



2023-2024 SECTOR ANALYSIS REPORT

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TEXTILE MACHINERY SECTOR PROFILE AND DETAILED FOREIGN TRADE ANALYSIS (2024)

Sources:



T.C. SANAYİ VE
TEKNOLOJİ BAKANLIĞI

Republic of Turkey Ministry of Industry and Technology



Türkîye
İHRACATÇILAR
MECLİSİ

Turkish Exporters Assembly (TİM)



TÜRKİYE İSTATİSTİK KURUMU

Turkish Statistical Institute (TÜİK)



İstanbul Textile and Apparel Exporters' Association (İTKİB)



TÜRKİYE'NİN
MAKİNECİLERİ
"Dünya Biziyle Çalışıyor"

Turkey's Machinery: "The World Works with Us"



International
Trade
Centre

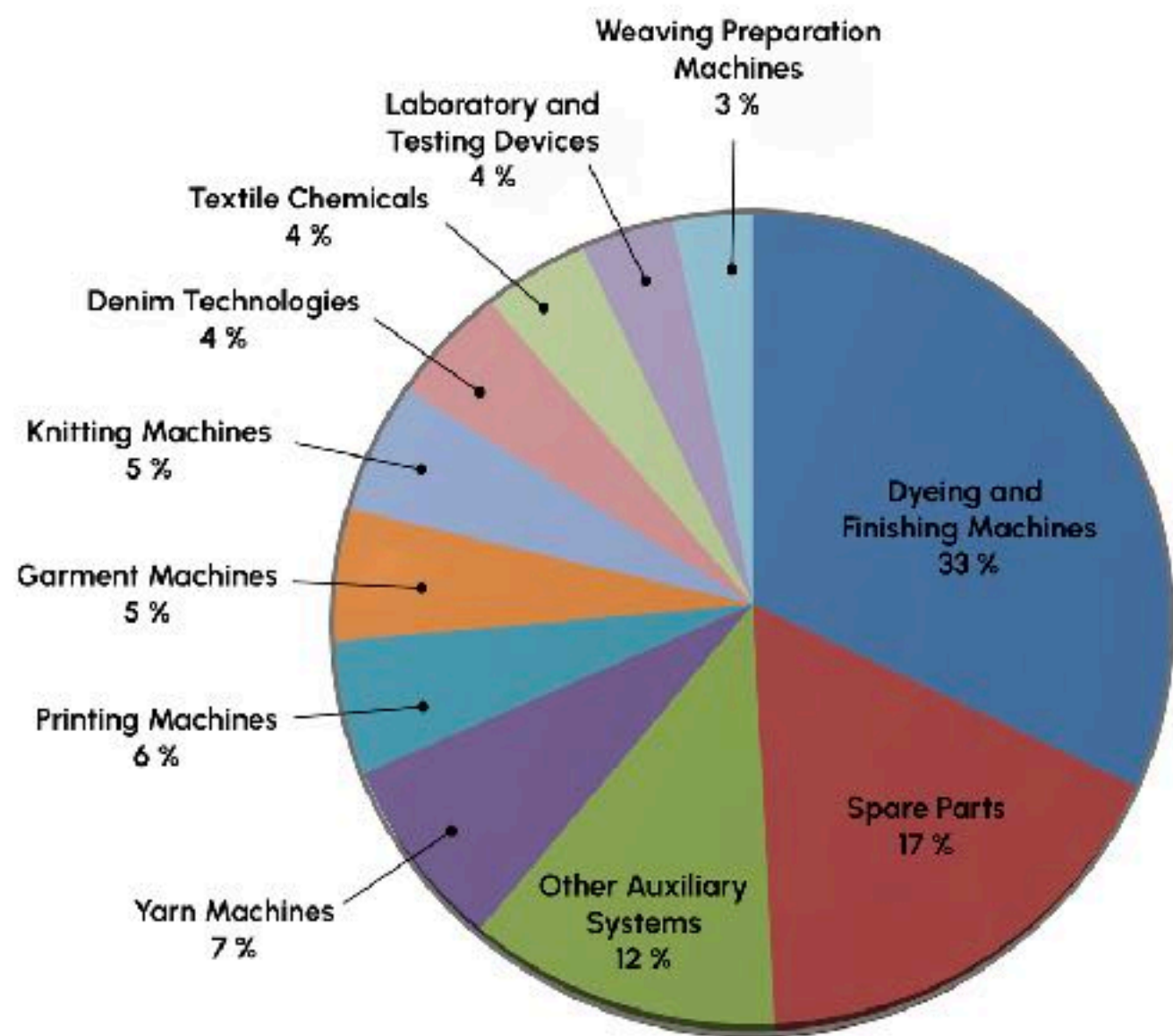


TEKSTİL MAKİNA
İSTANBUL
TEMSAD
1998
VE AKS. SAN. DERNEĞİ

Textile Machinery and Accessories Industrialists Association (TEMSAD)

- **ESTABLISHMENT DATE:** 1998
- **NUMBER OF MEMBERS:** 189
(90% of sector companies operate under the umbrella of TEMSAD.)
- **SECTOR EMPLOYMENT NUMBER:** 9,500
- **MEMBER PROFILE:** Manufacturers of Textile Machinery, Textile Machinery Spare Parts, and Textile Chemicals
- **EXPORTING COMPANY RATE:** 95%
- **OUR MEMBERS HAVE 22 R&D AND 4 DESIGN CENTERS**
- **Founding Membership of the Turkish Machinery Federation (MAKFED)**
- **COOPERATION PROTOCOLS:** With 21 organizations abroad and 4 organizations domestically...

Distribution of TEMSAD Member Production Areas / Number of Companies



Category	Number of Companies
Dyeing and Finishing Machines	61
Spare Parts	32
Other Auxiliary Systems	22
Yarn Machines	14
Printing Machines	10
Denim Technologies	10
Knitting Machines	10
Garment Machines	9
Textile Chemicals	8
Laboratory and Testing Devices	7
Weaving Preparation Machines	6
Total	189

Overseas Equivalent Associations and Textile Sector Organizations with Which We Have Signed Cooperation Agreements

1. American Textile Machinery Association (ATMA)
2. Russian Union of Textiles and Light Industry of Russian Federation of Textile Industry
3. Arab Federation of Textile Industry (Representing 14 Arab Countries)
4. Bangladesh Textile Mills Association (BTMA)
5. Bangladesh Knitwear Manufacturers and Exporters Association (BKMEA)
6. China Textile Machinery Association (CTMA)
7. Indonesian Textile Association (API)
8. Federation of Indian Chambers of Commerce and Industry (FICCI)
9. Indian Textile Machinery Manufacturers Association (TMMA)
10. Indian Textile Accessories and Machinery Manufacturers Association (ITAMMA)
11. Textile Dyers Association of TIRUPUR INDIA
12. Association of Iran Textiles Industries (AITI)
13. Korea Textile Machinery Association (KOTMA)
14. Egyptian Textile Development Association (EDTA)
15. Egyptian Junior Business Association
16. All Pakistan Textile Mills Association (APTMA)
17. Karachi Chamber of Commerce and Industry
18. Uzbekistan Textile Industry Governing Association
19. Association of Polish Textile Workers (SWP) (Poland)
20. Association of Textile- Clothing- Leather Industry of the Czech Republic (ATOK)
21. Bulgarian Association for Textile, Apparel and Leather (BATOK)

Organizations in Which We Take Roles Within the Scope of Machinery Sector Working Groups:

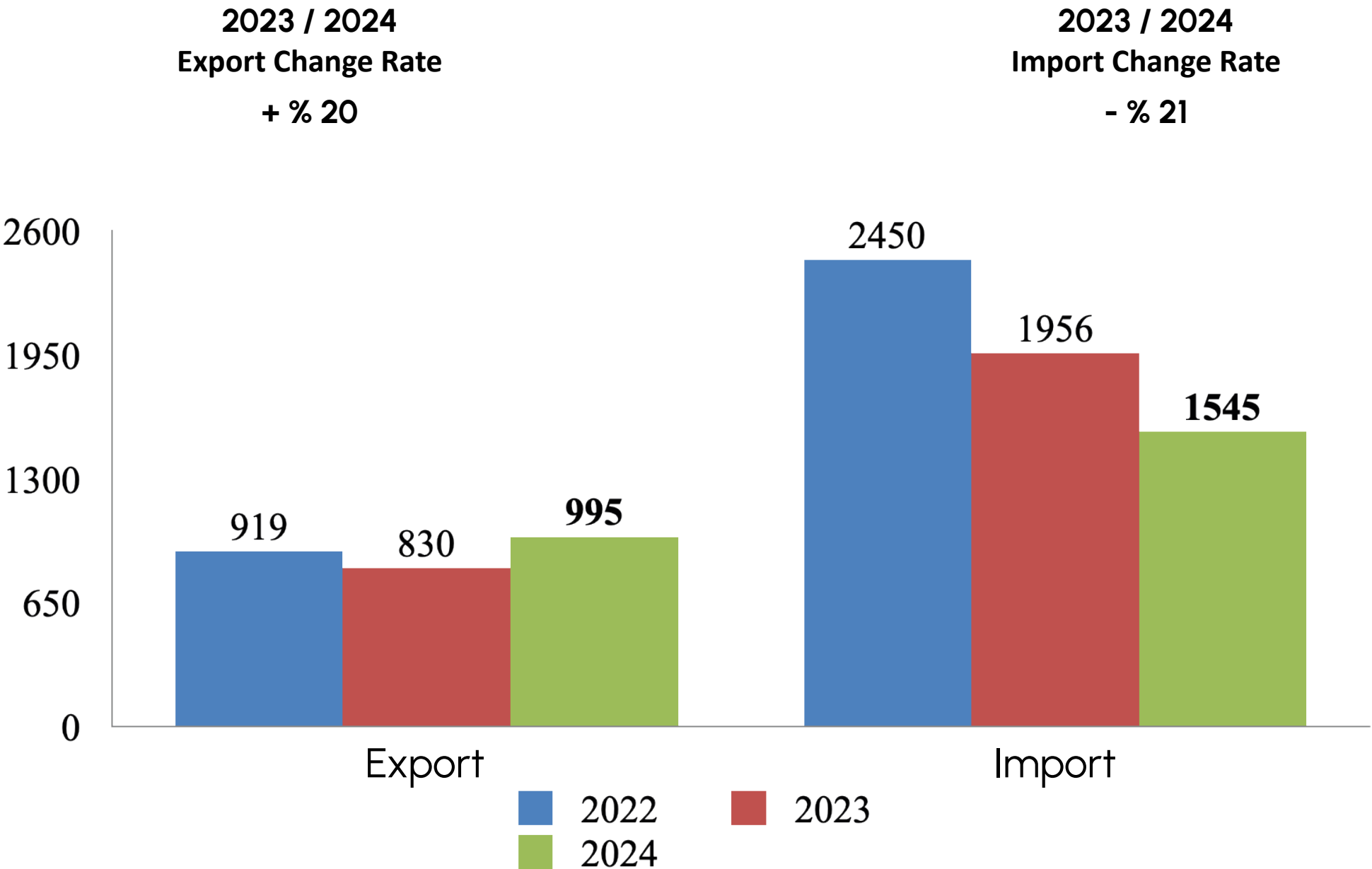
1. Machinery Exporters' Association (MAİB) (Vice Chairman of the Board of Directors)
2. Turkish Machinery Federation (MAKFED) (Founding Membership and Board Membership)
3. Istanbul Chamber of Commerce (İTO) (Machinery Sector Committee Membership)
4. Istanbul Chamber of Industry (İSO) (Chairmanship of the Machinery Sector Committee)
5. Union of Chambers and Commodity Exchanges of Turkey (TOBB) (Machinery Sector Committee Membership)
6. Independent Industrialists and Businessmen's Association (MÜSİAD) (Machinery Sector Committee Membership)

Textile Sector Organizations We Collaborate With Domestically:

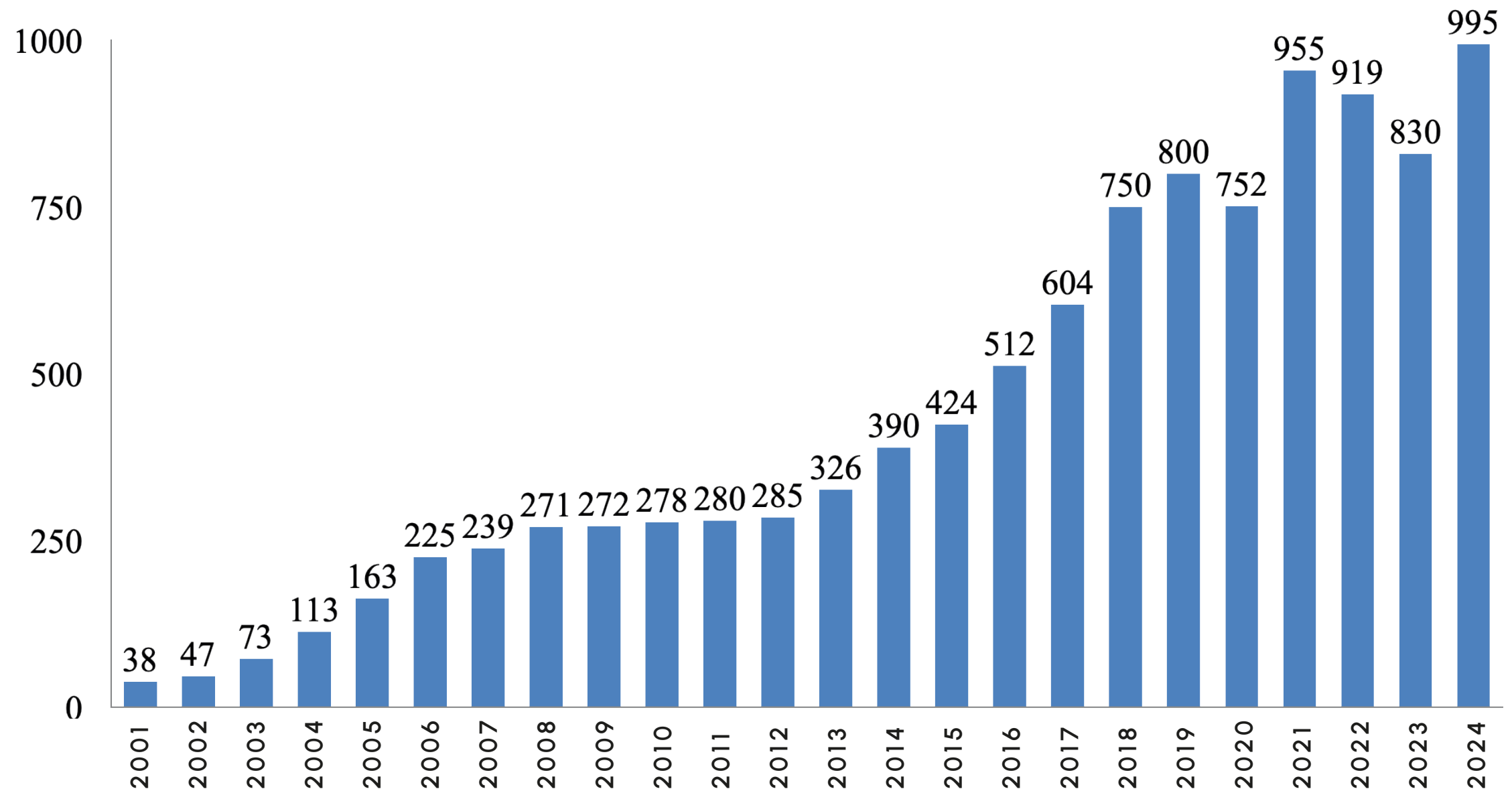
1. Fashion and Ready-to-Wear Federation (MHGF)
2. Turkish Textile Finishing Industrialists' Association (TTTSD)
3. Turkish Textile Industry Employers' Union (TTSİS)
4. Marmara University Innovation and Technology Transfer Center (MITTO)

Turkey Textile Machinery Export and Import Status

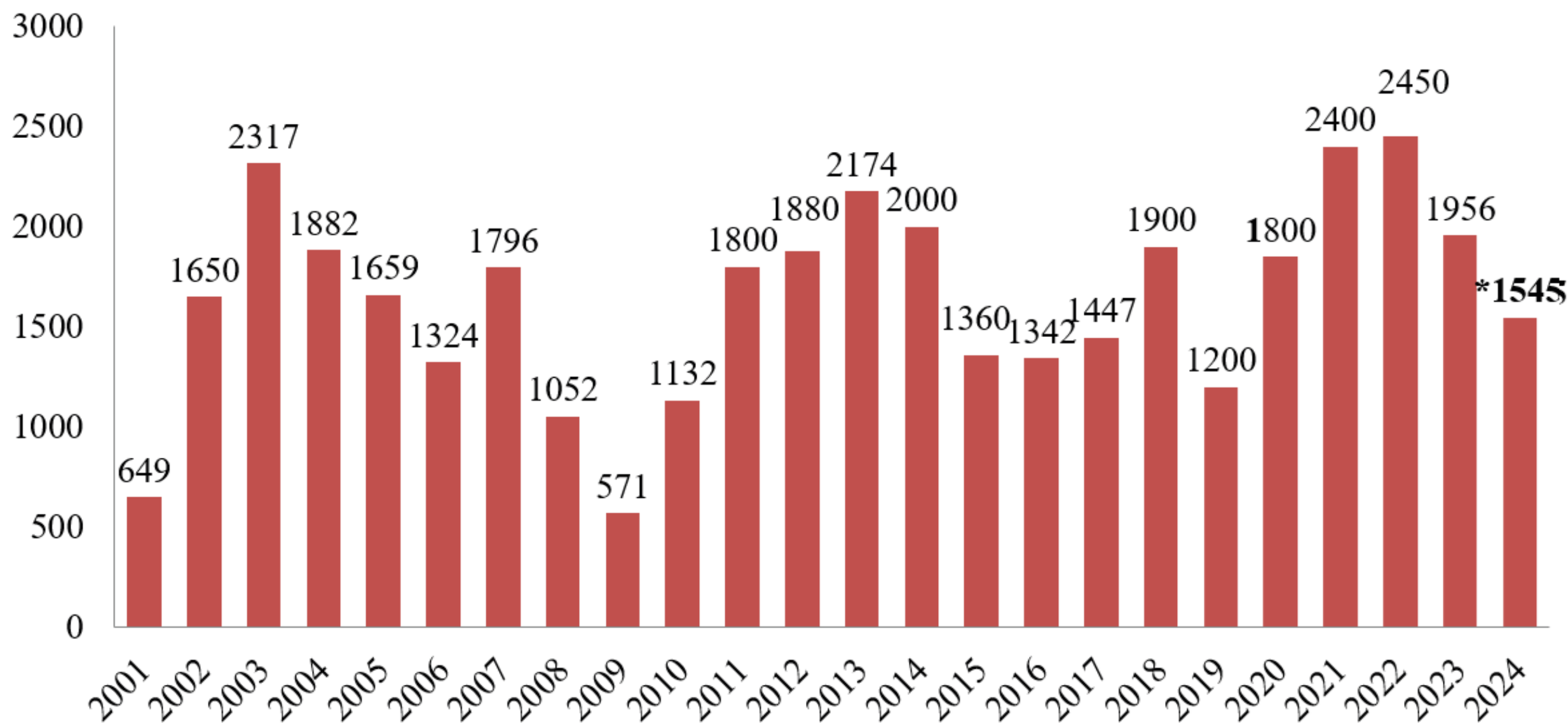
Comparison for January-December 2022 / 2023 / 2024 (Million \$)



Textile Machinery Exports by Years (Million \$)



Textile Machinery Imports by Years (Million \$)



Textile Machinery World Export Ranking (2022/2023)

		(Million \$)	(Million \$)	2022/2023	2023
		2022	2023	Change (%)	Market Share (%)
1.	CHINA	8.754	7.218	- % 17,5	% 25,7
2.	GERMANY	3.647	3.652	+ % 0,2	% 13
3.	JAPAN	2.640	2.542	- % 3,7	% 9
4.	ITALY	2.356	1.996	- % 15,3	% 7,1
5.	S. KOREA	1.215	1.162	- % 4,3	% 4,1
6.	USA	924	896	- % 3	% 3,1
7.	TURKEY	919	830	- % 9,7	% 2,9
8.	BELGIUM	957	781	- % 18,4	% 2,8
9.	INDIA	843	769	- % 8,7	% 2,7
10.	FRANCE	756	639	- % 15,5	% 2,3
	Top 10 Total	<u>23.011</u>	<u>20.485</u>	- %11	%73
	Global Textile Machinery Exports Total	<u>31.477</u>	<u>28.142</u>	-% 10, 6	%100

2023 Global Textile Machinery Exports: Export Values of Sub-Product Groups in the Top 10 Exporting Countries (Million \$)

	GTIP NO:	8444-8445	8446	8447	8448	8449	8451	8452	
	Sub-Category Exporter Countries	Yarn Machines (Including Synthetic Yarn Machines) (Million \$)	Weaving Machines (Million \$)	Knitting Machines (Million \$)	Spare Parts (Million \$)	Nonwoven Manufacturing and Finishing Machines (Million \$)	Dyeing, Washing, Drying, Finishing, and Other Machines for the Textile Industry (Million \$)	Garment Machines (Million \$)	TOTAL (Million \$)
1	CHINA	935	562	1.198	859	183	1.507	1.974	7.218
2	GERMANY	1.270	113	173	557	270	1.014	255	3.652
3	JAPAN	1.320	405	347	169	9	63	229	2.542
4	ITALY	431	154	165	347	72	720	107	1.996
5	S. KOREA	42	11	30	104	10	938	27	1.162
6	USA	71	10	68	204	14	365	164	896
7	TURKEY	37	23	29	55	4	634	48	830
8	BELGIUM	44	499	6	132	2	90	8	781
9	INDIA	405	27	4	201	1	69	62	769
10	FRANCE	70	2	9	324	59	169	6	639

Textile Machinery World Import Ranking (2022/2023)

		(Million \$) 2022	(Million \$) 2023	2022/2023 Change (%)	2023 Market Share (%)
1.	USA	3.701	3.363	- % 9,1	% 11,7
2.	CHINA	3.608	3.215	- % 10,9	% 11,2
3.	INDIA	3.038	2.926	- % 3,7	%10,2
4.	TURKEY	2.450	1.956	- % 20,2	% 6,8
5.	VIETNAM	1.464	1.134	- %22,5	% 4
6.	BANGLADESH	1.427	1.107	- % 22,4	%3,8
7.	GERMANY	1.402	1.012	- %27,8	%3,6
8.	ITALY	825	720	- % 12,7	% 2,5
9.	INDONESIA	546	597	+ % 9,3	% 2,1
10.	UZBEKISTAN	630	472	- % 25	% 1,5
	Top 10 Total	19.514	16.502	- % 15,4	% 57,5
	Global Textile Machinery Imports Total	32.690	28.668	- % 12,3	%100

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1	USA	201	26	215	232	112	2.171	406	3.363
2	CHINA	1.644	249	104	688	66	310	154	3.215
3	INDIA	687	763	417	510	44	237	268	2.926
4	TURKEY	872	215	228	187	41	235	178	1.956
5	VIETNAM	191	74	138	185	27	291	228	1.134
6	BANGLADESH	289	32	190	122	6	266	202	1.107
7	GERMANY	45	18	26	277	36	423	187	1.012
8	ITALY	43	35	82	206	19	248	87	720
9	INDONESIA	137	56	72	110	18	119	85	597
10	UZBEKISTAN	162	35	49	60	5	82	79	472

Turkey's Top 10 Countries in Textile Machinery and Components Imports (2022/2023 Period)

Rank	Country	Import 2022 (Million \$)	Import 2023 (Million \$)	Change Rate (2022/2023)
1	China	644	472,3	- %26,6
2	Germany	490	464,8	- % 5,1
3	Italy	320,8	198,5	- % 37,8
4	Belgium	202,6	143,7	- % 29,1
5	Japan	193,5	168,4	- % 12,9
6	India	166,7	157,4	- % 5,6
7	France	80,9	34	- %57,7
8	Switzerland	45,8	35,2	- % 23,1
9	Czechia	56,5	45,5	- % 19,5
10	South Korea	18	10,5	- % 44,4

Turkey's Top 10 Target Markets for Textile Machinery and Components Exports (2022/2023 Period)

Rank	Country	Export 2022 (Million \$)	Export 2023 (Million \$)	Change Rate (2022/2023)
1	Uzbekistan	95	82	- % 13,6
2	Russia	41	63,4	+ % 54,6
3	Egypt	45,2	56,2	+ % 24,3
4	Bangladesh	74	53	- % 28,3
5	Pakistan	58	39	- % 32,7
7	India	35,5	32,2	- % 9,2
8	Iran	32	29,8	- % 6,8
9	Poland	24	29	+ %20,8
10	Brazil	22	18,2	- % 17,2
10	USA	18	11,2	- % 37,7

Turkey's Textile and Apparel Investments Incentive Certificate Statistics

(JANUARY - DECEMBER 2022 PERIOD INCENTIVE CERTIFICATES)

Investment Area	Complete New Investment	Modernization	Expansion	Total Number of Investor Companies
Textile Finishing	54	37	48	139
Preparation of Textile Fibers	128	36	124	288
Knitted (Tricot) Products Manufacturing	131	2	137	270
Textile Products Not Classified Elsewhere	61	2	48	111
Ready-Made Textile Products Manufacturing	29	0	34	63
Clothing Manufacturing	579	9	191	779
TOTAL	982	86	582	1650

Turkey's Textile and Apparel Investments Incentive Certificate Statistics

(JANUARY - DECEMBER 2023 PERIOD INCENTIVE CERTIFICATES)

Investment Area	Complete New Investment	Modernization	Expansion	Total Number of Investor Companies
Textile Finishing	45	26	39	110
Preparation of Textile Fibers	71	31	63	165
Knitted (Tricot) Products Manufacturing	80	2	69	151
Textile Products Not Classified Elsewhere	57	2	28	87
Ready-Made Textile Products Manufacturing	26	4	30	60
Clothing Manufacturing	571	10	167	748
TOTAL	850	75	396	1321

Compared to 2022, in 2023:

- The number of investments in the "Textile Finishing" sector decreased by **21%**,
- The number of investments in the "Preparation of Textile Fibers" sector decreased by **43%**,
- The number of investments in the "Knitted Products Manufacturing" sector decreased by **44%**.

Strengths of the Textile Machinery Sector

1. The presence of a strong textile industry.
2. Experience in textiles, accumulated knowledge, and a skilled workforce.
3. A competitive balance between price and quality.
4. Rapid increase in R&D and Design Centers (22 R&D and 4 design centers established in the sector over the last 7 years).
5. Collaboration between textile manufacturers in field experience and machine development.
6. The ability to quickly respond to emerging needs and innovations (e.g., mask machines).
7. The ability to act in an organized manner under the umbrella of associations and federations.

Weaknesses of the Textile Machinery Sector

1. Insufficient progress in branding and patent-related matters.
2. Weakness in crediting and financing in both domestic and international markets.
3. Low demand from buyers for the production of imported machines.
4. The inability to establish the auxiliary industry at the desired level.
5. Difficulty in new investments and growth due to insufficient equity capital of companies.
6. Unfair competition within the sector.
7. Inability to maintain price stability in the sector due to high inflation.

Opportunities in the Textile Machinery Sector

1. Proximity to potential markets.
2. Opportunities to acquire European textile machinery brands.
3. Declaration of the machinery sector as a strategic sector and announced support for localization efforts in this field.
4. Increased recognition of the importance of localization.

Threats in the Textile Machinery Sector

1. China's introduction of dumped products into the market.
2. The possibility of lagging behind in industrial transformation, carbon footprint, and Green Deal processes.
3. Difficulty in finding new-generation engineers and technical staff to transfer experience.
4. Increases in raw material prices necessary for production.
5. Continued imports of Far Eastern machinery into Turkey due to insufficient customs duties, even in areas where domestic production is strong.
6. Risks arising from macroeconomic changes.

*** Current Agenda Topics ***

- Expanding the frequency of member communication meetings.
- Continuing member visits, analyzing demands, expectations, and opinions.
- Continuing symposiums focused on Textile Machinery and Systems (University, Textile Industry, Textile Machinery Manufacturers).
- Persistently communicating our opinions and demands to the Ministry of Industry and Technology and the Ministry of Trade regarding sector-related issues.
- Addressing the issue of combating unfair competition (popularizing the "Turqum Quality Certificate" within our sector).
- Exploring new markets and partnerships (such as Morocco, South Africa, and Portugal). In this context, obtaining updated reports and representative information from organizations we collaborate with.
- Conducting an inventory study on domestically used textile machinery (in collaboration with textile manufacturers from the ISO Top 500 and Second 500 lists).
- Holding discussions on encouraging global textile machinery brands that are not currently produced in Turkey to invest in domestic production.



Tekstile Yön Veren Teknolojiler

Technologies Driving Textile Sector

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