

TECHNICAL TEXTILES AND NONWOVENS INDUSTRY IN TURKEY

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PRODUCTION

Technical Textile and Nonwovens are the most developing and promising sector in the global textile industry. The production and consumption of technical textiles and nonwovens has gained great economic value in the last decade.

The Demand for technical textiles and nonwovens is directly related to overall economic developments and textile technology. The increase in GDP per capita in Turkey in recent years has fueled demand for technical textile and nonwoven products such as feminine hygiene products, diapers, medical textiles and disposable products. In addition, rapid growth and the requirements in the automotive, construction, filtration, agriculture and chemical industries have stimulated demand for technical textiles and nonwovens.

Today, many sophisticated, functional, hightex and high performance textiles are produced in Turkey including waterproof, windproof, breathable, flame retardant, anti-bacterial fabrics and garments, tire cord fabrics, military and protective wear.

The production capacity in Turkey for nonwovens is over 110,000 metric tons per year. İstanbul, Bursa, Gaziantep, Kocaeli and Tekirdağ are the major cities in the production of technical textiles and nonwovens.

During the past decade, an increasing number of Turkish companies have moved into technical textiles and nonwovens production because of the high value added of the products and less vulnerability to price changes. Both production volume and the variety of products are continuing to increase. There were 10 companies which dealt with technical textiles and nonwovens among Turkey's 500 largest companies in 2004.

There are more than 150 companies manufacturing technical textiles and non-woven in Turkey. More than 20 large companies produce nonwoven roll goods. Some Turkish nonwoven and technical textile companies are members of the European Disposables and Nonwovens Association-EDANA. These companies are:

- Advansa Sasa Polyester San. A.Ş.
- Akınal Sentetik Tekstil ve Ticaret A.Ş.
- General Tekstil San.ve Tic. A.Ş.
- Gülsan Group
- Hassan Group
- Hayat Temizlik ve Sağlık Ürünleri San ve Tic. A.Ş.
- Kurt Kumaş San.ve Tic. A.Ş.
- Mogul Tekstil Sanayi ve Ticaret Ltd. Şti.,
- Vateks Tekstil Sanayi ve Ticaret A.S.

The major end-user sectors for technical textiles and nonwovens are automotive, packaging, hygienic, medical, construction, clothing, military, agriculture and filtration in Turkey.

Turkey is also an important producer of tire cord fabrics and industrial yarns. Kordsa, with manufacturing facilities in seven countries and a global supply network, is the world's

leading supplier of nylon industrial yarn fabrics and single end cord to tire, mechanical rubber goods, webbing ropes and cordage markets.

Some Turkish companies have formed joint ventures with foreign technical textile firms, especially in the production of technical fabrics. Sude Suni Deri and Fiberflon, are the Turkish companies which have joint-ventures with foreign companies.

Turkey is one of the world leaders in big bag (FIBC) production and Turkey ranked first in world big bag (FIBC) exports in 2004.

Mogul Tekstil was the winner of the IDEA "Entrepreneurship" award given by INDA (Industrial Nonwovens and Disposables Association in North America) during the IDEA 01 show organized in Miami - USA.

There is a suitable infrastructure for technical textiles and nonwovens which is growing and developing in terms of technology, human resources and know-how in Turkey. The technical textile industry in Turkey has the benefit of a well-established textile infrastructure, strong textile educational and research institutions, a skilled workforce and the availability of raw materials. The Scientific & Technological Research Council of Turkey (TUBİTAK) and its subsidiary organizations, the Textile Research Center (TAM), the Marmara Research Center (MAM) and the Bursa Test and Analysis Laboratory (BUTAL) provide technical, testing and scientific assistance to the sector. TUBİTAK provides research and development aid to support the companies which are conducting R&D projects, regardless of the size of the company. In addition, a National Nano-technology Center will begin operating at Bilkent University, Ankara.

EXPORTS

In 2005 the total value of technical textiles and nonwovens exports was estimated to exceed US\$ 1.1 billion. The main export products in 2005 were big bags, tire cord fabrics, glass fibers and articles, high tenacity yarns, industrial yarns, technical fabrics, nonwovens and sewing yarns. The EU, the USA, the Russian Federation, Iran, Romania, Ukraine and Israel are the most important markets for Turkish technical textiles and nonwoven sectors.

Although all technical textiles products cannot be identified in the Harmonized System, the major items are given in the table.

TURKEY'S TECHNICAL TEXTILES AND NONWOVENS EXPORTS BY MAJOR PRODUCT GROUPS (US \$ 1000)

HS-Codes and Product Descriptions	2001	2002	2003	2004	2005
630532- Flexible Intermediate Bulk Containers (FIBC)	138.359	154.244	188.486	225.965	255.119
5902- Tyre cord fabrics of high tenacity yarn of nylon or other polyamides, polyesters or viscose rayon	91.065	102.833	115.240	135.629	153.250
7019- Glass fibres (incl glass wool) and articles thereof	43.771	47.703	57.253	80.290	81.069
540210- High Tenacity Yarn Of Nylon Or Other Polyamides	49.730	58.458	66.098	68.135	76.791

5903- Textile fabrics impregnated, coated, covered or laminated with plastics	40.506	43.842	55.841	61.888	58.778
5603- Nonwovens, whether or not impregnated, coated, covered or laminated	13.845	20.478	28.290	45.869	51.756
5907- Textile fabrics otherwise impregnated, coated or covered; painted canvas being theatrical scenery, studio back-cloths or the like:	4.135	8.339	14.196	20.722	25.311
540720- Woven Fabrics Obtained From Strip Or The Like	8.354	9.386	10.438	8.875	15.917
6306- Tarpaulins, sails for boats, sailboards, awnings, tents&camping good	6.011	5.958	6.676	7.669	15.813
5807- Labels, badges and similar articles of textile materials, in the piece, in strips or cut to shape or size, not embroidered	7.004	7.514	10.134	13.840	15.641
5401- Sewing thread of man-made filaments, w/n put up for retail sale	8.819	8.797	11.042	15.080	14.319
5906- Rubberised textile fabrics	8.281	9.646	10.008	11.791	13.066
5602- Felt, whether or not impregnated, coated, covered or laminated	3.604	5.506	6.587	9.609	12.434
5806- Narrow woven fabrics, other than goods of heading 5807; narrow fabrics consisting of warp without weft assembled by means of an adhesive (bolducs)	12.825	11.164	7.059	8.830	11.509
5508- Sewing thread of man-made staple fibres, w/n put up for retail sale	4.246	6.015	6.043	8.645	9.605
300590- Medical dressings etc except those with adhesive layer	4.843	3.056	4.260	4.573	8.436
5911- Textile products&articles for technical uses	835	3.475	5.309	6.019	7.704

Source: Undersecretariat of Foreign Trade

In July 13-16 a technical textile and nonwoven fair, named HIGTEX 2005, was organized in İstanbul. The next HIGTEX 2007 is planned for July 2007 in İstanbul. For detailed information <http://www.hightex2005.com/>