

Europe's nearest big garment maker is losing Europe.

Türkiye sits two days from EU shelves. Its share of EU apparel imports fell from 10.81% to 9.23% in a year — while suppliers far farther away gained.

THE PRINT

A third straight year down.

-6.4%

Türkiye's 2025 apparel exports fell to ~\$16.8B (textile + apparel ~\$26.2B, -4.4%). Q1 2026 fell a further 7.2%.

THE PARADOX

Farther away, growing. Closest, shrinking.

CHINA

+6.7%

EU apparel imports, Jan–Oct 2025. #1 extra-EU supplier.

BANGLADESH

+9.6%

#2 extra-EU apparel supplier.

TÜRKİYE

–10.6%

#3 supplier. EU share 10.81% → 9.23%.

WHY

Proximity can't close a price gap this wide.

1 The base repriced. **Labour costs and the lira's real level** lifted the Turkish cost of a basic garment above Asian rivals.

2 Demand traded down. **Weak EU consumer demand** pushed buyers toward lower-cost suppliers, where lead time matters least.

3 The floor thinned. **Sector employment is down ~390,000** from its 2022 peak — ~1.25M to ~860,000.

WHERE THE WORK WENT

The work is repricing its base, not leaving the corridor.

\$567M

Turkish textile exports to Egypt in 2025 — up 23% in a year (\$344M → \$461M → \$567M), alongside new Turkish investment there.

WATCHPOINT – THE PREMIUM THAT STAYS

\$21.3 a kilo.

VALUE PER KILO, 2025

Turkish apparel exported at \$21.3/kg against a \$1.59/kg national average; textiles at \$4.3/kg. The value-dense end Türkiye can still defend — **faster turns, smaller batches, design and compliance** — is the part proximity rewards. The commodity end is the part it no longer covers.

STRATEGIC BOTTOM LINE

Proximity is a premium, not a discount.

It buys speed, small batches and compliance — never the lowest price per shirt.

For EU-bound sourcing, Türkiye is the right base for fast, complex, low-volume, compliance-heavy programmes. For price-led commodity volume it is not — and the firms moving that work to cheaper bases already know it.

WHAT TO WATCH NEXT

Three reads on the corridor.

A H1-2026 prints. If value-per-kilo rises while tonnage and EU share keep falling, Türkiye is upgrading defensively — not recovering volume.

B The Egypt build-out. More Turkish cut-make capacity relocating to Egypt and the Maghreb — keeping the corridor, repricing the base.

C EU rules. CBAM, ESG due-diligence and "Made in EU" procurement leaning the premium end back toward nearby, compliant suppliers.

SOURCES

For the record.

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Fibre2Fashion, *"Türkiye's apparel exports slip 7.2% in Q1 on soft demand"* — 1 May 2026.

Eurostat — extra-EU apparel imports by supplier, Jan–Oct 2025.

İTHİB (Istanbul Textile & Raw Materials Exporters' Association) — *2025 sector data* (value-per-kilo, Egypt, employment).