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Report Name: Cotton and Products Update

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Report Highlights:

Turkiye's cotton production in marketing year (MY) 2023/24 is forecast to decrease to 695,000 metric tons (MT; 3.19 million bales), since farmers chose to plant less cotton in response to decreasing cotton prices and rising input costs. Cotton farmers were unable to make adequate profits in MY 2022/23 to cover rising input costs. In MY 2023/24, Turkish cotton consumption is expected to increase to 1.55 million metric tons (MMT; 7.12 million bales). Cotton imports in MY 2023/24 are forecast to be 750,000 MT (3.45 million bales), with the United States maintaining its market share as the leading supplier. In October 2023, the Government of Turkiye (GoT) increased the customs tariffs for imported yarn and fabric, as well as imported ready-to-wear garments and home textiles.

I. Production

The MY 2023/24 cotton production forecast is adjusted downward to 695,000 metric tons (MT) (3.19 million bales) compared to the [earlier report](#) this year, on 440,000 ha. This estimate is down by 380,000 MT or 35 percent compared to the previous MY. Although the planting area forecast has not changed since the earlier report this year, yields have been lower than expected, especially in the southeastern part of Türkiye but also in other regions. There have been several reasons for the decrease in yields for MY 2023/24. For example, heavy rains just before and during planting season caused planting of cotton to be delayed (and sometimes planting was done in fields which had more moisture than was needed) which caused lower yields. Also connected, because of increased humidity during planting caused by excessive rain, there was an increase in pests in some regions. Finally, unusually high daytime temperatures in August and September compared to cooler nights stressed the plants.

In some of the cotton growing regions there were challenges with irrigation, poor timing or decreased water use and frequency due to scarcity of water. Furthermore, market sources report that labor costs are increasing, and some farmers have refrained from using labor to trim the plants, which would increase the yield.

The main reason for the decrease in the planting area, hence the production amount, when compared to MY 2022/23 is decreased cotton prices. Domestic cotton prices, like in global markets, have decreased over the past year, causing farmers to move away from cotton for MY 2023/24. While the price of cotton is low, input costs continue to increase, although at a slower pace than the previous MY. Details of the matter may be read in the [earlier report](#) this year. Many domestic farm/agriculture related organizations claim that the subsidies given for production of cotton should be increased to maintain cotton production in the country.

The direct subsidy given to production of cotton is declared as 1.60 Turkish Lira (TL)/kg (about 5.5 cents/kg with November exchange rates) of seed cotton produced. The National Cotton Council of Türkiye ([NCCT](#)) has declared in the news that the direct subsidies need to be a minimum of 4.60 TL/kg (16 cents/kg) for seed cotton produced in order for cotton farmers to continue production, otherwise NCCT expects cotton production in Türkiye to continue declining in the next MY.¹

The Turkish Ministry of Agriculture and Forestry (MinAF) reports that in MY 2022/23 (harvested in fall 2022), 13,859 MT of organic seed cotton was harvested on 3,213 ha of land in five different provinces. This is approximately 5,500 MT (about 25,000 bales) of organic cotton fiber in MY 2022/23.

The production of cotton under the Better Cotton Initiative (BCI) is estimated at about 120,000 MT (about 551,000 bales) for MY 2023/24, according to the [Better Cotton Practices Association of Türkiye](#) (IPUD). BCI production is increasingly important as the Turkish textile and apparel industry seeks to produce sustainable and traceable products to meet the demands of high-end consumers in Europe and the United States. IPUD reports that they have moved into the [second phase of their training project](#), in collaboration with The European Bank for Reconstruction and Development for both agricultural engineers (training the trainers) and farmers.

¹ News in Turkish <https://www.tarimdunyasi.net/2023/10/10/pamukta-yasanan-krize-cozum-araniyor/>

II. Consumption

The MY 2023/24 cotton consumption forecast is 1.55 million metric tons (MMT) (7.12 million bales), an increase of 100,000 MT (7 percent) compared to the previous MY. However, the domestic cotton consumption forecast is adjusted downward 100,000 MT from the earlier report this year since the market sources report that yarn factories are still over stocked with cotton from previous MY and they are working under capacity; some cotton spinners have even been working half capacity.

Consumption of cotton in MY 2023/24 will continue to be below its full potential because of poor macro-economic conditions in Türkiye that affect the purchasing power of the middle and lower classes. About 50 percent of the garment production in Türkiye is done for the domestic market. Likewise, the Ukrainian market is still reeling from the effects of Russian aggression, which has significantly decreased demand for ready-to-wear apparel from Ukraine. Additionally, the purchasing sentiments of European consumers has been affected by the war, and they are unwilling to spend as much on discretionary purchases. This, in turn, affects Turkish garment and apparel production, since Europe and the U.S. are Türkiye's largest markets for this industry. The armed conflict in the Middle East will also affect the sentiment of Turkish and European customers. Although not considered a large market for Turkish ready-to-wear apparel industry, exports to Israel might also shrink.

Industry leaders indicate that cotton spinning facilities have been working at about 40 to 60 percent capacity in the last year or so. The reason is twofold: first, the demand for apparel/garments has declined, hence the demand for yarn and fabric; second, the industry indicates that some cotton yarn is being imported under the production costs of similar yarn in Türkiye. As of November 2023, in reaction to increased yarn and fabric imports from cheaper producing countries, the GoT increased customs tariffs for these items. Details of the increase can be read in the [policy section of this report](#).

On the other hand, Turkish ready-to-wear-garment producers expect to get more orders from European and American brands for their winter 2025 collections starting the second half of 2024. Most sources in the industry hope that the second half of 2024 will see growth for Turkish garment and apparel producers as the European and U.S. economies may start to give signs of improvements in the perception of the consumers in those countries. Furthermore, the increases in the customs tariffs for imported yarn and fabric should help increase the domestic yarn and fabric production in Türkiye, in the short run.

The Turkish Clothing Manufacturers Association ([TCMA](#)) indicated in a news excerpt that they forecast the ready-to-wear garment production industry in Türkiye will lose 200,000 employees by the end of 2023. The president of the association mentioned that they expect that the industry will continue to see decreased demand in the first half of 2024, too. He indicated that the minimum wage in Türkiye increased by 100 percent (in TL) in the last year, along with other cost increases. TCMA estimates that production costs in Türkiye were already 10 to 15 percent higher than competitor garment production countries, but as of fall 2023 the difference rose to about 40 percent. This caused many large international buying groups to leave Türkiye or decrease purchasing from Türkiye. The industry has asked the GoT not to raise the minimum wages more than one time per year and that the minimum wage raise not to be more than the declared inflation rates. Furthermore, TCMA asked the GoT to provide cheap credits for the transformation of the industry.²

² News in Turkish <https://www.ekonomigazetesi.com/sector-haberleri/kuresel-moda-devleri-turkiyeden-cekiliyor-21047/>

Capacity utilization rates (CUR) in the textile industry had hit their lowest level since 2020 at the start of COVID-19 lockdowns and were at 66 percent in the immediate aftermath of the February 2023 earthquakes, according to the Central Bank of Türkiye (CBT). The CUR for the textile industry is at 71 percent as of October 2023, about the same compared to same period last year and down 10 percent compared to October 2021. Similarly, CUR in the ready-to-wear apparel industry fell to its lowest level in March 2023, to 76 percent, and it is still at 76 percent as of October 2023. The October 2023 CUR for ready-wear apparel industry is down 5 percent from the same period last year.

III. Trade

Cotton Imports

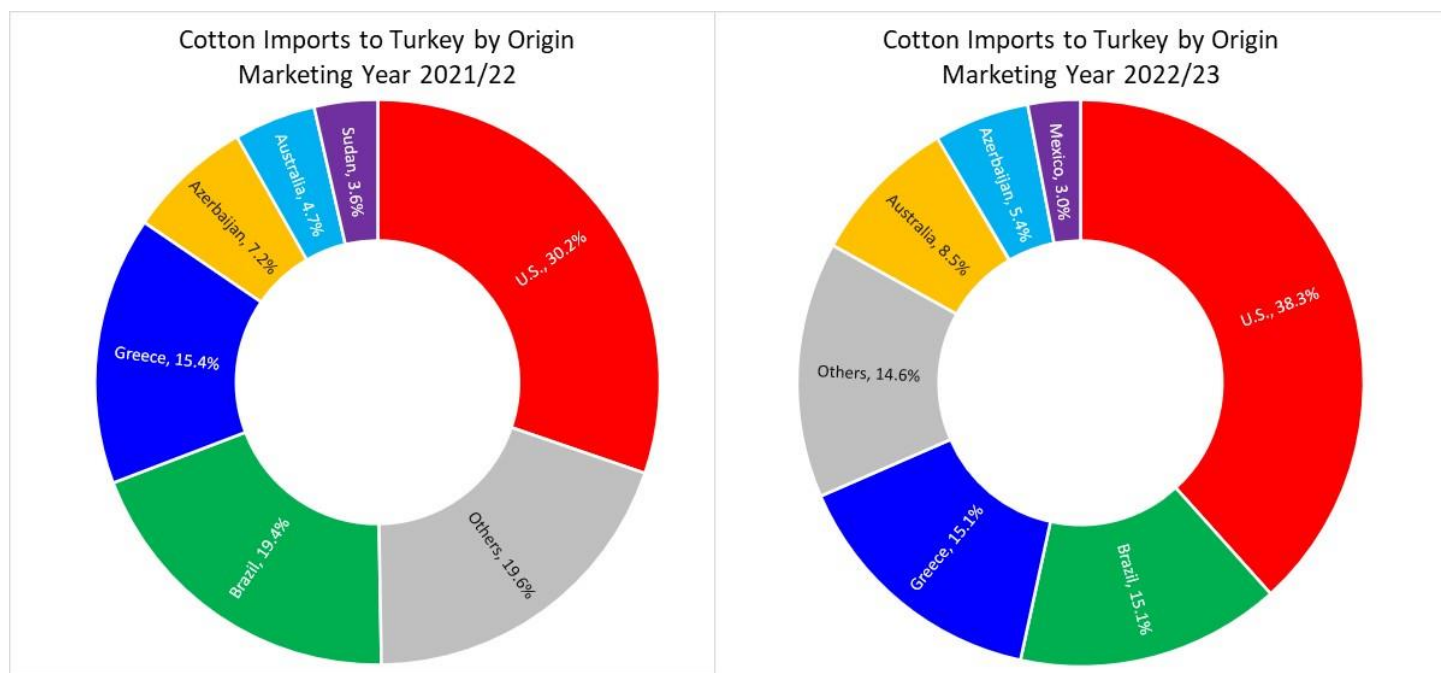
The MY 2023/24 cotton import forecast is 750,000 MT (3.45 million bales), a bit lower than Post's [August 2023 forecast](#). The forecasted decrease of cotton imports is due to high carry-over stocks of cotton in Türkiye from last MY and low cotton demand from yarn producers.

During the first two months of MY 2023/24 (August-September 2023) imports of cotton to Türkiye were 124,391 MT (571 thousand bales) which is 30 percent less than the same period of the previous MY. This large decrease of demand for imported cotton was caused by the decrease of ready-wear-apparel orders to Türkiye and the currently low domestic demand for apparel/garments.

In MY 2022/23, Türkiye's cotton imports reached about 912,000 MT (4.19 million bales), which is 24 percent lower than the previous year. This year-over-year decrease was mainly due to lower demand for ready-to-wear apparel in domestic market and less incoming orders for production of apparel/garments from Europe and the United States. For the marketing year 2022/23, the United States was the leading source of imported cotton, accounting for 38 percent (349,238 MT). The other leading suppliers were Brazil (15 percent), Greece (15 percent), Australia (9 percent), Azerbaijan (5 percent) and Mexico (3 percent). Market share of U.S. cotton was about 8 percent higher than the last MY, although the volume of cotton imports were less than in MY 2021/22. The United States is expected to remain the top supplier of cotton to Türkiye for the near future amid continued competition.

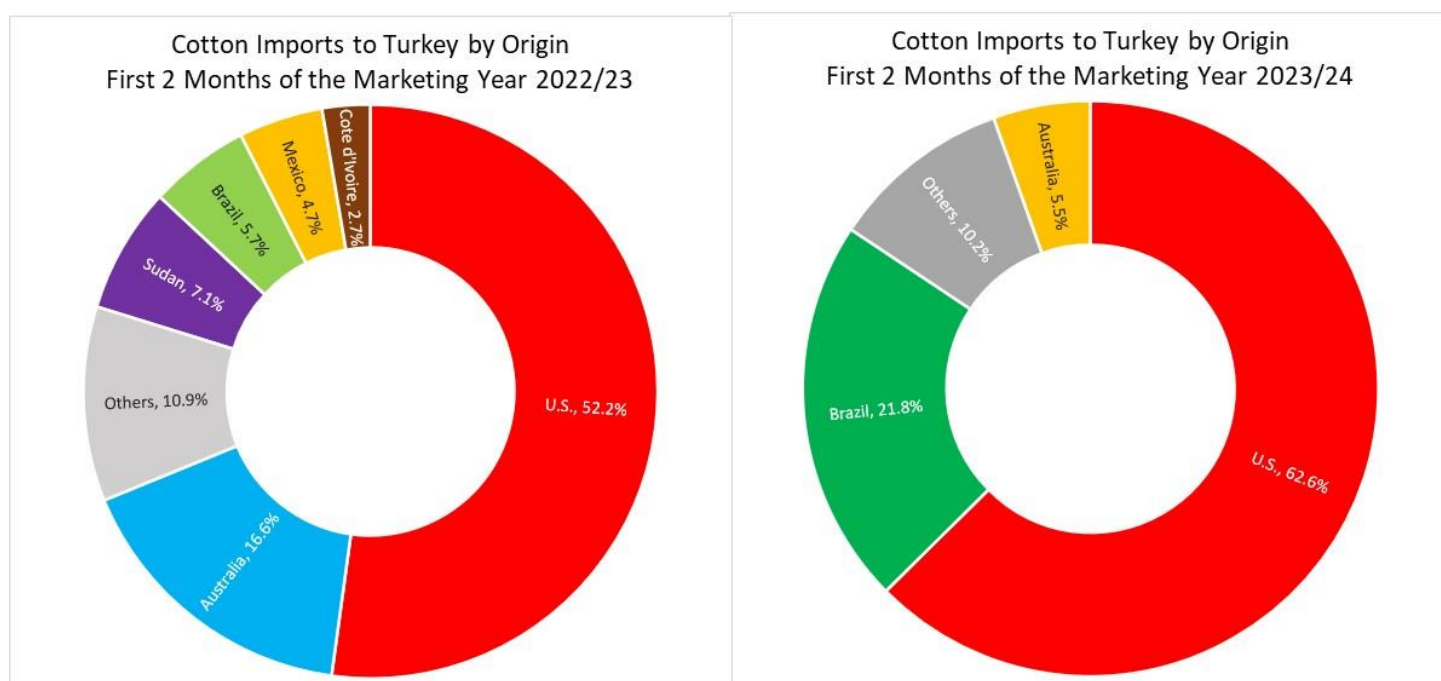
The demand for ready-to-wear apparel has decreased considerably from Europe and the U.S., partly due to the perception of a bad economy in these markets worrying consumers, and partly because of the relatively high value of the Turkish Lira. Turkish producers not being able to match prices of some other garment/apparel producer countries due to high value of TL hindered incoming ready-to-wear garment and apparel orders that could have been placed in Türkiye, but instead were placed in Far East destinations with cheaper production prices.

Chart 1: Cotton imports to Turkiye from various sources (previous MY)



Source: Trade Data Monitor, LLC

Chart 2: Cotton imports to Turkiye from various sources (current MY)



Source: Trade Data Monitor, LLC

Cotton Exports

Cotton exports from Türkiye in MY 2023/24 are forecast at 200,000 MT (~ 920,000 bales), 7 percent higher than the previous MY. The exports for the first two months of the MY 2023/24 were realized as 56,627 MT (~ 260 thousand bales).

In MY 2022/23 Türkiye exported 187,346 MT (860,473 bales). 148,215 MT of the exported cotton were for textile use. Leading export destinations for textile cotton were Pakistan, Bangladesh, China, Vietnam, and Iran. Exporting this much cotton is extraordinary for Türkiye, as normally most Turkish cotton is used in Turkish yarn production industry. Low usage in the domestic industry in MY 2022/23 led to increased exports. Market contacts indicate that some of Türkiye's cotton exports are organic, but conventional cotton dominated in MY 2022/23 and is expected to remain so for MY 2023/24, too.

About 39,000 MT of Türkiye's total cotton exports in MY 2022/23 were hydrophilic cotton for medical and cosmetic use; this amount is included in the total export number in the production, supply, and distribution table. Top buyers of Turkish hydrophilic cotton are EU countries and Russia.

Cotton Yarn Trade

Türkiye's cotton yarn imports were 176,008 MT for the first three quarters of calendar year (CY) 2023, approximately 16 percent lower than the same period of the previous year. Major suppliers for cotton yarn were Uzbekistan, India, and Turkmenistan. Due to decreased apparel/garment demand in Türkiye's target markets, the demand for cotton yarn has also decreased. Reportedly, the cost of cotton yarn production in yarn supplying countries has been cheaper than Türkiye in CY 2023 because of lower labor and energy costs.

Cotton yarn exports during the first nine months of CY 2023 fell by 25 percent year-on-year to about 82,000 MT. Demand for cotton yarn continued to decline in Türkiye's target markets (like the EU) because the demand for ready-to-wear apparel and garments also declined in major markets like Europe and the USA. Moreover, as previously mentioned, the price of Turkish-made cotton yarn has been relatively high due to high costs of production. Many importing countries diverted some of their cotton yarn purchases to cheaper supplying countries. Nevertheless, even with its higher costs, many had to continue purchasing higher quality yarn from Türkiye. The major export destinations for Turkish yarn in first three quarters of CY 2023 are Portugal, Italy, Egypt, Morocco, Germany and Spain.

Cotton Fabric Trade

For the first three quarters of CY 2023, cotton fabric imports declined to 170 million square meters (m²), down about 28 percent from the same time last year. Leading cotton fabric suppliers to Türkiye were Pakistan (70 million m²), Turkmenistan (32 million m²), China (25 million m²), and Egypt (18 million m²).

During the same nine-month period, cotton fabric exports totaled about 275 million m², down about 17 percent from the same period a year ago. Major destinations for Turkish cotton fabric were Italy (45 million m²), Egypt (20 million m²), Spain (19 million m²), Tunisia (18 million m²), Morocco (17 million m²) and Georgia (11 million m²).

IV. Policy

Türkiye's textile and apparel sector are a major part of the country's economy, accounting for approximately 15 percent of all exports. The sector depends on domestic and imported cotton to produce finished products, most of which are exported to destinations around the globe. As previously mentioned, Türkiye's economic troubles and a global economic slowdown cut into the industry's ability to receive orders. Furthermore, the overvaluation of the Turkish lira against major currencies, despite high levels of inflation, affects the competitiveness of the textile and ready-to-wear-apparel industry, as they must cover input costs in TL. However, despite these all too familiar headwinds, the sector is expected to overcome these challenges and remain an integral part of the country's economy for years to come.

In October 2023 the GoT levied additional customs tariffs (CT) on hundreds of textile and ready-to-wear apparel items, including all man-made and natural-fiber yarns, and woven and knitted fabric made of man-made and/or natural fibers (except from countries that Türkiye has free trade agreements (FTA) with such as all EU, EFTA and [19 other countries](#)). For yarns, the CT rates are now between 10 and 13 percent; for fabrics the CT rates are now 27 percent. For ready-to-wear-garments/apparel and home textiles and garnishing, the CT was increased to 39 and 29 percent, respectively. For FTA countries the CT rates are 0 percent. Previously, Uzbekistan and Pakistan were also exempt from the CT, however they are now included, which is important because these countries are where Türkiye imports a lot of yarn and fabric from. These new CT will be valid starting November 15, 2023, according to the Presidential Decision Decree (PDD No:7709 published on November 16, 2023, see it attached to the report). The tariff rates for textile raw materials such yarn and fabric were between 5 to 8 percent previously. The customs tariff rate for cotton is still zero percent from all origins.

Turkish yarn and fabric producers (textile manufacturers) were for quite a time lobbying for these protectionist customs tariff increases. Market sources indicate that [the February 2023 earthquakes of Türkiye](#) also encouraged the GoT to increase the CT on textile products, since the earthquake zone cities are major textile producers. There have been mixed reactions from Turkish industry, though. Although yarn and fabric producers are happy with the decision, since it was getting harder for them to compete with imported yarn and fabric, ready-to-wear garment and apparel producers are unhappy about the increase of CT on textile items since they will have to source the raw material at higher costs. It was already difficult for Turkish clothing producers to compete with other, cheaper garment and apparel producing countries. Turkish manufacturers were already losing orders to countries who had cheaper costs, as mentioned in the [consumption](#) chapter of this report.

On May 25, 2021, the Turkish Ministry of Trade published a [communiqué](#) making the registration of cotton exports mandatory. The intention behind this registration requirement is to discourage organic cotton exports and promote the domestic use of organic cotton to make higher-valued textile and apparel products for eventual export. The Turkish ready-to-wear apparel industry continues to face challenges in sourcing organic cotton/yarn/fabric locally, at a time when orders from Europe for garments made from organic cotton is increasing.

With growing awareness about the effects of climate change and the need for greater sustainability, there are changes afoot across the Turkish cotton value chain. For instance, farmers from the different cotton-

growing regions across Turkiye are reportedly interested in having the government ease its stance on biotechnology and allowing growers to access biotech cotton seeds. Despite this interest, however, the government is unlikely to relax its strict rules against planting of genetically engineered cotton for the foreseeable future. In addition to improved cotton seed, farmers are calling on the government to start providing low-cost, long-term credit to farmers who are interested in adopting precision irrigation systems to save on scarce water resources. Most cotton in Turkiye is watered using furrow irrigation, which is less efficient than newer precision irrigation systems.

Besides improvements to the way cotton is produced in Turkiye, contacts report an uptick in textile recycling to make yarn. While the recycled yarn is reportedly lower quality compared to virgin yarn, this appears to be a step in the right direction for lowering the textile sector's carbon footprint.

V. Production, Supply and Distribution Tables

Table 1: Production, Supply and Distribution, Bales
(thousands of hectares, thousands of 480lb. bales)

Cotton	2021/2022		2022/2023		2023/2024	
Market Begin Year	August 2021		August 2022		August 2023	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	450	450	555	555	440	440
Beginning Stocks	1,758	2,422	1,915	2,556	2,629	4,149
Production	3,800	3,789	4,900	4,937	3,500	3,192
Imports	5,524	5,525	4,189	4,189	4,300	3,445
Total Supply	11,082	11,737	11,004	11,682	10,429	10,786
Exports	567	570	860	859	650	919
Domestic Use	8,600	8,612	7,500	6,660	7,900	7,119
Loss	0	0	15	14	0	0
Domestic Use & Loss	8,600	8,612	7,515	6,674	7,900	7,119
Ending Stocks	1,915	2,556	2,629	4,149	1,879	2,748
Total Distribution	11,082	11,737	11,004	11,682	10,429	10,786
Stock to use %	20.89	27.83	31.45	55.19	21.98	34.19
Yield (kg/HA)	1,839	1,833	1,922	1,937	1,732	1,580

Source: USDA forecasts, FAS Istanbul forecasts.

Table 2: Production, Supply and Distribution, Metric Tons
(thousands of hectares, thousands of MT)

Cotton	2021/2022		2022/2023		2023/2024	
Market Begin Year	August 2021		August 2022		August 2023	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	450	450	555	555	440	440
Beginning Stocks	383	527	417	556	572	903
Production	827	825	1,067	1,075	762	695
Imports	1,203	1,203	912	912	936	750
Total Supply	2,413	2,555	2,396	2,543	2,271	2,348
Exports	123	124	187	187	142	200
Domestic Use	1,872	1,875	1,633	1,450	1,720	1,550
Loss	0	0	3	3	0	0
Domestic Use & Loss	1,872	1,875	1,636	1,453	1,720	1,550
Ending Stocks	417	556	572	903	409	598
Total Distribution	2,413	2,555	2,396	2,543	2,271	2,348
Stock to use %	20.89	27.83	31.45	55.19	21.98	34.19
Yield (kg/HA)	1,839	1,833	1,922	1,937	1,793	1,580

Source: USDA forecasts, FAS Istanbul forecasts

VI. Trade Matrices

a. Cotton Trade Matrices

Table 3: Cotton Imports to Türkiye (HS Code: 5201), 480lb. Bales

TURKEY					
COTTON					
Import Trade Matrix					
Units:	Bales				
Time Period	Aug/July		Aug/July	Aug/Sept (2 months)	
Imports for:	MY 2021/22		MY 2022/23		MY 2023/24
U.S.	1,669,078	U.S.	1,604,037	U.S.	348,831
Others		Others		Others	
Brazil	1,071,442	Brazil	632,323	Brazil	121,259
Greece	848,155	Greece	631,895	Australia	30,502
Azerbaijan	396,428	Australia	357,847	Sudan	13,976
Australia	258,212	Azerbaijan	226,585	Mexico	13,641
Sudan	198,843	Mexico	124,864	Azerbaijan	9,365
Tajikistan	159,752	Kazakhstan	100,283	Greece	7,317
Turkmenistan	151,012	Sudan	97,490	Cameroon	5,985
Mexico	117,456	Syria	97,183	Tajikistan	4,524
Spain	90,941	Tajikistan	72,762	Argentina	4,368
Mali	74,443	Cameroon	33,584	Syria	1,966
Total of others	3,366,684	Total of others	2,374,815	Total of others	212,902
Others not listed	488,136	Others not listed	209,747	Others not listed	9,590
GRAND TOTAL	5,523,898	GRAND TOTAL	4,188,599	GRAND TOTAL	571,323

Source: Trade Data Monitor, LLC

Table 4: Cotton Imports to Turkiye (HS Code: 5201), metric tons (MT)

TURKEY					
COTTON					
Import Trade Matrix					
Units:	Metric Tons				
Time Period	Aug/July		Aug/July	Aug/Sept (2 months)	
Imports for:	MY 2021/22		MY 2022/23		MY 2023/24
U.S.	363,399	U.S.	349,238	U.S.	75,949
Others		Others		Others	
Brazil	233,279	Brazil	137,672	Brazil	26,401
Greece	184,664	Greece	137,579	Australia	6,641
Azerbaijan	86,312	Australia	77,912	Sudan	3,043
Australia	56,219	Azerbaijan	49,333	Mexico	2,970
Sudan	43,293	Mexico	27,186	Azerbaijan	2,039
Tajikistan	34,782	Kazakhstan	21,834	Greece	1,593
Turkmenistan	32,879	Sudan	21,226	Cameroon	1,303
Mexico	25,573	Syria	21,159	Tajikistan	985
Spain	19,800	Tajikistan	15,842	Argentina	951
Mali	16,208	Cameroon	7,312	Syria	428
Total of others	733,009	Total of others	517,055	Total of others	46,354
Others not listed	106,279	Others not listed	45,667	Others not listed	2,088
GRAND TOTAL	1,202,687	GRAND TOTAL	911,960	GRAND TOTAL	124,391

Source: Trade Data Monitor, LLC

b. Cotton Yarn Trade Matrices

Table 5: Cotton Yarn Imports to Turkiye, metric tons (MT)

TURKEY	COTTON YARN		
Import Trade Matrix	Units: Metric Ton		
Time Period	Jan-Dec	Jan-Dec	Jan-Sept.
Import from:	CY 2021	CY 2022	CY 2023
U.S.	0	3	9
Others			
Uzbekistan	125,607	141,371	89,080
India	19,890	35,555	38,345
Turkmenistan	58,968	40,879	31,055
Azerbaijan	15,134	6,763	6,765
Pakistan	5,815	9,313	5,916
Tajikistan	3,506	3,453	2,169
Egypt	2,267	3,364	1,587
Italy	278	546	276
China	883	1,508	210
Germany	139	157	88
Total of others	232,487	242,909	175,491
Others not listed	1,900	3,406	508
GRAND TOTAL	234,387	246,318	176,008

Source: Trade Data Monitor, LLC

Table 6: Cotton Yarn Exports from Turkiye, metric tons (MT)

TURKEY	COTTON YARN		
Export Trade Matrix	Units: Metric Ton		
Time Period	Jan-Dec	Jan-Dec	Jan-Sept.
Export to:	CY 2021	CY 2022	CY 2023
U.S.	1,731	1,615	662
Others			
Portugal	44,670	27,419	13,625
Italy	32,538	23,336	13,249
Egypt	21,665	18,233	10,387
Morocco	2,545	11,359	7,197
Germany	8,036	6,699	3,940
Spain	6,819	4,537	3,691
Russia	311	2,486	3,666
Bulgaria	5,921	4,123	3,166
Greece	5,232	4,197	3,133
France	3,335	3,738	2313
Total of others	131,072	106,127	64,367
Others not listed	65,408	28,044	17,025
GRAND TOTAL	198,211	135,786	82,054

Source: Trade Data Monitor, LLC

c. Cotton Fabric Trade Matrices

Table 7: Cotton Fabric Imports to Turkiye, thousands of square meters (m²)

TURKEY	COTTON FABRIC		
Import Trade Matrix	Units: 1,000 m2		
Time Period	Jan-Dec	Jan-Dec	Jan-Sept.
Import from:	CY 2021	CY 2022	CY 2023
U.S.	57	161	21
Others			
Pakistan	87,994	88,546	69,849
Turkmenistan	73,476	61,299	32,171
China	55,167	59,577	25,178
Egypt	27,452	28,047	17,501
Italy	10,797	12,239	5,635
India	9,560	9,027	4,779
Germany	3,290	4,388	2,524
Malaysia	2,718	1,928	1,882
Spain	3,391	4,153	1,722
Greece	89	13	1,521
Total of others	273,935	269,218	162,760
Others not listed	15,376	20,858	6,777
GRAND TOTAL	289,368	290,237	169,558

Source: Trade Data Monitor, LLC

Table 8: Cotton Fabric Exports from Turkiye, thousands of Square Meters (m²)

TURKEY	COTTON FABRIC		
Export Trade Matrix	Units: 1,000 m2		
Time Period	Jan-Dec	Jan-Dec	Jan-Sept.
Export to:	CY 2021	CY 2022	CY 2023
U.S.	4,297	8,066	4,189
Others			
Italy	104,011	85,468	45,220
Egypt	28,391	21,896	19,740
Spain	29,975	26,054	18,846
Tunisia	26,983	31,547	18,264
Morocco	24,829	27,408	16,512
Georgia	13,606	13,102	11,157
Bulgaria	14,254	8,870	9,263
Pakistan	46,470	11,126	9,182
Belgium	33,360	20,512	8,726
Portugal	23,934	15,685	7,287
Total of others	345,813	261,668	164,197
Others not listed	186,428	153,288	106,722
GRAND TOTAL	536,537	423,022	275,108

Source: Trade Data Monitor, LLC

Attachments: [20231016-6 Turkish Official Gazette Textile.pdf](#)