



TURKEY

ORGANIC COTTON
SOURCING GUIDE

COVER PHOTO: Lampas-woven textile with tulips, silk and silver lamella

Turkey; 2nd half of 16th century

130 × 56 cm

Although this textile was cut down a couple of centimeters on the sides, its large, stylized tulips make it a fine example of the highly original and magnificent patterns that were designed in the Ottoman court studios. The point of departure for the patterns was often a fairly true-to-life depiction of local Turkish plants, but frequently – as here – combined with more abstract elements such as scale patterns, cloud ornaments, and other features like the little growths that resemble stamens.

So much gold and silver thread was used for certain textiles that the sultans prohibited their production for periods, since they drained the reserves of precious metals.

Photographer Pernille Klemp

The David Collection, Denmark: <http://davidmus.dk>

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INTRODUCTION

Turkey is a country with an enormously rich and vibrant tradition in textiles; it was also the home of our first global conference in 2005. We are delighted to be returning to Istanbul for our 2013 Textile Sustainability Conference. We are also excited about presenting the Turkish Organic Cotton Sourcing Guide as a first of a new regional series.

Our time in Turkey this year – a key organic cotton region – will allow us to not only look back on how far we have come but also to communicate our newly defined goals for the future. Turkey is one of the pioneers in organic, and has been growing and manufacturing organic cotton products for nearly 30 years. Turkey’s textile sustainability movement is growing fast; the number of GOTS, OE and OCS certified companies is steadily rising.

Alongside the pioneers, new champions have sprung up. The United Nations Development Program (UNDP) and the Republic of Turkey Ministry of Development Southeasten Anatolia Regional Development Administration in Turkey see organic as a fundamental tool for eliminating poverty and developing sustainably in parts of the country that are still suffering economically. Today, it is more widely recognized that efforts to help our environment can also help regions economically as well. In this Guide, you will read more about the collaborative efforts of governments, the United Nations, and the private sector in Southeast Anatolia.

FOREWORD

Organic cotton farming is moving up the organic farming agenda of many countries. The maintenance of “organic” characteristics in all phases of the value chain starting from raw organic cotton is also among the top priorities of many countries which seek to be competitive in the textile industry. Data from the 2012 Organic Cotton Market Report by Textile Exchange indicates that organic cotton presently has a global market of 8.9 billion USD. It is expected that the market will grow further with the development of new techniques and technologies and the increase of both the supply of organic cotton and the demand for organic cotton products. The commitment by many leading global textile companies to source all their cotton from sustainable origins by 2020 signals that the demand for organic cotton fibres will also increase.

Organic cotton production is growing in importance in Turkey. Textile Exchange data shows that in 2012 Turkey ranks second in organic cotton production in the World. Across Turkey, the Aegean Region and the Southeast Anatolia Region are the leaders.

Factors such as suitable climate and soil conditions, relatively low populations of disease vectors and pests, historically low use of chemicals, availability of a young population employable in organic farming and the high quality of cotton varieties grown, combine to support the Southeast Anatolia Region as it aims to scale up its organic cotton production volume.

Currently only about 20% of irrigation investments has been completed in the Region; however, when completed, irrigated land in the Southeast Anatolia Region will increase to 1.8 million hectares. Even at the present level, the Southeast Anatolia Region supplies 50% of the conventionally produced cotton, and 75% of organically produced cotton in Turkey. It is our expectation that Turkey - which has always ranked in the top four since mid 2000s - will become the most important organic cotton supplier and textile production centre.

As the Regional Development Administration of the Ministry of Development (GAP RDA), we have been implementing the “Southeast Anatolia Project” (GAP), a large-

scale multi-sector regional development project. This project aims to foster regional prosperity, eliminate regional disparities, and put regional water and soil resources to the best use to raise this region to the same level as developed regions of the country. We firmly believe that GAP Organic Agriculture Cluster (GAP-OAC) Project, being implemented in cooperation with the United Nations Development Programme (UNDP) will boost both the quality and the quantity of organic cotton grown in the region. The vision formulated under the GAP-OAC Project is that

“The GAP Region, with its extensive, fertile, irrigable agricultural land, will be the leading supplier of organic textile and food raw materials in Turkey, and an innovative, competitive organic production centre in 2023.”

The revised GAP Action Plan (2014-2018) indicates that, 65% of the irrigation investment will be completed by the end of 2018 increasing the total land under irrigation 1 million hectares. This infrastructure is a major step towards the achievement of the goals in the GAP-OAC vision. As indicated in the value chain analysis report by experts for the GAP-OAC Project, the GAP Region has the potential to grow 400,000 tonnes of organic raw cotton and 160,000 tonnes of organic cotton fibres on land of 100,000 hectares as a result of the infrastructure investments and the spread of organic farming practice across the region. It is clear that the Region has real potential to become a significant supply centre for organic textile manufacturers.

Environmentally friendly organic farming is a hallmark of the Southeast Anatolia Region, which is also known as the cradle of sustainable civilizations. Our region is up to the task of contributing to fostering the global organic textile industry and offering its resources to the development of this sector.

Sadrettin Karahocagil
President
Southeastern Anatolia Project Regional Development Administration

THE GUIDE

At Textile Exchange, we want to support your sustainability journey. We spoke with our Turkish members to prepare for the 2013 conference and they helped us understand how we can best contribute to the great work they are doing in organic cotton and responsible textiles. We also asked “you” (our conference-goers) how we could better support your sourcing needs. This Guide is the result!

In this Guide we aim to:

- Help you with the basics – an “Organic Cotton 101.” Many of our members felt there was a need in the industry for more information on how to get started in organic and how to go about sourcing responsibly.
- Give you an introduction to Turkish organic: where its grown, manufactured and some of the people involved. We hope this Guide helps you with more specific information on Turkey as an organic cotton sourcing country.

We are excited to bring you our [GUIDE TO SOURCING ORGANIC COTTON IN TURKEY](#) – a document introducing organic cotton and textile responsibility – while also providing an overview of the Turkish organic cotton sector.

Enjoy!

La Rhea Pepper
Managing Director, Textile Exchange

CONTENTS

1

GETTING STARTED

- Organic Agriculture – 9
- Integrity and Certification – 13
- Sourcing Organic – 18
- Responsible Manufacturing – 22
- Feature: Fair Wear Foundation – 25
- Feature: Control Union – 26

2

WHY TURKEY?

- 10 Good Reasons – 29
- Feature: One Minute with Atila Ertem – 30
- Feature: Nudie Jeans – 31

3

GROWN IN TURKEY

- Organic Cotton – 35
- Feature: Akasya – 42
- Special Feature: The GAP Project – 43

4

MADE IN TURKEY

- The Textile Industry – 48
- Feature: Egedeniz – 51
- Feature: Sanko – 52
- Feature: Orimpex – 54

5

WHO'S WHO IN ORGANIC IN TURKEY

- Textile Exchange Turkish Members – 57
- Certification Bodies in Turkey – 61
- Textile Exchange Membership – 62

1

GETTING STARTED



PHOTO: Farmers harvesting organic cotton (Akasya).

ORGANIC AGRICULTURE

ORGANIC COTTON IS COTTON THAT ORIGINATES FROM ORGANIC AGRICULTURE. AGRICULTURAL PRODUCTION IS CONSIDERED “ORGANIC” WHEN IT HAS BEEN CERTIFIED ORGANIC BY INDEPENDENT INSPECTION AND CERTIFICATION BODIES ACCORDING TO THE RULES AND REGULATIONS THAT APPLY IN THAT PARTICULAR COUNTRY, REGION, OR CONSUMER MARKET.

The International Federation of Organic Agriculture Movements (IFOAM) defines Organic Agriculture as:

Organic Agriculture is a production system that sustains the health of soils, ecosystems and people. It relies on ecological processes, biodiversity and cycles adapted to local conditions, rather than the use of inputs with adverse effects. Organic Agriculture combines tradition, innovation and science to benefit the shared environment and promote fair relationships and a good quality of life for all involved.

The Principles of Organic Agriculture serve to inspire the organic movement in its full diversity. They are:

THE PRINCIPLE OF HEALTH – Organic Agriculture should sustain and enhance the health of soil, plant, animal, human and planet as one and indivisible.

THE PRINCIPLE OF ECOLOGY – Organic Agriculture should be based on living ecological systems and cycles, work with them, emulate them and help sustain them.

THE PRINCIPLE OF FAIRNESS – Organic Agriculture should build on relationships that ensure fairness with regard to the common environment and life opportunities.

THE PRINCIPLE OF CARE – Organic Agriculture should be managed in a precautionary and responsible manner to protect the health and well-being of current and future generations and the environment.

Organic Agriculture aims for an optimum and sustainable use of local natural resources for production without the application of external inputs like synthetic pesticides, chemical fertilizers, herbicides, defoliant and chemically treated or genetically modified (GM) seed. External organic inputs (approved by the Standard) may be used.

Farmers wishing to convert to Organic Agriculture will have to go through a conversion period of one to three years, depending on the history of land use. The conversion period enables the soil and the environment to recover from previous cultivation, while applying organic methods of production. The “in-conversion” crops cannot be sold as organic, and do not usually fetch a premium in the market. So, farmers may require support and incentives during the conversion years.

ORGANIC AS A BEACON OF SUSTAINABILITY

Organic farming is particularly well suited to small-scale farming, and acts as a beacon of best practice for the agricultural sector in general. Organic production is knowledge and labor intensive, rather than dependent upon chemicals and fossil fuels. With the use of appropriate technologies and nature to help achieve production needs within a healthy ecosystem, organic agriculture strives for closed-loop systems of production: recycling by-products rather than releasing as waste. Organically grown products, be they food or fiber, come to the market with an ecological and human health value addition.

Research continues to quantify the benefits that organic agriculture holds in an age of climate change, water scarcity, and poverty: which often have the greatest impact on rural populations.



PHOTO: Organic cotton balls ready for harvest (Pamuk-Bismil).



PHOTO: Farmers tending to organic cotton fields (Akasya).

REFERENCES

TEXTILE EXCHANGE – START HERE, GO ANYWHERE

Farm & Fiber Report for global organic cotton cultivation data and trends: <http://farmhub.textileexchange.org/farm-library/farm-fiber-reports>

Organic Cotton Market Report for global organic cotton market information and trends: <http://textileexchange.org/publications/2012-organic-cotton-market-report>

Organic Cotton Growing Regions are outlined here: <http://farmhub.textileexchange.org/learning-zone/growing-regions>

Find a Producer is our interactive organic cotton producer database. Click on the link and navigate your way around the world: <http://farmhub.textileexchange.org/find-a-producer>

Case Studies on organic cotton producers and champions can be found here: <http://farmhub.textileexchange.org/learning-zone/organic-in-action> and in our library: <http://farmhub.textileexchange.org/farm-library/case-studies>

MORE INFORMATION

The International Federation of Organic Agriculture Movements (IFOAM) is the representative body for organic agriculture worldwide <http://infohub.ifoam.org/en/node>.

FiBL is an independent, non-profit, research institute with the aim of advancing cutting-edge science in the field of organic agriculture: <http://www.fibl.org/en.html>

HELVETAS Swiss Intercooperation is one of the most experienced and largest development organizations in Switzerland specializing in organic and fair-trade agriculture: <http://www.helvetas.org/>. Also visit the Helvetas Organic & Fairtrade Competency Center: <http://www.organicandfair.org/>.

Louis Bolk Institute (LBI) provide research and advice to advance truly sustainable agriculture, nutrition and health <http://www.louisbolk.org/>.

Join the **Global Organic Cotton Community Platform** <http://www.organiccotton.org/>.

Organic Trade Association (OTA) is the membership-based business association for the organic industry in North America <http://www.ota.com/index.html>.

Soil Association is the UK's leading membership charity campaigning for healthy, humane and sustainable food, farming and land use <http://www.soilassociation.org/whatisorganic/organic/textiles/organiccotton>. Also visit the Soil Association / GOTS **Cottoned On Campaign** <http://www.cottonedon.org/>.

INTEGRITY AND CERTIFICATION

IN TEXTILE SUSTAINABILITY, INTEGRITY IS THE BACKBONE. INTEGRITY MEANS THAT BRANDS AND RETAILERS CAN HAVE MORE CONFIDENCE THAT THEIR GOOD INTENTIONS TO BE MORE SUSTAINABLE COME TO FRUITION. INTEGRITY MEANS THAT WHEN A CONSUMER PICKS UP A T-SHIRT LABELED “MADE FROM ORGANIC COTTON,” IT IS A FACT, NOT JUST A MARKETING MESSAGE.

FROM FARM TO RETAIL

The minimum certification that is needed is the farm certificate (be sure that it is valid for the country where the products are being sold). However, note that you should also ensure that the organic fiber can be tracked from the certified farms, through all steps of processing, and into your final products to protect the integrity of your claim. First and foremost, a product should follow the labeling requirements of the country in which the product will be sold. These laws generally require truth in labeling. The laws may affect how material may be represented on the content label or the words used on hang tags and other point of purchase materials. It is important to understand the markets where your products are sold, to ensure labeling choices are legal.

ORGANIC TEXTILE STANDARDS

Standards support product claims and ensure that the desired impacts are happening. To work toward ensuring integrity, Textile Exchange has created several textile standards that address the needs in the industry. One of these is the Organic Content Standard (replacing the OE100 and OE Blended Standards). This voluntary chain of custody standard provides companies with third party verification that a final product contains the accurate amount of a given organically grown material.

The Global Organic Textile Standard (GOTS) is a processing standard for textiles made from organic fibers. In addition to tracking organically grown materials through the supply chain, it defines high-level social and environmental criteria along the entire organic textile supply chain.

THE ROLE OF CERTIFICATION

Certification confirms that the levels of social and/or environmental performance claimed for a product are correct and verified by an external party. Third party certification is considered one of the strongest ways to ensure the integrity of sustainability claims. In this system, an independent third party gives assurance that a company, process, or product is in compliance with the requirements of a particular standard. Certification provides legal and brand protection, purchase assurance, and greater credibility to the claims being made. Above all, certification is a means for ensuring that environmental and/or social improvements lead to meaningful and positive change.

WHAT ARE THE ESSENTIAL STEPS OF CERTIFICATION?

The basic steps to follow, depending on which part of the supply chain you are in, are described below. Keep in mind when you are asking a company to become certified to a standard, this will entail a reasonable cost to them (certification fees, compliance measures). Reward their efforts by giving them business. This will ultimately drive down the per-unit cost of certification, reward good behavior and, hopefully, influence other companies to go down the same path.

THE ESSENTIAL STEPS FOR BRANDS AND RETAILERS:

DETERMINE WHICH CLAIMS YOU WANT TO MAKE ABOUT YOUR COMPANY OR PRODUCT, and choose a standard that supports this claim. Consider your sustainability strategy and priorities and the areas you would like to address through certification. For example, you may only want to back up the use of certain fibers such as organic. Or you may want to make more of a full product claim that addresses the raw material use, as well as, social and environmental considerations such as GOTS.

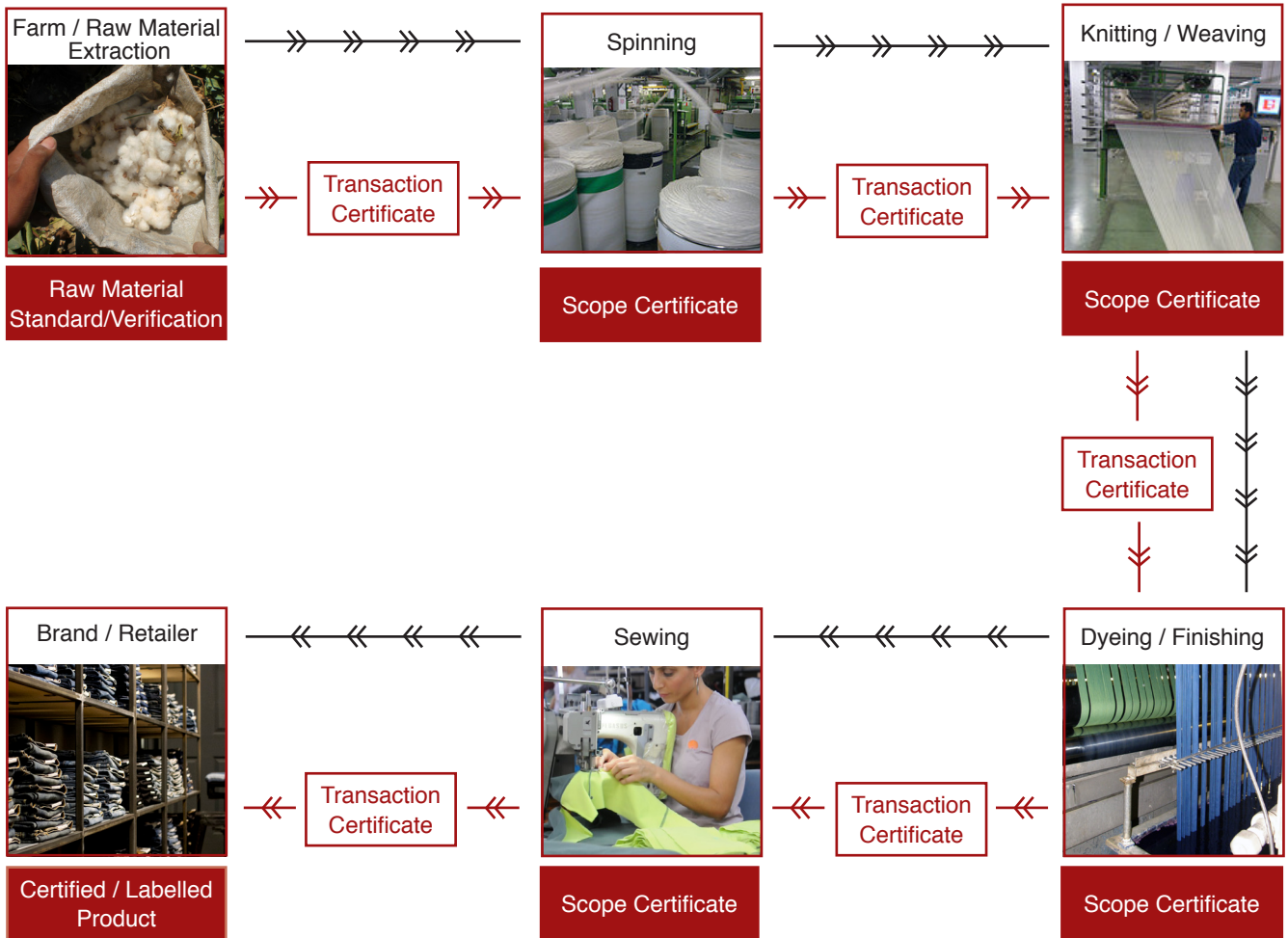
SELECT A RESPECTED THIRD-PARTY STANDARD BASED ON THESE CONSIDERATIONS. Be sure to read the standard and fully understand the requirements of the standards you have chosen. Inform your suppliers of your selected standards and the reasons behind the choice. They could give you insight into other standards or restrictions you might not know exist. They may also already be certified to a similar standard that meets your needs.

CONFIRM WITH YOUR SUPPLIERS that they can provide you with the certified product you need.

- If your suppliers are already certified to the standard:
 - Identify which certification body they are using.
 - Verify that the certification body is accredited to the standard.
- If your suppliers are not yet certified to the standard:
 - Advise your suppliers to get a copy of the Certification Toolkit and to follow the outlined steps to become certified.
 - You may also choose to find the list of accredited certification bodies on the standard's website and provide this list to your suppliers.
 - Support their application and certification process in any way you can. The best thing you can do is to assure them that you will give them sufficient business for the certified products to justify their efforts and investments.

CERTIFICATION THROUGH THE SUPPLY CHAIN

Each buyer in the supply chain only needs to check the Scope Certificate and Transaction Certificates of the supplier(s) to help ensure the benefits to the farmer and the environment have been achieved.



REFERENCES

TEXTILE EXCHANGE – START HERE, GO ANYWHERE

Learning Zone provides information on organic cotton agriculture standards, and farm level certification: <http://farmhub.textileexchange.org/learning-zone/all-about-organic-cotton>

Industry Integrity for textile standards and certification: <http://textileexchange.org/content/industry-integrity-textile-exchange>

Read more about how certification works and actions your company can take to begin certifying your products by downloading the **Certification Toolkit**: <http://textileexchange.org/content/certification-toolkit>

To become certified, find an approved third-party certification body and apply for certification to the standard you choose: <http://textileexchange.org/accreditation>

To find certified products, a list of certified suppliers and their products is available at: <http://textileexchange.org/standards>

Organic Content Standard: <http://textileexchange.org/OCS>

Recycled Claim Standard: <http://textileexchange.org/RCS>

Find out how brand and retailers develop and implement their certification strategy by downloading the case studies **Building Integrity**: <http://textileexchange.org/content/integrity-training-tools>

MORE INFORMATION

IFOAM Information on organic agriculture standards and regulations in the different countries can be found here: http://www.ifoam.org/sites/default/files/familyframe_web.pdf

The Global Organic Textile Standard (GOTS) is recognized as the world's leading processing standard for textiles made from organic fibers. It defines high-level environmental criteria along the entire organic textiles supply chain and requires compliance with social criteria as well: <http://www.global-standard.org/>

A full list of organic certifiers can be found on the **International Organic Inspectors Association (IOIA)** website: <http://www.ioia.net/standards.html>

SOURCING ORGANIC

IF YOU WANT TO BE COMPLETELY SURE OF YOUR SUPPLY CHAIN, THERE ARE A FEW GOLDEN RULES TO FOLLOW: KNOW YOUR ENTIRE SUPPLY BASE, COMMUNICATE FROM BEGINNING OF THE CHAIN TO THE END OR MAKE SURE A CERTIFICATION SYSTEM IS IN PLACE, AND ENSURE YOUR PRODUCTS HAVE SOUND ETHICAL AND ENVIRONMENTAL CREDENTIALS.

In reality, there are major gaps in supply chain communication. There is rarely communication between the brand and the farm where the cotton is grown (even with organic). In a recent survey, Textile Exchange found that the majority of brands and retailers do not make the purchasing transaction themselves when it comes to buying cotton fiber, yarn and even fabrics (Textile Exchange Market Report, 2013).

This disconnected model of sourcing – and lack of communication along the chain – can result in brands and retailers being disappointed when supply does not come through. For the farmer, there are no guarantees on program continuity, price, or even whether their income will cover the cost of their efforts. The majority of fiber sales are not done with advance commitments. Farmers also lack information about the types and volumes of cotton that the market needs. Therefore, it is difficult for them to make informed decisions, to ensure that the right quantities are available, and to reduce their financial risks. As a result, farmers are forced to speculate and guess what to plant.

Furthermore, in the market, where commodity prices are volatile; the knock-on effect for organic cotton prices may mean many brands and farmers are not prepared to take the risk of “going the extra mile”. If organic cotton farmers have the opportunity to grow alternative organic crops on a contracted basis, some farmers may choose not to grow organic cotton but grow food crops instead.



PHOTO: Farmer in the warehouse (Egedeniz).



PHOTO: Farmer harvesting organic cotton (Repunzel).

RECOMMENDATIONS

Risks to your supply of organic cotton can be substantially reduced through better supply chain planning and linkages. To support sustainable expansion of organic cotton fiber supply, TE recommends that brands and retailers should:

1. **UNDERSTAND YOUR SUPPLY CHAIN** and the partners involved in the making of your products.
2. **DETERMINE HOW MUCH OF YOUR COTTON USAGE YOU WISH TO TRANSITION TO ORGANIC** over the long term and make that future demand known to those who can supply it. Clearer expectations will help existing producer groups, and new projects, to develop in a more sustainable manner. Incorporate cotton in conversion to organic to support the years of change.
3. **DEVELOP DEDICATED SUPPLY CHAINS** with high levels of communication, planning and support between manufacturers and retailers, their business partners and farmers. This communication will help ensure that the right qualities and quantities of fiber are produced in the right regions to meet the needs of specific brands and retailers.
4. **EXPLORE INNOVATIVE WAYS OF ASSOCIATING WITH PRODUCER GROUPS AND FARMERS**, through profit sharing, joint ownership with farmers in the supply chain, and forward contracting with pre-financing arrangements. This will help ensure organic cotton farmers enjoy a stable business and are able to finance development and production growth on their own terms.
5. **DEVELOP THE MARKET BY SENDING STRONG DEMAND SIGNALS.** Brands and retailers, merchants and agents, can help reduce the market risk faced by farmers by making public their demand. Obviously, follow through is critical!
6. **PAY A FAIR PRICE TO THE FARMER.** There will be no business case for the farmer unless he or she is able to realize a return on their investment. It is important to ensure that the fair price for the organic cotton actually gets to the farmer.

7. **ADD YOUR WEIGHT TO SECTOR INVESTMENT** from financial institutions, government and development or philanthropic institutions for research and technical support for existing programs and the development of new projects. Access to finance is more likely where farmers are in dedicated chains.
8. **COLLABORATE!** Working together with other brands and retailers to help achieve scale will help build a supply base beyond individual supply chains. This shared approach will also help manage the risk more equitably, better match supply to demand, and help the organic market expand in a sustainable way.

REFERENCES

TEXTILE EXCHANGE – START HERE, GO ANYWHERE

Collaborative Learning Series Rethinking and Reframing Sustainable Sourcing covers six inter-related topics and consists of blogs, topic summaries, and webinars: <http://farmhub.textileexchange.org/learning-zone/collaborative-learning-series>

Our **Trading Post** is a place to find organic cotton fiber on offer. It also provides information on challenges in supply chain management and provides tips for best practice in sourcing: <http://farmhub.textileexchange.org/trading-post/pricing-organic>

Our **Knowledge Center** is designed to inspire and equip people (whether members, industry leaders, learning institutions, or other sectors) to successfully implement and accelerate sustainable business practices. Our expertise spans organic cotton and other raw materials, chemistry and processing, integrity, value chain development, among other key areas of textile sustainability. We create and disseminate both Tailored Solutions and Industry Solutions in the form of consulting training and education, tools, publications, and product and industry standards. Contact: Solutions@TextileExchange.org

FURTHER RESOURCES

CottonConnect is a pioneering company with a social purpose, delivering business benefits to retailers and brands by creating organic and a range of more sustainable cotton supply chains. Find out more about CottonConnect here: <http://www.cottonconnect.org/>

RESPONSIBLE MANUFACTURING

ALONGSIDE THE SOURCING OF MORE SUSTAINABLE MATERIALS INTO YOUR SUPPLY CHAIN, LIES THE NEED FOR MORE RESPONSIBLE PRACTICES DURING MANUFACTURING. AS SUCH, CLEANER PRODUCTION, RESOURCE EFFICIENCY, AND ETHICAL TRADING SHOULD BE PART OF YOUR CORPORATE RESPONSIBILITY (CR) AGENDA, AND WILL ENHANCE YOUR BUSINESS'S SUSTAINABILITY PERFORMANCE.

Today, textile retailers and brands invest in CR to minimise risk, protect reputation and brand value, improve product quality and to stay ahead of regulations. Additional benefits include securing supply, attracting and retaining employees and gaining access to capital, finance and insurance.

Textile companies that lag in this area often tend to have a reactive and short-term management perspective. A more proactive response can help address some of the current challenges that are inherent to the textile industry, such as: poor purchasing practices, excessive working hours, skill shortages and rising input costs.

CR focuses on how companies can manage their business operations to contribute to a more sustainable outcome – sustainable for society, the environment as well as business. These three aspects tend to be inter-related and yield cost saving and other benefits:

- Better working conditions can lead to higher job satisfaction; reduced risk of work related accidents and improved productivity.
- More resource efficient practices and technology may lead to reduced input costs and better quality products.
- More sustainably operating manufacturers can attract international buyers who look to operate a more socially and environmentally-conscious business.

ETHICAL TRADE (and social compliance) is the responsibility of a textile company to ensure decent working conditions for the people that produce their goods. This involves a close relationship with manufacturers that employ the majority of garment workers. The need for retailers and brands to take a proactive role arises from the fact that the labor law in countries where garment manufacturing is located is either inadequate or not sufficiently enforced. Many companies today have adopted a Code of Conduct that lists their expectations of manufacturers / suppliers in terms of working hours, wages, health and safety, the right to join free trade unions, etc. (Ethical Trade Initiative).

CLEANER PRODUCTION can be defined as manufacturing-specific environmental protection measures with the intention to preserve resources (e.g. water, energy), minimize waste (e.g. waste water or solid waste) and emissions (e.g. greenhouse gas) and maximize product output. A flow analysis helps identify areas of resource use prevention, minimization, reuse, recycling and recovery. Organizational improvements of manufacturing processes and new technology can significantly enhance these efforts. Textile companies are increasingly collaborating with their suppliers on cleaner production projects as a way to address growing stakeholder and regulatory pressure as well as to identify cost saving potentials (United Nations Environment Program).

MANAGEMENT SYSTEMS can be a way of addressing the root causes of poor labor standards and wasteful resource use rather than just dealing with the symptoms. Good management systems at the manufacturing level (e.g. for human resource, productivity or the environment) tend to consist of a set of policies, objectives and targets aimed at improving and maintaining the functionality of the factory. The system creates and develops organizational structures, responsibilities, procedures, activities and resources that ensure objectives and targets are met.

REFERENCES

TEXTILE EXCHANGE – START HERE, GO ANYWHERE

Our Materials Solutions section provides snapshots on a range of preferred materials and more sustainable practices: <http://textileexchange.org/material-solutions>

The Learning Zone provides information and resources on organic cotton, including a getting started slideshow from field to fashion: <http://farmhub.textileexchange.org/learning-zone/learning-journey/from-fiber-to-fashion>.

MORE INFORMATION ON CLEANER PRODUCTION

Clean by Design from NRDC <http://www.nrdc.org/international/cleanbydesign>

IFC PaCT program in Bangladesh http://www.ifc.org/wps/wcm/connect/region_ext_content/regions/south+asia/news/ifc+helps+bangladesh+textiles

Solidaridad CP program in China <http://solidaridadnetwork.org/china-sharing-achievements-cleaner-production-textile-processing>

Zero Discharge of Hazardous Chemicals (ZDHC) <http://www.roadmaptozero.com/>

Sustainable Textile Production (StEP) https://step.oeko-tex.com/en/step/step_home/home.html

Bluesign <http://www.bluesign.com/>

United Nations Industrial Development Organization <http://www.unido.org/cp.html>

United Nations Environment Program <http://www.unep.fr/scp/cp/>

Global Social Compliance Program <http://www.gscpnet.com/>

MORE INFORMATION ON ETHICAL TRADE

Ethical Trade Initiative <http://www.ethicaltrade.org/>

Social Accountability International <http://www.sa-intl.org/>

Fair Labour Association <http://www.fairlabor.org/>

Fair Wear Foundation <http://www.fairwear.org/>

Business Social Compliance Initiative <http://www.bsci-intl.org/>

International Labour Organisation <http://www.ilo.org/global/lang--en/index.htm>

FEATURE: FAIR WEAR FOUNDATION

Fair Wear Foundation (FWF) is an independent, non-profit organization that works with companies and factories to improve labor conditions for garment workers. FWF's 80+ member companies represent over 120 brands, and are based in eight European countries; member products are sold in over 20,000 retail outlets in more than 80 countries around the world. FWF is active in 15 production countries in Asia, Europe and Africa.

FAIR WEAR FOUNDATION IN TURKEY

Turkey is the second biggest supplier country for FWF affiliated companies. Around 170 factories are supplying 26 affiliates. This combined with the challenges for the garment industry in Turkey makes the country a high priority for FWF. For questions about FWF's work in Turkey, please check the resource section on our website or contact Margreet Vrieling: vrieling@fairwear.org.

WELLMADE

Fair Wear Foundation has launched the WellMade project, funded by EuropAid, in June 2013. WellMade is all about improving working conditions in clothing factories. The project helps European apparel professionals learn how they can make life better for garment workers.

At trade fairs across Europe, brand employees can join free interactive WellMade seminars. They get an insight in the major labor issues they have influence over; the high pressure put on delivery times for example, can lead to excessive, badly paid overtime for workers. During the seminars employees at European clothing companies learn in a fun way what they can do in their day-to-day work to prevent these kinds of things from happening.

Please visit <http://www.fairwear.org/>

FEATURE: CONTROL UNION

CONTROL UNION TURKEY

Founded in 1920 in the Netherlands, Control Union has since grown to become a global operation offering its quality inspections and laboratory services in more than 60 countries worldwide and Control Union certificates are accepted in just about every country.

In 2000, we established our first office in Istanbul, Turkey, and today there are six offices across Turkey providing inspection and certification services.

From the beginning, sustainability has been the main focus of our certification services. Control Union presents a wide range of programs in agriculture, food, feed, forest products, textiles and bio energy. Our programs are managed in a more decentralised way, with accreditations that reduce dependency on any one authoritative body. Key program issues are food safety, sustainability, recycling, footprint and social aspects.



PHOTO: Testing organic cotton fiber (Repunzel).

TEXTILE CERTIFICATION SERVICES

Control Union Certifications can offer you two certification programs for your sustainable textile production. To make sure that these programs are workable in practice they were developed them in cooperation with experts of the textile industry, consumer organisations and environmental groups.

These two programs are:

- Global Organic Textile Standard (GOTS)
- Textile Exchange certification

CUSTOMIZED PROGRAMS

More and more brands are choosing customised (sustainable) programs. We can help with the set-up, implementation and running of these programs on a global scale. Our network of dedicated experts are familiar with social, environmental and economic auditing along with the practices of farmers, foresters, processors and traders.

CONTACT INFORMATION

CERTIFICATIONS

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2

WHY TURKEY?



PHOTO: Organic cotton fields (Egedeniz).

10 GOOD REASONS

1. Organic cotton growing regions are well established and cotton yields in Turkey are one of the highest in the world.
2. High quality long staple organic for fine textile production, as well as shorter staple options.
3. An expanding source of organic cotton from the Southeast of the country as part of a sustainable development initiative to improve livelihoods and living conditions (see our special feature on the GAP project).
4. Turkey is GMO-free (Turkish Biosafety Law).
5. Turkey is both a grower and manufacturer of organic cotton, offering proximity of raw material to textile processing.
6. Proximity to European customers (major consumers of organic textiles) offers easy access, reduced transportation and as a result a lower carbon footprint.
7. Turkey offers the full range of textile manufacturing processes from organic cotton growing, to spinning, manufacturing, and garment making.
8. Turkish manufacturers have long specialized in materials innovation, design and fashion, (including denim), in addition to production and manufacturing.
9. The number of companies certified to organic and social responsibility standards is increasing. Currently, almost 300 are certified to the OE/Organic Content Standards and 400 facilities are certified to the Global Organic Textile Standard.
10. The Turkish Government is supporting the progression of Corporate Social Responsibility and improved environmental and social management in textile manufacturing, in accordance with the Sustainable Development Goals (SDG).

Please note: Textile Exchange, does not favor Turkey over other organic cotton producing countries or responsible manufactures. Each country will have its own set of benefits, opportunities, and attractions.

FEATURE: ONE MINUTE WITH ATILA ERTEM

Atila Ertem lives in Izmir. He is the President of the Turkish Association of Organic Agriculture Organizations.

1. TELL US ABOUT YOUR INVOLVEMENT IN ORGANIC AGRICULTURE?

It was in 1986 when I got involved in the organic sector. I started as a part-time consultant in organic sultanas and I ended up as the CEO of an organic processing and export company with more than 300 workers and a 15 million USD turnover. I resigned 4 years ago to have more time to support the organic movement in Turkey and worldwide. I'm now serving my second term as the president of the ETO and I share my experience as a free-lance consultant with companies, projects and initiatives in Turkey and in the international context.

2. WHAT ARE THE OPPORTUNITIES FOR ORGANIC IN TURKEY?

For me the question is: can a Turkish grower afford to farm organic? This needs to be answered by the market, by the consumers and by the Government. Looking at other countries, success only comes when Governments get involved. Organic farmers are not only pure growers of crops, but environmental "knights" at the same time. They are not contributing to water pollution, they actively fight erosion, they are not contributing to chemical pollution – all of these are activities which are valuable for communities and should be paid for.

3. WHAT HAS BEEN YOUR PROUDEST MOMENT IN YOUR PROFESSION?

My former company was one of the first organic cotton projects in 1990. This was done in order to support farmers to practice good rotation on the fields. Cotton was the first non-food product grown to organic quality – and a product which was previously thought to only be grown with a lot of chemical input. We proved otherwise and this made me incredibly proud.

FEATURE: NUDIE JEANS

SOURCING IN TURKEY

Nudie Jeans, head quartered in Sweden, with a turnover of approximately €41 million and sales of over 1 million pair of jeans each year, has close ties with Turkey for their denim fabric manufacturing.

Ninety percent of the denim used in Nudie's jeans is manufactured in Turkey; 100 percent organic. Main supply partner is Bossa Denim, and Nudie also work with ISKO, ORTA Anadolu, TRC and Kaihara.

For recycling jeans Nudie partnered with Isko in Turkey, which is a Sanko Group company. Nudie is experimenting with Upcycling and a new range of Upcycled Products are now on the market. Upcycling is carried out in collaboration with Bossa.

The Production Guide offers more information on Nudie Jeans' denim fabric suppliers and production partners <http://www.nudiejeans.com/#productionguide>



PHOTO: The making of Nudie Jeans (Nudie Jeans).

TALKING WITH SANDYA LANG

TE's Carlotta Cataldi, spoke with Nudie's CSR manager Sandya Lang to find out a little about their sourcing practices...

CARLOTTA: TELL US ABOUT YOUR BUSINESS IN TURKEY?

SANDYA: In Turkey we work closely with our main denim supplier Bossa. They are based in Adana, Turkey. They have been there for a long time and are a good partner. Bossa has a vertically integrated chain. They have all the processes in house starting from spinning. Plus they are GOTS certified.

CARLOTTA: WHAT DO YOU LOOK FOR IN A SUPPLIER?

SANDYA: When searching for new suppliers we take into account the knowledge we have ourselves and our agents and in applicable cases other companies' audits. It is of great importance that the new supplier works towards sustainable production, and is within our price frame.

Nudie Jeans is not an aggressive sourcing company, we are working with suppliers that we have established a good relationship with and that share our concern for environmental and CSR issues.

When we need to select new suppliers the most important elements for us are:

- That the suppliers are specialists and concentrate on a specific garment type.
- That their environmental management and Code of Conduct are in line with an understanding of our philosophy.
- That no workers are being exposed to harmful chemicals at the workplace and that health and safety is valued.
- That we can grow together in a long-term relationship.

When we source for new production units the main issue is the quality of the products together with a commitment to work for sustainability both regarding CSR and environment. We would not choose a production unit with a low price if the CSR or environmental issues and the quality are not up to our level.

CARLOTTA: **HAVE YOU DEVELOPED A PREFERRED FIBERS POLICY?**

SANDYA: We have a written sourcing policy which we send to all new potential suppliers we meet.

For organic cotton we don't have policy documents but there is trust between us and the supplier. We base our relationship on trust and then of course we have the certificates.

We work closely with Fair Wear Foundation. Before starting production, a new supplier is informed of the FWF Code of Labor Practices and their cooperation is essential for a long term relationship.

“THE LEADING MANUFACTURERS OF DENIM CLOTH ARE LOCATED IN ITALY AND TURKEY. SINCE TURKEY IS ALSO A MAJOR PRODUCER OF ORGANIC COTTON, IT WAS A NATURAL STEP TO START THERE. IN COLLABORATION WITH OUR SUPPLIERS, WE STARTED TO DEVELOP NEW FABRICS THAT RESULTED IN A SELECTION OF HIGH-QUALITY ORGANIC WEAVES. THESE FABRICS ARE NOW USED IN ALL OUR DENIM COLLECTIONS.”

– MARIA LEVIN, CO-OWNER OF NUDIE JEANS

3

GROWN IN TURKEY



PHOTO: Farmer holding organic cotton boll (Egedeniz).

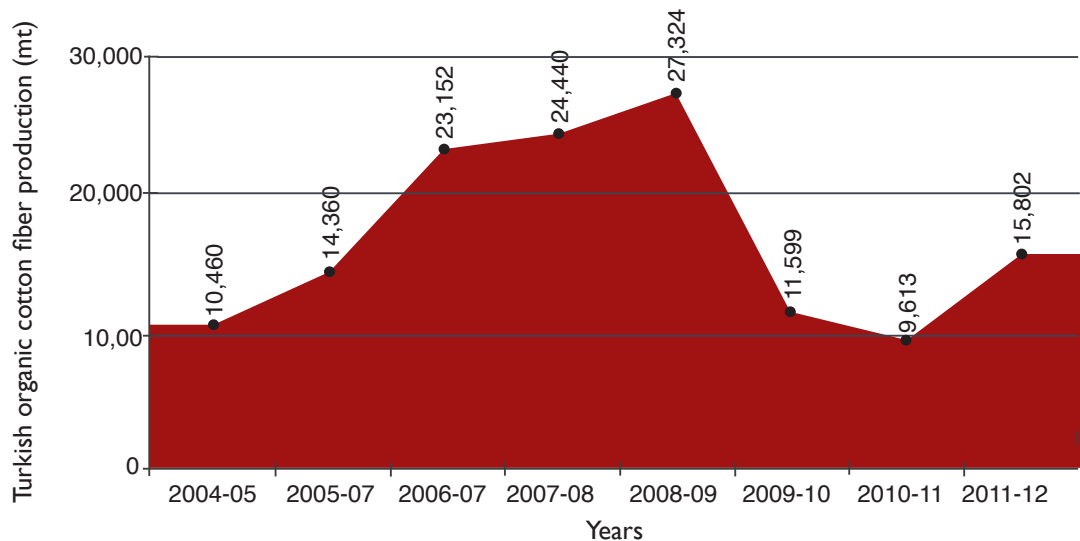
ORGANIC COTTON

COTTON HAS BEEN GROWN IN TURKEY FOR CENTURIES AND TURKEY IS RECOGNIZED AS PRODUCING SOME OF THE FINEST QUALITY COTTON IN THE WORLD. IN 2012, TURKEY WAS THE SEVENTH LARGEST PRODUCER OF COTTON AND THE SECOND LARGEST ORGANIC COTTON PRODUCER. TURKEY REMAINS GMO-FREE AND HAS A BURGEONING DOMESTIC ORGANIC MARKET.

ORGANIC COTTON PRODUCTION AND TRENDS

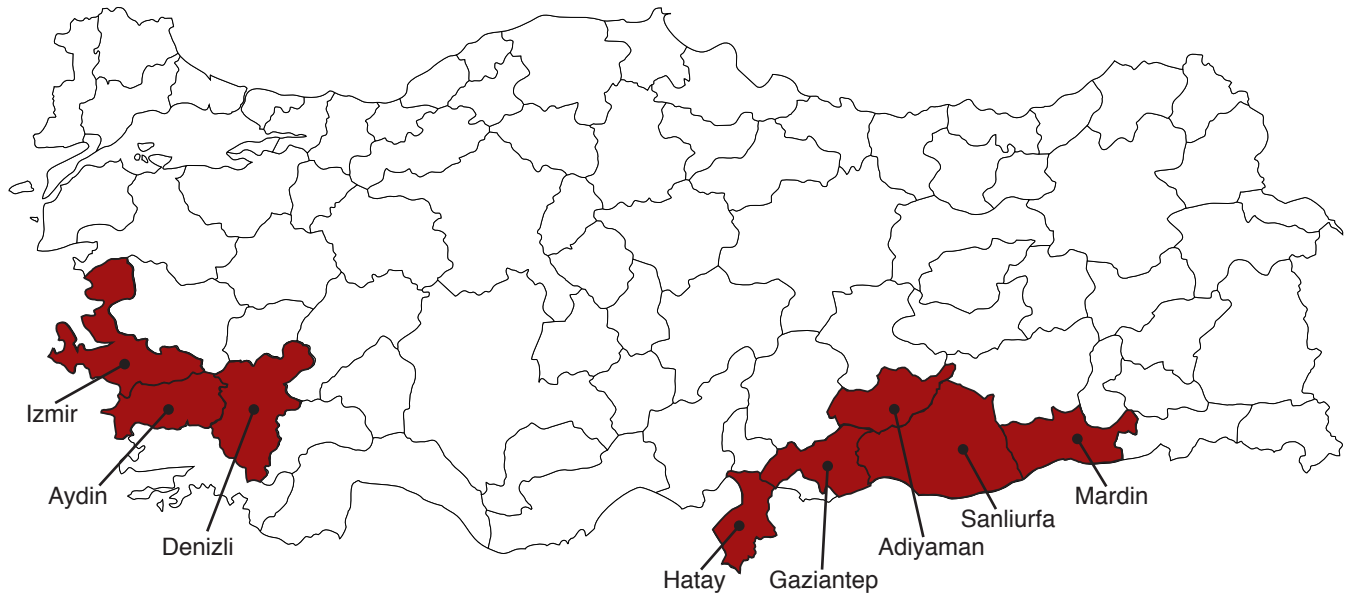
Organic cotton production started in Turkey in the late 1980's and production quickly expanded to place Turkey as the largest organic producer globally from 2000 to 2007. At that point organic production in India took off. However, Turkey remains firmly established as one of the top three organic cotton producers worldwide, currently sitting in second place behind India.

From the graph below you can see that production fell over the past few years but is now starting to rise again (Textile Exchange figures). The expansion is a result of the Southeastern Anatolia Project (GAP), which is the largest production project ever attempted in Turkey. In organic cotton, Turkey now ranks second after India, producing approximately 16,000 MT (approximately 12 percent) of the world's organic cotton fiber.



ORGANIC COTTON GROWING REGIONS

Turkish cotton comes from the Aegean Region, Çukurova, South Anatolia, Southeast Anatolia, and Antalya. Organic cotton is mainly grown in the Aegean in the west of Turkey and in the Southeast Anatolia (SEA) Region. Approximately 20-30 percent of Turkish organic cotton comes from the Aegean and the rest is from SEA. The textile industry is well-established in both locations and is home to some of the biggest and longest established organic textile manufacturers in the world.



Since 2000, cotton growing (including organic) has started shifting more towards the SEA region. This is mainly due to production and labor costs in the west of the country, and in the case of organic, the effect of the GAP Project by the Southeastern Anatolia Project Regional Development Administration (See Special Feature: The Gap Project on page 43). The GAP project is decreasing the flow of seasonal workers from east to west during summer by creating employment in the region.

TURKISH ORGANIC COTTON CHARACTERISTICS

In Turkey, the characteristics and “quality” of the cotton are derived from the variety, location and growing conditions such as climate and soil type.

COTTON FROM THE AEGEAN, with its rare white color and fiber strength, is regarded as one of the world’s highest quality cottons. The high quality of Aegean is mainly due to fiber length, spinnability and “handfeel” (softness). Aegean is also thought to have excellent dye characteristics and color retention. For combed cotton, long staple Aegean is ideal.

COTTON FROM THE SEA REGION is a shorter staple fiber than that of the Aegean, but still relatively long with good fiber strength. Cotton from SEA usually has a whiter color and is considered most suitable for open end spinning. SEA cotton is perfect for denim among other medium staple uses.

The same characteristics hold true for organic as they do for conventional cotton, of course.

HOW MUCH DOES IT COST?

THE DIFFERENCE BETWEEN AEGEAN AND SEA COTTON: In the market, Aegean cotton will fetch a higher price than SEA cotton (conventional, organic, or otherwise). As mentioned earlier, Aegean cotton is superior to SEA cotton in terms of color, fiber strength and capacity to retain color. This difference in quality is reflected in the price. The cost difference is estimated to be around 8 to 10 percent. For example in 2012, conventional top quality Aegean cotton traded at 3.85 TL/kg ex-gin – compared to top quality Urfa cotton (SEA) which was offered around 3.50-3.55 TL/kg ex-gin.

CURRENT MARKET DIFFERENCE FOR TURKISH ORGANIC: The price difference between Turkish organic and Turkish conventional cotton fiber is generally around 20 percent more for organic (subject to commodity price spiking which can bring down the percentage). Note this is the fiber cost, through the manufacturing of the textile product this percentage increase reduces.

TRADING OF ORGANIC COTTON in Turkey tends to be very closely aligned with the Turkish cotton commodity trading board, and closely reflects the commodity trading price. There will be other influences, such as the demand and supply of organic worldwide. Most significant will be the relationship (contract, agreement) between the grower and the buyer, and whether the grower is working in partnership with the manufacturer, or trading in a more speculative environment.



PHOTO: Farmers preparing organic cotton for transport (Egedeniz).

PRICING ORGANIC – SO WHERE DOES THE EXTRA COST GO?

RAW MATERIALS: Turkish organic cotton fiber costs up to 20 percent more than conventionally grown fiber. Around half of this goes directly to the farmer for the seed cotton (before ginning), the other half goes towards associated costs such as the trader, segregation, ginning, warehouse costs, inspection and certification.

PROCESSING: Up to 5 percent is typically added through the value chain to cover logistical and certification costs associated with maintaining the integrity of the organic product. The increase in cost per unit will depend upon the weight.

FINAL PRODUCT: The total cost difference of producing an organic product versus a conventional one is said to be about 5 to 10 percent. This is higher in the heavier items such as sweatshirts, and only a few percent in items with low fabric consumption such as underwear.

A WORD ON “PREMIUMS”: A premium has been connected to the pricing of organic cotton for a long time now. It does not always do justice to the concept of a fair price. There is a need for a better understanding of “full cost accounting” for organic and a trading model that more clearly rewards farmers for their organic practices. However, there is more work to be done to improve the business model. For now the concept of an organic “premium” remains the norm.



PHOTO: Visitors testing the organic cotton fiber quality (Egedeniz).



PHOTO: Fabric materials ready for further processing (Sanko).

THE FUTURE

ORGANIC COTTON PRODUCTION IN TURKEY has the potential to not only improve the sustainability of agriculture but also to help drive transformation in the textile industry. Investment in organic cotton fiber entering the supply chain can have a knock-on effect for the factory, and be the first step to raising the consciousness of sustainability among the manufacturers, and their customers.

However, there are questions facing not just organic cotton growers in Turkey but the cotton industry worldwide and this adds impetus to the need for supply chains to shift into new and more sustainable ways of doing business together.

“IN THE EARLY DAYS, TURKISH GROWERS WELCOMED ORGANIC COTTON AGRICULTURE. FIELD SIZES WERE SMALL AND PRODUCTS FOR THE LOCAL MARKET AS IMPORTANT AS COMMODITY CROPS. EVEN BACK THEN SMALLER FARMERS WERE NOT USING MANY CHEMICALS, AND THEY WERE HARVESTING COTTON BY HANDPICKING. THEY WERE HAPPY TO GAIN A PREMIUM IN THE MARKET FOR THEIR HARD WORK. THEY ALSO LIKED THE SPIRIT OF ORGANIC AND IDENTIFIED THEMSELVES WITH PROTECTING THEIR ENVIRONMENT... TO HAND OVER A CLEANER ENVIRONMENT TO THEIR CHILDREN.”

– AYDIN UNSAL, KADIOGLU GROUP

CHALLENGES TO GROWTH

MARKET DEMAND: Turkish cotton farmers will shift to higher-value food crops such as corn and sunflowers if the price for cotton is not attractive. With organic, farmers tend to grow a range of crops (as part of their approach to building soil fertility, etc) and usually remain organic, simply leaving cotton out of the mix, in favor of the higher value food crop. If farmers let go of their organic status altogether the speed in which they can return to organic cotton is obviously compromised.

COMPETITION: The other big challenge for the Turkish organic cotton sector is price competition from other countries. This is partly due to the cost of labor relative to many other cotton producing countries. Once again, this comparison is not simply a “conventional versus organic” challenge for Turkey, although organic agriculture typically requires more manual labor.

OPPORTUNITIES FOR GROWTH

The “Why Turkey” section in this Guide provides insight into the many advantages and opportunities in Turkey. Adding to the list is the growing influence of material rating tools.

Textile Exchange research shows that an increasing number of brands and retailers are planning to source organic, and other more sustainable cotton, into their supply chains. This motivation comes from a growing recognition of the need to improve their operations and sourcing practices and reduce impacts on the environment and people, and secure their access to raw materials in the long term. This motivation is being accelerated by an increased focus on metrics and the influence of indexes such as the Higg Index (developed by the Sustainable Apparel Coalition) to drive change within the industry.

FEATURE: AKASYA

GREENFIELDS OF ORGANIC

Leading international trading company Akasya Ltd. is located in Izmir, the heart of Turkish agricultural trade and organic production. Akasya has ecological farming projects in four big centers of the Aegean; Izmir, Denizli, Aydın and Manisa.

Producing both cotton and dried fruits (organic figs, sultanas, raisins), they have about 300 farmers and 2,000 ha. Some of the production is conventional: the rest is certified organic and is produced under Akasya's Greenfield Brand and Greenfield Organic. All of the cotton is grown by contracted farmers and ginners under the Akasya Greenfield Project and certified organic by Control Union. This organic cotton is exported to a wide range of countries including Europe, the Far East, and the USA, besides being sold into the Turkish textile industry.

The Greenfield project is one of the biggest organic cotton projects in Turkey. The cotton is distinguished by being produced and processed following organic requirements. Traditional methods are used to produce the best quality, minimum use of fossil fuels and irreplaceable raw materials, and no use of artificial additives and colorings. These processing methods ensure natural preservation and packaging which is environmentally friendly with recyclable materials.

Akasya has high standards based on its values of: perfection, continuous improvement, innovation, social responsibility, team spirit and fairness. While they offer the best quality product at the most competitive price, human and environment health are their major concern.

Visit <http://www.akasyaltd.com/>

SPECIAL FEATURE: THE GAP PROJECT

SOUTHEASTERN ANATOLIA PROJECT REGIONAL DEVELOPMENT ADMINISTRATION

With its 75 million inhabitants, Turkey is today the 16th largest country in the world, and the fastest growing economy in Europe, growing at an annual rate of 5.2 percent. A focused macroeconomic strategy has transformed the country into one of the major beneficiaries of foreign direct investment. This has also boosted foreign trade, while exports reached USD 135 billion by the end of 2011. It is the Government's stated intention that Turkey becomes one of the world's 10 largest economies by 2023, the 100th anniversary of the founding of the Turkish Republic.

Against that background of growth, regional economic disparities between the West and the East of the country have been one of the most persistent problems for Turkey. Over many decades, the South East of the country (also called Upper Mesopotamia) has received far less investment and has suffered from out-migration. With the Southeastern Anatolia Project (GAP), the Government is now reducing this interregional disparity.

VISION – BY 2023, TURKEY IS A LEADING SUPPLIER OF ORGANIC TEXTILES AND FOOD RAW MATERIALS, AND AN INNOVATIVE AND COMPETITIVE ORGANIC PRODUCTION SECTOR BENEFITING FROM ITS SUPPLY OF FERTILE IRRIGATED AGRICULTURAL LAND.

THE GAP PROJECT

The GAP project promotes sustainable human development, and aims to create an environment in which future generations can flourish. The basic strategies of the project include social inclusion, fair distribution of wealth, employment generation and environmental protection. As an integrated initiative, the GAP Project goes beyond investments into physical infrastructure and includes activities such as sustainable agricultural and industrial development, communication, education, health, culture, tourism and social services.



PHOTO: Farmers harvesting cotton in the SEA region (UNDP & GAP RDA).

THE GAP ORGANIC AGRICULTURE CLUSTER PROJECT

The GAP Regional Development Administration started the Gap Organic Agriculture Cluster Project as part of the GAP Action Plan (2008-2012) in order to ensure competitiveness in the GAP area for organic agriculture. The project, implemented in cooperation with United Nations Development Program (UNDP) aims to shape the demand for organic products, to create the organic agriculture infrastructure of the area, to define products that can be produced organically, to aid government oriented research institutions and universities and to determine the support that these institutions can most usefully provide.

The project also aims to create new regional employment opportunities by encouraging the productivity of the land and better water usage. In order to reach these goals, the GAP Agriculture Cluster Project has established a governance structure where all related stakeholders of Organic Sector work together.

ORGANIC COTTON EXPANSION

Organic cotton is the immediate Unique Selling Proposition (USP) of Upper Mesopotamia. The main features are:

- Upper Mesopotamia has fertile soils, a climate very suitable for cotton which at the same time deters its pests and diseases, and a growing availability of water for irrigation (1,000,000 ha of irrigated land target by 2018).
- Turkey does not allow GMO cotton, so contamination of organic cotton is avoided. The prevailing large field sizes in Upper Mesopotamia allow for pure organic farming and prevent contamination with conventional crops.
- An organic textile cluster is developing fast in Upper Mesopotamia with all the processing facilities (ginning, spinning, weaving, knitting, dyeing and final apparel making) in its reach.
- In processing, Upper Mesopotamia has a number of global advantages including being the most inexpensive processing region close to major markets in Europe.
- From about 80 large organic spinners around the world, eight are located in Upper Mesopotamia. Among them is Sanko - the largest spinner in Turkey and the third largest in the world. Spinning is energy-intensive, but with recent investments in hydroelectric power (installed capacity: 7 GW), clean energy is abundantly available in Turkey.
- Apparel making requires more labor, especially of women, than any other step in the textile value chain. Although workers in Turkey enjoy full social security, wages in Upper Mesopotamia are still much lower than in Western Turkey or Europe, making the region highly competitive.
- Turkey's proximity to Europe allows for a short "lead-time," i.e. short notice delivery into fast moving fashion markets.

It is clear that Upper Mesopotamia has the opportunity to become the world leader in the production of organic cotton which is harvested, processed and transformed into garments with full environmental and social responsibility - recognition of basic labor rights including no child labor, minimum wages, and social security.



PHOTO: Textile factory Adiyaman (UNDP & GAP RDA).

Manufacturing company **INTERNET TEKSTIL** recently started a contract-farming project to support farmers in Upper Mesopotamia to become organic. Abdurrahman Dicle, CEO, says:

“SOURCING COTTON FROM UPPER MESOPOTAMIA NOT ONLY IMPROVES TRANSPARENCY AND TRACEABILITY, BUT ALSO CUTS LOGISTICS COSTS ALLOWING FOR A HIGHER COTTON PRICE TO BE PAID TO THE FARMERS WHO, AT THE MOMENT, EARN THE LEAST ALONG THE ENTIRE TEXTILE VALUE CHAIN.”

More information can be found at www.gap.gov.tr and www.gaporganic.org

4

MADE IN TURKEY



PHOTO: Employees working in a textile factory in Adiyaman (UNDP & GAP RDA).

THE TEXTILE INDUSTRY

The Textile and Garment Industry is one of the most critical sectors in Turkey in terms of contribution to the gross domestic product (GDP), employment generation, and exports. There are approximately 40,000 companies in the sector, which employ an estimated workforce of 750,000 (Republic of Turkey – Ministry of Economy, 2012).

Lower income countries typically focus on lower value-add segments of the textile market such as inputs and fabric production, whereas high income countries focus on higher value add segments such as specialty apparel (McNamara, 2008). Turkey is one country that actually plays across the entire value chain.

TEXTILE & CLOTHING – The Turkish clothing industry is the seventh largest supplier in the world, and the second largest supplier in the EU. Turkey is listed as one of the world’s top ten exporters. The Turkish textile and clothing industry also plays a significant role in world trade, and can compete in international markets in terms of quality, design, and ability to deliver a wide range of products.

The established capacity of woven production in Turkey is estimated to be around 1,350,000 mt while that of knitted products is around 2,250,000 mt. In recent years, pantyhose, tights, stockings, socks and other hosiery production in Turkey has shown a faster growth and with the new investments it is estimated to have reached a production capacity of 200 million dozens per annum.

FIBER & YARN – The Turkish fiber and yarn industry has developed in recent years and as a consequence of the increase in demand for textile and clothing products from both domestic and foreign markets, the fibers and yarns production and exports have increased together with investments in the industry.

Mills are spread out all over Turkey, mostly in Istanbul, Bursa, Kahramanmaras, Gaziantep, Adana, Izmir, Kayseri, Malatya, Tekirdag, Usak, Hatay and Denizli. Most of the large mills have integrated fiber production into clothing.

SUSTAINABILITY TRENDS IN TURKISH TEXTILE MANUFACTURING

The Government of Turkey is supporting the transformation of the national textile and clothing sector, within the framework of the World Trade Organization rules. Underpinning this transformation is the implementation of a national Textile Strategy which requires a holistic approach based on three inter-connected pillars: (a) productivity, (b) innovation, and (c) corporate social responsibility (CSR) and sustainability.

MOVING EAST

The “National Textile, Garment and Leather Sector Strategy” foresees that the manufacturing capacity in the western regions of the country will increasingly move to the eastern (less developed) regions, creating “hubs” that specialize in different segments of the textile and garment value chain.

A UN Joint Program aims to enhance the international competitiveness of Small and Medium Enterprises (SMEs) in the textile and clothing sector of Turkey. Launched in early November, “Harnessing Sustainable Linkages for Small and Medium Enterprises in Turkey’s Textile Sector” will concentrate specifically on SMEs located in poor and vulnerable regions such as Gaziantep, Kahramanmaraş, Adıyaman, and Malatya, the program and integrate them into the global and domestic value chains, providing job for millions residing in these regions.

According to a recent Ministry of Economy report an increasing number of Turkish manufacturers have ecological labels for their products, and are implementing environmental management systems in their plants; particularly the bigger companies. The Government of Turkey has taken a number of measures to transform the national textile and garment industry, within the framework of the World Trade Organization rules, with a special focus on small and medium enterprises (SMEs). Find out more: on the Transforming Turkish Textiles website: <http://www.mdgfund.org/country/turkey/story/TransformingTurkishTextiles> and in the Report by the MDG Achievement Fund: Harnessing Sustainable Linkages for SMEs in Turkey’s Textile Sector



PHOTO: Garment making (Egedeniz).

MANUFACTURING ORGANIC

Currently, there are almost 300 facilities in Turkey certified to the Organic Content Standards (formerly OE Standards) and 400 certified to the Global Organic Textile Standard (GOTS).

“TURKEY IS SET TO INCREASE ORGANIC TEXTILE EXPORTS. OUR TEXTILE EXPORTS AMOUNTED TO USD 15 BILLION IN 2010 AND ORGANIC TEXTILE EXPORTS REACHED USD 60 MILLION. TURKEY EXPORTS ORGANIC TEXTILE PRODUCTS TO MORE THAN 30 COUNTRIES. THE WORLD ORGANIC TEXTILE MARKET REACHED USD 6.8 BILLION IN 2010. WE WANT TO INCREASE OUR SHARE IN THIS MARKET IN THE COMING YEARS.”

– EMRE KIZILGUNESLER, CHAIRMAN, AEGEAN CLOTHING MANUFACTURERS’ ASSOCIATION (EGSD)

FEATURE: EGEDENIZ

PIONEERS IN ORGANIC

Egedeniz Textile is a part of the Kadioglu Group of Companies. The Kadioglu Group's main line of business is agricultural products. The business started in the early 1900s with cotton trading and ginning as well as dried fruit supply to exporters. In the early 1990s the business diversified into garment manufacturing from both organic and conventional cotton.

Egedeniz was Turkey's first textile company certified to manufacture organic products. The company's organic cotton is grown in western Turkey, and the cotton is one of the highest quality cottons in the world. Egedeniz contracts farmers for organic agriculture, yarn, fabric and manufacturing of finished garments for many well-known brands throughout the world.

Egedeniz provide agricultural knowhow to their growers, and have their own agricultural engineers employed by the company, and also finance the farmers. It all starts from the soil. Plants are grown on these farmers' fields without use of any artificial fertilizers, insecticides, and herbicides. This enables the fields to clean away any past plantation residues. Rotation of crops is employed to contribute to soil improvement. Hand picked cotton from their projects are roller ginned to keep fibers much less damaged than saw ginning as well as minimizing the neps count in the fiber, thus in the yarns. Good spinning characteristics supported by long staple values, fine count yarns up to Ne 60's can be spun.

All processes from fields through ginning, spinning, knitting or weaving, washing, dyeing and manufacturing the garments are done under strict supervision of experienced colleagues and certified by Control Union.

The product range consists of mainly knitted sportswear and outdoor wear, underwear, and baby clothing. Egedeniz also manufactures woven products such as shirts, pants, towels, bathrobes, and bedding items. Besides garments, Egedeniz supply organic cotton as fiber, yarn and fabric.

For more information on Egedeniz please visit: <http://www.egedeniztextile.com/>.

FEATURE: SANKO

SCALING UP ORGANIC

Sanko was founded by Mr.Sani Konukoğlu in 1943. The Sanko Group is headquartered in Gaziantep, a city in the Southeastern part of Turkey. As is one of the biggest textile companies in Turkey, Sanko employees 12,000 people, and has links all over the world.

Sanko's main product lines are yarns, knitted and dyed fabrics. Currently, Sanko has 500,000 spindles. 15 mt of capacity is 100 percent Cotton Melange, 15 mt in Blended yarns, 30 mt in Open-End production, and the rest is Ring Spun Production. Sanko also produces 150 mt of knitted fabric per day.

Daily production capacity is 300 mt of yarn per day. Sanko produces open end, ring spun and air jet yarn with its daily production capacity of 300 mt of yarn per day. It has a very wide range of yarn qualities such as cotton melange, compact, core spun, slub, organic and BCI. Sanko also produces 100 mt of knitted fabric and 30 mt of dyed fabric per day.

Sanko's impact on organic cotton in Turkey is significant. Sanko is one of the largest producers of organic yarn and fabric in the world, making them an important part of the organic cotton supply chain. Sanko started their own organic cotton growing almost 10 years ago, and they are responsible for buying much of the organic cotton grown in Southeastern Turkey. Sanko has built a long term relationship with the growing community, guaranteeing sales and prices for the farmers.

Sanko sells most of its organic cotton products domestically, to the various textiles manufacturers around the country. Find out more about Sanko here: <http://www.sankotextile.com/>.



PHOTO: Organic cotton yarn (Sanko).

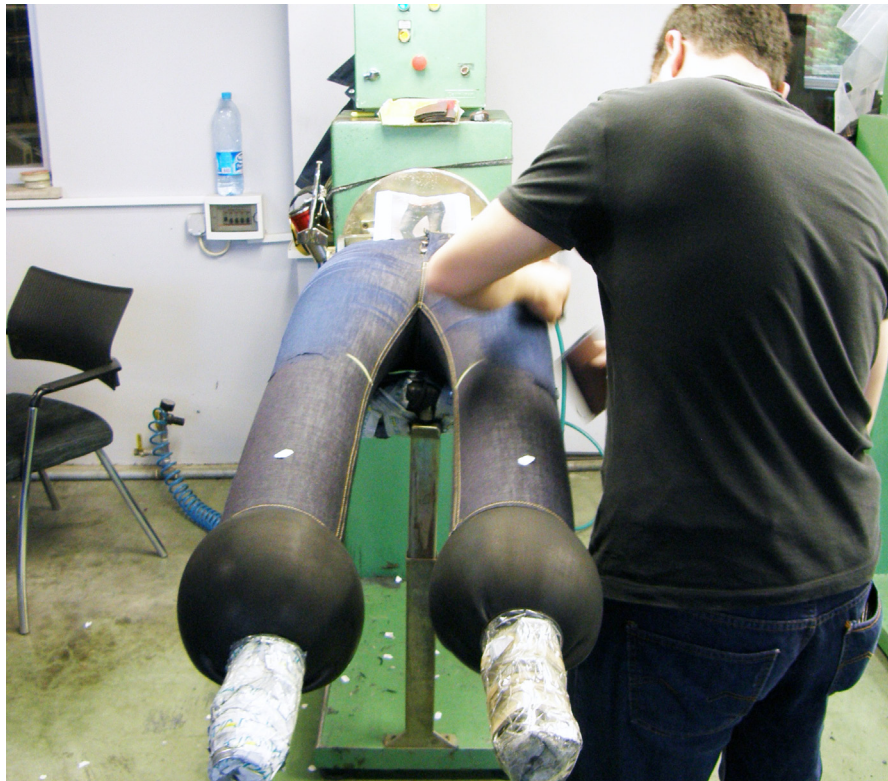


PHOTO: Denim finishing process (Orta Anadolu).

FEATURE: ORIMPEX

SPECIALISTS IN ORGANIC

Orimpex is a Turkish and Dutch company specialized in manufacturing organic textiles. Orimpex's production facility is located in Izmir in the Aegean region of Turkey. Organic cotton cultivated in this region is famous for its long, soft, strong fibers. From 100 percent organic cotton Orimpex produces baby, women's, and men's apparel. All Orimpex's products are certified to the Global Organic Textile Standard (GOTS), OE 100 and the OE Blended Standard by Control Union

Orimpex, established in 2007, now has a production capacity of 45,000 products per month, and increasing every year. All process steps: cutting, sewing, quality control, and packaging are carried out in-house by qualified and trained personnel.

Orimpex has a showroom and office, in De Meern the Netherlands, where they closely serve their West European customers. From this base they help clients with logistics and customs.

THE TEAM

The Orimpex team is experienced and knowledgeable in textile production techniques, prints, embroidery and all aspects of manufacturing clothing and other textile product collections. The Company is continuously growing and keeps up to date with the latest production techniques and fashion trends. Orimpex believes that good teamwork results in good quality and good design.

MISSION

As a young and environment-friendly company Orimpex want to contribute to keeping the earth clean and safe for our children and future generations. Therefore, the company provides only products which are certified as environment friendly and without the use of hazardous chemicals. Orimpex believes that textile products can be produced in an eco-friendly and healthy way – and that these qualities make their products even more enjoyable and comfortable to wear.



PHOTO: Quality control at factory (Orimpex).

“WE WOULD LOVE TO WELCOME YOU TO ORIMPEX AND PROVIDE YOU WITH ALL THE INFORMATION YOU NEED ABOUT MANUFACTURING YOUR COLLECTION. WE FIND THAT OUR CLIENTS ARE FOND OF COMING TO IZMIR AND ENJOYING THE ENVIRONMENT AND CULTURE OF TURKEY, AS WELL AS THE OPPORTUNITY TO VISIT OUR FACTORY. YOU ARE ALWAYS MORE THAN WELCOME TO MAKE AN APPOINTMENT AND VISIT US!”

VISIT ORIMPEX!

Alongside telephone, email, and video conferencing, you can visit the Orimpex factory in Izmir or meet at their European showroom and office in De Meern, The Netherlands.

www.orimpex.com.tr or www.orimpex.nl

5

WHO'S WHO IN ORGANIC



PHOTO: Alterations service at retail outlet (Nudie Jeans).

TEXTILE EXCHANGE TURKISH MEMBERS

Find a partner in your company's journey to sustainability through the Textile Exchange online member directory: <http://textileexchange.org/companies>. Information on Turkish growers, processes and manufacturing member companies is presented below:

EGEDENIZ

PRODUCT RANGE	• Yarn • Wovens • Knits • Fabric • Garments
MANUFACTURING	• Ginner • Spinner • Fabric Mill • Cut and Sew (CMT) • Dyes Finisher
CERTIFICATIONS	• GOTS • OE100
WEBSITE	http://www.egedeniztextile.com
CONTACT	Ozgu Cubukcuoglu
EMAIL	ozgu@egedeniztextile.com
PHONE	+90 232 4637094
ADDRESS	Isciler Cad 176 Alsancak Izmir 35230, Turkey

INTERNET TEXTIL

PRODUCT RANGE	• Yarn • Knits • Garments
MANUFACTURING	• Spinner • Fabric Mill • Cut and Sew (CMT) • Dyes Finisher
CERTIFICATIONS	• GOTS • OE100 • OE Blends • OEKO-TEX • SA8000
WEBSITE	http://www.internettekstil.com.tr
CONTACT	Koray Asici
EMAIL	korayasici@internettekstil.com.tr
PHONE	+90 532 5757580
ADDRESS	Organize Sanayi Bölgesi Adiyaman, Turkey

ORIMPEX

PRODUCT RANGE	• Fiber • Yarn • Wovens • Knits • Fabric • Garments
MANUFACTURING	• Cut and Sew (CMT)
CERTIFICATIONS	• GOTS • GRS • OE100 • OE Blended
WEBSITE	http://www.orimpex.com.tr
CONTACT	Ali Polat
EMAIL	info@orimpex.com.tr
PHONE	+90 232 4310276
ADDRESS	AOSB 10040 sok No:28 Cigli 35620, Izmir, Turkey

ORTA ANADOLU

PRODUCT RANGE	• Fabric • Jeanswear, Sportswear, Casualwear, Fashion Denim • Denim and Flat (RTD) fabrics
MANUFACTURING	Vertically-integrated denim fabric mill
CERTIFICATIONS	• ISO 9001 • ISO 14001 • TS 18001 • GOTS • OEKO-TEX • GRS • Organic Exchange • Fairtrade
WEBSITE	http://www.ortaanadolu.com http://www.ortablu.org
CONTACT	Ebru Ozaydin
EMAIL	eozyaydin@ortaanadolu.com
PHONE	+90 212 3153200
ADDRESS	Cumhuriyet Cad. No:155/5 34373 Harbiye, Istanbul, Turkey

PUTAS TEXTILE

PRODUCT RANGE	• Yarn • Knits • Fabric
CAPABILITIES	• Spinner • Fabric Mill • Cut and Sew (CMT)
CERTIFICATIONS	• GOTS
WEBSITE	http://www.putas.com.tr
CONTACT	Yilmaz Yildirim
EMAIL	yilmazyildirim@putastextile.com.tr
PHONE	+90 232 8641859
ADDRESS	Pancar Koyu Girisi Ayrancilar Torbali 35386, Izmir, Turkey

SANKO

PRODUCT RANGE	• Yarn • Knits • Fabric
MANUFACTURING	• Spinner • Fabric Mill • Dyes Finisher
CERTIFICATIONS	• OE100 • OE Blended • GOTS • OEKO-TEX • GRS • SUPIMA • BELCORO • ISO 9001
WEBSITE	http://www.sankopazarlama.com
CONTACT	Sahin Demirdag
EMAIL	sdemirdag@sanko.com.tr
PHONE	+90 342 2116423
ADDRESS	2.Organize Sanayi Bölgesi Sani Konukoğlu Bulv. No:1 Başpınar, Gaziantep, Turkey

TOPKAPI IPLIK

PRODUCT RANGE

- Yarn (Raw White & Dyed)
- Knits
- Garment (Baby & Children Wear)

MANUFACTURING

- Spinner
- Fabric Mill

CERTIFICATIONS

- OCS 100
- OCS Blended
- GOTS
- OEKO-TEX
- ISO 9001
- ISO 14001
- OHSAS 18001
- SA 8000

WEBSITE

<http://www.topkapiplik.com.tr>

CONTACT

Vehbi Bayrak

EMAIL

info@topkapiplik.com.tr

PHONE

+90 212 8661700

ADDRESS

Hadimkoy Mah. 34555
Elvan Sok. No:6-8, Arnavutkoy, Istanbul, Turkey



COMPANIES CERTIFIED TO OE 100, OE BLENDED STANDARDS AND THE NEW ORGANIC CONTENT STANDARD

To find suppliers certified to OE 100, OE Blended Standards and the new Organic Content Standard, please visit the Textile Exchange website for a regularly updated list of companies:

<http://textileexchange.org/standards>



COMPANIES CERTIFIED TO THE GLOBAL ORGANIC TEXTILE STANDARD (GOTS)

The GOTS public data base is a practical tool that enables its users to search for GOTS certified entities in the supply chain, their location, fields of operation and GOTS certified products according to individual parameters: <http://www.global-standard.org/public-database/search.html>

CERTIFICATION BODIES IN TURKEY

Certification bodies accredited to to OE 100, OE Blended Standards and the new Organic Content Standard.

CERES-CERT

CERES Turkey
Korutürk Mah. Ahlat Sokagı No:39
35330 Balçova – Izmir
Turkey

Phone: +90 232 2472022
Email: ceres-turkey@ceres-cert.com
Website: www.ceres-cert.com.tr

CONTROL UNION

Control Union – Istanbul
Icerenkoy Mah. Firuze sokak No: 4 / 2-3-4-5
Pk: 34752 Atasehir, 34752 ISTANBUL
Turkey

Phone: +90 216 4697557
Email: trteam@controlunion.com
Website: www.controlunion.com

ECOCERT

ECOCERT Denetim Ve Belgelendirme Ltd
Sirketi
184 Sok. No:60
Hasan Bey Apt. Kat:2 D:3
35030 Bornova - Izmir
Turkey

Phone: +90 232 3434360
Email : office.turkey@ecocert.com
Website: www.ecocert.com.tr

ETKO

Head Office 160 sk
No: 13/7 Bornova Izmir 35040
Turkey

Phone: +90 232 3397606
Email: info@etko.org
Website: www.etko.org

ICEA

M. Kemal Cad,
No: 166/2 D.13 - 35030, Bayrakli - Izmir
Turkey

Phone +90 232 3426068
Email: icea.turkey@icea.info
Website: www.icea.info/en/perche-bio/bio-tessile

IMO

IMO-CONTROL Sertifikasyon Tic. Ltd. Sti.
225 Sokak
Dündar Apt. No 29 Kat 7 Daire 7
TR 35040 Bornova/Izmir
Turkey

Phone: +90 232 3474705

Email: imotr@imo-control.org

Website: http://www.imo.ch/logicio/pmws/indexDOM.php?client_id=imo&page_id=tr

For certifiers approved to GOTS
visit <http://www.global-standard.org/certification/approved-certification-bodies.html>



TEXTILE EXCHANGE MEMBERSHIP

A membership with Textile Exchange will help you navigate the complicated maze of the sustainable textile industry. TE helps embed sustainability into evolving business and supply chain strategies. We make it easier to adapt to changing opportunities and requirements in textile sustainability and we work to ensure that actions taken toward sustainability result in real and meaningful change. We partner with organizations of all types and sizes who want to advance their sustainability efforts. Since 2002 we have helped to establish best practices and fair business models for the entire supply chain, from the farm to retail. When you become a Textile Exchange member, you'll have access to industry experts, networking opportunities, one-on-one consulting, content standards, and the most comprehensive industry reports and tools. Our goal is to help you succeed.

Membership@TextileExchange.org

SUPPORTER MEMBERSHIP OPEN TO ALL 3,000 USD PER YEAR	PARTNER MEMBERSHIP FOR BRANDS AND RETAILERS 12,500 USD PER YEAR	PARTNER MEMBER FOR TEXTILE SUPPLY CHAIN 12,500 USD PER YEAR
<p>Basic Visibility</p> <ul style="list-style-type: none"> • Use of TE member logo • Online member profile TE membership certificate <p>Publications</p> <ul style="list-style-type: none"> • Beginner's Guide to Sustainable Fibers • Certification Toolkit • TE Cotton Farm & Fiber Report • TE Organic Cotton Market Report <p>Training and Services</p> <ul style="list-style-type: none"> • Early access and discounted rates for all webinars and support materials <p>Networking</p> <ul style="list-style-type: none"> • 1 Pass to TE Global Textile Sustainability Conference 	<p>Access to all Supporter Membership benefits, plus:</p> <p>Premium Visibility</p> <ul style="list-style-type: none"> • Your logo in all basic Textile Exchange publications <p>Premium Publications</p> <ul style="list-style-type: none"> • Free access to all paid publications (new publications added annually) <p>Training and Services</p> <ul style="list-style-type: none"> • Priority, free access for all webinars and support materials • 12 hours of private consultation or training <p>Networking</p> <ul style="list-style-type: none"> • 3 Passes to the TE Global Textile Sustainability Conference 	<p>Access to all Supporter Membership benefits, plus:</p> <p>Premium Visibility</p> <ul style="list-style-type: none"> • Your logo in all basic Textile Exchange publications • Website advertising banner for 60 days • Featured member profile on TE website for 30 days • Personalized introductions to 10 members of your choice during annual term <p>Training and Services</p> <ul style="list-style-type: none"> • Priority, free access for all webinars and support materials <p>Networking</p> <ul style="list-style-type: none"> • 3 Passes to the TE Global Textile Sustainability Conference • 1 Exhibit Space at the TE Global Textile Sustainability Conference

ABOUT TEXTILE EXCHANGE

Textile Exchange is a 501(c)(3) non-profit organization incorporated in 2002. We operate internationally and are committed to the responsible expansion of textile sustainability across the global textile value chain. Textile Exchange is headquartered in the USA with staff and contractors located in eight countries.

VISION: We envision a global textile industry that protects and restores the environment and enhances lives.

MISSION: Textile Exchange inspires and equips people to accelerate sustainable practices in the textile value chain. We focus on minimizing the harmful impacts and maximizing the positive effects of the global textile industry.

WHAT WE DO

- Convene, inform and build capacity in our membership base and across the industry
- Advocate product and industry integrity
- Help bring positive innovations to scale
- Specialize in the organic cotton value chain
- Improve organic farmers' visibility, access to stable markets, and better develop business capabilities through education
- Create partnerships that accelerate sustainable practices across the global textile industry



TextileExchange
Creating Material Change

farmhub.textileexchange.org

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