	Mattresses of cellular rubber or plastics, whether or not covered	3.728	4.838	4.949	France(37) Iraq(11) Switzerland(10) Germany(6) Belgium(6)
940429	Mattresses, fitted with springs or stuffed or internally filled with any material (excl. Cellular rubber or plastics, pneumatic or water mattresses and pillows)	40.013	39.535	45.479	Italy(19) Iraq(14) Germany(6) Netherlands(6) Iran(5)
	<b>Total</b>	<b>1.153.520</b>	<b>1.363.062</b>	<b>1.607.384</b>	<b>Iraq(18) Germany(10) Azerbaijan(7) Iran(6) France(5)</b>

Source: TurkStat

**Major Export Markets in Furniture Industry (Value: US\$ 1,000)**

Countries	2009	2010	2011	Share of Countries (%) 2011
Iraq	136.623	207.794	284.183	17,7
Germany	114.889	128.564	160.818	10,0
Azerbaijan	69.240	81.033	106.619	6,6
Iran	70.618	84.502	103.463	6,4
France	63.871	70.697	87.684	5,5
Turkmenistan	38.172	46.590	75.714	4,7
Netherlands	48.509	45.757	55.570	3,5
Russian Fed.	17.118	34.961	47.667	3,0
Saudi Arabia	22.736	28.891	41.521	2,6
UK	41.715	39.111	39.003	2,4
Italy	25.169	29.959	32.814	2,0
Greece	46.611	41.372	31.984	2,0
Georgia	14.293	16.413	27.991	1,7
USA	18.740	22.233	26.141	1,6
Austria	20.508	19.422	24.353	1,5
Israel	16.394	19.173	23.069	1,4
Belgium	17.570	18.336	22.263	1,4
Turkish Republic of Northern Cyprus	19.661	26.207	21.686	1,3
Romania	23.168	21.170	18.797	1,2
Kazakhstan	17.013	20.619	17.821	1,1
UAE	30.725	16.296	17.638	1,1
Libya	41.216	73.686	17.059	1,1
Spain	8.762	11.756	14.744	0,9
Egypt	9.712	10.654	13.955	0,9
Lebanon	7.188	9.212	13.473	0,8
Algeria	6.850	10.509	12.882	0,8
Bulgaria	13.710	12.267	12.702	0,8
Ukraine	3.527	5.665	11.950	0,7
Macedonia	9.274	8.698	11.451	0,7
Syria	10.663	16.814	11.094	0,7
Rep. of South Africa	3.485	6.265	10.962	0,7
Brazil	1.501	4.159	10.726	0,7
Others	164.289	174.277	199.587	12,4
<b>Total</b>	<b>1.153.520</b>	<b>1.363.062</b>	<b>1.607.384</b>	<b>100,0</b>

Source: TurkStat

## TRADE FAIRS IN TURKEY

Turkish furniture is exhibited in many international and local fairs organized in Turkey. In 2012, over 20 fairs will be organized in this sector.

### *Some of them are;*

- MODEKO 2012 Izmir Furniture Fair, in Izmir, in April
- ANKAMOB 2012 Ankara Furniture Fair, in Ankara, in April
- K.MOB 2012 Kayseri Furniture Fair, in Kayseri, in April
- MODEFEXPO 2012 Furniture and Decoration Fair, in Bursa, in April and in October
- ZOW 2012 Furniture Components and Accessories Fair, in Istanbul, in September
- Furniture Decoration Fair 2012 of Turkey, in Ankara, in October
- INTERMOB 2012 15. International Furniture Related Industry, Accessories, Forestry Products and Wood, in Istanbul, in October
- Adana Furniture - Decoration Fair 2012, in Adana, in October

## USEFUL LINKS AND ADDRESSES

- Istanbul Union of Wood and Forestry Products Exporters  
[www.iib.org.tr](http://www.iib.org.tr)
- Aegean Forestry and Wooden Products Exporters' Union  
[www.egebirlik.org.tr](http://www.egebirlik.org.tr)
- Mediterranean Wooden And Forestry Products Exporters Union  
[www.akib.org.tr](http://www.akib.org.tr)
- Kayseri Chamber Of Furniture Manufacturers And Wood Workers  
[www.kaymobodasi.org](http://www.kaymobodasi.org)
- Association Of İnegöl Carpenters And Sellers/Makers Of Furniture  
[www.inmob.org.tr](http://www.inmob.org.tr)
  
- Ankara Chamber of Carpenter Trademen and Craftmen  
Address : Yapıcı Sok. No:1/A 1, Siteler 06160, Altındağ ANKARA  
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E-mail : [ankaramarangozlar@joturk.com](mailto:ankaramarangozlar@joturk.com)
  
- Ankara Chamber of Furniture & Lacquerers Trademen & Craftmen  
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- Izmir Chamber of Carpenters and Wood Workers  
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