

TURKISH TEXTILE INDUSTRY, CIRCULAR ECONOMY AND DEDICATION TO SUSTAINABILITY

Brussels, May 2022





THE IMPORTANCE OF TURKISH TEXTILE AND APPAREL INDUSTRY FOR TURKISH ECONOMY

WE MAKE 13,4% OF
TURKEY'S EXPORTS



WE CREATE 6.2% OF
GDP



WE REALIZE 14% OF
MANUFACTURING
INDUSTRY PRODUCTION



WE GENERATE 25.4% OF
EMPLOYMENT IN
MANUFACTURING INDUSTRY



EXPORTS

WE ARE THE BIGGEST EXPORTER SECTOR WITH 30 BILLION DOLLARS OF EXPORTS

FOREIGN TRADE SURPLUS

WITH 20 BILLION DOLLARS OF EXPORTS OUR SECTOR ACHIVES THE HIGHEST AMOUNT OF FOREIGN CURRENCY INFLOW TO TURKEY

EMPLOYMENT

OUR SECTOR PROVIDES THE HIGHEST EMPLOYMENT WITH 1,2 MILLION JOB OPPORTUNITY IN MANUFACTURING INDUSTRY
(FEMALE EMPLOYMENT RATE IS 41%)

PRODUCTION

TOGETHER WITH APPAREL SECTOR OUR SECTOR MAKES THE MOST PRODUCTION IN MANUFACTURING INDUSTRY WITH 70 BILLION USD MANUFACTURING VALUE



PRIVILEGED POSITION

We are one of the few countries in the world that can carry out all production stages of textile and apparel sectors from fiber production to apparel production with more than 20,000 producers.

OUR STATUS IN GLOBAL FOREIGN TRADE

WE ARE THE 5TH
IN GLOBAL
TEXTILE EXPORTS

WE ARE THE 2ND
BIGGEST SUPPLIER
OF THE EU

WE ARE THE
WORLD'S BIGGEST
DENIM PRODUCER

WE ARE THE WORLD'S
4TH BIGGEST HOME TEXTILE,
5TH BIGGEST FABRIC
SUPPLIER



We get 3.6% share of global textile and raw materials exports

COMPETITIVE ADVANTAGES OF TURKISH TEXTILE



Advanced
Accessories and Sub-
Industry Products



Easy Access to World
Markets



Creativeness



Skilled Labor



Full Package Production



Flexible Production



Compliance with EU
Standards

TURKISH TEXTILE EXPORT BY PRODUCTS



☐ In 2021, Turkish reached the all-time high export with of 12,9 Billion \$

☐ In 2022, Turkish Textile Industry aims to reach:

☐ 15 Billion \$ to World

☐ 7,5 Billion \$ to EU (18% share)

☐ 1 Billion \$ to US (%3,5 share)

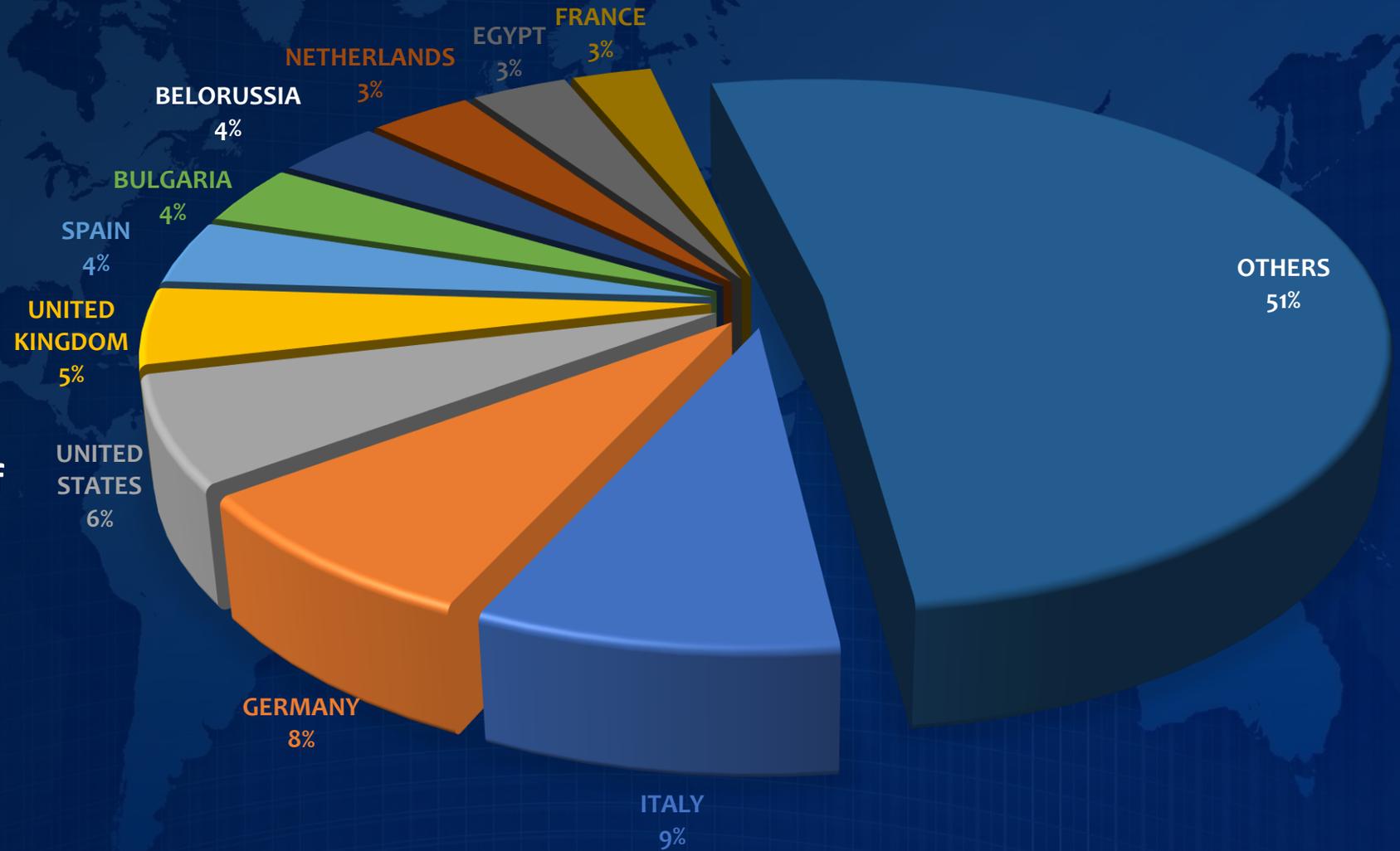
☐ Increase of 90% of its all export market

Source: Exporters Association, May 2022 (Unit: Million \$)

TURKISH TEXTILE EXPORT MARKETS



Mainly to European markets, with approximately half of its total export



PROMINENT COUNTRIES IN FIBER EXPORT

UNIT: MILLION \$	2017	2018	2019	2020	2021	CHANGE	SHARE
1 USA	7.054	7.770	7.254	6.952	6.792	-2,3%	17,3%
2 AUSTRALIA	4.449	4.791	3.357	1.904	4.070	113,7%	10,4%
3 INDIA	2.726	3.209	1.995	2.301	3.972	72,6%	10,1%
4 BRAZIL	1.473	1.737	2.752	3.333	3.518	5,5%	9,0%
5 CHINA	3.159	3.675	3.202	2.285	2.667	16,7%	6,8%
6 SOUTH KOREA	1.332	1.588	1.328	1.130	1.328	17,6%	3,4%
7 BELGIUM	855	1.106	1.145	932	1.204	29,2%	3,1%
8 INDONESIA	535	612	881	687	1.061	54,6%	2,7%
9 THAILAND	804	992	850	706	921	30,5%	2,4%
10 GREECE	406	411	598	456	815	78,6%	2,1%
TURKEY (13th)	315	383	397	347	640	84,6%	1,6%
OTHER COUNTRIES	11.676	12.809	12.110	9.780	12.158	24,3%	31,1%
TOTAL EXPORT	34.786	39.083	35.870	30.813	39.147	27,0%	100,0%

Source: ITC Trade Map - May 2022

PROMINENT COUNTRIES IN FIBER IMPORT

UNIT: MILLION \$	2017	2018	2019	2020	2021	CHANGE	SHARE
1 CHINA	7.566	9.175	8.713	7.334	8.308	13,3%	20,3%
2 TURKEY	3.059	2.757	2.902	2.626	3.739	42,4%	9,2%
3 VIETNAM	2.953	3.462	3.087	2.761	3.397	23,0%	8,3%
4 BANGLADESH	2.118	2.687	2.508	2.232	3.225	44,4%	7,9%
5 PAKISTAN	1.345	1.701	1.266	1.861	2.600	39,8%	6,4%
6 INDONESIA	2.128	2.356	1.823	1.273	1.727	35,6%	4,2%
7 ITALY	1.628	1.889	1.659	1.186	1.655	39,5%	4,1%
8 INDIA	1.923	1.694	2.406	1.054	1.500	42,3%	3,7%
9 USA	1.284	1.391	1.304	1.134	1.466	29,2%	3,6%
10 GERMANY	1.289	1.253	1.116	934	1.179	26,2%	2,9%
OTHER COUNTRIES	12.766	14.216	12.823	10.356	12.065	16,5%	29,5%
TOTAL IMPORT	38.058	42.582	39.608	32.753	40.860	24,8%	100,0%

Source: ITC Trade Map - May 2022

GLOBAL FIBER EXPORT BY SUB-PRODUCT

UNIT: MILLION \$	TOTAL EXPORT			TURKEY'S EXPORT			TURKEY'S SHARE	
	2020	2021	CHANGE	2020	2021	CHANGE	2021	2021
	COTTON FIBER 8	14.955	18.698	25,0%	213	389	82,9%	1,4%
SYNTHETIC-ARTIFICIAL FIBER	9.672	12.087	25,0%	115	223	92,8%	1,2%	1,8%
WOOL AND FIBER OF FINE/COARSE ANIMAL HAIR	4.072	5.778	41,9%	17	27	58,8%	0,4%	0,5%
VEGETABLE FIBER	1.807	2.232	23,5%	1	0	-52,5%	0,0%	0,0%
SILK FIBER	308	352	14,3%	1	1	62,9%	0,3%	0,4%
TOTAL EXPORT	30.813	39.147	27,0%	347	640	84,6%	1,1%	1,6%

Source: ITC Trade Map - May 2022

GLOBAL FIBER IMPORT BY SUB-PRODUCT

UNIT: MILLION \$	TOTAL IMPORT			TURKEY'S IMPORT			TURKEY'S SHARE	
	2020	2021	CHANGE	2020	2021	CHANGE	2021	2021
	COTTON FIBER 4	14.297	18.374	28,5%	1.672	2.474	48,0%	11,7%
SYNTHETIC-ARTIFICIAL FIBER 2	12.337	14.836	20,3%	874	1.173	34,2%	7,1%	7,9%
WOOL AND FIBER OF FINE/COARSE ANIMAL HAIR	4.175	5.315	27,3%	70	77	10,2%	1,7%	1,4%
VEGETABLE FIBER	1.633	1.976	21,0%	8	12	54,8%	0,5%	0,6%
SILK FIBER	311	358	15,4%	2	2	31,0%	0,6%	0,7%
TOTAL IMPORT 2	32.753	40.860	24,8%	2.626	3.739	42,4%	8,0%	9,2%

Source: ITC Trade Map - May 2022

Home Page » Topical » SASA Launches Giant Investment of 11.8 Billion Dollars

SASA Launches Giant Investment of 11.8 Billion Dollars

Sasa will invest \$11.8 billion for petrochemicals in Adana-Yumurtalik.

Author: Feth Cengirslan | 26 July 2019 | Modified Date: 3 March 2020

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Recent News



The groundbreaking ceremony of the 3rd stage investment of the DowAksa carbon fiber factory was held with the participation of Industry and Technology Minister Mustafa Varank

DAILY SABAH

Turkish polyester giant Sasa announces new \$300M investment

BY DAILY SABAH WITH AA | ISTANBUL | ECONOMY | MAR 22, 2021 | 1:23 PM GMT+3



Sasa's polyester production factory in southern Adana province, Turkey, Sept. 21, 2020. (Sabah)

Turkish polyester producer Sasa announced a new investment Monday with an estimated value of \$330 million (TL 2.61 billion).

Aksa Akrilik will make another 45 million dollar investment

Aksa Akrilik Board Member and General Manager Cengiz Taş noted that they achieved sustainable success thanks to their value-added export performance and production diversity, in his statement evaluating the financial results in the first quarter of 2022. Taş stated that they continue to add value to their stakeholders with the important investments they have made in the past and their corporate governance approach.

Taş relayed that they will invest in a new technical yarn facility, and shared the following details; "We are starting a new yarn facility investment with an annual production capacity of 7 thousand tons, considering the demand in our country and in the world. We are planning to commission our facility, which has a budget of 45 million dollars, at the end of 2024, with the negotiations we made with the machinery manufacturers. Our investment will continue to contribute to the country's economy by providing high export income when it gets completed."

ITKIB is one of the 13 General Secretariat of Exporters' Associations exist country-wide. With its share of 11% in Turkey's total exports and more than 20.000 member exporter companies, ITKIB is a fundamental industrial organization of Turkey.

Istanbul Apparel Exporters' Association (IHKIB)

- 80% of total apparel exports of Turkey



Istanbul Textile and Raw Materials Exporters' Association (ITHiB)

- 45% of total textile exports of Turkey



Istanbul Leather and Leather Products Exporters' Association (IDMiB)

- 85% of total leather products exports of Turkey



Istanbul Carpet Exporters' Association (IHIB)

- 22% of total carpet exports of Turkey



OUR VISION AND GOALS



to enhance the textile exports of Turkey

to promote Turkish textile industry around the world



to support its members in all kinds of trade related activities.

iTHiB

ISTANBUL TEXTILE AND RAW MATERIALS EXPORTERS' ASSOCIATION

to promote common interests of the industry in both national and international platforms as well as in governmental levels



ACTIVITY AREAS OF ITHIB

Activities for the development of export

Export registration

R&D, reporting and data sharing

National participation to international fairs

Trade delegations

Design and fashion contests

Guidance on Formalities

Promotion

Sectoral Projects

Training Programmes

Publication

Many others...



TEXHIBITION ISTANBUL FABRIC AND TEXTILE ACCESSORIES FAIR

Texhibition Istanbul Fabric and Textile Accessories Fair brings yarn, woven fabric, knitted fabric, textile accessories companies (166 Total # of Exhibitors) together!

Fabric and Textile Accessories Fair

16-18 MARCH 2022

ISTANBUL EXPO CENTER



TEXHIBITION
ISTANBUL

You are invited
to Texhibition Istanbul Fair,
where the textile sector comes together.

10.00
18.00



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ISTANBUL CHAMBER OF COMMERCE

KOSGEB

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This fair is organized by İTKİB Fuarlık A.Ş.

ORGANIZED WITH THE AUDIT OF TOBB (THE UNION OF CHAMBERS AND COMMODITY EXCHANGES OF TURKEY) IN ACCORDANCE WITH THE LAW NO. 5174.

- More than 12.000 Visitors
- Approximately 200 Exhibitors

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Fabric and Textile Accessories Fair

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- Futuretex is a contest that brings new talents trained in fashion design and industry together and gives these young designers the opportunity to present their collections




**FUTURETEX
İSTANBUL**
FutureBase International

CONTEST COACH
Tuvana Büyükçınar

AWARDS

First Place	12.000 €
Second Place	9.000 €
Third Place	6.000 €
Special Jury Award	3.500 €
Visit Première Vision Paris Fair	

DEADLINE
JUNE 24TH, 2022

HOW TO APPLY
futuretexistanbul.com



Türkiye   

Vocational Education

- Supporting of vocational high schools and higher education department
- Cooperation with universities and design faculties

On-the-job trainings

- Informative sectoral seminars and conferences
- Training programmes for foreign trade, marketing and market research

UNIVERSITY

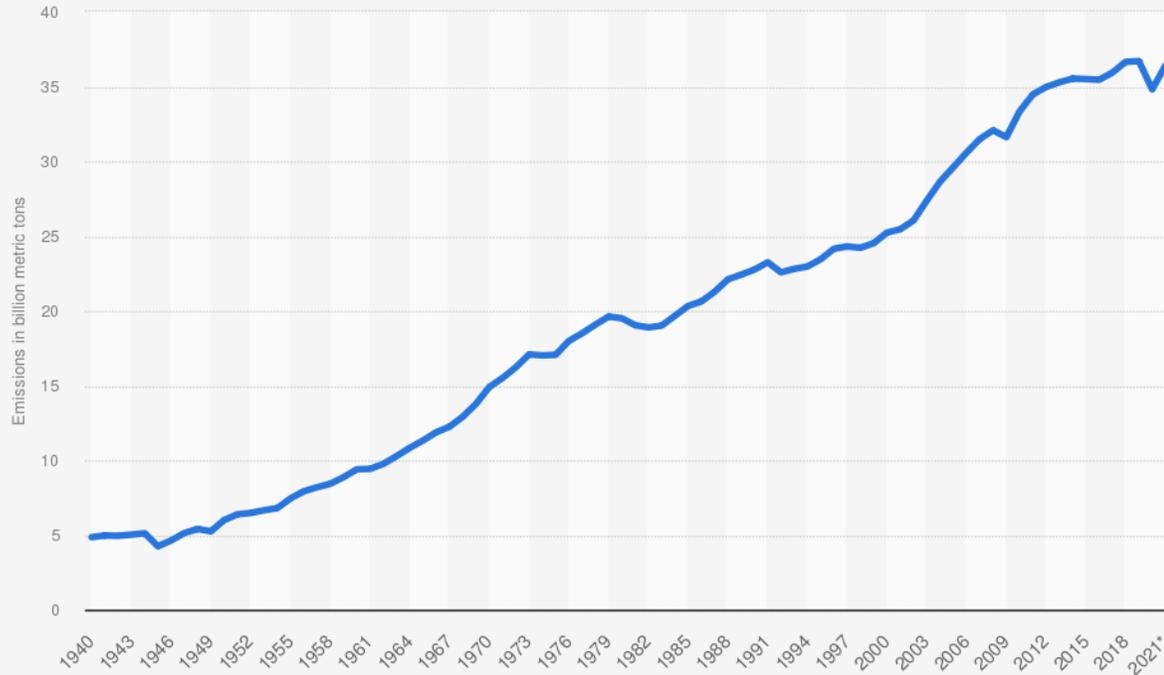
TERCİHİM
TEKSTİL MÜHENDİSLİĞİ
TEKSTİL MÜHENDİSLİĞİ OKU GELECEĞİNİ DOKU

My choice is Textile Engineering Project!

scholarships and job guarantees up to the minimum wage for students who choose the textile engineering department in the university entrance exam!



Annual CO2 emissions worldwide from 1940 to 2020 (in billion metric tons)



Sources

Global Carbon Project; Expert(s) (Friedlingstein et al.)
© Statista 2021

Additional Information:

Worldwide; Global Carbon Project; Expert(s) (Friedlingstein et al.); 1940 to 2020

- The increase in carbon emissions, which was relatively slow until the middle of the 20th century, increased to 6 billion tons in the 1950s, and reached 22 billion tons in 1990, almost quadrupling this level.

DIRECT



INDIRECT



- ❑ **\$2.5 trillion** industry is the second highest water user, produces 20% of total waste and is the 2nd or 3rd largest sector polluting the world.
- ❑ The production of a cotton shirt requires **2,700 Liters of water**.
- ❑ **4% of global carbon emissions** are emitted by the fashion and textile industry.
- ❑ The average consumer buys 60% more clothes compared to 2000, but each garment is used for half as long as before, and 40% of the clothes in our closets are never worn.
- ❑ **95% of used textile products can be recycled**.
- ❑ **Only 20%** of clothing waste is collected for reuse and 80% is treated in landfills or incinerators.
- ❑ If renewable energy is used in textile, a decrease of approximately **60% can be achieved**

- Sustainability can only be achieved with the cooperation of brands.
- Leading brands have great responsibility to set an example for the textile industry and to pave the way for a better future.
- The customer now wants to know where, how and under what conditions the product he wears is produced and its impact on the world.
- Brands cannot ignore this demand and expect their manufacturer/supplier to meet these standards.
- All brands of all sizes will follow this path and differentiate themselves from the competition by providing these standards.
- The increase in emissions, which was relatively slow until the middle of the 20th century, increased to 6 billion tons in the 1950s, **and reached 22 billion tons in 1990**, almost quadrupling this level.

- ❑ **64%** of global consumers care strongly about the social, ethical and environmental impact of their behaviors
- ❑ **57%** think it is the responsibility of brands and manufacturers to drive change in society & business and support the issues that are important to them
- ❑ **48%** think that brands should be doing better on environmental issues





- ❑ The Textile Ecosystem is facing a fundamental challenge: the need to reduce its environmental footprint and advance the adoption of sustainable business models.
- ❑ According to the Circular Economy Action Plan of the European Commission, this industry is the fourth highest-pressure category for the use of raw materials and water and the fifth in terms of Greenhouse Gas (GHG) emissions.

 July 2021 'Turkish Textile Industry Sustainability Action Plan' was announced by the Istanbul Textile and Raw Materials Exporters' Association (ITHIB) under the leadership of the Turkish Exporters' Assembly (TIM).

 Turkish Textile Industry is the FIRST and ONLY sector which announced Sustainability Action Plan.

 Turkish Textile Sustainability Action Plan won «Sample Action Plan Award» from Turkish Corporate Social Responsibility.



- Sustainability and Circularity focused awareness programs, general and technical trainings, workshops, webinars are being held.
 - 4 months-certificate program,
 - More than 1000 participant to every session,
 - Textile Industry Sustainability Guideline



TEKSTİL SEKTÖRÜ SÜRDÜRÜLEBİLİRLİK DÖNÜŞÜMÜ

SERTİFİKALI EĞİTİM PROGRAMI

4 AY / 72 SAAT

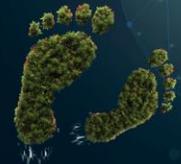
Başvurular Devam Ediyor!



8 Mart 2022' den itibaren
her Salı ve Perşembe

10:00 - 12:30

Zoom



Not: Eğitim Ücretsizdir.

EĞİTİM İÇERİĞİ

- Sürdürülebilirlik
- Döngüsellik ve Sürdürülebilir İş Modelleri
- Sürdürülebilirliğin Finansmanı
- Gezegenin Sürdürülebilirliği
- İnsan Odaklı Sürdürülebilirlik
- İş Dünyasında Sürdürülebilirlik
- Sürdürülebilir Tedarik Zinciri Yönetimi
- Tekstilde Sürdürülebilirlik Sertifika, Standart ve Platformları
- Markalar ve Sürdürülebilirlik Hikayeleri
- Sorumlu Üretici Markaları Sürdürülebilirlik Uygulamaları

Ayrıntılı Bilgi ve Kayıt İçin;

www.ithib.org.tr

tekstilarge@ithib.org.tr

0212 454 02 06



- ❑ An awareness raising conference+networking event highlighting innovation and transparency and amplify sustainable solutions to many of the difficult challenges facing the textile industry, from the climate emergency to transparency of supply chains, responsible sourcing of raw materials and minimum resource usage in water and energy.
- ❑ 550 in person + 3500 digital participation



GMO FREE TURKISH COTTON

- ❑ GMO Free Turkish Cotton is cotton that has been produced and processed responsibly in accordance with environmental and social sustainability criteria, using GMO free seeds.
- ❑ According to data provided by International Cotton Advisory Committee (ICAC), Turkey occupies the 2nd place in cotton production efficiency in the World.
- ❑ With GMO Free Turkish Cotton standard, it is aimed to trace purchase, process, and use of GMO free cotton products in all industrial processes involving cotton, to determine and document producer criteria.
- ❑ The standard will ensure sustainability and traceability of GMO free cotton textile products, thus environmental and social policies determined in the framework of the standard will be spread out.





ITHiB

ISTANBUL TEXTILE AND RAW MATERIALS
EXPORTERS' ASSOCIATION

**MUSTAFA DENIZER
BOARD MEMBER OF ITHIB**

**THANK YOU FOR
YOUR ATTENTION**