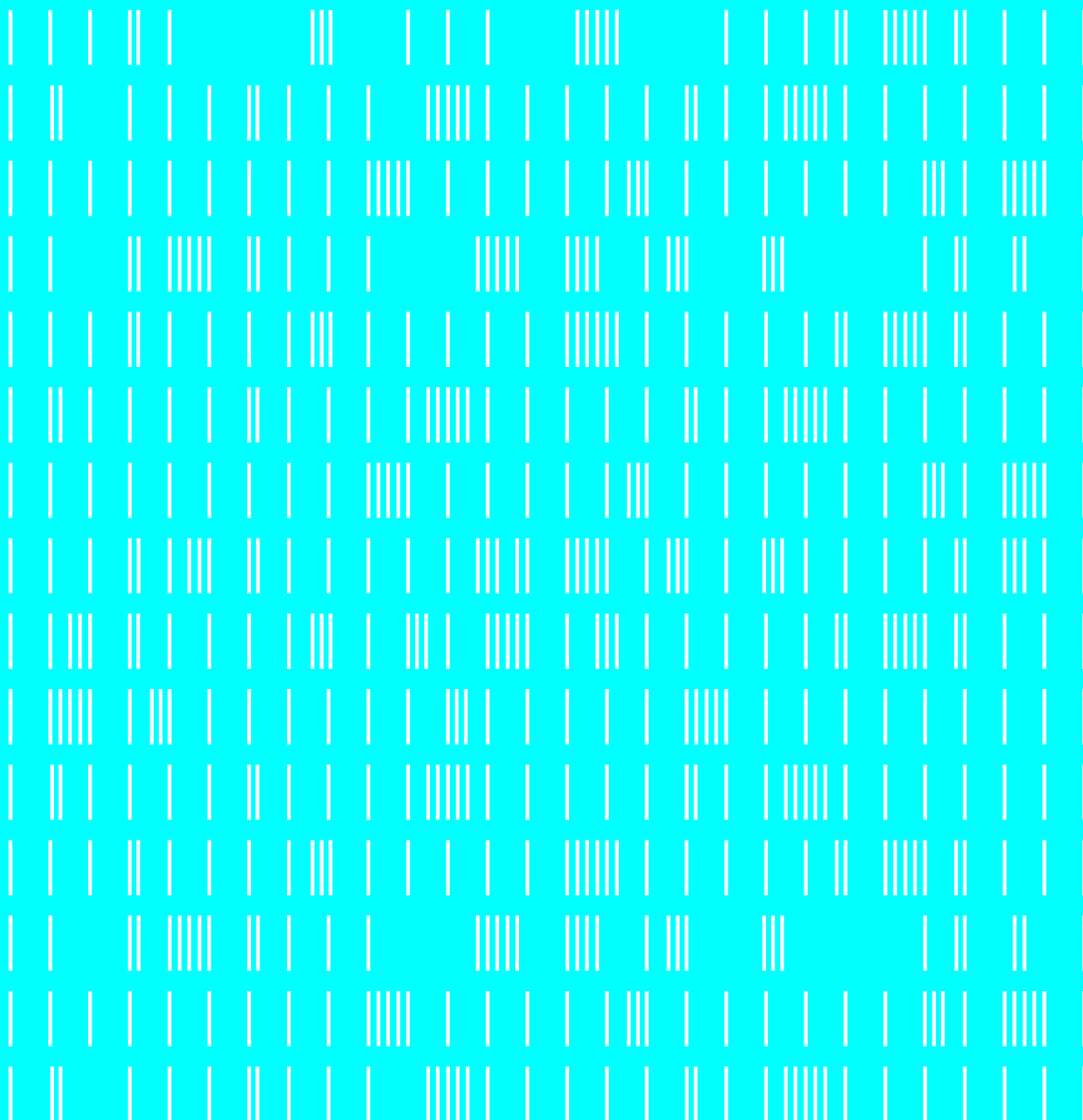


Fashion in Turkey

Version 2019
Written by Melissa Karadana



Fashion in Turkey

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In 2011, SICA (the predecessor of DutchCulture) produced a comprehensive mapping of the Turkish cultural field. This mapping was written by local experts and edited by Teike Asselbergs and Chantal Hamelinck. The mapping was produced as a means to promote cultural exchange between the Netherlands and Turkey and as a starting point of the year 2012, which marked 400 years of Dutch – Turkish diplomatic relations. The mapping was supported and produced in close co-operation with the Dutch public funds.

An update of these mappings was commissioned in 2018 by DutchCulture while working with the same editors. The existing mappings were revised and several new mappings were added. The updated mappings are focusing more on giving Dutch cultural practitioners an insight into the Turkish cultural field and its infrastructure, and helping them get in contact with colleagues.

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I Summary

Turkey is well established in the international fashion industry, with a reputation for high quality products and designers with a global reach. Although more expensive than their counterparts in Asia, Turkish manufacturers can offer faster delivery times and the flexibility to repeat a production in season. Asia cannot compete with Turkey's close proximity to Europe, which allows buyers to quickly make repeated orders on products that are flying off the shelves.

A striking trend in the Turkish fashion industry is e-commerce. Estimations are that the online retail industry of Turkey reached 50 billion Turkish lira by the end of 2018 – an increase of 18.5% from 2017. Social media is an integral part of the e-commerce industry, not least because it helps businesses to improve relationships with their customers. Companies are now working with influencers to reach a larger audience with the aim of persuading that audience to buy their products.

Many sectors are taking advantage of e-commerce, and one of the fastest-accelerating of these is modest fashion, which appeals to both the secular and the religious communities. This is a global phenomenon that Turkey is leading. Meanwhile, because new luxury brands such as Harry Witson, Galeries Lafayette and Harvey Nichols began to enter the country in the mid-2000s, the luxury goods market has also expanded. The industry for high-end shoes, watches, bags and other accessories is set to reach nearly \$500 billion by 2020, with the premium segment overtaking the top luxury segment as the main driver of growth.

The demographic drivers of these advances are Turkish young people. In particular, the youth population is significant for many industries – not least for the baby and maternity sectors – but, most importantly, it means that the market is technologically active and receptive to social media. The standard of living has increased and resulted in greater consumption across the country. This has affected the market for luxury goods and heralded a behavioural change in the population: malls have existed in Turkey since 1988 and the browsing habits that accompany them are thriving all over Turkey.



Istanbul is at the heart of all this change. Thanks to its numerous fashion boutique districts and high-profile events such as Istanbul Fashion Week and Istanbul Design Week, the city is gaining a reputation for fashion and many Turkish designers are reaching new global audiences. They are supported by a number of organisations such as Istanbul Textile and Apparel Exporter Associations (ITKIB), the Turkish Clothing Manufacturers Association (TGSD) and the Fashion Designers Association of Turkey (MTD), who look after their industry's interests both at home and abroad. The non-profit sector in Turkey also has an important and increasing role to play. Non-governmental organisation membership and activity has grown roughly 50% since 2000, and the sector plays an important role in the provision of services such as improving labour conditions in factories and educating workers about their rights.

As of 2018, Turkey has been suffering a currency and debt crisis. Having attracted massive amounts of foreign investment – and thus foreign currency debt – over the past few years, the country had become vulnerable to a fiscal crisis. When raised US interest rates combined with a loss of investor confidence based on regional politics and Turkish domestic policy, foreign investment suddenly stopped. This loss of confidence devalued the Turkish lira, which made foreign debt more expensive to repay. This, in turn, damaged the real economy and further reduced confidence in Turkey's ability to cope. In the meantime, though, there are short-term benefits to a devalued currency for exporters. Apparel exports from Turkey increased by 7.4% in the first seven months of 2018, according to data from the Turkish Statistical Institute. In sum, the immediate outlook does not look good for the Turkish economy in general. Nonetheless, the crisis is currently too volatile to make predictions with any sort of certainty. A lot of shops in malls have got into difficulties because these retailers pay their rent in euros or dollars while their income is based on the lira. To prevent rents from further increasing, the government decided to solve this problem by converting the foreign currency rentals into lira. Even though the government has prohibited rental prices in foreign currencies, the gap between import prices and domestic prices continues to be a problem. The increase in minimum wages of 26% for 2019 has also affected the fashion industry.

In the long term, though, the Turkish fashion industry has many possibilities for growth. The government, business and workers are all determined to see it do well. They have set goals for the next decade with the combined aim of becoming an international fashion hub for many countries and companies.

I Introduction

The textiles and apparel industries have long been cornerstones of the Turkish economy. The country remains one of the world's most important textile and apparel manufacturers – it is the sixth-largest supplier in the world and the third-largest supplier to the EU. Fashion, on the other hand, has only recently reached any national significance. Nonetheless, its growth has been rapid and assured. With the new generation of Turkish designers and fashion retail companies, the fashion industry in Turkey is set to receive more attention both locally and internationally.

Turkish brands are now present on high streets around the world, with their combination of international trends and Turkey's own multicultural style successfully competing with fast-fashion organisations such as Inditex, Mango and H&M. High-profile designers such as Les Benjamin, Hussein Chalayan and Cengiz Abazoğlu led the way for more affordable designs, showcased by the likes of Koton, Ipekyol, Roman, Mavi and Damat Tween to foreign markets. This success abroad has led to increased engagement at home. And nowhere is this more visible than at the annual Istanbul Fashion Week (IFW), also known as "Mercedes Benz Fashion Week", which has been showing collections twice a year since 2013. Here, local and international designers and brands gather to give direction to this growing market.

| Short history

Ottoman Times

The history of textile production in Turkey goes back to the Ottoman times. In the sixteenth and seventeenth centuries, cities such as Bursa, Bilecik and Üsküdar were production centres for the world's finest silks, velvets, cottons and woollens. The Ottoman world was known for its production of sumptuous textiles that were woven with shimmering silk and metallic threads. Exquisitely decorated satins and velvets were cherished by both the Ottomans and the Europeans. These luxurious fabrics also provided a medium for the arts of embroidery, hand-painting and block-printing.

The Ottoman Empire was strategically located on the path of the east-west silk route bridging Asia and Europe. Silk, transported by caravans from Iran, passed through Anatolia as far as Bursa. Bursa was the major centre for the international silk trade during the early sixteenth century and provided substantial revenue to the state by customs, taxes and brokerage fees levied from the Iranian and Italian merchants. In addition, it developed its own textile industry, an important sector of the Ottoman economy.

The tradition of tailoring and master tailors can be traced back to the same period. Even today with fast fashion available everywhere, there isn't a neighbourhood in Istanbul without a tailor shop. Turkish tailors are able to execute the most intricate designs and produce spectacular garments often without patterns, cutting directly on the fabric. In other countries with sizable Turkish communities, many tailor shops are headed or owned by people with Turkish roots and they also, to some extent, have skills and networks that can be used by fashion entrepreneurs from the Turkish market that seek expansion abroad.

Today

Turkey is already well established in the international fashion industry, with a reputation for high quality products and designers with a global reach. Although more expensive than their counterparts in Asia, Turkish manufacturers can offer faster delivery times and the flexibility to repeat production within a season. Asia cannot compete with Turkey's close proximity to Europe, which allows buyers to quickly make repeated orders on popular products.

Today, Turkey remains among one of the world's most important textile and apparel manufacturing countries. Apparel is Turkey's second most successful export product, which earned 9.4% of the country's total exports, of which knitwear amounted to \$US8.8 billion (5.6% of total exports), while exports of woven clothing reached \$6 billion (3.8% of the total) in 2017, according to Textile today.

Exports of both the Turkish textile and clothing industries achieved a modest growth in 2017, rising 2.5% and 3%, respectively. Industry leaders predicted that 2018 would be better. Last year, textile exports totalled around \$10 billion and clothing exports around \$17 billion.

Hikmet Tanriverdi, chairman of the Istanbul Apparel Exporter Associations, forecast an 8%-10% increase in clothing exports in 2018.

According to World Trade Organisation (WTO) data from 2016, the Turkish apparel industry, with a global share of 3.39%, is the sixth largest supplier in the world and the third largest supplier to the EU. It has a share of 4.06% in knitted apparel and 2.73% in woven clothing exports in the world.¹

1
<http://www.tim.org.tr/en/home-page-special-fields-expert-from-2017-to-2018.html>

| Main trends and topics

The new generation

Turkey has a crop of home-grown fashion talent of its own. A few names mentioned below are on the path to becoming global brands, ranging from casual streetwear to haute couture and bridal wear.

Streetwear

Les Benjamins is an Istanbul-based contemporary streetwear brand with a growing fan base. As of January 2019, Les Benjamins had 86.3 thousand followers on Facebook and 79.3 thousand followers on Instagram. The hybrid design philosophy of the founder and creative director, Bünyamin Aydın, merges culture and comfort through textures and prints. Les Benjamins was launched in 2011 in Istanbul, with the mission of becoming a global streetwear brand, embracing the beauty of discovery with dynamic variation and explosive colours. Les Benjamins' main competition is Givenchy, Eleven Paris and Balmain.

Les Benjamins is proving an impact on retail – it now has 120 retail stockists and in September 2018 inaugurated a brand-new flagship in Istanbul. A first collaboration with Puma is on the way, too. A debut wave of Les Benjamins and Athleisure pieces will appear in 450 Puma stores worldwide in the spring of 2020.

Haute Couture

Dilek Hanif is a true Turkish fashion pioneer who through her creative and visionary designs has been able to translate her Anatolian cultural heritage into the world fashion scene.

In 1990, she established her first brand, the Dilek Hanif line, and entered the international fashion world with her first haute couture fashion show in 2002 in the historical setting of the Aya Irini Church in Istanbul. In 2003, she was named Woman Fashion Designer of the Year with her spring-summer collection where she used traditional needle-embroidered figures. Then in 2004, again with a spring-summer collection, she became the first Turkish fashion designer to present a collection at the Paris Haute Couture Week, thus becoming a true pioneer. After 2004, her collection became an acclaimed regular fixture at the show every year. In 2011, with great entrepreneurial spirit, she launched her ready-to-wear line under the brand Dilek Hanif. In addition to her label being an international Turkish brand in the world fashion industry, she has

managed to become a global brand with great market sales, unique selling points and high quality production capacity.

Hanif's designs, which range from sleek ready-to-wear dresses to sensual draped couture gowns, have been worn by celebrities such as Miranda Kerr, Katherine Heigl, Nicole Richie and Jane Fonda.

Bridal Wear

Raşit Bağzıbağlı was born in London in 1985. After studying in London, he designed his first collection at the age of 21 and began his career as a couture designer. In 2010, he received the award for "best young designer of the year" in Turkey and in the same year received an award for "best upcoming designer" at the Face of Fashion competition in New York. In 2013, he designed the police uniforms, corporate identity logos and emblems for the Turkish Republic of Northern Cyprus.

He designed costumes for the Elidor Miss Turkey 2014 and 2015 finalists, and in 2014 he also received an award for fashion designer of the year during the FTV Awards. He has shown his collections during Istanbul Fashion Week since 2015.

In 2016, he became a jury member on the TV show Gardırop Savaşları and gave tips and advice to the audience over two years for 220 episodes. In 2017, he added a wedding dress collection to his ready-to-wear collections RASHID and COUTURE.

The designer celebrated the 10th anniversary of his career in 2018. He has worked together with many Turkish celebrities such as Tuba Büyüküstün, Tülin Şahin, Demet Şener, Bergüzar Korel, Fahriye Evcen, Dilan Deniz and Amine Gülşe. He has also dressed international celebrities such as Paris Hilton, Yolante Cabau, Petra Nemcova and Victoria's Secret model Doutzen Kroes.

E-commerce

E-commerce in Turkey is growing quickly. Although the country has a relatively low internet penetration, at 67% in 2018, more and more Turks are using the internet regularly, and they have become aware of the benefits of online shopping. The value of the sector grew from some 4.7 billion euro in 2013 to a predicted 6.4 billion euro in 2017, and (as of February 2018) reached 7.59 billion by the end of 2017, which means a growth of 18.5%.

Fashion has played a significant part in driving this expansion. Before 2015, the growth of fashion online had largely been driven by flash sale start-ups, but is now increasingly dominated by big retailers such as Zara and the Turkish brand LC Waikiki. Turkey's domestic textile and fashion manufacturers have also expanded their e-commerce ventures. The most notable ones are Trendyol and Morhipo. The latter is owned by Boyner Holding, which was named Europe's fastest-growing e-commerce site in 2015 and is now the second-most visited e-commerce site for clothing in Turkey after Trendyol. Other important ventures as Alwaysfashion, which was Turkey's first luxury e-commerce store; Modacruz, a marketplace for women to buy and sell second-hand fashion; and Modanisa, which is one of the world's leading online fashion retailers for Muslim women. In 2018, Amazon opened a branch in Turkey, with a website, warehouse and office.²

²
<https://ecommercenews.eu/ecommerce-in-turkey-to-reach-7-59-billion-euros-in-2018/>

Modest Fashion

Muslim fashion has evolved from a religious and cultural movement to a fashion-savvy trend and booming industry. The increasing demand for Islamic clothing has not only encouraged the growth of the domestic Muslim fashion industry, but also inspired mainstream brands to cater to a Muslim clientele. With Dolce & Gabbana launching an abaya line in 2016 and Nike creating a mainstream sports hijab in 2017, Muslim fashion is now acknowledged in mainstream Western society.

In the 2015 Thomson Reuters State of the Global Islamic Economy report, Muslim consumer spending on apparel topped \$243 billion, with an expected increase to over \$368 billion by 2021. As a result, some fashion companies and brands are increasingly recognising the scale of opportunity from better connecting with such a prosperous consumer segment.

Istanbul has sought to become an Islamic fashion capital, an ambition that reflects the degree to which Turkish society has been reshaped under the Islamist government of President Recep Tayyip Erdoğan. Kerim Ture, the creator of the modest-wear fashion house Modanisa, had already spotted a gap: "The market for Muslim women's fashion is one of the largest, but their needs are still very under-addressed," he said in an interview with Wired in 2015. Modanisa was the winner of the e-commerce and digital experience award at the 2018 International Business Excellence Awards.

While many international brands started to launch their own modest fashion lines, including Koton, H&M, DKNY and Mango, Turkey recently introduced a new concept by launching the world's first conservative women-specific mall in Zeytinburnu, Istanbul. Zeruj Port brings together modest fashion brands under one roof. The shopping centre targets women of all ages.

Luxury market

The luxury goods market in Turkey is becoming increasingly fragmented as a result of new brands entering the country. The global market for fashionable luxury products will see strong growth in the coming years, according to a study by EY-Parthenon. Valued at around \$420 billion today, the industry for high-end shoes, watches, bags and other accessories is set to reach nearly \$500 billion by 2020, with the premium segment overtaking the top luxury segment as the main driver of growth.³

The luxury goods market is expected to show positive growth driven by the expanding middle class, a greater number of women in the workplace and the opening of new luxury shopping centres and hotels. Luxury goods are expected to continue attracting foreign investors and a higher number of luxury brands is expected to enter the country over the forecast period.

In 2017, Turkey had 39.9 million tourists and ranked sixth among the most-visited countries in the world, according to United Nations World Tourism Organisation (UNWTO) data released in 2017. The drop in value of the Turkish lira positively affected the retail expenditure of foreign tourists particularly in the luxury retail sector. Luxury brands now expect record figures in turnover, with tourists forming long queues in front of shopping malls, according to a report from Turkish newspaper Hürriyet.⁴

³
<https://www.consultancy.eu/news/768/premium-products-driving-growth-in-420-billion-luxury-fashion-market>

⁴
<http://www.hurriyetdailynews.com/tourists-rush-to-luxury-shops-in-istanbul-to-benefit-from-strong-dollar-135797>



Opportunities for Expansion

While most e-commerce activity has been concentrated in Istanbul, it has also proven to be successful in Samsun, on the Black Sea. Expectations are that it will expand in central Anatolia, led by companies such as Tozlu Giyim.

The decline of the flash sale start-ups has relegated private shopping clubs and daily deal websites to the fringes. No doubt niche fashion design will continue to flourish there, but, for the most part, expansion is predicted to come from areas such as plus-size, luxury and children's products.

Popular

Nişantaşı

Nişantaşı is an upscale residential area that is popular for its fashion boutiques selling international and prominent local labels. Abdi İpekçi Street's broad sidewalks are lined with cafés, while the backstreets are dotted with neighbourhood bakeries and markets.

Nişantaşı, Istanbul's equivalent of London's Chelsea or New York's Upper East Side, used to be dominated by strawberry orchards in the 18th century. Walking down the streets, you will notice very small differences in the Turkish people there.

There are more blonde women, botox is popular and you will hardly see any hijabs, the headscarf some Turkish women wear. This privileged district has several small buildings that house the world's top fashion brands, as well as prominent Turkish ones. Abdi İpekçi Street, for instance, is a fashionista's paradise, with shops such as Christian Louboutin, Prada, Louis Vuitton, Armani and l'Occitane, to name a few. Prices, in general, tend to be a slightly lower than in European capitals. Two neighbourhoods for finding more luxury fabrics or lace are Osmanbey and Kurtuluş. Here you can find all sorts of fabrics such as silk, cotton and beautiful laces. In these areas you can also find a few wholesale sellers such as Şair Nigâr, Hacı Mansur and Kodaman.

Istiklal-Galata-Karaköy region

Located in Istanbul's central Beyoğlu neighbourhood, İstiklal Avenue is the shopping preference for many. Visited by millions of tourists every year, this street is always crowded and vibrant 24/7 with its shops, restaurants, galleries, bars, art galleries and cinemas. The area around

Galata Tower is definitely worth a visit to find several cool local designers. Serdar-ı Ekrem, one of the streets in this area, has particularly interesting retro clothes, as well as fashion from local designers. At the foot of the Galata hill, the neighbourhood becomes Karaköy, which used to be known for its fish stalls and machinery shops. Now the area is being gentrified with exciting new designer hotels, many fashion stores and art galleries. Young Turks and foreigners have also opened small boutique stores with a creative twist.

Arnavutköy and Bebek

A bit further from Istanbul's centre, Bebek is another wealthy neighbourhood with many million-dollar estates on the Bosphorus that line the way to Sarıyer. Apart from its high-end restaurants, Bebek has plenty of shops to explore up and down the side streets. You'll find great boutiques with exceptional clothing and accessories from local designers. If you continue on to Arnavutköy by strolling along the Bosphorus, you'll find more restaurants and boutiques hidden in the side streets.

Bağdat Caddesi

If you happen to be on the Asian side and are looking to go shopping, then Bağdat Street is the place to go. With one end displaying high-end brands such as Prada and Vakko (another one of Turkey's premier department stores), the other has other brands such as Zara or Massimo Dutti.

Shopping malls

Ever since the first shopping mall was constructed in 1988, they have been popular in Turkey. The combined revenue of all malls in the country was 110 billion lira in 2017. According to Chairman of the Shopping Centres and Investors Association Hulusi Belgü, the target for 2018 was 125 billion lira and for 2023 it is estimated at 200 billion lira. However, this sector reflects the economy as a whole: of Turkey's 397 malls, 82 were financed by foreign investors, which suggests that they are also vulnerable to the ongoing fiscal crisis.

<http://www.hurriyetdailynews.com/uncontrolled-growth-in-malls-is-killing-merchants-in-turkey-confederation-128257>

Zorlu Centre

Zorlu shopping mall is home to some 205 stores built on 22,000 square metres and surrounded by a further 73,000 square metres. Beymen, Turkey's top high-end store, is on the top floor, along with many big designer brands. On the floors below are international brands such as Cos and Gap, along with restaurants and cafés.

Istinye Park

Istinye Park has received a number of international awards: the "Shopping Mall Developer of the Year Award" in 2008 from Mapic, the world's biggest real estate and retail expo; the "Grand Opening", "Expansion & Renovation" and "Maxi Silver" awards from the International Shopping Mall Council ICSC in 2009; "Europe's Best Shopping Mall" from ICSC, also in 2009; and "Shopping Mall of the Year" from Shopping Malls and Retailers Association AMPD. The mall is bigger than Zorlu, with more than 87,000 square

metres of store area.

Mavi Bache

Mavi Bache in Izmir is marketed as a "town square" for people to meet with their children and friends and shop in a green environment. It was designed by an investment group from Izmir whose mission was to create a "meeting, dining, shopping and entertainment point". Mavi Bache offers a collection of some 220 national and international brands and is supported by 2,000 parking places.

Forum Bornova

Forum Bornova in Izmir has 128 shops and 3,000 parking places. Built in 2006, it was one of the first Forum shopping centres in Turkey. In 2016, Forum Bornova was awarded the IC Silver Solal Award in the customer services category by the International Council of Shopping Centres.

Kanyon

Also built in 2006, Kanyon is located in Levent, a business district of Istanbul. It has 160 stores, 2,300 parking places, a multiplex cinema, a 30-floor office tower and a 22-floor residential block with 179 residential apartments. It was built to create an integrated centre for the district.

Outlets

Due to the huge textile business in Istanbul, you can find lots of outlet shopping malls and stores. These outlet stores, malls and even factories sell their stock directly to the public. Here are a few of the most popular outlet stores or malls in Turkey:

Star City

Star City is an outlet shop that sells

clothes, shoes, jewellery, as well as interior design homeware and electronics. Here you can find well-known Turkish brands and also international brands such as Mango and United Colors of Benetton. Prices are much more affordable because the collections are from previous seasons. Star City opened its doors in July 2016 and attracts locals and foreign tourists alike.

Yeşilköy market

Yeşilköy market in Istanbul is a perfect place to go to for a market experience. Here you can find rejected items from factories that produce clothes for brands such as Mango, H&M or Tommy Hilfiger. The market has more than 2,000 stands and sells everything from make-up to clothes and even food. This market takes place every Wednesday from early morning till the afternoon.

Optimum outlet

Optimum is one of Turkey's bigger outlet shopping malls, with three locations: Istanbul (located in the Ataşehir district), Ankara and Izmir. Here you can find good quality products from international and local brands.

Viaport outlet shopping

This shopping mall has more than 250 stores as well as an entertainment centre, with a multiplex cinema and other facilities.

Audiences

The Turkish consumer is fashion-savvy and aware of trends, says Erdiñç Karataş from Worth Global Style Network (WGSN). They are more concerned with making a “statement” and “dress to impress” style than with discretion and subtlety – their style choices are for the most part logo-driven. In general, men and women dress well and take care of their appearance. Turkish women’s fashion sense is little different from the rest of the world, especially since the advent of social media. Good public appearance is important – 24/7 and 365 days a year. Indeed, the public and personal life of Turkish women presents a great variety of occasions when they are both obliged and happy to dress up. In fact, the possibilities to dress up in Turkey are endless. All of the above applies to secular and religious women alike.

Consumer behaviour in Turkey is affected by two particular factors. The most important is the interest in shopping by young people: 49.2% of the population is under the age of 35 (as of 2018). The significance of this extends to technology, since the younger generations in Turkey, as in the rest of the world, have proven to be more frequent users of technology.

This means there is a great appetite for planning purchases and online searches, largely in line with global trends. According to the Turkish Consumer Academy Survey of 2017, 60% of internet users in Turkey shop online at least once a month, and 20.5% do so once a week. Much of this focuses on foreign goods, branded goods from Europe and America and cheaper imitations from Asia.

The second factor is the steady growth of disposable incomes. Living standards have increased and resulted in greater consumption across the country. This has affected the market for luxury goods and heralded a behavioural change in the population: malls, and the browsing habits that accompany them, are thriving all over Turkey.

As disposable incomes have increased, so has access to credit. There were 62 million credit cards in Turkey as of January 2018, according to the Turkish Interbank Card Centre Survey, while the total number of debit cards was 130 million. This makes Turkey the biggest bank card market in Europe. Meanwhile, bank loans in 2017 were up 24% over the previous year, reaching 2.24 trillion lira. All in all, Turkish consumers have greater access to both capital and goods, and have proven themselves ready to take advantage of this.

Sub-disciplines

Leather Industry

The Turkish leather industry has a long and rich heritage. Today Turkey is one of the biggest producers of high-quality leather products in the world. It is mainly known for processing sheep and goat leather, which puts it in second position in Europe after Italy, but 22% of the world's small cattle leather processing and production is Turkish. The country has 13 industrial leather zones that use modern technology and produce high-quality products. Perhaps most importantly, production is carried out to European standards using eco-friendly advanced methods – 70% of the leather produced in Turkey is made using environmentally friendly methods.

In 2017, the Turkish Leather Federation sought to double leather export revenue over the next three years, from some \$1.6 billion. The number of Russian tourists increased 25% in 2018. Exports to Russia also grew rapidly in 2018 – at a rate of 124% from 2017 to 2018.

Jewellery Industry

Purchasing gold and coins for celebratory events and weddings has always been a part of Turkish culture. With the rise in the price of gold, consumers have switched to cheaper products, which has led manufacturers to develop new gold products. In 2017, domestic jewellery brands continued to enjoy wide national coverage, offering high-quality products at fair prices. Individual jewellery manufacturers such as Atasay Kuyumculuk, Altınbaş Kuyumculuk and Gülaylar Uluslararası Kuyumculuk Mücevherat control the entire supply chain down to the retail level.

Fashion-conscious Turkish women continued to purchase high volumes of costume jewellery in 2018 and this will likely continue throughout the forecast period. In 2018, growth of costume jewellery outstripped fine jewellery with a robust performance. Turkish exports of jewellery stood at over \$1 trillion in 2017. Much of this goes to the Middle East, where the UAE is one of Turkey's fastest-growing markets. Big names in the jewellery industry in Turkey that are also popular internationally are Vedra Alaton, Yesim Yüksek, Sevan Bıçakçı and Aida Bergsen.

Organic and sustainable fashion

Today consumers are in search of new environmentally friendly and customised goods. Turkish textile producers have been making an effort to improve the image of sustainable fashion in Turkey. The president of the Turkish Clothing Industrialist Association (TCIA), Hadi Karasu, said on June 20, 2018, that the aim is to reach 18 billion dollars by the end of 2018 and that their target is to increase that amount to 25 billion dollars in the next five years. Unfortunately, the EU's perception of Turkish sustainability has been negative. Therefore, according to the TCIA president, Turkey is working together with NGOs in Europe to clear that image. Turkey's textile sustainability movement is growing fast and the number of certified companies is steadily rising. Although Turkey is going in the right direction, the sector also needs to improve the quality of labour to compete with other countries.

Organic cotton

Turkey has a high number of organic cotton fields and the country has been manufacturing organic cotton product for nearly 30 years. In 2017, there were 185 organic cotton farmers. Over the past three production seasons in Turkey, there has been a shift in the size of production areas, producers and production volumes, which decreased from 7,958 megatons in 2013/2014 to 7,304 megatons in 2014-2015 and back up again in 2015-2016 with 7,577 megatons.

Professional groups and organisations

Under secretariat for Foreign Trade

The under secretariat for Foreign Trade of the Prime Ministry is the highest authority that controls and directs all issues related to imports and exports. The UFT assists the government in the formulation of foreign trade policy and arranges bilateral and multilateral trade and economic relations, along with exports, export promotion, imports and contracting services abroad, monitoring their implementation and promoting them.

The UFT is composed of seven General Directorates (GD), namely: Exports; Imports; Agreements; European Union Affairs; Free Zones; Standardisation of Foreign Trade; and Economic Research and Assessment. Besides these GDs, the UFT also has complementary institutions such as the Export Promotion Centre and Exporters' Union. The UFT, with its complementary institutions, facilitates entry to the global market for Turkish producers.

The UFT has representative organisations and representatives abroad whose task is to promote exports to the countries to which they are accredited, as well as facilitate imports from these countries. The under secretariat for Foreign Trade has 61 operational commercial offices in 51 countries and three international organisations (OECD-Paris, WTO-Geneva, EU-Brussels).

The Textiles Department functions under the General Directorates of Imports. The Under secretariat for Foreign Trade provides institutional support and funding, as well as promotional and other activities to strengthen the textile sector, including Istanbul Fashion Week and Collection Premiere Istanbul.

Istanbul Textile and Apparel Exporter Associations (ITKIB)

The Istanbul Textile and Apparel Exporter Associations (ITKIB) has four associations under its umbrella: the Istanbul Apparel Exporters' Association, Istanbul Textile and Raw Material Exporters' Association, Istanbul Leather and Leather Products Exporters' Association and Istanbul Carpet Exporters' Association. The General Secretariat of ITKIB has been in operation since 1986. ITKIB's main functions consist of assisting members to improve their export performance, increase the market share in textile, apparel, leather and carpet exports in international markets and defend the common-interests of these sectors at a national and international level.

In order to fulfil these functions, ITKIB carries out the following activities: export registration; trade promotion and development; economic research and reporting; consulting; co-ordination and public relations; training and publication.

For the promotion of trade and development, members are given advice and support to participate in international fairs. Members can attend more than 30 international fairs annually with ITKIB's assistance, as well as getting help with trade missions abroad, foreign trade delegations to Turkey, matchmaking to facilitate interaction between Turkish and foreign businessmen; and import and cooperation requests of foreign companies. A Young Designers Contest is held every year to promote creativity and fashion, as well as an EU-funded "Fashion and Textile Clustering Project" to increase international competitiveness among SMEs in the textile and clothing sectors.

ITKIB is the driving force behind the organisation of Istanbul Fashion Week and the trade fair CPI, Collection Premiere Istanbul, as part of an ambitious push to turn Istanbul into a fashion hub and rebrand Turkey from a textile manufacturer to a country of fashion design.

Among CPI's objectives are to transform Istanbul into a meeting point loyal to its eastern roots and welcoming the enterprise-oriented culture of the West; to support the growth of the Turkish textile and fashion industry by increasing its competitive power; to leverage the value of Turkish brands and designers; to support the branding movement in the Turkish prêt-à-porter industry; to create an environment for cross-business opportunities; to increase export, find new markets and maintain the share in existing markets; and to be a "fashion-designing country" rather than a "fashion-producing country".


Turkish Clothing Manufacturers Association

The Turkish Clothing Manufacturers Association (TGSD) is the leading professional association of the industry. Founded in 1976, its objective is to create a climate that is conducive to the development of the clothing industry in Turkey, to promote the sector abroad and to encourage cooperation among sector players. Since 2008 it has organised the "Bridges of Fashion, Where Design and Production Meet" Istanbul Fashion, Textile and Apparel Conference and Exhibition. To date, TGSD has some 400 members who occupy leadership positions in the Turkish apparel industry.

The Fashion Designers Association of Turkey

Established in 2006, the Fashion Designers Association of Turkey (FDAT) pursues the vision of creating a distinctive Turkish fashion school of thought as a reference in world fashion. The brainchild of Bahar Korçan and six other designers, FDAT currently counts some 100 designers among its members. They represent various design fields, including fashion, textile design and haute couture. The association tries to promote Turkish fashion and designers locally and internationally. It also seeks to contribute to the overall development of the fashion industry in Turkey through the organisation of promotional and educational events, deepening interaction between businesses and designers, and by conceiving of and supporting projects that raise awareness of the value of Turkish fashion design.

Galata Moda is the signature event launched by FDAT. An alternative to the luxury shopping centres dominating the retail landscape, Galata Moda is a street platform for Istanbul designers to connect directly with consumers. In this case, the street platform does not imply street fashion, but rather, Galata Moda features established



designers selling their evening gowns next to alternative lines with up-and-coming designers offering more experimental fashion. Galata Moda has been very successful in raising awareness of the local fashion talent, making it “cool” to wear Turkish designers.

Compared to other countries where the fashion industry is often divided, FDAT is an exceptional organisation that represents and promotes the interests of all designers in Turkey.

Educational institutions

Universities

Students who study fashion design learn about the art of designing and creating different types of clothing and accessories. History, techniques, drawing and business are possible subjects covered in programmes in this field. Universities in Turkey provide two to four years of education for undergraduate studies, while graduate programmes last a minimum of two years. There are around 820 higher education institutions in Turkey, including 76 universities with a total student enrolment of over one million. The quality of education at Turkish universities varies greatly, with some providing education and facilities on par with internationally renowned schools.

Mimar Sinan University of Fine Arts is one of the most reputable schools in Turkey. Many successful designers of the Turkish fashion scene today are graduates of Mimar Sinan University.

Istanbul Technical University has a textile technologies and design faculty where fashion design is taught. Education, training and R&D activities of the Fashion Design Department are in the framework of cooperation between Istanbul Technical University and the Fashion Institute of Technology (FIT, New York) under the auspices of New York State University (SUNY). Accordingly, students accepted to this department continue their education for five terms at Istanbul Technical University and the last four academic terms at FIT in New York. They graduate with a diploma approved by both institutions. Thirty students are accepted to this department each year, where they

are taught in English. Students who graduate from this department have work permits for one year in the United States.

Yeditepe University, Izmir University of Economics, Atilim University Ankara and Istanbul Bilgi University all have fashion and textile design programmes.

From discussions with Turkish designers who studied abroad, it transpires that they enjoy the conceptual project-based approach and the freedom to experiment in the European schools of fashion. They say the Turkish system is more authoritarian, more technical and too dependent on test results.

Private Institutions

A growing demand for fashion education and its importance to the national economy has spurred the growth of private fashion education institutions. Lasalle International Academy was the first to open in Istanbul in the 1990s and has been very successful. The school has an intimate, family style of teaching and interacting with students. The language of instruction is English. Director Selim Çeçen is a passionate industry visionary who focuses on teaching the business of fashion. Through well-established links with the industry, graduates are either placed in partner companies or start their own businesses. Çeçen is very keen on establishing contacts with foreign educational institutions. He expressed great interest in developing projects that could benefit students and promote exchange and interaction. As he pointed out, "Here at Lasalle we make decisions very fast; we do not wait for approval from the top."

IMA, Istanbul Moda Akademi, was founded as part of the Fashion and Textile Cluster Project, financed by the European Union, the Undersecretariat for Foreign Trade and the Istanbul Textile and Apparel Exporters' Associations (ITKIB). The Academy's aim is to contribute to the development of the Turkish textile and apparel industry. IMA commenced its educational programmes at the beginning of 2008 with courses in fashion design, fashion product development and technology, fashion photography and media, and fashion management and marketing in collaboration with the world's leading fashion schools: the London College of Fashion, Domus Academy (Italy) and Institut Français de la Mode (IFM, France). The staff consists of foreign and local instructors who train fashion professionals of the future through professional development programmes and academic programmes focusing on the industry.

Esmod Istanbul, a new branch of the world's oldest fashion school, opened its doors to Turkish students in September 2010. It has joined the international network of 21 other ESMOD schools from around the globe where students are trained by unique "French expertise" to become future designers in their country. It starts with a three-year programme in fashion design. Nadine Massoud, Esmod's director, has a long-term vision for the school and believes that Turkey has great potential in design and creation: "Local designers have impressive technical skills and savoir faire. What they need is discipline, organisation and openness." She sees poor language skills as one of the major obstacles for the internationalisation of

Turkish fashion. Since the language of instruction at Esmod is English, Esmod is considering running language courses to help students cope with the curriculum. Massoud is keen to pursue potential collaboration with foreign fashion schools.

Non-professionals

The non-profit sector in Turkey has grown over the past few years. Non-governmental organisation membership and activity has grown about 50% since 2000, and the sector plays an important role in the provision of services. The following organisations represent the fashion and textile industries within this sector.

Fair Wear Foundation

The Fair Wear Foundation (FWF) was established in Turkey in 2002. The country now ranks fifth for FWF production volume, after China, Bangladesh, Vietnam and Italy, with 165 factories in Turkey mostly in the Istanbul and Izmir regions. FWF seeks to improve labour conditions in Turkish factories through a complaints helpline and training to educate workers of their rights under the Code of Labour Practice.

Turkish Textile Employers Association

The association aims to protect the economic and social interests of its members within the frame of local regulations. The organisation is the only one that forges group collective bargaining agreements with trade unions in the garment and textile industry. It is affiliated with the Turkish Confederation of Employer Associations, which works with the following: the International Organisation of Employers, Confederation of European Business, European Apparel and Textile Confederation, Business and Industry Advisory Committee and the OECD (Organisation for Economic Cooperation and Development).

Women's Labour and Employment Platform – KEIG

KEIG is an umbrella organisation of

women's NGOs operating in 12 different Turkish cities. This NGO aims to increase women's employment with decent working conditions in all industries. It is an advocacy organisation that aims at contributing to the development of policies responsive to women's needs regarding employment.

Workers' Health and Work Safety Assembly (WWSA)

The Workers' Health and Work Safety Assembly is a labour organisation founded by workers, public employees, families of victims of past accidents, doctors, engineers, scholars, journalists and their organisations. It monitors the occupational health and safety conditions and occupational accidents in all industries and provides regular monitoring reports.

Support to Life (STL)

Support to Life is an independent humanitarian agency working in the field of disaster risk reduction, disaster preparedness and emergency response by promoting community participation in Turkey and the surrounding region. STL's work is based on international principles such as humanity, impartiality, neutrality, independence and accountability.

Youth

The Turkish baby and maternity sector reached \$2.05 billion in 2017 and according to the Children Baby Maternity Expo (CBME), it will grow by 5% in the next five years. Turkey counts 1.25 million new-borns annually and has a young population, with more than 19 million under the age of 14. Although the fertility rate in Turkey has been decreasing, as of 2017 the number of baby-store chains had grown from 200 to 500 in three years.

Popular children fashion brands

Children's fashion is a huge part of the Turkish textile industry with many big names, says Semih Etyemez from CBME. According to Etyemez, the most popular children's fashion brands are Best Kids, Pamina, NK Textile, Incity, Roly Poly, Cimpa, Nanica, Monna Rosa, Caramell, Cantoy, Bebus, Ilgaz Kids and Cemix. Big chains such as LC Waikiki and Zara are also doing well in children's wear in the Turkish market.

Influencers in the children's fashion world

There are a few brands that influence the market: Best Kids, Pamina and Incity, says Mehmet Nesih Özmen from CBME. This is mainly because of their design, seasonal colours and quality fabrics that come from abroad, especially Italy and France. Although they are young (aged 5 to 10) there are a few Instagram influencers who are effecting the children's fashion world in Turkey. Two well-known influencers on social media are:

Lavinya Ünluer

Lavinya Ünluer is a Turkish social media star. Born in Istanbul, this eight-year-old actress and model was awarded the Best Child Style

Award in 2017. She has a contract with LC Waikiki and worked for American fashion brands Mama-luma and Goose. Lavinya currently has 151,000 followers on Instagram, which makes her a fashion icon for a lot of her fans.

Maya Başol

With her 18,000 followers, Maya Başol is very young – aged five – but already an Instagram star. She models for LC Waikiki, is sponsored by Deichmann and attends events for Pandora and Lazzoni.

Venues

There are a number of venues in Turkey that add value to the fashion and textiles industries. Here are some of the leading ones:

Monroe Creative Studio

The Monroe Creative Studio provides support for all sorts of creative endeavours. This includes help with brand identity, the production of communication materials, including photography and video, as well as website development. Founded in Istanbul in 2011 by Hatice Çağlar and Onur Gökalp, it now has an office in London. Turkish brands and designers such as Zeynep Tosun and Art by Chance have all benefited from the studio's support.

Worth Global Style Network Istanbul (WGSN)

The WGSN was founded in London in 1998 and quickly revolutionised the market with its new online trend library. This was the first successful attempt to apply modern technology to the global creative industry. Their office in Istanbul provides business intelligence on Turkish consumers, along with "Discover the Potential of Turkey", which is a campaign to promote Turkey internationally and attract investment in Turkey. In order to do so, they facilitate Turkish brand attendance at international events. The WGSN is used only by fashion professionals.

<https://www.wgsn.com/en/contact/>

The Istanbul Fashion Conference

The Istanbul Fashion Conference, which was first held in 2008, aims to bring together all the supply chain rings of the apparel and textiles sector: supply, manufacturing, export, import, economy, fashion design, brand, retail and logistics. At the conference, Turkish manufacturers

from all over the country are able to mingle with local and international designers and entrepreneurs.

<http://www.istanbulmodakonferansi.com/>

L'appart PR

Created in 1999, L'appart PR is a creative public relations agency that supports fashion designers, luxury brands and cosmetics brands.

The team designs communication strategies, including digital public relations, and organises events to enhance global brand awareness.

The Istanbul office was founded in 2005 as part of L'appart PR's expansion into new regions, which includes a partner office in Beijing.

<http://www.lappartpr.com/>

Leather industry

There are several leather associations and supporting organisations in Turkey. These vary in focus, but all aim to provide support and assistance to the various members of the Turkish leather industry and boost the sector in the international market.

Turkish Leather Industrialists Association

Founded in 1999, the Turkish Leather Industrialists Association is a non-governmental organisation that aims to contribute towards the development of the leather sector in Turkey. It brings together all kinds of organisations and associations under its umbrella, including those of the various sub-sectors of the industry such as tannery, garment industry, shoemaking and leather-craft products, fur, machinery and chemical suppliers.

<http://www.tdsd.org.tr/en>

Istanbul Leather and Leather Products Exporters Union (IDMIB)

Istanbul Leather and Leather Products Exporters Union (IDMIB) is one of the most important organisations of Turkish leather and leather products. Istanbul has a significant share in the IDMIB has an indispensable role in the industry. Founded in 1988, IDMIB is one of the four associations operating under the General Secretariat of Istanbul Textile and Apparel Exporters' Association. IDMIB has more than 1,500 registered member firms mostly located in and around Istanbul. More than half of Turkish leather products and leather exports are made by IDMIB.

<http://www.idmib.org.tr/>

Footwear Industrialists Association of Turkey

The Turkish Footwear Industry Association was established in Istanbul in 1985. This institution seeks to advance the technical and economic development of the industry. It also provides professional support to members.

<http://www.tasd.com.tr/>

Istanbul Leather Industrial Organised Zone

Free zones are defined areas in which special regulations apply. The Istanbul Leather Industrial Organised Zone offers a flexible business climate to increase trade volume and exports. It was established in 1982 by a protocol signed by the Istanbul Leather Industrial Organised Zone Entrepreneur Organisation. Later it gained legal status of the Organised Industrial Zones, Law No. 4562.

Izmir Menemen Leather Industrial Organised Zone

The Izmir Free Zone was founded in 1997 when the Leather Industry Organised Area was given full legal status as a free zone. It was opened to other industries in 2011.

The Izmir Menemen Leather Free Trade Zone thrives thanks to local and foreign investors. It is conveniently located and has gained attention and popularity among investors due to its treatment plant with a capacity of 18,000 square metres per day. It also offers assistance for incorporating Turkish companies and obtaining free trade licenses.

Textile and apparel industry

Sanko Tekstil

Founded in 1943, Sanko Textile Industries is active in cotton and synthetic yarn production, home textiles, weaving and knitting. The main goals of the company are to support the position of textiles in the Turkish economy, encourage quality, stability and trust within the industry in Turkey and maintain strength in the Turkish economy by increasing textile production and employment. Sanko Textiles is part of Sanko Holding, which was established in 1904 by Sani Konukoğlu. This holding has more than 14,000 employees in 12 different sectors.

ISKO

ISKO was established in 1904. In 1989, it opened a 300,000-square-metre manufacturing plant that made ISKO the world's largest denim manufacturer. They have a production capacity of 250 million metres of fabric per year, while their portfolio includes more than 25,000 products. ISKO's sales are rapidly expanding across the world. They have a strong presence in 30 countries and an international network of textile technologists, design experts and retail specialists. ISKO is part of Sanko Tekstil, the textiles division of the Sanko Group.

Eroğlu Giyim Sanayi Ltd.

Eroğlu Giyim was founded by Nurettin Eroğlu in 1983 as a small-sized clothing workshop. By 1992, all factories had been merged under the roof of Eroğlu Giyim Sanayi Ltd., and its Kulis brand was renamed Colin's. Today, Colin's is a popular jeans company in Turkey.

Saide Group

Founded as a family company in 1993, Saide specialises in fast and

design-led sourcing and planning of apparel, goods and lifestyle products, such as cosmetics and footwear, which reflect the latest trends and consumer needs for the growing SPA market. Saide Group works with global companies in the fashion industry such as Inditex, New Look, NKD and OVS. The Marubeni Group invested in Saide Group as a shareholder in 2017. Saide Group has a planning base in London, which is the centre of fast fashion. In recent years Saide has been rapidly expanding sales in the European apparel market by providing customers with a short lead time production in Turkey, which has a cluster of textile manufacturers with the advantage of being close to European centres, and design and planning that reflects the latest global trends.

Fashion designers

Thanks to its numerous fashion boutique districts and high-profile events such as Istanbul Fashion Week and Istanbul Design Week, Istanbul is becoming increasingly important for fashion and many Turkish designers are reaching new global audiences.

Upcoming and artistic fashion designers

These are fashion designers who are producing on a smaller scale with a specific market or goal in mind. They can be contacted in English to collaborate with smaller brands or designers.

Zeynep Kartal

Zeynep Kartal is a fashion designer with global recognition. Although she is yet to achieve fame in Turkey, Kartal is very well known in the international fashion market. Part of her success comes from working with celebrities such as Lady Gaga and Cheryl Cole. She is also one of the first fashion designers whose fashion was shown on the red carpet during the Cannes international film festival.

Şebnem Günay

Şebnem Günay is a Belgium/Turkish young woman who is an emerging talent in the fashion industry. Hip hop dancers opened her show at the Fashion Week in Istanbul. She has won the Best Design Award in Paris. Models such as Gigi and Bella Hadid have worn her designs.

Meltem Özbek

Meltem Özbek is a Turkish fashion designer who was awarded a scholarship to the Centre of Fashion Enterprise in London. She also won a prize at the Koza Young Fashion Designers Istanbul in 2014. She

continues to reach fashion lovers in new locations all over the world.

Established fashion designers

The following are the most well-known fashion designers in Turkey, according to Feride Tansuğ from Lappart PR.

Hussein Chalayan

Hussein Chalayan is one of the best-known Turkish fashion designers. He won the British Designer of the Year Award twice – in 1999 and 2000 – and was awarded an MBE (Member of the Most Excellent Order of the British Empire) in 2006. In 2018, Chalayan was awarded the Panerai London Design Medal, which recognises the individual who has distinguished themselves within the industry and demonstrated consistent design excellence. In an interview with London Fashion Festival, he describes himself as “a weaver of different worlds”. He said he is trying to understand the world by looking at different scenarios and discovering new connections between different facets of life.

Dice Kayek

Dice Kayek is a blend of many influences, ranging from its Turkish heritage to modern Paris. Founders Ece Ege and Ayşe Ege have created a universe in which they look at art, architecture, film and their own memories to create collections that are poetic in spirit yet made to the most exacting standards of couture. Balanced between tradition and modernity, harmony and contradiction, the Dice Kayek brand has tried over the past two decades to associate itself with the finest creativity, couture and craftsmanship. The Dice Kayek philosophy pitches itself beyond fashion, celebrating the architecture

and aesthetic of each piece through its form, structure and detail.

Ümit Benan

Ümit Benan was born in Germany in 1980 but raised in Istanbul. Trained as a filmmaker, he transitioned his storytelling skills to fashion. Freedom of expression is Benan's main goal in life and why he decided to be a fashion-maker. With each collection, he addresses issues that touch him personally, be they misconceptions around a beard, the ethos of outlaw artists who wander around the city streets at night or memories of a girlfriend who loved menswear.

Bora

Bora Aksu is a London-based Turkish designer who gained acclaim when he graduated from Central St Martins in 2002. Bora's collection attracted the eye of Domenico Dolce and Stefano Gabbana, who purchased pieces to use as inspiration. The ARG group awarded him a sponsorship enabling him to make his debut at an off-schedule show during London Fashion Week in 2003. In 2012, Aksu was asked to join the judging panel of the WGSN Global Fashion Awards and he also won Designer of the Year at the Elle Style Awards in Turkey. Bora Aksu's first flagship store opened in Beijing in 2015, with further stores in Hong Kong, Shanghai, Macao and Singapore. So far, a total of 25 Bora Aksu stores have opened in the Asia Pacific region.

Arzu Kaprol

Arzu Kaprol's couture line is shown at her concept stores in Istanbul, Bursa and Antalya, while her prêt-à-porter luxury line is presented in Europe, China and Japan through

showrooms located in Madrid and Hong Kong. Her philosophy is to express her enthusiasm within a context, where many details reflect the mystery of the city and the Ottoman culture. Her designs hide details within the garments. Nowadays, Kaprol continues to create her collections in Istanbul. Since 2002, she has been the creative director of Network, the leading brand of Ay Marka Mağazacılık and Que brand. She has also designed home products under Arzu Kaprol Home Collection for Linens shops. Kaprol was awarded “Fashion Designer of the Year” twice, in 2007 by Fashion TV and in 2011 by Elle Style Awards.

Mehtap Elaidi

Mehtap Elaidi studied business at Bosphorus University after her graduation from Robert College. In 2000, she opened her first work-shop/shop in Nişantaşı and soon her trendy and experimental lines became her brand's signature. In 2003, she started to show her collections at Pure London and Prêt-à-Porter Paris fashion fairs. Currently, Elaidi and Mehtap Elaidi collections are sold in 19 countries, with 45 different sales points. In Turkey, both collections are sold in Gizia Gate, WePublic, Brandroom and Midnight Express.

Festivals and events

Istanbul Fashion Week

Istanbul International Fashion Week, also called Mercedes-Benz Fashion Week, organises fashion shows with local and international designers twice a year. The event has been sponsored by Mercedes Benz and produced by IMG Doğuş since 2013. Designers featured during Mercedes-Benz Fashion Week include Aslı Filinta, Bahar Korçan, Cihan Nacar, Ipek Arnas and Zeynep Tosun. Istanbul International Fashion Week receives media coverage via television programmes, news channels, magazines and celebrity guest appearances.

Istanbul Modest Fashion Week

In 2016, Muslim designers from all around the world showcased their designs for the first Istanbul Modest Fashion Week (IMFW), sponsored by the Turkish modest fashion giant Modanisa. The biannual event consists of world-class stages, modest fashion shows, fashion booths and workshops. Designers such as Annah Hariri, Aywa Londra, Luvica, Mustafa Dikmen and Zamzam Zalila attended the first event.

Première Vision Istanbul

Première Vision Istanbul is an event for professionals that takes place over three days, twice a year at the Istanbul Congress Centre. Launched in 2014, Première Vision Istanbul is the business centre for creative fashion solutions. It is a platform that meets the needs of all fashion professionals in Europe and the Middle East. Both Première Vision Paris and Première Vision Istanbul are centred on fabrics, but Première Vision Istanbul is primarily for the Turkish market and suppliers.

Istanbul Fashion Film Festival

Istanbul's fashion film festival showcases a selection of cinematic works across the globe, presenting an international competition, talks, master classes, lectures, workshops and parties. Since 2015 Istanbul has screened its own fashion film festival organised by Tuna Yılmaz and hosted by Zorlu Performing Arts Centre.

Istanbul Jewellery Show

Istanbul Jewellery Show is a comprehensive marketplace for the international jewellery community and professionals, including manufacturers, wholesalers, suppliers, retailers and designers. The event is organised as a worldwide distribution centre to build business and sales contacts among Turkey, Europe, the Middle East, Russia and North Africa.

International Istanbul Yarn Fair

The International Istanbul Yarn Fair, hosted by Tüyap in 2018, was organised with the participation of 318 companies and company representatives from 23 countries. The fair welcomed 2,729 foreign and 9,769 domestic visitors. The fair is held twice a year.

Texhub Istanbul

The Turkish ready-to-wear textile industry, Texhub Istanbul Fabrics, Accessories, Yarns, Fibres & Design Exhibition offers a trade platform for qualified textile suppliers from all over the world. Texhub was held on November 7-9, 2018, at the Hilton Istanbul Bosphorus Convention Centre.

Istanbul Kids Fashion

Organised by UBM (market-leading B2B event organiser) Istanbul Kids

Fashion is Turkey's must-attend children's fashion event for trade professionals. It features a comprehensive overview of children's fashion and accessories (from babies to 16 years). The event is held twice a year, in January and July. In January, the event combines with the International Children Baby Maternity Industry Expo (CBME Turkey) and in July with CBME Istanbul Kids Fashion.

| Prizes and grants

Koza Young Fashion Designers Competition

The Koza Young Fashion Designers Competition has been organised since 1992 by Istanbul Ready-Made Garment Exporters' Association (IHKIB) with the aim of discovering promising young Turkish fashion designers. The contest is an important platform for young talented creatives who want to make a career in the fashion design industry.

Koza has created Turkey's most impressive fashion archive over its 24-year history. With its archive, Koza represents the development and history of the fashion industry in Turkey. The 240 finalists chosen by Koza are among the most well-known fashion designers in Turkey, and they either have established brands of their own or they manage design departments of the most important fashion brands. This contest is only for Turkish fashion designers.

<https://www.ihkib.org.tr/en/activities/koza-young-fashion-designers-contest/k-313>

| Financial situation

Earnings and salaries

On January 1, 2018, the gross minimum wage in Turkey increased to 2,029.5TL per month, up from 1,777.5TL per month in 2017. The net minimum wage also rose, to 1,603.12TL per month from 1,404.06TL per month in the previous year. The minimum wage over the past 28 years has fluctuated dramatically: the average was 491.51TL per month from 1990 until 2018, with a high of 2,029.50TL per month in 2018, according to Trade Economics. Most textile and garment workers earn this minimum wage, or not much more. An entry-level fashion designer (1-3 years of experience) earns an average salary of 53,697TL per year. On the other end, a senior level fashion designer (8+ years of experience) earns an average salary of 92,521TL per year.

Annual leave is only given to employees who have worked for at least one year, including probation time. In their second-year, employees receive 14 paid vacation days; after four years this rises to 20 days and after 15 years employees get 25 paid vacation days.

Salaries in Istanbul are higher than anywhere else in Turkey; however, the consumer price index is the highest there as well.

Regional

The production facilities in Turkey are mainly concentrated in the regions of Istanbul, Izmir, Denizli, Kahramanmaraş and Gaziantep.

Denizli

The textile industry in Denizli grew rapidly in the 1980s and 1990s making a place for itself in both the domestic and export markets. Towels, bathrobes and other home textiles are products particularly associated with Denizli. The biggest firms in the city include Değirmenci and Funika (especially for bathrobes).

The Aegean region

The Aegean is one of the most important regions for cotton production. The Turkish cotton production area is forecast to increase by about 10% in the marketing year (MY) 2018/19, reaching 520,000 hectares and 950,000 metric tons (4.36 million bales) as a result of good returns during the past two seasons. Domestic consumption is also expected to increase in MY 2018/19, up to 1.6 metric tons.

Kahramanmaraş

The textile sector in Kahramanmaraş is the most developed sector of their economy. The textile sector mainly specialises in manufacturing different kinds of yarn, knitting and ready-garments.

Gaziantep

Gaziantep is one of the most important textile manufacturing centres in Turkey. The textile industry ranks first in Gaziantep's manufacturing industry with a share of 33%. Machine-made carpets have been the most important export share in the textile sector of Gaziantep. Machine-made carpet exports constituted 20% of Gaziantep's exports in 2012.

Turkish currency and debt crisis
Turkey has been suffering a currency and debt crisis since 2018. Having attracted massive amounts of foreign investment – and therefore foreign currency debt – over the past few years, the country had become vulnerable to a fiscal crisis. When raised US interest rates combined with a loss of investor confidence based on regional politics and Turkish domestic policy, foreign investment suddenly stopped. This loss of confidence devalued the Turkish lira, which made foreign debt more expensive to repay. This, in turn, damaged the real economy and further reduced confidence in Turkey's ability to cope.

This pattern has been seen before – in Southeast Asia, South Korea and Argentina – and the solutions are fairly well established in economic theory: capital controls should be put in place to prevent capital flight. Some foreign debt may need to be repudiated. The most important thing, though, is to put in place policy that will help the economy to recover sustainably once the crisis is over, as this will restore investor confidence. Turkey has yet to demonstrate a willingness to return to conventional economic wisdom or to halt the unpredictable tendencies of the president, and so the crisis continues.

If the crisis cannot be contained, the spiral will eventually bottom out and the economy will recover on the back of an export surplus due to the favourable exchange rate. By that point, though, most Turkish companies with foreign links will likely have gone bankrupt. It is therefore difficult to predict the long-term effects of the crisis on the apparel

and textile industries.

In the meantime, though, there are short-term benefits to a devalued currency for exporters. Apparel exports from Turkey increased by 7.4% in the first seven months of 2018, according to data from the Turkish Statistical Institute. Many mills are locked in fixed price term contracts in Turkish lira. However, the cost of raw materials has effectively increased by 30%, meaning that these mills still have to contend with the crisis. In the medium term, lack of investor confidence in the Turkish economy will eventually mean that it is too big a risk for brands to place orders in Turkey.

In sum, as of 2018 the outlook was bleak for the Turkish economy in general, and the textile industry in particular. Nonetheless, the crisis is too volatile to make predictions with any sort of certainty.

Syria

The war in Syria has also had a big impact on the Turkish economy. In 2018, according to the United Nations High Commissioner for Refugees, Turkey is home to over 3.58 million Syrian refugees. More than 660,000 school-age Syrian children in Turkey are not in school; a large percentage of these children are illegally working in textile jobs to help provide for their families and make ends meet. According to 2017's findings from Support to Life, a Turkish charity, one-quarter of refugee households in Turkey must withhold at least one of their children from school because the family is dependent on their earnings.

| Time-to-market infrastructure

Turkey is looking to maintain and increase its competitive edge through development and investment. The main goal on Turkey's list is to achieve \$500 billion worth of exports and \$2 trillion GDP by 2023, says ISPO (an integrated service portfolio that creates networking opportunities among business professionals and consumers). One of the key target areas is infrastructure. Turkey is planning on adding 13,000km of roads as well as 12,000km of new railways to make shipments easier and faster. It plans to increase the number of logistics centres from 8 to 21 over the same period to maximise the rate at which goods can be exported to Europe. The aim is to mitigate higher labour costs. Another key target is to increase the amount of specialised materials, along with raising the general quality of all textile goods. The Turkish government has laid out a set of economic incentives to encourage more research and development to grants and subsidies with its main goal of spending 3% of GDP on R&D by 2023.

Critics and researchers

Fashion journalism and fashion criticism are still not highly developed as a profession in Turkey. Journalists who write about fashion in the local press did not study fashion journalism. There are a few leading figures in the fashion industry who are seen as influencers in Turkey:

Konca Aykan

Konca Aykan is the fashion director of Vogue Turkey. She also works as a freelance stylist and creative consultant. Working alongside advertising campaigns for brands such as Desa, Max Factor and Givenchy, she has also worked as a creative consultant for designers in both Europe and Turkey. Over the past 10 years, she has worked with a number of established and up-and-coming fashion photographers, including Boo George, Richard Burbridge, Sean and Seng, David Bellemere, Liz Collins, Miguel Reverigo, KT Auleta, Jem Mitchell, David Slijper, Horst Diekgerdes, Tung Walsh and Cüneyt Akeröglü.

Alphan Eşeli & Demet Muftuoğlu

Alphan Eşeli is a Turkish film director, screenwriter and photographer, whose directing work includes feature films, commercials and music videos. Together with Demet Muftuoğlu, he started Istanbul74, a cross-disciplinary, creative entrepreneurship that provides an exemplary platform for cultural and artistic interchange between their hometown of Istanbul and the rest of the world.

Demet Muftuoğlu Eşeli

Demet Muftuoğlu Eşeli is a prominent figure in the Turkish art and fashion scene. She is the founder of ISTANBUL74 and co-founder and creative head of the Istanbul Inter-

national Arts and Culture Festival. Muftuoğlu divides her time between New York and Istanbul.

Emre Güven

Emre Güven has a degree in graphic design from Bilkent University. He took up photography in 2006 and since then has been working as a fashion photographer. Güven is considered to be one of the top Turkish fashion photographers. He shoots for Elle, Harper's Magazine, Marie Claire and Arena among others.

Lorna McGee

Lorna is a stylist, art director and fashion consultant based in London and a well-known face in the Turkish fashion industry. Formerly fashion editor at Vogue India, she now regularly contributes to fashion publications including Vogue Turkey.

(Social) media on fashion

According to Feride Tansuğ of L'Ap-part PR, fashion is one of the most popular topics on social media. She says: "In our country all the fashion brands are investing heavily in fashion blogger collaborations. So, I could say it is growing very rapidly, especially Instagram, which is the tool that is used the most. Brands could really target their end-user consumer group and take the right fashion influencer to attract more audience." Below are several well-known and active influencers in Turkey.

Buse Terim

Before she made a name for herself in the fashion blog industry, Buse Terim was well known as the daughter of celebrity football manager Fatih Terim. Her blog is well developed with fashion, beauty, lifestyle, and entertainment sections. She has 1.7 million Instagram followers, which makes her one of the most well-known fashion bloggers in Turkey.

Meriç Küçük

Meriç Küçük is the woman behind the very popular and professional fashion and beauty blog Marista. She is a stylish, sophisticated woman and adored within the Turkish fashion industry. She currently has 207,000 followers on Instagram.

Şeyma Subaşı

Şeyma Subaşı studied fashion design at Istanbul Aydın University. She participated in Top Model in 2006. She also featured on the TV programme "Var Mısın, Yok Musun?". Subaşı designed costumes for the TV show "Yok Böyle Dans". Her collection is available for sale in her showroom in Nişantaşı. She currently has more than 2.8 million followers on Instagram and is

founder of Healthyish Cafe in Bebek, Istanbul.

Didem Soydan

Didem Soydan is one of Turkey's most well-known top models. She has been one of the most preferred models among designers during Istanbul Fashion Week. She has 591,700 followers on Instagram.

Umut Eker

Umut Eker is a model and television personality who has become widely known as a host on the reality show "This Is My Style". He is also a successful style consultant and worked for brands as Diesel and Puma. A well-known face on social media, he has 221,000 followers on Instagram.

Moda Tutkusu

Moda Tutkusu was founded by best friends Ayşegül Afacan and Yasemin Öğün. The two style icons live in Istanbul where they regularly influence the international fashion scene. They run Turkey's most followed style blog, www.modatutkusu.net, and have more than 550,000 followers on Instagram. International brands such as Tiffany & Co, BCBG and Karl Lagerfeld rank among their collaboration partners. Ayşegül and Yasemin established their own fashion label "MybestFriends" in 2013.

Resources

Vitali Hakko Creative Industries Library

The Vitali Hakko Creative Industries Library is located on the Asian side of Istanbul within the headquarters of Turkey's leading fashion brand Vakko. This library has special and limited editions of media materials about architecture, design, fashion, art and film. The Vitali Hakko Creative Industries Library was established in 2011 especially to help ESMOD students prepare for collections and presentation projects. Next door, Vakko ESMOD Fashion Academy hosts workshops and other fashion production facilities at the Vakko Production Centre.

Publications

The annual circulation of magazines and newspapers in Turkey fell by 2.6% in 2017, the Turkish Statistical Institute (TurkStat) reported. According to the print media statistics in 2017, the total annual circulation of newspapers and magazines published in Turkey amounted to 1.66 billion – dominated by newspapers at 94% – 1.70 billion down from 2016.

Vogue Turkey

Vogue is a lifestyle and fashion magazine covering many topics including fashion, beauty, culture, living and runway shows. It began as a weekly newspaper in 1892 in the US before becoming a monthly publication years later. The first issue of the Turkish edition of Vogue magazine was in March 2010.

Elle Turkey

Elle is a global lifestyle magazine of French origin that focuses on fashion trends, beauty, health, home and entertainment. It was founded by Pierre Lazareff and his wife, Helene Gordon, in 1945. Elle is the largest fashion magazine, with 43 international editions in over 60 countries. The Turkish edition of Elle magazine was launched in 2001.

Ala magazine

Known as Vogue for the Veiled, this Turkish fashion magazine was created for women who wear headscarves – a magazine for modern, fashion-conscious Muslim women. The magazine currently has a circulation of 30,000 with some 5,000 subscriptions abroad. A total of 1,500 subscriptions are sent to Germany alone where the magazine has a big following among devout Turkish migrants.

Films/TV Shows/Documentaries

The Fashion Film Festival presented more than 52 local and international fashion movies and documentaries during the festival week in 2017.

“The Universe”, a fashion film by Turkish director Dağhan Celayir, won Elle’s Best Choice award in 2017. Below you find a link to the list of past years’ winners:

<http://www.fashionfilmistanbul.com/awards-2017/>

Facilities

There are many areas that manufacture and sell wholesale textile and apparel for men and women. These most important areas are Osmanbey, Merter, Zeytinburnu and Yenibosna. Most fashionistas you will find in the areas of Nişantaşı, Bebek and Karaköy. You will meet lots of fashion influencers in these areas, some well-known from TV and other from social media. Some of the hotspots where you can meet up for an inspiring fashion meeting and meet potential business partners are Lucca and Backyard in Bebek, Karaköy Mitte, Nişantaşı Brasserie and Must Nişantaşı.

Merter and Zeytinburnu areas

The areas Merter and Zeytinburnu are well known for wholesale shopping for accessories such as zippers, buttons, tape, etc. and stock fabrics. Retailers fly in from all over the world to do their season's shopping there. Kuyumcukent is the place to go for wholesale purchasing of jewellery and belts, wallets, and other leather goods.

Merter stock fabrics:

- Mars Tekstil: <http://www.marstekstekstil.com/en/index.html>
- Accessories' Merter – button, zippers, decorations:
- Sefa Fermuar: <http://www.sefafermuar.com.tr/>
- EMR Fermuar: <http://www.emrfermuar.com/>
- YKK: <https://www.ykk.com.tr/>
- Graphic designers Merter – three minds:
<http://three-minds.com/>
- Osmanbey:
- Printing companies:
- Aker Tekstil: <http://www.aker-tekstil.com/>
- Ipeker, also specialised in

vegan printing: <http://www.ipeker.com/>

- Tabloteks: <http://www.tabloteks.com/>
- Osmanbey – fabric companies:
- Sinem Tekstil:
<http://www.sinemtextile.com/en/>
- Yarn suppliers:
- AEG <https://www.aegplc.com/>
- Denim suppliers Turkey:
- ISKO: <http://www.isko.com.tr/>
- ERKA: <https://www.erak.com/en/>
- Fashion holdings in Turkey:
- Eroğlu Group: <http://www.erogluholding.com/>
- Saide Group: <http://www.saide.com.tr/>
- Unilever: <https://www.unilever.com.tr/>

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