

FOOTWEAR

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FOOTWEAR IN TURKEY

Turkey's footwear industry has developed at a rapid pace due to modern manufacturing processes, the availability of major quality raw materials, skilled workers and high design capacity. Today the Turkish footwear industry has a strong position among exporters of high quality fashion goods. Another sign of positive development is the increase in foreign investments in the sector.

It is obvious that the footwear industry is extremely dependent on the leather industry in the country. The Turkish leather sector, which has a history of 500 years, is becoming a leading centre in the leather world. The Turkish leather industry which occupies a prominent place in the Turkish economy has been developing rapidly by combining its technology and its historical background.

Initial efforts to modernize the leather industry began in the 70s but significant progress on a real industrial scale only began in the mid-80s. The sector has developed very quickly in recent years. At present, there are three organised leather industry zones in Turkey and wastewater treatment plants for these zones have been completed. In addition, eight organised leather industry zones are under construction. The sector produces according to international standards and is becoming more sensitive to health and the environment; about 90 % of the production is based on health and environmental standards.

Leather is one of Turkey's leading export sectors. The export figure of the leather sector for 2007 was about 846 million dollars.

PRODUCTION

The shoe industry, which began to appear as a small-size industry in 1950, is now a well-developed industry. Especially in the 1980s significant investments in machinery parks were made and now over 15 % of the sector has completed its industrialization process. About 70 % of the production in the sector is carried out by semi-mechanized production processes and almost 15 % of production is hand-made.

According to State Institute of Statistics, the footwear industry employs 26,954 people and the industry has about 4753 companies which are manufacturing various shoes and slippers. Almost 50 % of the total number of companies is active in İstanbul. Konya, Ankara, Gaziantep, Manisa and Denizli, Adana, Malatya and Çorum (İskilip) are the other important shoe production centers.

The production capacity of the 33 leading companies in the sector is 328,100 pairs daily. In addition, there are many small and medium-size establishments in the sector.

Turkey's shoe production reached 200 million pairs in 2004. Almost 26 % of the production consists of leather shoes. In addition, there has been a rapid increase in the manufacture of plastic shoes and slippers.

The footwear sector relies on Turkish-made shoe production machinery as well as shoe parts. The share of the shoe parts industry in the total shoe industry production is around 5 % and production is very diversified. The soles, heels, casting molds and the welt of the shoes are exported. The shoe parts industry is located in İzmir and the Aegean region, Konya, Gaziantep and in particular İstanbul.

The military boots, work and safety shoes industries in Turkey have developed significantly in recent years. These sectors are producing according to international standards, and shoes with the CE mark are exported to European countries.

The footwear sector closely follows the latest trends in the fashion world. Turkish shoe companies prepare their own collections for every season according to fashion trends both in Turkey and in the world.

The industry is now concentrating its efforts on training and design. In this context, with the initiative of shoe industry, the Turkish Shoe Industry Research, Development and Education Foundation was established in 2001. In order to meet the need of qualified personnel in shoe design, a new department of education, "The Shoe Design Department" has been opened at Mimar Sinan University in Istanbul, which offers two-year courses. In addition to these, every year various shoe design competitions are being organized in order to discover new talents in the field of design.

EXPORTS

Today the Turkish footwear sector has the capacity of creating its own brands and fashion. The performance of the sector largely depends on exports. The Turkish shoe sector had an export value of 316.6 millions of dollars in the year 2007. At present, the Russian Federation, Romania, Bulgaria, Saudi Arabia, England, Greece, Germany, the Netherlands, France, Iraq, and Israel are major markets for the Turkish shoe sector.

Shoes made with leather coated outer surface make up 53 % of shoe exports and had a value of 167 million dollars in 2007. Russia is currently the most important market of Turkish leather shoes. The second important group consists of rubber or plastic materials coated outer soles and surface with an export value of 58 million dollars in 2007.

Turkish shoe industry has one sectoral foreign trade company named ASD Footwear. ASD with 57 shareholders who are small and medium size manufactures operating in footwear industry is the largest shoe exporter of Turkey.

ASD Footwear Company plans to open shoe retail stores all around the world. Under this concept, the company opened two fashion stores in the Czech Republic/Prague and Poland. Now it is planning to open new retail stores in other countries.

All these indicate that Turkish shoe-manufacturing companies are in search of new markets and especially export possibilities to the West European countries.

The Turkish footwear sector takes part in important international fairs and exhibitions abroad. GSD Shoe Fair-Düsseldorf/Germany, Motexha Spring Fair-Dubai/U.A.E., Mosshoes Moscow/Russia and Lineapella-Italy are the most attended ones.

As an important footwear producer/exporter country, many fairs are held in Turkey in the sector every year. Major fairs in the Turkish footwear industry in 2008 are as follows:

GAP-Shoes, 6 th Footwear, Saddlery and Footwear Industry Suppliers Fair, GAZiANTEP in 24.01.2008-27.01.2008

23. İzmir Shoes, Bags and Accessories Fair, İZMİR in 24.01.2008-27.01.2008

15. Shoes Fashion Fair, ANKARA in 07.02.2008-10.02.2008

Konya 21. Shoes, Side Industry and Fashion Fair (summer), KONYA in 28.02.2008-02.03.2008

International Shoe Fashion Fair, İSTANBUL in 17.04.2008-20.04.2008

24. İzmir Shoes, Bags and Accessories Fair, İZMİR in 03.07.2008-06.07.2008

16. Shoe Fashion Fair, ANKARA in 10.07.2008-13.07.2008

Konya 21. Shoe, Side Industry and Fashion Fair (winter), KONYA in 28.02.2008-02.03.2008

İstanbul Shoe Side Industry Fair II, İSTANBUL in 18.09.2008-20.09.2008

İstanbul Shoe Fair II, İSTANBUL in 20.11.2008- 22.11.2008

Major Sectoral Magazines:

Ayak's (www.ayaks.com)

Turkish Shoes (www.turkishshoes.com).

Footwear Exports Of Turkey By Countries (Dollars)

Countries	2003	2004	2005	2006	2007
Russia	12 547 623	8 054 565	11 655 344	16 908 001	32 044 908
Romania	4 895 581	5 016 269	10 128 236	15 388 582	26 290 561
Bulgaria	4 106 406	9 685 446	13 757 185	22 807 429	22 436 624
England	7 069 007	10 712 410	7 663 520	12 729 624	18 272 891
Netherlands	6 862 383	9 764 726	12 532 228	11 640 685	18 083 056
Saudi Arabia	16 390 091	17 305 610	20 719 427	18 137 916	18 080 901
Greece	8 981 318	14 476 621	15 629 044	15 122 077	17 004 224
Germany	13 546 974	20 709 327	23 392 559	18 851 279	15 785 827
Iraq	5 720 982	9 823 782	10 645 475	12 248 983	14 209 323
France	13 228 360	13 744 035	11 493 490	8 549 655	10 017 395
Israel	9 546 184	7 067 368	9 402 408	7 990 979	8 221 133
U.A.E.	2 076 667	3 719 053	3 767 853	2 326 916	7 090 436
Spain	3 126 682	3 569 285	4 716 877	4 776 783	5 676 870
Italy	2 569 152	3 469 871	3 533 043	3 521 140	5 613 043
Libya	7 267 135	4 567 574	4 381 401	2 150 546	1 225 888
TOTAL	121301 999	142 676 530	215 576 433	236 542 954	316 650 101

Source: Undersecretariat for Foreign Trade