

A QUALITATIVE STUDY ABOUT INTERNATIONALIZATION OF TURKISH TEXTILE & CLOTHING INDUSTRIES

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ABSTRACT

The national textile and clothing industries do not operate in isolation anymore; they are significant parts of one global sector which serve to the whole world. The Turkish textile and clothing industries are mainly export oriented and like other developing industries, they have an important role in the internationalization of the Turkish economy with their contribution to GDP, trade and employment. This article reviews the major developments that shaped the internationalization process of Turkish textile & clothing industries. Findings from semi-structured case studies with 14 Turkish textile and clothing industries tries to highlight the changes occurring currently in the industries. The qualitative data obtained from our research gives deep and detailed understanding of the Turkish textile and clothing industries.

KEYWORDS

History of Turkish textile industry; Internationalization; Turkish clothing industry; Turkish textile industry; Qualitative study.

INTRODUCTION

The textile and clothing industries are one of the oldest and most international industries as they are the milestone industries for countries which are export-orientated and aim labour-intensive industrialisation plan [1]. Although they have totally different technological development levels, textile and clothing industries are generally mentioned together as they have a strong linkage between them. This linkage is mainly from the supply demand relation between these two industries as the textile industry supplies the inputs such as yarn, fabric of the clothing industry [2]. However, clothing industry requires lower technology and it is more labour intensive where as textile industry is capital intensive and requires higher technology [3]. In the short run, textile and clothing industries are important in developing jobs and foreign currency flows whereas in the long run they give opportunity to develop a growth in economic terms [1]. The low cost of labour force is a crucial factor in the development of the textile and clothing industries. This is the main reason why development of those industries takes place mainly in developing countries. Especially clothing industry is heavily dependent on low labour and therefore the development of clothing industry takes before the development of textile industry [4].

HISTORICAL DEVELOPMENT OF TEXTILE & CLOTHING INDUSTRIES IN THE WORLD

The textile and clothing industries have been significantly important sectors in the economic development of the all countries. Indeed, they played a vital role in the period of early industrialization in the UK, North America and Japan. The textile industry is an industry almost as old as human history and the innovation in the textile industry accelerated the industrial revolution [5]. After that, the second stage of development, which emerged with the influence of capitalism on consumer culture, reached its present structure with the fashion phenomenon [6].

Until the 1940s, industrialised European countries and US dominated the textile and clothing industries and the developing countries were the suppliers of raw materials to those countries. After the Second World War, European countries and US were aware of economic gains from the liberation of trade in the world. Although developing countries and uncompetitive industries favoured protectionism, the developed countries declared a worldwide agreement called General Agreement on Tariffs and Trade (GATT) which was due between 1947 and 1995. The GATT's main aim was the reduction of tariffs, create regional free trade areas were allowed and industries such as agriculture, textiles, and clothing industries were exempted from this agreement. Since 1995,

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GATT have favourably lowered the trade barriers and helped to move world trade clearer and more anticipated environment [7].

The textile and clothing industries are shelter industries for developing countries as they need low technology, low labour skills and low fixed costs. Beginning from 1950s, the textile and clothing industries are used as an export-led industrialization industries for internalization [8]. By the early 1950s, the textile and clothing production shifted from developed countries to Japan. The first protective measurement was put in use by USA for imports from Japan in 1955. In 1962, the Long-Term Arrangement Regarding International Trade in Cotton Textiles (LTA) was in enactment by twenty countries for five years after a year of Short-Term Arrangement Regarding Trade in Cotton Textiles (STA)'s formulation. The main purpose of the LTA was to restrict cotton-based textile imports from developing countries to USA and European countries. After renewal of LTA in 1967 and 1970, the agreement was replaced by the Multifibre Arrangement (MFA), which included the other fibres into the coverage of the agreement [8].

The MFA allows its members to impose unilaterally import quotas to protect their domestic industries. Between 1986 and 1994, the members of GATT discussed the creation of new international trading system in Uruguay Round. During Uruguay Round, World Trade Organization (WTO) was established and today it has 164 member countries. The General Agreement on Tariffs and Trade (GATT) remained to cover international trade in goods. In order to integrate the textile and clothing industries to the general rules of GATT, the members signed the Agreement on Textiles and Clothing (ATC) which was in use between 1995 and 2005. By ATC, it was aimed to forbidden the imposition of import quotas after 2005 by putting the most favoured nation clause in use for the textile and clothing industries. According to the ATC, the quotas should be abolished at four steps and but in practice that was not achieved. As a conclusion by 2005, the goal of establishing free international trade was not achieved. The major buyers of textiles and clothing countries which are USA and European Union continued restricting imports from mainly China, India, Hong Kong and Taiwan. The preferential agreements such as regional area agreements allowed countries to escape from quotas such as Mexico to the USA and Turkey to the EU [9].

In 2001, China joined to the World Trade Organization. This was an important milestone for international textile and clothing industry. After the abolishment of MFA and ATC completely in 2005, China's exports increased dramatically as China faced no more any quota restrictions. During the post MFA and ATC period, other Asian economies such as Bangladesh, Cambodia, India, and Vietnam also

increased their exports especially in clothing industry. There has been a moderate grow in the export numbers of some central and south American, East European and North and South African countries compared to Asian countries [10]. During the 1970s, the production of textile and clothing industries began to shift from developed countries to developing countries because of the rising production costs in developed countries and globalization [11]. By the effect of increasing exports in textile and clothing industries, Hong Kong, South Korea and Taiwan have become newly industrialized countries of Asia, after Japan [12]. This shift enabled underdeveloped countries such as Bangladesh and Indonesia to be present in the international markets as new exporters countries by transforming their low-cost labour force into a competitive advantage [13].

After the 2007 global crisis, the share of the textile and clothing industries in global foreign trade has fallen. As developing countries are mainly exporters of textiles and agriculture and those products price flexibility is low which means they are not affected much by price and income changes compared to high-technology product lines. For the reasons mentioned, although the crisis has helped textile foreign trade recover, the share of textiles in global foreign trade has decreased sharply compared to 1995 [14].

DEVELOPMENT OF TURKISH TEXTILE & CLOTHING INDUSTRIES

Enroute to the industrialization in Turkey, textile and clothing industries have played a key role and they are defined as the "Turkey's oil" to indicate the importance of those industries [15]. These two industries are the essence of Turkish economy in terms of GDP contribution with their share in manufacturing, employment, investments and macroeconomic indicators. The Turkish clothing industry had an export of USD 17,143 billion and textile industry USD 7,287 billion which makes 14,4 per cent of all the exports of the Turkish economy [15]. The textile industry was dependent on imports until 1950s and this dependency continued until 1970s in the clothing industry whereas manufacturing of both industries was for the local market until the 1980s [16].

For more than 3,000 years, textile production in Anatolia has been known as an important trade facility. Actually, the history of textile weaving in Anatolia begins by the Hittite and Assyrian periods. In the Central Asia, weaving was used for meeting the need of basic dressing and covering. In Anatolia, Turks were encountered the old, traditional weaving industry and they developed this industry further by adding their own cultures. By the 14th century, cotton weaving industry was present in Denizli, Alasehir, Adana, Bursa, Ankara and Sivas. Especially Bursa

became the Anatolian station of "Silk Way" and in the documentary of the 14th Century, it was determined that the number of silk looms in Bursa reached to thousand. By time, the wool, hemp and linen weaving developed in Anatolian cities in addition to cotton and silk weaving. Weaving industry, which continued its development until the end of the sixteenth century, experienced an unproductive period with the invasion of Indian fabrics in the seventeenth century. However, this unproductive period did not last long for Anatolian textile industry and it recovered by beginning to produce similar items like Indian textiles [17].

Later on, the Turkish textile industry is divided into sub-sectors as spinning, pattern-mould preparation, weaving and dyeing and became the one of the most important economic activity in Anatolia until the invasion of Western countries textile industries. Owing to capitulations given to foreign countries and "Industrial Revolution" that emerged in The UK towards the end of the 18th century which led to the industrialization of the textile industry in Europe, textile goods began to be produced in Europe five times cheaper than the Ottoman Empire [19]. The above-mentioned developments were the main reasons of the downturn and the subsequent collapse of Ottoman weaving industry. After the 18th century, European textile products such as British cotton wool, French woollens, which were previously afforded by the rich people in Anatolia spread in lower segments of the society as a result of the fact that reduction in the prices [18].

During the 19th century, in the major cities within the borders of the Ottoman Empire, weaving mills has largely shut down leaving only small ones operating to meet local demand. During this period, the Chuha Factory in Beykoz (1805), Feshane in Halic (1826) and Basmahane in Bakırköy continued production to meet the needs of the Ottoman army. Private establishments which were very few in number mainly bankrupt during this period and only rare existed until the Republican period. Processing of textile raw materials especially spinning of cotton yarns in cities Tarsus and Adana sustained the textile industry during that period [19].

The Turkish textile industry was seen as one of the important sectors by the state after the establishment of Turkish Republic and governments continued their support in this industry. The economic decisions taken at the Izmir Economic Congress in 1923 also played an important role in the development of the textile industry. The importance of woven industry was underlined and the Turkish woven industry was taken under protection in the Izmir Economic Congress. This declaration advanced the development of Turkish textile industry's growth and thirteen new textile factories were established with the incentives given in the Industrial Incentive Law of 1924 [20]. Thus, in the 1930s, 23 per cent of Turkey's total industry in the economy was in the textiles industry [21].

The development of modern Turkish textile industry goes back to the early 1930s when textile mills producing cotton fabrics were established. It became the pillar industry in the "First Planned Industrial Programme" of the Turkish Republic and the textile industry has remained one of the leading industries since those years. The fact that Sumerbank was the first public economic enterprise established in Kayseri in 1933 after the Republic is an indication that the industrialization moves in textiles that started in the last days of the Ottoman Empire continued with the same importance and speed after the establishment of the Republic. With the establishment of Sumerbank, the other state-owned textile mills established during Ottoman Empire were given under the control of Sumerbank which accelerated the growth of Turkish textile industry [22]. Sumerbank had 17 mills all over the Turkey mainly producing grey fabric, yarn-dyed fabrics, piece-dyed fabrics and printed fabrics. By the mid 1950s, Sumerbank was engaged in the mass production of short staples for the Turkish domestic market and until the 1980s, it was the producer of one sixth of Turkey's yarn and fabric production and more than one fifth of Turkish clothing output. In the 1990s, Sumerbank began to lose its competitive advantage and in 1992 Sumerbank's annual lost reached its annual turnover and privatisation of Sumerbank took place in 1994 [23].

In the first years of the Republic, as in all sectors, there was an intensive restructuring and heavy investments in the textile industry. Therefore, from 1925 to the 1940s, exports in the textile sector lagged behind imports, while in 1940, imports more than doubled. Later, exports decreased to very low levels due to World War II, but after the 1950s, exports were more than imports [21]. In the 1960s, the textile industry is included in an intensive industrial investment support programme which was introduced by the establishment of "Turkish State Planning Organisation" [25]. In 1963, between Turkey and the European Union association agreement known as the Ankara Agreement was signed and in 1973, an additional protocol aimed at abolishing customs duties between the two parties came into force. By the additional protocol, EU abolished customs duties on industrial goods of Turkish origin from the beginning of the transition period, while Turkey was envisaged to gradually abolish customs duties on EU industrial goods. This protocol enabled Turkish textile and clothing goods to be exported to the EU countries without any tax, tariff or quota. In the 1960s, large privately-owned textile giants such as Sabancı, Koc, Cukurova for which textile industries are only a part of their activities; and firms such as Altinyıldız, Sektas, Guney Sanayi and Akın whose main and sole activities are textiles began producing man-made fibres. However, the state-owned enterprises were the major players of the Turkish textile industry until the 1980s. Afterwards, high fixed costs, out-dated

technology, overmanning and poor management capabilities made state-owned enterprises to lose their competitive advantage [4].

Although the ready-made clothing industry began to develop after the 1840s in the UK and the rest of developed countries [26]. It was only over the last two centuries; the clothing manufacturing have moved tailored made products to factory production [9]. Turkish clothing industry was dominated by tailor- or home-made products until the 1970s and this began to change by the late 1970s. By the late 1970s, the Turkish clothing industry emerged as a source for foreign currency as Germany and other European countries have shifted their production to Turkey. Low labour costs and cheap raw material supply were the main reasons behind the growth of the Turkish clothing industry. However, this growth was restrained by the low quality of raw materials, lack of trained workers, inadequate supply of equipment and quota restrictions. The growth of clothing industry supported the Turkish textile industry's expansion during the late 1970s [1]. The main strength of Turkish clothing industry is the knitting sector. Despite the less value-added items in knitted garments and fabrics, the knitting sector receives more investments as it can be established on a small scale with relatively less capital in comparison to the weaving industry [23]. Single jersey, terry, pique, velour, rib, interlock and jacquard are the main types of fabrics and underwear and t-shirts are main lines produced by local Turkish knitting companies. In order to produce higher value-added products such as sweaters, cardigans and jogging wear, larger knitting companies invested on flat bed knitting machineries [27].

In the early 1980s, ex Turkish president Turgut Ozal introduced radical changes to the Turkish economy which have had a continued effect on its evolution until the 2000s. Broad-based restructuring measures were instituted, which included the opening of the economy to international competition, the liberation of foreign exchange and trade regimes and the recognition of the need to reduce the state-owned sectors of the Turkish economy. Following those changes, macroeconomic indicators were generally positive in the 1980s, expect for high inflation rates which remained around 50 per cent. Therefore, in the 1980s the Turkish economy was characterised by high economic growth and a strong balance of payments. In between 1980-1990, there was a tremendous increase in the international trade of Turkey; imports increased 300 per cent and exports increased more than 500 per cent value terms. This dramatic increase in international trade was that the Turkish governments pegged the exchange rates often at unrealistically high currency values and imports were restricted by high trade barriers. The textile and clothing exports have increased significantly by the second half of 1980 and the growth rate of those industries were higher than the

average of Turkish economy. This rapid increase was stimulated by the introduction of the new-export oriented model in the 1980s and this plan aimed to export outputs of textile and clothing industries to nearby countries especially to European Union [28]. In 1983, the Foreign Investment Law was modified which offered better conditions for the foreign investors in Turkey. At the same time with this modification, a legislation was passed to encourage foreign direct investment in high technology required and export-oriented industries such as textile and clothing [29].

In order to attract the foreign investment, Turkish governments have established free trade zones and offered investment incentives such as export subsidy credits, tax and duty exemptions on the imported machinery. This government policy caused many European companies to use Turkey as a manufacturing base because of Turkey's location and low labour costs compared to Europe. In Europe, Germany is the leader of "outward processing" of manufacturing. It was the first country which began outsourcing their garment production to other countries and in order to have the control over, Germany investments were mainly established as joint ventures. In the 1980s, 35 per cent of foreign investment in the Turkish textile and clothing industry was made by German companies. German companies were followed by Italian, French and English companies and they also established joint ventures in textiles and clothing industries with a share of 40-50 per cent. The growth of foreign investment in the Turkish textile and clothing industry caused the industries to upgrade their technology and quality of the work force. Unfortunately, the levels of foreign investment were low even in 1980s compared to other developing countries because of the political and economic uncertainty [30].

By 1991, Gulf crisis and political uncertainties in Turkey caused a stagnation in the Turkish economy. The political uncertainties were solved after the 1991 election and industrial output growth accelerated in 1993 however external fiscal deficit continued to increase until 1994. In 1994, Turkish economy had one of the worst economic crises in its history due to the major external deficits and deterioration in public sector finances. In April 1994, stabilisation programme was launched following a standby agreement with the IMF. During the 1990s, the Turkish textile and clothing industries were the largest industries in terms of export with the share of 38.5 per cent of the Turkish economy. Turkish textile and clothing industries had a surplus in the 1990s and Turkish textile imports began to increase to meet the demands of Turkish clothing industry for yarns and fabrics which cannot be supplied from the local market. Turkey signed "Customs Union Agreement" with the European Union in Jan, 1996 and after this agreement, Turkey's exports were expected to increase by ten per cent, surprisingly three per cent

decline occurred in 1996. The reasons behind this decline were; firstly, the economic recessions in the main European countries such as Germany, France and Italy had a negative effect on consumption patterns of consumers as fashion is accepted as a “discrete purchasing” item that consumers cut spending firstly. Secondly, new regulations imposed on trade with EU and Turkish textile and clothing manufacturers could not adopt to those changes in a short period of time. Thirdly the compensation tax imposed on raw materials of clothing exports has increased the costs of the Turkish clothing manufacturers [4]. In 1997, European Union candidate countries were exempted from import duties and quotas to EU which provided direct access for countries such as Poland, the Czech Republic and Hungary to Turkey’s main export markets such as Germany. In 1999, Turkey’s textile and clothing exports decreased annually for the first time after thirty years. 1999 Golcuk earthquake, economic turmoil in world markets and fluctuations in exchange rates had also an impact on this decline [22].

China’s entrance to the World Trade Organization in 2001 and abolishment of quotas in 2005 are the major factors that affected the Turkish textile and clothing industries negatively. Turkey has become in direct competition in its export markets with China and other Asian industries in 2007 the economic crisis in US market made the situation worse for the Turkish textile and clothing industry. After the crisis, because of the shrank in the European market, the European Union companies revised their structures and they began to purchase in small lots rapidly from close geographies and the strength of Turkish companies in this area have increased the exports in the industry [31]. The world-wide financial crisis in 2008 hit mainly the emerging markets and Turkey was one the developing countries which is affected deeply. Turkish economy had a currency crisis followed by a recession in the second half of 2008 which had an effect on the Turkish textile and clothing industries and lowered the demand in the local market and had a negative impact on the overall performance of the Turkish textile and clothing industry [32].

TURKISH WOOL INDUSTRY

The Turkish woolen industry is smaller specialist industry compared with Australian and Chinese woolen industries which controls the world wool market [33]. The Turkish wool industry is a stable sub-sector of Turkish textile industry through the years and remained small. Turkish wool industry has few breeds of sheep compared with many other countries. The Turkish wool is mainly 30 microns thick and short-staple, therefore the Turkish wool industry mainly serves to the domestic market for carpets, blankets and other coarse fabrics [33]. The industry is mainly dependent on imports for fine wool fibres; imports were from New Zealand and Australia until

the 1990s and afterwards from Turkish Republics and Eastern Europe. Unfortunately, high quality wool, merino has only a 3 per cent share in total wool production. Turkey quickly emerged as the main manufacturer of woolen fabrics for clothing in the 1980s. The main market was the Centre Europe and this was hampered by the Russian financial crisis and low-priced imports from the Far East [4].

TURKISH COTTON INDUSTRY

Turkey is the 6th biggest producer of cotton, 11th biggest country in cotton cultivation area, 6th biggest country in terms of fibre cotton yield obtained from unit area, 5th biggest country in terms of cotton consumption and 6th biggest country in terms of cotton imports in the World [34]. Cotton fibre accounts more than 60 per cent of the total mill consumption in Turkey. The Turkish cotton is ranked as a medium quality cotton with a with a fibre length no longer than 31 mm and fibre thickness with a value between 2.7 and 5.0 microfibre [4]. However, only Aegean cotton is an exception in Turkey and ranked one of the best quality cottons in the international markets. Unfortunately, there has been a decline in the crop of the Aegean region related to changes in the social structure of the region such as development of tourism in the Aegean area [35].

The expansion of Turkish cotton spinning industry has begun in the 1970s. There has been massive amount of investment in the cotton spinning industry during 1990s and as a result Turkey became the biggest importer of open-end spinning machinery and third biggest importer of ring spinning industry in the world by 1995. The reasons behind those heavy investment figures were; an anticipated increase in cotton exports after custom union with EU and the start of cotton cultivation in the GAP project in South East Anatolia. GAP, which is Southeast Anatolian Development Plan is an irrigation project which made the Southeast Anatolia largest cotton growing area in Turkey. The increase in the capacity of cotton spinning was accepted to reduce the price of cotton yarn which will in turn increase the competitiveness of the clothing industry both in domestic and international markets [36]. However, the EU which is the largest export market for Turkish cotton yarns imposed a 12 per cent anti-dumping levy in 1991 and this made Turkish cotton spinners to lose their competitive advantage in the EU market as the levy was twice the levy on imports from Third World countries. Furthermore, Turkish cotton spinning industry had heavily invested on open-end carded yarn where they do not have a competitive advantage in the international markets. This excess capacity occurred because of the incentives given in Southeast Anatolia to accelerate the industrial development in that area by Turkish governments but in order to prevent unused capacity, the Turkish spinning industry should invest in ring spinning

machinery [35]. Until the 1980s, the main problem of Turkish cotton weaving industry was the obsolescence of the machinery. In a 1985 dated study conducted by Boston Consulting Group, found that 60 per cent of the Turkish weaving looms were older than 25 years old. The heavy investment on the spinning industry forced the Turkish weaving industry to make complimentary investments in new technology to continue to compete in the international markets.

The Turkish cotton cultivation area continued to increase until 2006, but decreased in the subsequent years and it was only 416,000 ha in 2017 [37]. During the same period, the countries which are main competitors of Turkey supported their cotton industries with high-rate subsidies whereas Turkish governments have narrowed the scope of subsidies and also created an excessive capacity in textiles and clothing industry. As a result, the consumption of cotton increased steadily during the same time period and Turkey became a net importer of cotton in the world with approximately 500 thousand tons. As an effect of high subsidies by rival competitors to the cotton lowered the prices of cotton whereas low subsidies have caused Turkish producers to stop the production of cotton which resulted in increasing numbers of imported cotton. In 2000s, Turkey imports reached to half million tons of cotton which is nearly 80 per cent of its production. Turkey mainly imports cotton from the United States which provides half of the world's cotton subsidies to its producers. The other main competitors of Turkey which are China, Greece and Spain producers also receive high rate of support and this support can reach to half of the market price of the cotton. Increasing production costs and high-rate of subsidies of competitors are the main reasons behind the decline of the Turkish cotton production and industry. This decline in the Turkish cotton industry makes the Turkish textile industry heavily dependent on foreign markets especially to the United States [37].

TURKISH MAN-MADE FIBRES INDUSTRY

The man-made fibres industries showed a tremendous development between the 1950s and 1980s in the world. The technological developments in the polymer chemistry and fibre-forming techniques were the source of those developments. During the same period, the developments in the staple-yarn manufacturing and multifilament synthetic yarns texturing technologies occurred worldwide [38].

The development of the Turkish man-made fibre industry followed the same path like the rest of the world. Until the 1960s, the Turkish textile industry was dominated by the cotton industry. In 1960s, the production of polyamide and polyester introduced the man-made fibres industry to the Turkish textile industry. The real expansion of the Turkish man-made fibre industry took place in the 1980s and the

major reasons behind this growth was the growing domestic demand and an increasing export potential particularly of polyester to the West Europe, North Africa and Middle East. The development of the Turkish man-made fibre industry followed the same pattern with the rest of the world. Firstly, development of the man-made staple sector occurred and then it was followed by the introduction of man-made filament yarns as filament yarns are indicators of a more sophisticated and advanced textile industry. Since 1984, the man-made filament sector grew at a higher rate than the Turkish man-made staple industry which confirms steady transition from traditional reliance on staple activity and a move towards a filament production. In the late 1980s, in volume terms, Turkey became the 9th largest producer of man-made fibres and yarns in the World [36].

Between 1990 and 1995, production of Turkish man-made fibre doubled as a consequence of increasing demand of local textile industry. On the other hand, surprisingly, between the same time period, supply of man-made fabric showed a decline and remained the below of the local demand. After 2008 crisis, man-made fibre mill consumption had a sharp decline in 2009 and it began to recover in 2014 and nearly doubled its mill consumption compared to 2008. The mill consumption continued to increase between the years 2010 and 2020 and surprisingly in 2020 it reached to 2017 million tons even there is Covid 19 pandemic.

MILL CONSUMPTION

Mill consumption is a significant indicator of general textile activity and it is determined by consumption in the domestic textile market and consumption of fibres to resource export activity in garment and fabrics. The below Table 1 shows the mill consumptions of Turkish wool, cotton and MMF industries.

Table 1. Mill Consumption (Source:TUIK).

(Tonnes)	Wool	Cotton	MMF	Total
1980	44	282	130	456
1990	73	558	309	940
2000	98	975	813	1886
2010	105	1237	1136	2478
2015	121	1.393	1.629	3.143
2016	99	1.500	1.664	3.263
2017	96	1.548	1.762	3.406
2018	70	1.644	1.575	3.289
2019	61	1.779	1.711	3.490
2020	60	1.878	2.017	3.955

TURKISH CLOTHING INDUSTRY

Generally, clothing industry is accepted as one of the most internationalized industry [39]. The Turkish clothing industry has rapidly grown since 1970s after German companies had moved their production to Turkey. The labor-intensive characteristics of clothing industry along with the minimal technology, capital

and skill requirements for its production has fostered the expansion of the Turkish clothing industry. The Turkish clothing industry has expanded more rapidly than other manufacturing industries since the 1980s for three reasons: the internalization of the Turkish economy, the rational use of investment incentives and liberalization of imports allowing the free follow of imports of machinery [40]. The relatively low labor cost is an advantage for the Turkish textile industry [41]. However, low labor productivity is one of the major problems of the Turkish clothing industry as the rate of labor productivity in the Turkish clothing industry is lower than all European countries with the expectation of Greece. After China's membership to the World Trade Organization in 2005, the quotas imposed on Chinese clothing industry was removed and the increasing shares of low labor countries such as Vietnam, Bangladesh negatively affected Turkish clothing industry. Furthermore, African countries which have been investing in the industry are expected to be important exporter countries in the sector. All of those developments will increase the competition for the Turkish clothing industry [42].

The Turkish clothing industry has enjoyed greater success in knitted garments compared to woven garments which can be linked to various factors. Firstly, the Turkish weaving companies which produce fabrics at international levels are vertically integrated and they cannot comply with the rapidly changing demand as opposed to the knitting industry because of the complexity of the production process. Secondly, most of the woven garment manufacturers have failed to create branded products. The Turkish clothing industry is mainly used as a subcontracting base by European companies for garment manufacturing, design, marketing and managerial skills are neglected.

This research aims to understand the dynamics of the Turkish textile and clothing industries and pathway of the Turkish textile and clothing industries which are mainly export-oriented. As a research method, qualitative analysis is used and 14 semi structured interviews were performed with managers from Turkish textile and clothing industries. In the light of the knowledge from the literature about the Turkish textile and clothing industries; our main research questions are formulated as follows;

Q1: What are current advantages and disadvantages of Turkish textiles and clothing industries in the internationalization?

Q2: How can Turkish textile and clothing industries can keep their competitive advantages and gain new ones in internationalization?

METHODOLOGY

In this study, a qualitative analysis approach has been adopted to investigate and understand the current situation, problems and perspectives of the

companies in the Turkish textile and clothing industry. This approach is widely accepted and applied in the context of SMEs [43]. Creswell (2013) defines qualitative research as "research in which qualitative data collection methods such as observation, interview and document analysis are used and a qualitative process is followed to reveal perceptions and events realistically and holistically in their natural environments". The case study pattern is "a qualitative approach in which the researcher collects detailed and in-depth information about real life, a current limited situation, or multiple classified situations within a given period of time through multiple sources of information, presenting a situation description or status themes" [44]. In this study, as stated by Yin (2009), the "case study pattern" used when it is necessary to investigate the current context in real life or a situation within the environment is preferred [45].

Middle and senior managers working in the Turkish textile or clothing sector were selected as a sample. Within the scope of the research, officials from 14 companies were interviewed between 1 and 30 December 2021. Participants are numbered P1-P14 to protect confidentiality. The participants answered 14 semi-structured questions in interviews which conducted online and recorded with the consent of the participants. The interviews lasted an average of 25-30 minutes. Firstly, content analysis was made for the interviews which were in written format and themes and codes were created. All the necessary qualitative analyses were made in Maxqda qualitative analyses program. Maxqda is a worldwide software tool for qualitative and mixed methods data analysis. By Maxqda, different kinds of data such as texts, images, videos, tweets and focus groups discussions can be analyzed. The themes were interpreted in line with the codes they contain and excerpts from the interview texts are also included in order to support the comments.

Qualitative researches are mostly criticized for their validity and reliability. In order to ensure the validity and reliability of the research, the following studies were conducted:

- Detailed literature review was carried out during the research.
- The interviews were recorded with the consent of the participants in order to prevent data loss. The interview questions were shown to an academican who is an expert in the field and to a manager experienced in the sector and necessary arrangements were made in line with their evaluations.
- A preliminary interview was conducted with a manager to test the clarity of the interview questions. The results of the pilot interview were shared with an expert academican in the field and the validity of the questions was confirmed.

- According to the coding audit that ensures internal consistency, the consensus between coders should be at least 80 percent [46]. When the encodings made by two different encoders on the interview document are compared at the level of code presence; 14 partitions were related, while 2 sections were not. The consensus among coders was found to be 87.50 percent.

FINDINGS

The main theme of our research is the internationalization and the codes under this theme are as follows; “knowledge and experience of employees”, “marketing and planning capabilities”, “export commitment”, “export markets information”, “export experience” and “export performance”. The model of the research is presented in the Figure 1 below.

The detailed code map of internationalization of Turkish textile and clothing industries is listed below as Figure 2. The numbers near the each subcode shows how many times a subcode is mentioned by the participants.

The main codes of our research are; knowledge & experience of employees, export commitment, export experience, export market information, export performance, marketing & planning capability. The details of each code are given below.

Knowledge and experience of employees

The participants mentioned that; the employees of their company have adequate knowledge and experience and the employees are sharing their experiences with their colleagues. If the top management is open-minded and promote learning in the company, the employees have continuous training. The quotes from P5 and P7 are as follows;

“... our company promotes learning and we have innovation department related to new designs and designers and export department work ...” (P5).

“... our company owner promotes continuous learning in the company and we are attending a consulting programme supported by Turkish Export Promotion Centre...” (P7).

Marketing and Planning Capability

This category is defined by “strategy & plan” codes and “change of export markets”. In this code plenty of companies states that they formulate plans and strategies for each year whereas some participants declare that they do not prepare any strategic plans. However, they added that the markets are volatile and unpredictable which makes difficult for them to follow their plans.

“ ...at the beginning of each year, we make yearly plans but we cannot follow all the plans because of

the unexpected changes from customers such as order cancellation...” (P8) and

“... we make plans for a year and every 3 months we check if we are following our plan...” (P13) said.

Export Commitment

This category is characterized by “attending fairs”, “importance of customer relations” and “retaining current customers”. The Turkish textile and clothing companies are highly dependent on export sales and they have a high level of export commitment. Majority of the participants attend to the international fairs regularly however a few of them stopped attending the fairs as they do not gain new customers. As it can be understood clearly from the below quotes, the companies give high importance to their export customers and they try their best to have good relations with them;

“... some export customers request too many and detailed samples, normally we do not provide them but in order to keep good relations with our important export customers, we provide them...” (P5).

The participants have high level of apprehension about retaining their current export customers. The companies are worried about the hard competition in the international markets and they focus on the current customers rather than searching for new customers. The below example is very indicative;

“... the markets are very volatile and our target is not to lose our current customers rather than having new customers...” (P3).

Export Markets Information

Market research, target market selection, network relations, competitor analysis and distance to target markets are the codes in this theme. The market research is the most mentioned code in this theme. The participants are searching for new markets and this search is mainly through internet. On the other hand, most of the participants believe that network relations are the main source for gathering new customers and the quotes about this issue is gathered under “network relations”. The participant P3’s quotes are as follows about network relation;

“...we usually find new customers through our network relations; you cannot say that I want to work with this customer and knock on anyone’s door. However, it is much easier if the customer representative you work with moves to another company, you begin working with the new companies by visiting him, communicating and using your personal network...” (P3).

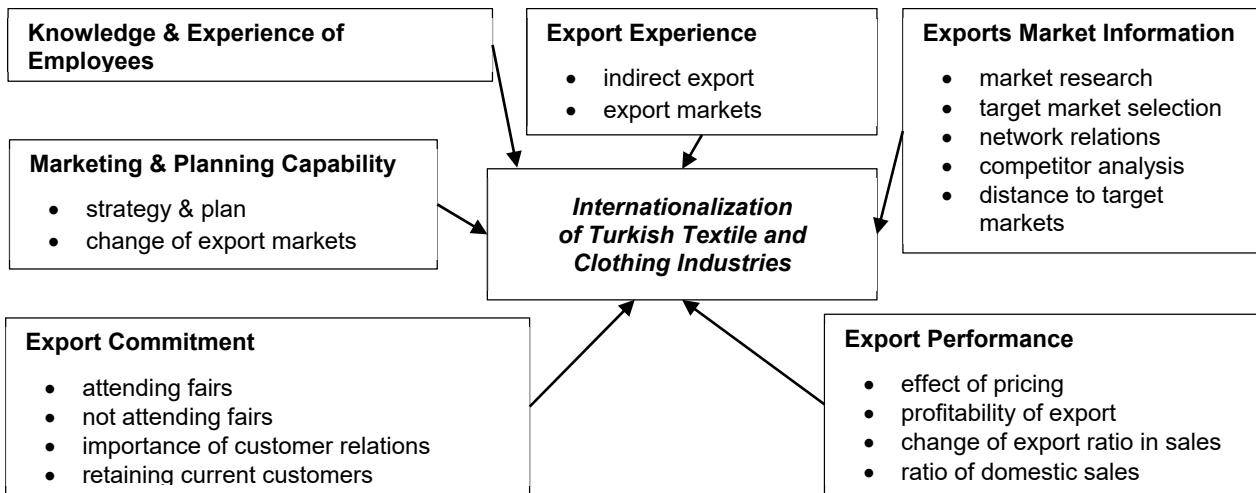


Figure 1. Model of the research.

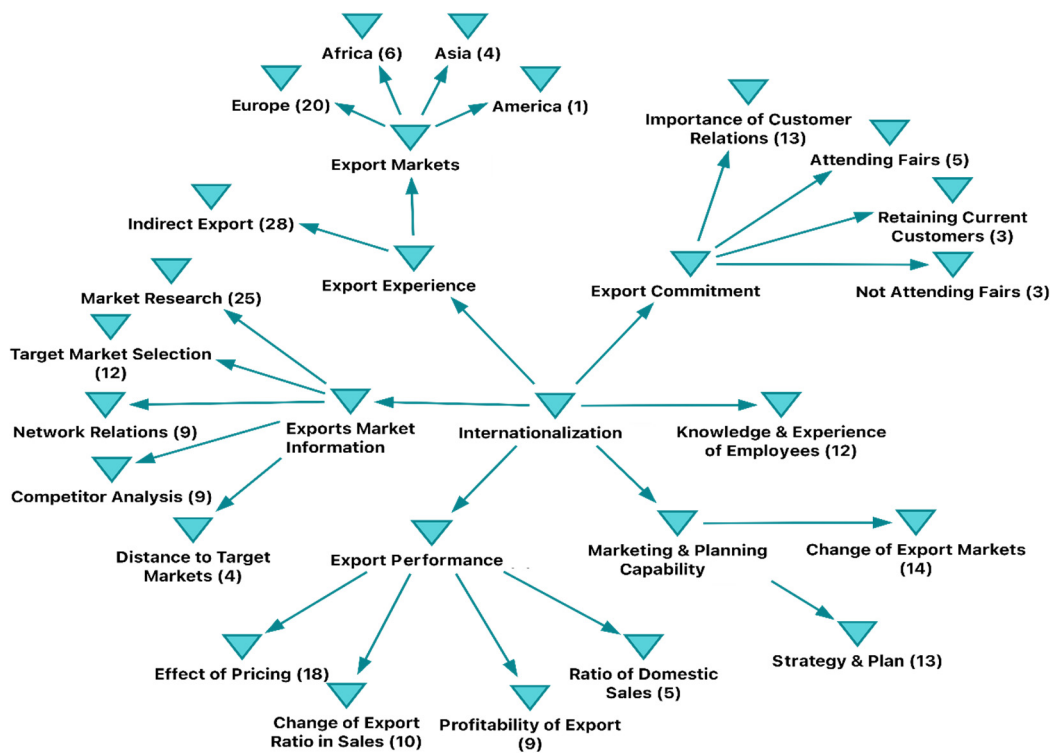


Figure 2. Detailed code map.

In market selection code, they stated that they do not prefer entering to the countries which do have developed banking system. Turkish textile and clothing industries have a substantially important exports to the Middle East and Turkic Republics and most of those exports are in the form of unregistered trade. The participants stated that they follow their domestic competitors rather than international competitors and emphasized that they are also followed by their competitors. The distance to target market is an important criterion when they are targeting new markets. The tremendous increase in the transport costs made both exporters and customers to focus more on near markets.

Export Experience

There are two sub-codes under export experience; indirect export and export markets. The indirect export is the most repeated code in our research. The Turkish textile and clothing companies are involved in indirect export either because of their low export skills or because of working with the Turkey offices of global brands.

“... we mainly work with agents especially for the Italian market...” (P5)

“... we have customers from 45 countries and we mainly work with agencies with most of those customers” (P11) quoted in “indirect export” code.

Related to “export market” code, most of the participants declared that they work with European countries. Europe is the most declared code in this theme. Europe is the largest export market of Turkey mainly because of proximity to Turkey and intensive network relations with the European countries.

Export Performance

Export performance theme has the “effect of pricing”, “profitability of export”, “change of export ratio in sales” codes. Most of the participants are complaining about the increase in the raw materials by the effect of covid-19 pandemic. The competition from Far East countries is forcing the Turkish textile and clothing manufacturers to reduce their profits. The quotes of P14 are as follows;

“... we have higher costs in zipper and we cannot compete with Chinese manufacturers but nowadays European and American companies do not want to work with China and we are trying to turn this into an opportunity...” (P14).

Export sales are more profitable compared to domestic sales according to the participants. During the periods that export ratio in the sales declines, the share of indirect export increases in their sales. Only exception is the beginning period of Covid 19 pandemic, as the exports of them were nearly stopped they stated.

The Figure 3 shows the most quoted codes in the internationalization theme. The bigger spot means “more quoted” and the numbers at the end shows the total quotation number. “Target market selection”, “effect of pricing” and “indirect export” are the mostly mentioned codes in the research. Those codes clearly indicate that the industries are searching for new markets because of the intensive competition and the Turkish textile and clothing industries are heavily dependent on indirect export.

The relation code map shows and helps to analyze the relations between the codes in Maxqda. The Figure 4 is the relation code map of the study. The thicker lines show a higher level of relation whereas thinner lines show weak relations. The strongest relation is between “change of export markets” and “effect of pricing”. The Turkish textile and clothing manufacturers are forced to change their export markets by the effect of pricing. There is also a strong relation between market research and indirect export; the manufacturers are researching for new markets to have more direct export rather than indirect export. “Effect of pricing” has strong relation with “ratio of domestic sales”. The Turkish manufacturers are forced to sell to the domestic market in order to cover general costs when they lose their customers by the effect of pricing. “Market research” has also strong relations with “competitor analysis” and “importance of customer relations”. The Turkish textile and clothing manufacturers carry competitors’ analysis

and market research at the same time and they mainly focus on domestic competitors.

CONCLUSIONS

The most repeated codes in our research are “indirect export” and “target market selection. Almost all of the participants declared that they make indirect exports through agencies. Participants expressed their belief in the necessity of conducting research on new export markets and the researches are made by the help of digital Technologies such as online fairs and B2B digital platforms. The importance of customer satisfaction was emphasized in ensuring export loyalty. In ensuring customer satisfaction, positive communication with the customer and solution-oriented customer relationships have come to the forefront. The participants emphasized the importance of the knowledge and experience of the employees of the company in the process of internationalization and it was stated that people with sectoral experience were tried to be employed. It is stated that the biggest effect of the change in the export markets in recent years is the inability to compete with the prices of competing countries. Turkish textile and clothing industries main competitor is China and they cannot compete with the prices of Chinese manufacturers. However, during and after the covid 19 pandemic, European manufacturers switched their orders from China to Turkey to receive smaller and faster shipments. All participants emphasized the importance of exports and stated that export sales are more profitable than domestic market sales. Despite the difficulties they experienced in the domestic market, they added that they manufacture to the domestic market during periods when exports weakened in order to cover their fixed costs.

It was stated by the participants that the main region of export is the European Union countries. Since the European Union is the closest developed market to Turkey, it is the region where textile and clothing companies carry out the most intensive export activities. This is covered by the Uppsala Theory, which stands out in the field of behavioural-based theories in explaining the internationalization processes theoretically [47]. The participants also declared that the internationalization mainly takes place by the help of the networks of the companies. Turkey has a location advantage exporting to Europe compared to other developing countries. Furthermore, Turkey has sent many workers to European countries mainly to Germany, Italy, France after the World War II and linkages from those people provides an important network for internationalization of the Turkish companies.

The Turkish textile and clothing industries are at cross-roads where strategic choices have to be made for the future of those industries.

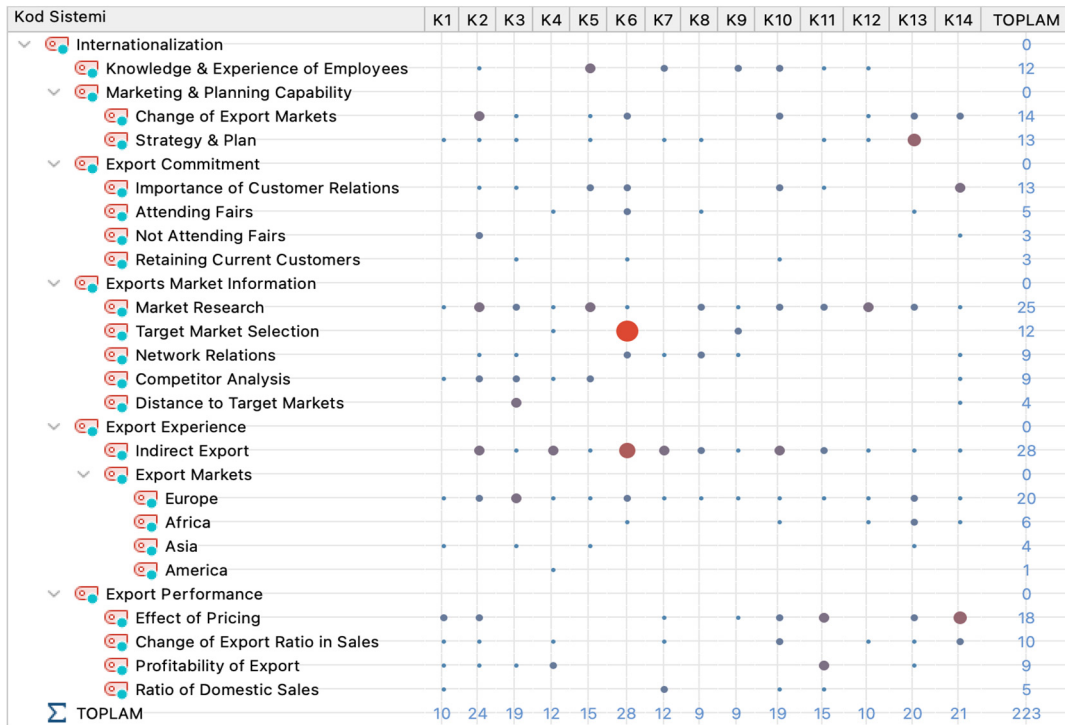


Figure 3. Most quoted codes map.

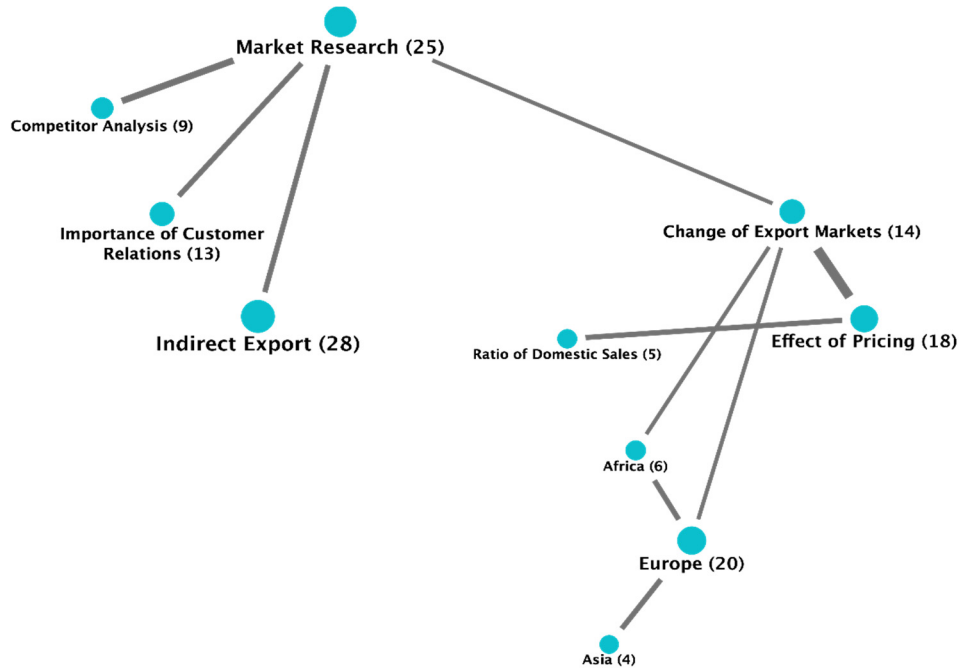


Figure 4. Relation code map.

The mix of strategies and policies will not be uniform across the country due to the radically different conditions. Turkish textile and clothing manufacturers are under intense competition from other developing countries especially from Far East competitors. Turkey has an advantage of proximity to major industrialised markets except Japan and Turkish textile and clothing manufacturers should examine opportunities to improve their distribution channels and other means to shorten lead times and services to customers. The circular fashion is gaining

importance and fashion consumers are more conscious about sustainability in the main export markets of the Turkey. Therefore, all the processes in the value chain are changing and Turkish textile and clothing industries should take necessary precautions to adopt those changes [48].

The technological developments accelerated the digital transformation of the textile and clothing industries like all the other industries. Therefore, a determined effort has to be made to improve

vocational education for digital transformation. Without significant improvements in digitalization of the industry, Turkey will not be able to accomplish repositioning which is crucial for the coming years. This is particularly relevant to support the emergence of middle-sized companies from the mass of fragmented manufacturers who currently exists. Without success in digitalization, a large gap is expected to open-up between the “big” private companies and “cottage” producers.

Discussion

As Turkish textile and clothing industries have a significant importance in the Turkish economy, mainly Turkish researchers had shown an interest in these industries. The researcher’s main point of interest is generally the competitiveness of the Turkish textile and clothing industries. One of the most recent research in this area is by Halife (2022) and the competitive advantages of textile industries in India, China, Vietnam, Turkey, and the United States during the 2010–2019 are compared by Balassa’s revealed comparative advantage approach. In this research, Turkey has less comparative advantages than Pakistan and Vietnam. Another study by Tokel et al., (2022) analyses the economic impact of Turkish cotton industry and lists the essential points for increasing the competitive advantage of Turkish cotton industry.

In the extant literature, the study of Esi (2017), which evaluates the development of Turkish textile and clothing industry is the most similar research to our study. However, in our study development of Turkish textile and clothing industries are criticised separately. The development of textile and clothing industries in the world is also evaluated and effect of the global trends to the Turkish textile and clothing industries are evaluated. In their study Uyanık and Celikel (2019), tried to point out the current situation of Turkish textile industry. Another article which was published by Onda (2005) outlines the importance of Turkish textile industry to the Turkish economy.

The other researches in this area are specifically targeting to evaluate a section or a geographic location of the Turkish textile and clothing industry. In the study of Yılmaz (2020), the historical development of Erbaa, location in the Black Sea region has been evaluated. In their study, Orhan and Ucar (2021) aimed to underline the importance of the Tarsus, Cukurova region and state the current conditions of that region. Pak and Atılğan (2021) analyzed the competitiveness of Denizli, by Porter’s diamond model and found its competitiveness high.

During industry 4.0 era, like digitalization, sustainability gained importance by the development of advanced technologies. The textile and clothing industries are referred as one of the most polluting industries in the world and those industries are blamed for their effect on environmental problems

such as climate change, water scarcity and chemical pollution. The value chain management is the most important part in sustainability. Turkish textile and clothing industries are important part of value chains are they are manufacturers of many international brands. Therefore, the Turkish textile and clothing industries should focus more on sustainability and assure that they get necessary measurements to develop a sustainable production. A research conducted by Kazancaoglu et al., (2022) tried to figure out the obstacles against the Turkish textile industry for establishing a circular economy. Their study found that unwillingness towards circular economy is the main problem of the Turkish textile industry.

In order to gain and sustain a competitive position, the Turkish textile and clothing industries should try to move upmarket which means developing their own collection with applying sophisticated marketing and merchandising techniques. The Turkish manufacturers should emphasize on concepts such as branding, design, greater flexibility, quick response, quality and service and their success will be dependent to the extent that they integrate all of those concepts which means a change to the consumer driven system.

Further Studies

Further studies should evaluate the history and developments of each sub-sectors of the Turkish textile and clothing industries in detail. The sub-sectors of the Turkish textile and clothing show significant differences amongst to their geographical location and therefore a further study based on geographical locations should be performed. Moreover, cross-cultural studies can be conducted for illuminating the possible differences between Turkish and foreign textile markets.

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