



REPUBLIC OF TURKEY  
MINISTRY OF TRADE



INDUSTRY



FOOTWEAR



TURKEY  
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## FOOTWEAR

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 of Turkey. The Turkish leather industry, which has a history of 500 years, is becoming a leading center in the world leather industry. The Turkish leather industry, which occupies a prominent place in the Turkish economy, continues to develop day by day by combining new technology and its historical background.

Although the initial efforts to modernize the leather industry began in the 70s, significant progress at a real industrial scale began in the mid-80s. 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 (including footwear) for 2018 was about US\$ 1.6 billion.

## PRODUCTION

The shoe industry, which began to appear as a small-size industry in 1950, is a well-developed industry now. 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 Social Security Institution Statistics there are 6.544 workplaces producing leather and leather related products and 65.257 insured persons in 2019. Turkey's shoe production reached more than 392 million pairs<sup>1</sup>, including sneakers, boots, plastic shoes and slippers. Almost 50% of the total number of companies is active in Istanbul. Konya, Gaziantep, İzmir, Ankara, Manisa, Hatay are other important shoe production centers in Turkey.

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 quite diversified. The soles, heels, casting molds and the welt of the shoes are exported. The shoe parts industry is located in the Aegean region, particularly in İzmir and in other parts of Turkey such as Konya, Gaziantep and Istanbul.

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

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<sup>1</sup> TÜİK (2019), PRODTR Code: 1520

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 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 (TASEV) was established in 2001. In order to meet the need of qualified personal 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. Moreover, there are footwear design and production departments within seven universities (Ankara, Bolu Abant İzzet Baysal, Gaziantep, Istanbul, Konya Technical University, Istanbul Aydın University) to meet the sector's qualified designer's shortage.

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 US\$ 932.4 million in the year 2019, with an increase of 5% compared to the previous year. The most important export market of Turkish footwear industry is Russia with a share of 11.3%. Other important markets are Iraq, Germany, Spain and Saudi Arabia.

### *Footwear Exports of Turkey by Countries (US\$)(GTIP: 6403)*

Country	EXPORTS			
	2018 (\$)	2019 (\$)	2018-2019 Change	2019 Share
RUSSIAN FEDERATION	103.606.074	85.398.598	-17,6%	20,6%
GERMANY	31.768.444	29.553.046	-7,0%	7,1%
SPAIN	6.127.037	25.107.337	309,8%	6,0%
ROMANIA	20.505.463	22.810.788	11,2%	5,5%
ITALY	16.348.071	19.082.606	16,7%	4,6%
ENGLAND	16.270.094	17.858.442	9,8%	4,3%
POLAND	10.572.835	17.388.837	64,5%	4,2%
NETHERLANDS	7.667.152	11.621.968	51,6%	2,8%
BULGARIA	13.278.765	11.158.905	-16,0%	2,7%
ISRAEL	9.410.580	10.235.349	8,8%	2,5%
USA.	7.075.620	8.948.462	26,5%	2,2%
AUSTRALIA	8.835.115	8.309.054	-6,0%	2,0%
FRANCE	4.474.118	7.731.042	72,8%	1,9%
SERBIA	7.425.023	7.291.783	-1,8%	1,8%
SAUDI ARABIA	4.106.356	6.652.194	62,0%	1,6%
OTHER	<b>137.537.873</b>	<b>125.929.330</b>	<b>-8,4%</b>	<b>30,3%</b>
GRAND TOTAL	<b>405.008.620</b>	<b>415.077.741</b>	<b>2,5%</b>	<b>100,0%</b>

Source: Ministry of Trade

## TRADE FAIRS

The Turkish footwear sector takes part in important international fairs and exhibitions abroad. Micam Shoe Event, Euroshoes Moscow, Euroshoes Premiere Collection, Expo Riva Schuh, Gallery Shoes/Dusseldorf, Micam Shoeevent / Milano, Shoesroom by Momad/Spain and Lineapella - Italy are the most attended ones.

As an important footwear producer/exporter country, many fairs are also held in Turkey in the related sector every year. Major fairs in the Turkish footwear industry in 2020 are as follows:

### *Trade Fairs in Turkey*

DATES		NAME	CITY	ORGANIZER
16.01.2020	18.01.2020	2nd LESHOW ISTANBUL Leather & Fashion Fair	Istanbul	Turkel Fuarcilik A.S.
30.09.2020	03.10.2020	Aymod 24th International Footwear Fashion Fair	Istanbul	Pozitif Fuarcilik A.S.
28.10.2020	30.10.2020	9th Eksposhoes Antalya Shoes Saddlery Fashion Fair	Antalya	EKS Fuarcilik A.S.
18.11.2020	21.11.2020	Aysaf 24th International Footwear and Footwear Parts Industry Fair	Istanbul	Pozitif Fuarcilik A.S.
09.12.2020	12.12.2020	31st Gapshoes International Footwear, Slippers and Footwear Parts Industry Summer Fair	Gaziantep	Akort Tanıtım Organizasyon ve Fuarcilik Ltd. Sti.

Source: TOBB

## USEFUL LINKS

- Aegean Exporters' Associations  
[www.egebirlik.org.tr](http://www.egebirlik.org.tr)
- Denizli Exporters' Association  
[www.denib.gov.tr](http://www.denib.gov.tr)
- Istanbul Textile and Apparel Exporters' Associations  
[www.itkib.org.tr](http://www.itkib.org.tr)
- Mediterranean Exporter Associations  
[www.akib.org.tr](http://www.akib.org.tr)
- Southeast Anatolia Exporters' Associations  
[www.gaib.org.tr](http://www.gaib.org.tr)
- Uludağ Exporters' Association  
[www.uib.org.tr](http://www.uib.org.tr)
- Footwear Industrialists Association of Turkey  
[www.tasd.com.tr](http://www.tasd.com.tr)
- Leather Manufacturers' Association of Turkey  
[www.tdsd.org.tr](http://www.tdsd.org.tr)
- Turkish Leather Council (TLC)  
[www.turkishleather.com/](http://www.turkishleather.com/)



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