THE TURKISH WOOL INDUSTRY

DECEMBER 2024

International Wool Textile Organisation
Market Intelligence

IWTO
International Wool Textile Organisation

The Turkish Wool Industry

An Overview

Turkey joined the International Wool Textile Organisation in 1977. The Turkish National Committee is managed by the Turkish Textile Employers Association (TTEA).

This 47-year partnership was most recently celebrated in November 2024 during the IWTO's Wool Round Table in Istanbul.

Ahmet Topbas, President of the TTEA, opened the event alongside IWTO President Klaus Steger and Sansal Cetin, TTEA's representative to IWTO.

Speakers came from leading Turkish companies, including Buğra Çelik of Nevodis, Engin Saribüyük of Yünsa, Fatma Atay of Altıyıldız, Ronnie Danon of G. Modiano, Gülin Girişmen of Istanbul Fashion Academy IMA, Kemal Erdem of Kaplanlar Textil, Prof. Gürsel Dellal of Ankara University and Erhan Ors of Han Carpet.

MP Zeynep Yıldız joined the event remotely to showcase a project to resurrect the Ankara goat population and reintroduce the traditional Angora fabric to be used in clothing.

Turkey is a key player in wool yarn manufacturing, with major production hubs in Bursa, Gaziantep, and Uşak.

TURKISH WOOL

Production

In 2023, Turkey produced approximately 43,000 tons of wool, ranking 4th globally in wool production. Turkey ranks 7th in the world for sheep numbers, with a population of approximately 43.4 million sheep.

Global Share

Turkey holds a 4.1% share of the world's total wool production.

Regional Focus

Major wool production regions include Central Anatolia, Eastern Anatolia, and the Aegean region.

Types of Wool

- Merino Wool: Turkey is known for producing high-quality Merino wool, noted for its fine fibres and softness.
- Domestic Breeds: Local breeds such as *Kıvırcık, Karayaka*, and *Akkaraman* are significant contributors to Turkey's wool production, each offering distinct characteristics suited for various textile applications.

Carpets and Rugs

Turkish wool is renowned for its use in handmade carpets and rugs, which are significant export products and have a deep cultural heritage. The art of carpet weaving is an integral part of Turkish culture, reflecting centuries of tradition and craftsmanship. These woollen carpets and rugs are not only functional items but also artistic expressions, often featuring intricate designs and patterns unique to different regions of Turkey.

Angora Goats

The Angora goat is indigenous to Turkey and forms another vital part of the country's cultural and economic fabric. The wool from Angora goats, known as mohair, is highly prized for its silky texture and lustrous sheen. This luxurious fibre has been used for centuries in traditional Turkish textiles, contributing to the country's reputation for high-quality wool products. The breeding and raising of Angora goats are deeply embedded in Turkish agricultural practices, particularly in the Ankara region, from which the goats derive their name.

TURKISH INDUSTRY

The Turkish wool industry is a significant part of the country's textile sector, contributing to the production of high-quality wool-based products like carpets, clothing (e.g., suits, sweaters, and socks), and other luxury textiles. Wool is also used in specialized applications such as firefighting gear and insulation.

The balance of trade in wool highlights Turkey's focus on adding value through textile production rather than exporting raw materials.

Turkey is a key player in wool yarn manufacturing, with major production hubs in Bursa, Gaziantep, and Uşak. The industry includes approximately 110 companies employing over 8,000 people in wool yarn production. In recent years, Turkey has maintained a robust market for wool despite challenges such as increased production costs and inflation.

Market Trends

Turkey's wool industry is a significant part of its textile and export economy. While exact figures for 2024 are still being consolidated, recent trends show

Turkey **imports approximately 10,000 to 11,000 metric tons of raw wool annually**, mainly from Australia, New Zealand, and South Africa, to meet the demands of its textile industry.

Processed wool and woollen textiles constitute a significant export segment. Turkey's **wool and wool product exports** have seen growth in the past few years, especially to European countries, with an export value exceeding **$700 million annually** for wool-based textile products.

Turkish wool contributes to both domestic and export markets, as part of the whole textile and apparel industry. The textile and apparel industry is one of the leading export industries of Turkey with **a total export volume of $ 33billlion in 2023**, creating a trade surplus of $20 billion.

However, the sector faced a 5% decline in 2024 due to market contractions and high production costs but expects recovery in 2025.

Consumption Trends

Turkey's worsted fabric consumption increased from 9.35 million meters in 2020 to 9.64 million meters in 2022.
Source: World Knowledge Information, Global Worsted Fabric Market Report 2022

Turkey has emerged as a key nearshoring hub for Europe, as is Latin America for the US

Source: The State of Fashion 2025 The Business of Fashion/McKinsey https://www.mckinsey.com/industries/retail/our-insights/state-of-fashion#/

Advantages in sourcing wool textiles from Turkey

- Shorter delivery times for European-based brands
- Supply Chain Traceability
- High sustainability criteria available from Turkish manufacturing partners
- The *Turkey REACH regulation* applies to both producers and importers of substances and goods in Turkey, offering a high standard in chemical standards (*Turkish KKDIK regulation)*

About the IWTO and the Market Intelligence Committee

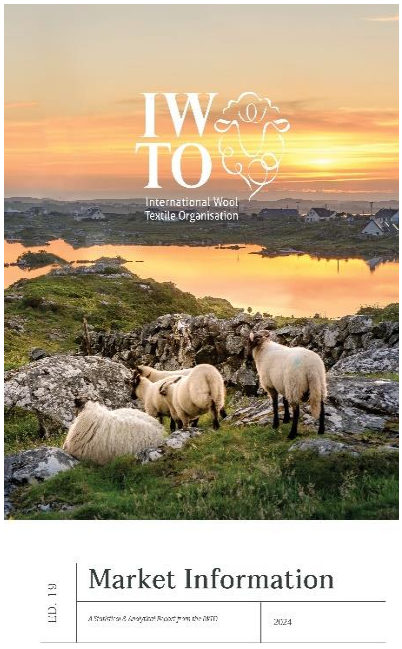
The International Wool Textile Organisation represents the collected interests of the global wool trade. With 38 members in 27 countries, IWTO's membership encompasses all stages of the wool textile pipeline. From farm to retail, through research, education, and knowledge sharing, IWTO ensures a sustainable future for wool.

IWTO's Market Intelligence Committee, chaired by Isak Staats of BKB Ltd., collects and analyses wool textile trade data, providing statistics and forecasts for wool and wool-related industries. Find the latest edition of the IWTO Market Information on iwto.org.

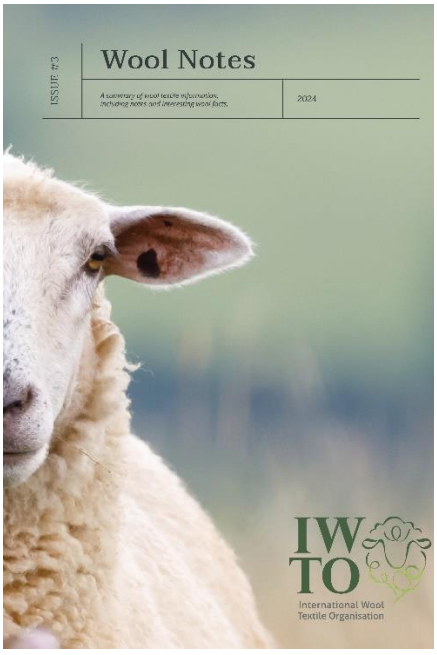
Sources

- *IWTO Market Information Edition 19*
- *Kohan Textile Journal*
- *World Knowledge Information, Global Worsted Fabric Market Report 2022*
- *Textilegence Dergisi ve Dijital Platform*
- *The State of Fashion 2025 The Business of Fashion/McKinsey*
- *The Turkish Textile Employers' Association*
- *Turkish Statistics Agency*

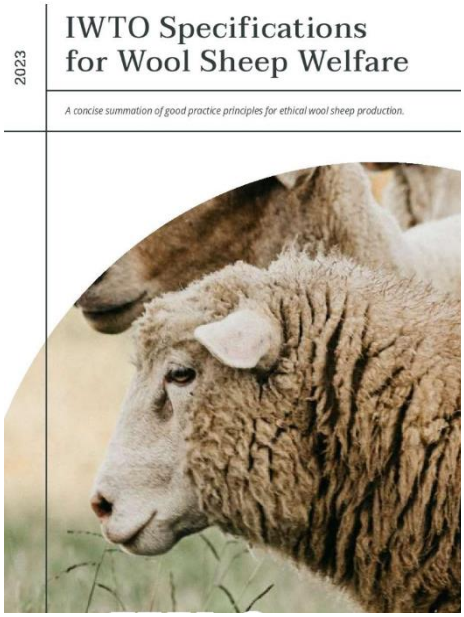
Discover the world of wool on IWTO.org



IWTO Market Information Edition 19 (2024)



Wool Notes



Wool Sheep Welfare Specifications