THE TURKISH FURNITURE PRODUCTS ASSEMBLY SECTOR REPORT

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PREFACE

The Union of Chambers and Commodity Exchanges of Turkey works in accordance with the requirements of private sector as an umbrella union, looks for solutions of the sectors' problems and consistently contributes to the development of the Turkish private sectors.

In line with the need to offer more comprehensive services to our industry and in the perspective of the development of these services, Turkish Sector Assemblies was established within the framework of Turkish Sector Assemblies Incorporation, Duty and Working Directive based on TOBB Law (dated 18/05/2004 and numbered 5174), article 57. After promulgating in the Official Gazette No. 25725 dated 12 February 2005, 52 Turkey Assembly Sectors were established under the umbrella of our Union pursuant to our regulation.

Turkey Sector Assemblies continues to operate since July 2006. The existing needs and demands from the sectors, the number of assemblies was increased to 59 within the period.

Turkey Sector Assemblies is the comprehensive servicing body with the structure of the industry to all interested parts through its integrated structure, being a local as well as international sectoral perspective and today, beside the future with flanking strategy and vision, and with the orientation of better services to offer than similar examples in the world. Turkey Sector Assemblies also provides major benefits to our sectors and economy with its national and international character, its vision and strategy.

Assemblies are important meeting point for the firms, sector organizations and relevant public institutions as well as the representatives and senior directors. Turkey Sector Assemblies represents a radical step for all aspects of economic sectors. Being able to gather under one roof for sector organizations and institutions, solving the problems of the sectors and positive contribution to the economy of the country, assemblies are the indication of a major commitment to boosting. Provided unity and togetherness within the assembly environment, the creation of a common vision and shared decision-making are allowed. Partners in accordance with decisions of the initiatives and related authorities are taking a more positive result. With this sectoral structure, public authorities and non-governmental organizations are effectively implemented as a solid foundation.

Within the framework of assembly activities, more output to obtain from the work of assemblies, harmonization of different opinions and thoughts, ensuring consistency, the current state of the sector and with expectations for the future in order to inform the public, sector reports are prepared by the assemblies.

Prepared sector reports are beneficially important for the creation of the sector policies, strategies, projections for the future and insights to future market research, the industry and our community and I wish good luck to those concerned.

M. Rifat HİSARCIKLIOĞLU
President

FOREWORD

The Turkish furniture industry has become a branch of information and capital weighted manufacture by the accession of medium and large scale enterprises in the 1990s to traditionally operating workshop type, small scale enterprises and has become one of the rare sectors without foreign trade deficits in the last 10 years. Being in a quick development and change period, the sector presents a potential in domestic and foreign markets in the direction of the factors such as brands, quality, small – large scale enterprises in the sector, geographical position, general growth policy of the country, young population, improvement of national income per capita. National organization in the sector has started in the early 2000s and now a numerous number of sector association is operating. International fairs organized by the sector associations are significant activities for the advertisement and development of the country's furniture sector.

Our sector is referred under the title 'Wood products and Furniture Sector' for the first time in 9th Development Plan in which we were assigned by the Presidency of the Union of Chambers and Commodity Exchanges of Turkey (TOBB) and a report was prepared for the furniture sector in 10th Development Plan. Today, it has become an important sector in our country with the efforts of esteemed M. Rifat Hisarcıklıoğlu, the President of TOBB. One of the 61 sector assemblies is 'Turkish Furniture Products Assembly'. Our furniture sector, has been a sub-sector until now in the wood works sector, is defined as main sector for the first time by the Union of Chambers and Commodity Exchanges of Turkey.

Today, the sector has become one of the limited industry sectors with the exportation of 1,9 billion USA dollars to 214 countries and has no foreign trade deficits with gradually increasing export value since 2001. The sector aims to enter among the first 10 largest furniture producers in the World and the first 5 in Europe with the expectation of 25 billion dollars production value and 10 billion dollars exportation value in 2023.

I should like to acknowledge my sincere thanks to esteemed M. Rifat Hisarcıklıoğlu, the President of the Union of Chambers and Commodity Exchanges of Turkey; the respectable representatives of our sector for their support, promotion and collaboration of the report which includes the updated information and thanks for Assoc. Prof. Dr. Hamza ÇINAR who prepared the report.

With respects,

Davut DOĞAN
The Head of Turkish Furniture Products Assembly

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ABBREVIATIONS

CSiL	Center for Industrial Studies
CTSPC (GTİP)	Customs Tariff Statistical Position Codes
EC	European Community
EU	European Union
FED	Federation
FSC	Forest Stewardship Council
FZ (Ser. Böl.)	Free Zone (Free zone)
IPP (DİİR)	Included in the Permit Process
ISE (BİST)	Istanbul Stock Exchange
IT	Information Technology
MC	Movement Certificate
MDF	Medium Density Fiberboard
MOBDER	Furniture Association (Mobilyacılar Derneği)
MOBSAD	Furniture Industry Businessmen Association (Mobilya Sanayi İşadamları Derneği)
MOSDER	Furniture Manufacturers Association (Mobilya Sanayicileri Derneği)
MUDER	Kitchen Furniture Manufacturers Association (Mutfak Mobilya Üreticileri Derneği)
OIZ (OSB)	Organized Industrial Zone (Organize Sanayi Bölgesi)
OMSİAD	Office Furniture Manufacturers Association (Ofis Mobilyacılar Derneği)
RE & DE	Research & Development
Rep	Republic
SCEA (NACE)	Statistical Classification of Economic Activities (Ekonomik Faaliyetlerin İstatistikî Sınıflaması)
SITC (USTS)	Standart International Trade Classification (Uluslararası Standart Ticaret Sınıflaması)
SME (KOBİ)	Small and Medium Enterprise (Küçük ve Orta Büyüklükteki İşletlemeler)
SMEDS (KOSGEP)	Small and Medium-Sized Enterprises Development and Support Department (Küçük ve Orta Ölçekli İşletmeleri Geliştirme ve Destekleme İdaresi)
SSI (SGK)	Social Security Institute (Sosyal Güvenlik Kurumu)
SWOT (GZFT)	Strengths, Weakness, Opportunities, Threats
TRNC	Turkish Republic of Northern Cyprus
TUIK	Turkey Statistical Institute (Turkiye İstatistik Kurumu)
UAE	United Arab Emirates
UCCET (TOBB)	Union of Chambers and Commodity Exchanges of Turkey (Turkiye Odalar ve Borsalar Birliği)
USA	United States of America
VAT (KDV)	Value Added Tax

INTRODUCTION

Furniture can be defined as the only most effective product in human life which attains a place in any field of daily life, provides the welfare of the individuals and society, serves the social and cultural requirements directed to life, directly influences the living quality of people, which everybody uses and needs. Furniture demand gradually increases with recently meaningful urban transformation projects, population increase, rising living standards experienced in the country, the increase in the export value of the sector and the results of these directly affect the furniture sector.

Oriented to national and international markets, production is made in Turkish furniture sector in a wide range such as panel furniture, solid furniture, sofa, seating group, moduler furniture (kitchen, bathroom, office, bedroom), garden furniture, furniture sections and parts, vehicle furniture, hospital furniture, hotel furniture, accessories, and the sector is located amongst the seldom sectors with limited import product/material use and high added value. Being one of the sectors in Turkey with the highest employment capacity, the furniture sector is distributed countrywide to any province and district. Economical and social development in Turkey after 1980s has increased the quality, functional and modern furniture demand particularly in big metropolises and accelerated the sector and the country economy.

The sector has become a sector of about 1, 9 billion dollars export to 214 countries and 817 million dollars import from 114 countries according to the values of 2012. Being in a period of rapid development and transformation, it aims to enter among the first 10 largest furniture producers in the World and the first 5 in Europe with the expectation of 25 billion dollars production and 10 billion USA dollars exportation in 2023.

This report contains 8 main titles; the place of furniture sector in Turkish economy, the status of sector in foreign markets, its obstacles and suggestions, swot/SWOT analysis of the sector and assessment of its competitiveness, improvement of investment environment, and regional incentives, new tendencies in the sector, status of the sector in EU harmonization process, and it ends with a general assessment of the sector.

FOREIGN TRADE CLASSIFICATIONS

There exist classifications developed to provide the foreign trade statistics of the countries and international comparisons of these. These classifications are: Harmonized System consisting 4, 6, 12 digit codes forms a universal basis worldwide for international trade statistics and the customs tariffs of the countries. Formal name is the Harmonized Commodity Description and Coding System, the Harmonized System is an international commercial classification system used for all commodities subject to international trade. In the Harmonized System, all products subject to trade are classified in the framework of certain logic and systematic. The products are registered at the customs over these codes and the goods subject to trade are transacted over these codes. The Harmonized System is a universal trade language for the products, product coding and essential tool for international trade. The Harmonized System code may be called as the “identification number” of the products in customs transactions. On the other hand, Customs Tariff Statistical Position Codes (CTSPC) is the name given to 12 digit code within Turkish Tariff Schedule which takes the Harmonized System as basis and which first six (6) digits is similar to the Harmonized System.

Furniture is defined in the world’s furniture trade according to such basic classifications as all the other products. However, while the Harmonized Commodity Description and Coding System, shortly the Harmonized System is used for detail data, CTSPC is used in general sense and Standard International Trade Classification (SITC Rev.3) is used for the aggregated data. Furniture is classified in sections 821 and 872.4 according to the Standard International Trade Classification (SITC). The Standard International Trade Classification of the furniture is given below.

SITC Code – Product Description

SITC Code	Product Description
82.00	Furniture And Parts Thereof; Bedding, Mattresses, Mattress Supports, Cushions And Similar Stuffed Furnishings
821.1	Seats (other than those of heading 872.4), whether or not convertible into beds, and parts thereof
821.2	Mattress supports; articles of bedding or similar furnishings (e.g., mattresses, quilts, eiderdowns, cushions, pouffes and pillows) fitted with springs or stuffed or internally fitted with any material or of cellular rubber or plastics, whether or not covered.
821.3	Furniture, n.e.s., of metal
821.5	Furniture, n.e.s., of wood)
821.7	Furniture, n.e.s., of other materials
872.8	Parts of the furniture of subgroups 821.3, 821.5 and 821.7
872.9	Instruments and Appliances, n.e.s., For Medical, Surgical, Dental or Veterinary Purposes

The descriptions of products for CTSPC are given below.

CTSPC Code – Product Description

4 Codes*	6 Codes*	Labels (HS Revision 1996, 2002 or 2012)
9401		**Seats (o/t dentists' & barbers' chairs, etc), & part thereof**
	940110	Seats, aircraft.
	940120	Seats, motor vehicles.
	940130	Swivel seats variable height adjustment other than those of head 94.02.
	940140	Seats exclude garden seats or camp equipment, convertible into beds.
	940150	Seats of cane, osier, bamboo or similar materials.
	940151	Seats of bamboo or rattan.
	940150	Seats of cane, osier, bamboo or similar materials.
	940159	Seats of cane, osier or similar materials (excl. of bamboo or rattan).
	940161	Seats with wooden frames, upholstered nest.
	940169	Seats with wooden frames nest.
	940171	Seats with metal frames, upholstered nes, other than those of head No 94.02.
	940179	Seats with metal frames, nes, other than those of heading No 94.02.
	940180	Seats nes, other than those of heading No 94.02.
	940190	Parts of seats other than those of heading No 94.02.
9402		**Med, surg, dental furniture (e.g. dentists' & barbers' chairs).**
	940210	Dentists', barbers' or similar chairs and parts thereof.
	940290	Medical, surgical, dental or veterinary furniture and parts nes.
9403		**Other furniture and parts thereof.**
	940310	Office furniture, metal, nes.
	940320	Furniture, metal, nes.
	940330	Office furniture, wooden, nes.
	940340	Kitchen furniture, wooden, nes.
	940350	Bedroom furniture, wooden, nes.
	940360	Furniture, wooden, nes.
	940370	Furniture, plastic, nes.
	940380	Furniture of other materials, include cane, osier, bamboo/similar materials.
	940381	Furniture of bamboo or rattan (excl. seats and medical, surgical, dent.
	940380	Furniture of other materials, include cane, osier, bamboo/similar materials.
	940389	Furniture of cane, osier or similar materials (excl. of bamboo, rattan.
	940390	Furniture parts nes.
9404		**Mattress supports; mattresses, quilts, etc.**
	940410	Mattress supports.
	940421	Mattresses of cellular rubber or plastics, whether or not covered.
	940429	Mattresses fitted w springs/stuffed/internally fitted w/any material.

*For the preparation and evaluation of the report, CTSPC Codes 9401 – 9404 are used. The codes of 9405, mattress supports, mattresses, quilts, etc and 9406, lamps & Lighting and prefabricated buildings are not included.

1. THE SCOPE OF SECTOR IN TURKISH ECONOMY

In this section, the position of the sector in the Turkish economy, the number of business places in the sector, employment level, production quantity, growth ratios, profitability ratios, added value, and regional distribution of the sector, import and export figures are presented. The trade of the first 25 countries and general total worldwide furniture trade volumes are processed in this report in reference to the goals of 2023 of Turkey. The report also presents Turkey's current rank in the list of world furniture trade and future positions considering the effective roles of the first 25 countries in the worldwide furniture trade.

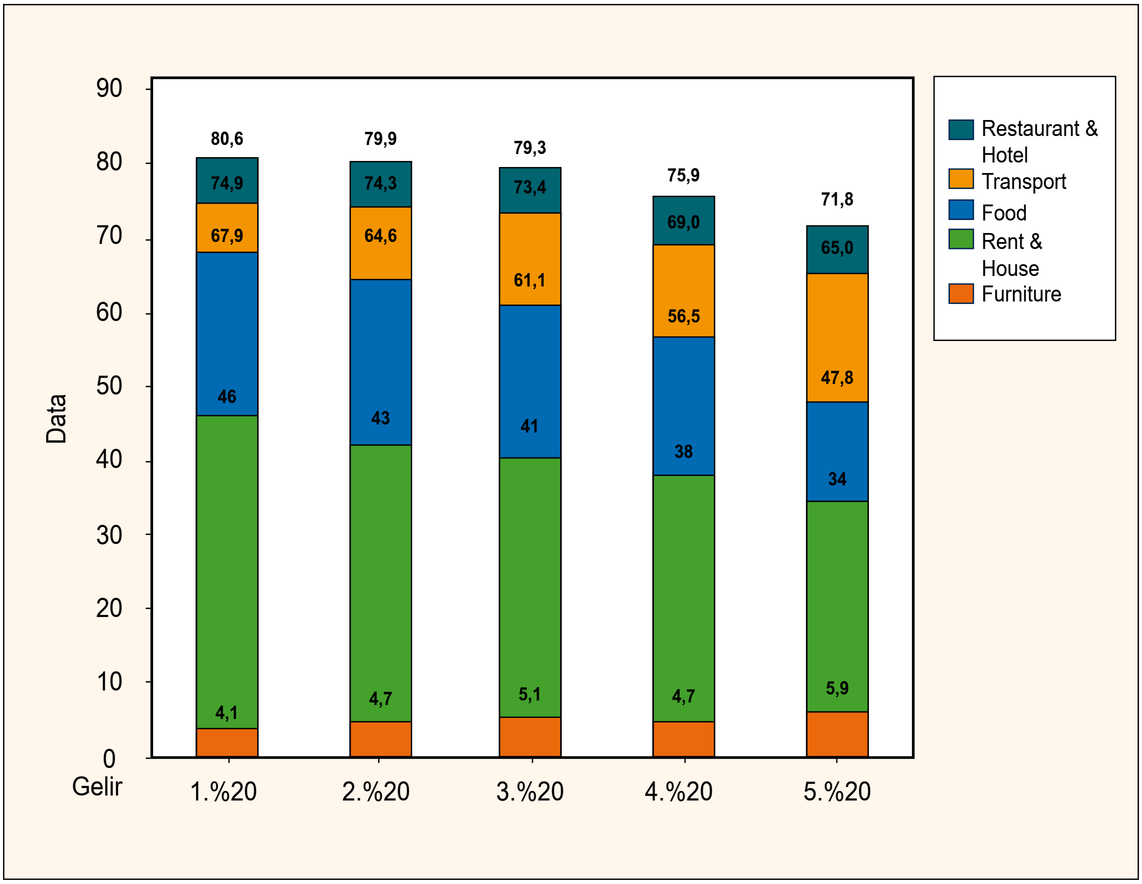
Production is made in the Turkish furniture sector in a wide range such as panel furniture, solid furniture, sofa, seating group, moduler furniture (kitchen, bathroom, office, bedroom), garden furniture, furniture sections and parts, vehicle furniture, hospital furniture, hotel furniture, accessories oriented to national and international markets, the usage of imported product/materials is limited. In this aspect, it is amongst the sectors with high added value. Being one of the sectors at Turkey with highest employment capacity, furniture industry is distributed countrywide to any province and district. Economical and social development in Turkey after 1980s has increased the demand for quality, functional and modern furniture especially at big Metropolis and such development has accelerated the country's economy.

National income per capita at Turkey was 6.500 dollars in 2005 in current prices and it has become 11.318 dollars in 2013 with an increase of %74. In parallel, the share of furniture sector in the national income has increased in amount and provided the achievement of investments required for the growth of the sector.

Furniture is ranked in the fifth line with a share of 5, 9 % within the cost items of household in terms of its share in expenses according to the TUIK research “incomes and living conditions”. Furniture follows the rent-dwelling, food, transportation, restaurant-hotel expenditures.

The rates of first five income groups in expenses and position of furniture share are given in Figure 1.1.

Figure 1. 1. The Rates of First Income Groups in Expenses (%)



Source: TUIK 2010 [1]

In spite of increasing furniture consumption in parallel to the developments triggered by industrialization such as the increase in the ratio of urbanization, participation in the labor force, economical development process in which the country has involved foreign expansion and the noteworthy increase in the national income, furniture does not take a privileged place within consumption expenditures. The factors, which influence furniture consumption may be listed as national income per capita, population increase rate, number of marriages, number of produced dwellings, (political, economical) expectations, cultural structure, etc.

1.1 Number of Enterprise and Employment

The number of enterprises and employment within the furniture sector is given in Table 1.1a.

Table 1.1a. Number of Enterprises and Employment

Number	2011
Enterprises	31.089
Local units	33.924
Employees	151.904
Employees with contract	121.080

Source: TUIK 2012 [2].

According to Table 1.1a., in 2011, it is possible to say that there are over 31.000 enterprises and over 151.000 employees. For 2012, distribution of the enterprises operating in the furniture manufacture and the number of insured as per the cities according to the data of Social Security Institution is given in Table 1.1b.

Table 1.1b. Number of Enterprises and Employment

No	Highest Employment and Enterprises			No	Lowest Employment and Enterprises		
	Cities	Enterprise	Sigortalı sayısı		Cities	Enterprise	Sigortalı sayısı
1	İstanbul	4.353	24.812	1	Ardahan	0	0
2	Bursa	1.549	17.031	2	Bayburt	3	4
3	Kayseri	760	13.432	3	Tunceli	3	4
4	Ankara	2.156	11.741	4	Gümüşhane	4	5
5	İzmir	1.642	9.916	5	Ağrı	4	8
6	Kocaeli	315	3.442	6	Hakkâri	4	14
7	Antalya	636	2.990	7	Edirne	9	15
8	Düzce	92	1989	8	Iğdır	4	17
9	Sakarya	221	1.795	9	Kilis	3	28
10	Mersin	344	1.529	10	Van	9	42
List Total		12.068	88.667	List Total		43	137
Country General Total							
Number of Enterprises	16.915						
Number of employees	116.860						

Source: SGK, 2012 [3].

10 cities having the highest and lowest employment and enterprises are included in the list. Country's general total employment and enterprises in the sector are given. The number of local units is 33.924 and the number of paid employees is 121.080 according to TUIK data while 16.915 registered business place and 116.860 insured employees are seen according to the records of

Social Security Institution. The number of employee per enterprise in furniture sector with a mean of 6, 9 % is lower than the general countrywide manufacture mean being 7, 68 %.

1.2. Regional Distribution of the Sector

The first five regions ranging from Istanbul (21%), Bursa (14, 5%), Kayseri (11, 5 %), and Ankara (10%) to Izmir (8.5%) are the most effective cities in the furniture manufacture sector, respectively. While finding interesting that there is no furniture enterprises and employee in Ardahan, the number of furniture enterprises and employments are extremely found low in the other 9 cities.

Istanbul leads in all types of furniture product groups both of enterprise and employment level. Bursa, Kayseri, Ankara and Izmir follow Istanbul respectively in employment ranking level. Although furniture sector is distributed to various places at Istanbul, the most important centers are Masko, in İkitelli Organized Industry Zone and Modoko, small industrial area. Istanbul region has an employment structure with an employment level of 5, 7 % per enterprise below the general rate of employment in the actual general manufacture sector of Turkey.

The other region, furniture production is concentrated, Bursa-İnegöl zone, is a region with high development dynamics. Taking advantage of being close to raw material resources and making the best of the commercial dynamism provided by being located on the ancient Silk Road, today İnegöl is an important furniture centre. It is in the third rank after Kayseri and İstanbul due to the distribution of exportation in the sector in the respective regions. The success achieved by the region in exportation shows that Bursa-İnegöl is on the way to be an important international furniture centre. Bursa-İnegöl zone is a region having the greatest employment average following Kayseri with a mean of 10, 9 per enterprise.

On the other hand, Kayseri is one of the provinces having significant efficiency in furniture production. Rise of Kayseri furniture industry has started with sofa, armchair and bed production. With its firms producing in any branch of furniture through technological developments and new investments, Kayseri has become an important furniture centre of Turkey. Kayseri involves the greatest one of the sectors according to UCCET data and TUIK export figures. Employment per enterprise is 17, 7 % and about three times the general manufacture of Turkey. In 2012, Kayseri has the status of being the most important furniture production and export centre of our country.

Ankara has always been an important centre in furniture production. Siteler region was founded in the 1960s in the leadership of Chamber of Carpenters. Today, Siteler zone is a large organized industrial zone operating on 5.000 decares of land. The zone involves many enterprises engaged in small and medium scale furniture production. Ankara furniture enterprises are labor intensive enterprises and the number of firms engaged in large scale production is very few. With an employment of 5, 4 % persons per enterprise, Ankara employees personnel both below the sector and the country’s general manufacture sector average.

Izmir region follows Ankara in the 5th rank according to the employment level. Karabağlar and Kısıkköy regions are centers where production is concentrated. Recent years, the city is in great progress in export with its seaport and transportation ease. The region has an employment level below Turkey’s average with 6, 0 % persons from the point of employees per enterprise and rather small firms are located at the region.

1.3. Turkey Production and Consumption

Furniture utilization is widespread in parallel to the developments triggered by industrialization such as the increase in the ratio of urbanization, participation in the labor force, economical development process in which the country has involved foreign expansion and the noteworthy increase in the national income. Furthermore, rapid increase in the sector exportation in the recent 10 years has affected the production quantity. According to TUIK Industrial Production Statistics, furniture production is grouped under 10 main titles. Weight of these groups in 2009 with the total production is given in Table 1.2.

Table 1.2. Turkey Furniture Production

Produced Furniture	Value Million TL			
	2006	2007	2008	2009
Seats (o/t dentists' & barbers' chairs, etc), &part thereof,	62	72	84	86
Seats with metal frames, upholstered nes, other than those of head,	1.133	1.316	1.287	1.180
Seats with wooden frames, upholstered nest.,	709	646	636	607
Seats nes, other than those of heading,	-	129	149	220
Parts of seats other than those of heading,	143	141	145	141
Office furniture, metal, nes.,	358	414	477	436
Office furniture, wooden, nes.,	176	183	237	241
Store wooden furniture,	18	29	15	35
Kitchen furniture,	138	170	223	251
Metal furniture not classified in other places,	115	133	176	141
Bedroom, dining room and sitting room furniture,	1.001	1.173	1.262	1.497
Wooden furniture not classified in other places,	162	204	268	250
Furniture of other materials, include cane, osier, bamboo/similar materials,	81	100	90	97
Home, office or store furniture parts thereof (except chairs),	493	539	679	572
Mattress supports,	89	101	117	252
Mattresses fitted w springs/stuffed/internally fitted/any material.	479	365	363	356
Total	5.157	5.715	6.208	6.362

Source: TUIK 2009 [4], İGM, 2012 [5].

Sum of 6, 4 billion liras for production is realized in Turkish furniture sector in 2009 according to TUIK data. The value of 1, 9 billion for wooden and metal parts seating group furniture, the value of 1, 5 billion for dining and living room furniture and the amount of 1 billion for office furniture are the most produced product groups in the sector. Furniture production amount is 10, 4 billion liras in 2010 according to TUIK Annual Industry and Service Statistics [6].

According to TUIK and Trademap data, the Turkish furniture export is realized with the value of 1, 9 billion dollars, the importation is about 821 million dollars (TUIK, 2013). However, according to Trademap (2012), the import value is 817 million dollars. Considering 2010 and 2011 growth, 2011 furniture production is estimated to be 11, 6 billion liras. Considering the production export and import figures, furniture consumption is assumed with the value of 10, 3 billion liras in the country. The Turkish furniture industry gets more than one percent share from the furniture production in the world with its total production capacity but this share is not at the desired level.

The producers are thought to determine the production quantity in parallel to furniture demand formed in the direction of different factors such as new dwelling constructions, furniture refurbishment, marriages and export-import requests, economical values, raw material, production pool, technology. The highest demand in the sector ranges from seating group furniture, dining room and office furniture. Demand for office furniture largely depends on the construction and opening of new businesses, use of office automation systems and naturally the increase of employment in the governmental and nongovernmental organizations. Therefore, demand to furniture which is a highly flexible consumer good and production capacity utilization ratios may follow an up and down course in parallel with economical fluctuations.

1.4. Capacity Utilization

Evaluating the production capacity ratios, it is observed that the sector has difficulties to operate in full capacity in last years. The ratios of capacity utilization for furniture production are provided in Table 1.3.

Table 1.3. Rates of Furniture Production Capacity

Months	Years (%)					
	2007	2008	2009	2010	2011	2012
January	60,7	62,8	58,2	64,8	70,1	69,0
February	59,9	67,9	58,3	66,8	68,6	69,8
March	62,0	69,5	60,1	68,7	69,2	69,8
April	67,5	66,6	60,7	68,9	71,1	71,6
May	72,1	70,7	69,9	73,1	72,1	68,8
June	75,5	74,9	75,6	72,1	73,1	69,3
July	75,8	70,8	73,5	74,3	75,3	71,8
August	76,4	70,9	70,3	69,6	76,0	67,5
September	75,5	71,3	71,9	72,5	75,5	69,9
October	76,3	65,2	69,9	72,3	74,8	69,8
November	76,0	67,4	67,7	72,0	72,9	70,8
December	73,2	64,0	66,7	70,1	72,2	69,9
Annual Rate	70,9	68,5	66,9	70,4	72,6	69,8

Source: TCMB [7].

The sector operates with a production capacity under 70 % in the direction of the last 6 years. This condition is under the production capacity level of competitive countries which Turkey competes. Reasons for the sector not being able to operate in full capacity could be many reasons but raw material, design, marketing, organizational weakness, lack of advertisement, qualified labor force, finance, presence of extremely small and nonconscious actors, problems concerning the employees seem to important (see the Section 3).

1.5. Turkey Export and Import

Product-basis export values according to 2012 CTSPC coding system of the Turkish furniture sector are given in Table 1.4. Products of 9405 and 9406 are not included in the list.

Table 1.4. Turkey Furniture Export for Product Groups

CTSPC Code	Product Descriptions	Turkey Export for the groups of CTSPC (1.000 $)				
			2011	2012	2012 (9 months)	2013 (9 months)
9401	Seats (o/t dentists' & barbers' chairs, etc), &part thereof	541.763	632.130	646.218	468.198	529.525
9402	Med, surg, dental furniture (e.g. dentists' & barbers' chairs).	21.469	26.609	32.409	21.687	35.359
9403	Other furniture and parts thereof.	750.290	894.529	1.113.034	806.337	945.958
9404	Mattress supports; mattresses, quilts, etc.	101.150	105.108	106.909	75.007	85.073
	Total	1.414.675	1.658.379	1.898.571	1.371.231	1.595.917

Source: TUIK 2013 [8].

12 CTSPC detailed codes for products are given in Add 1.

The evaluation of the Turkish furniture sector in order to analyze for product groups, there is a positive tendency in the recent decade. The sum of the three months export in 2013 also shows the continuing increase positively. In the year of 2012, the export was almost 1, 9 billion USA dollars; individually for the product code of 9403 the export was 1, 1 billion USA dollars, while the lowest export was done for the product code of 9402. In spite of positive tendency for the Turkey's exportation, the total sum of the export is not at the desired level internationally. The future development of production capacity and product varieaty might increase Turkey's position in global aspects. Turkey's furniture export to the 25 countries and its total volume is given in Table 1.5.

Table 1.5. Turkey Furniture Export

NO	Country	Years (USA Dollar)						Difference %
		2008	2009	2010	2011	2012	September 2013	2011/2012
1	Iraq	104.295.060	136.622.913	207.794.423	284.104.069	396.207.276	311.504.273	39
2	Libya	20.096.346	41.216.134	73.686.034	17.058.561	167.211.290	172.664.550	880
3	Germany	155.271.564	114.889.275	128.563.643	160.814.359	152.839.224	103.456.953	-5
4	Azerbaijan	48.853.789	69.239.912	81.032.699	106.543.529	131.495.049	121.342.064	23
5	France	74.332.390	63.870.729	70.696.886	87.684.330	85.437.224	76.627.181	-3
6	Iran	73.348.981	70.618.090	84.502.481	103.462.953	71.527.314	23.115.554	-31
7	Saudi Arabia	27.530.213	22.736.001	28.891.213	41.520.963	66.676.562	67.943.702	61
8	Turkmenistan	23.459.681	38.171.707	46.590.007	75.659.613	61.209.134	65.257.447	-19
9	Russian Fed.	47.183.199	17.117.564	34.961.322	47.639.157	59.346.905	59.881.200	25
10	Holland	58.358.948	48.508.813	45.756.767	55.569.786	53.180.000	34.226.594	-4
11	United Kingdom	58.653.479	41.715.176	39.111.112	38.993.741	49.672.190	42.064.140	27
12	Georgia	16.458.368	14.292.583	16.412.652	27.991.242	32.126.202	20.161.668	15
13	Italy	22.171.784	25.168.821	29.959.111	32.814.174	30.344.909	25.095.155	-8
14	USA	21.547.622	18.739.806	22.233.433	26.140.730	30.335.122	28.989.113	16
15	Belgium	17.051.566	17.570.171	18.335.557	22.235.167	24.620.794	16.322.725	11
16	Kazakhstan	18.086.559	17.012.524	20.618.579	17.821.158	24.326.492	23.099.969	37
17	Israel	19.435.159	16.393.913	19.172.607	23.069.439	23.419.348	22.074.235	2
18	Austria	30.288.870	20.508.432	19.421.985	24.352.879	22.634.247	18.797.270	-7
19	TRNC	25.633.387	19.660.949	26.206.621	21.680.693	21.512.284	18.313.924	-1
20	UAE	27.292.446	30.724.570	16.296.125	17.638.230	20.864.793	29.047.084	18
21	Egypt	9.431.010	9.711.838	10.654.002	13.954.737	20.493.500	17.664.095	47
22	Greece	61.014.780	46.610.991	41.371.837	31.981.220	19.434.169	12.172.018	-39
23	Romania	56.470.838	23.168.101	21.170.309	18.792.043	18.535.895	16.694.742	-1
24	Ukraine	13.455.326	3.526.856	5.665.095	12.394.959	16.592.530	10.560.951	34
25	Algeria	5.849.695	6.849.648	10.508.626	13.828.285	14.271.911	14.024.608	3
	List Total	**1.035.571.060**	**934.645.517**	**1.119.613.126**	**1.323.746.017**	**1.614.314.364**	**1.351.101.215**	**22**
	Total 214 Country	**1.332.922.279**	**1.153.520.085**	**1.363.062.079**	**1.606.993.772**	**1.898.602.367**	**1.595.917.065**	**18**
	Annual Rate %	**%29**	**-%13**	**%18**	**%18**	**%15**	**-**	

Source: TUİK 2013 [9].

Turkey's detailed export values for all countries including 9 months, 2013 values are given in Add 2.

Turkey's furniture export for 2012 was traded to 214 countries with the value of 1, 9 billion dollars and an increase of 15 %. It is remarkable that about 84 % of the export was made to the first 25 countries. Looking at the general export values of the last 5 years, a decrease of 13 % was experienced in 2009 while an increase of 29 % in 2008, 18 % in 2010 and 2011 were in question. According to volume, the first 5 countries are Iraq, Libya, Germany, Azerbaijan and France, respectively. By the end of 2012, the most significant increase in the export was to Libya with an increase of 880 %. The other countries with an export increase were Saudi Arabia (61 %), Egypt (47 %), Iraq (39 %), Kazakhstan (37 %), Ukraine (34 %) and Russian Federation (25 %). The countries with significant serious drops values were Greece (39 %), Iran (-31), Turkmenistan

(-19), Italy (-8) and Austria (-7). The most remarkable volumes according to 9 months' data of 2013 are the export increase to Iraq and Libya. Germany has the other remarkable position. It is estimated according to 9 months' data that about 1, 6 billion dollars export shall easily exceed 2 billion dollars at the end of the year. Turkey's furniture export data to near neighbors and Arabic countries are given in Table 1.6.

Table 1.6. Turkey Furniture Export to Near Neighbors and Arabic Countries

		Years (USA Dollar)				Near Neighbors and Central Asia	Years (USA Dollar)		
NO	Arabic Countries	2011	2012	Difference %	NO	Countries	2011	2012	Difference %
1	Libya	17.058.561	167.211.290	880	1	Iraq	284.104.069	396.207.276	39
2	S. Arabia	41.520.963	66.676.562	61	2	Azerbaijan	106.543.529	131.495.049	23
3	UAE.	17.638.230	20.864.793	18	3	Iran	103.462.953	71.527.314	-31
4	Egypt	13.954.737	20.493.500	47	4	Turkmenistan	75.659.613	61.209.134	-19
5	Algeria	12.881.703	14.271.911	11	5	Georgia	27.991.242	32.126.202	15
6	Lebanon	13.473.086	11.959.145	-11	6	Kazakhstan	17.821.158	24.326.492	37
7	Qatar	9.528.136	11.375.405	19	7	K.K.T.C.	21.680.693	21.512.284	-1
8	Kuwait	6.433.537	9.479.696	47	8	Greece	31.981.220	19.434.169	-39
9	Morocco	7.956.733	9.246.980	16	9	Bulgaria	12.701.439	11.311.682	-11
10	Jordan	7.066.953	7.891.506	12	10	Tajikistan	2.893.128	3.514.367	21
11	Bahrain	4.708.272	3.802.670	-19	11	Uzbekistan	2.887.881	3.196.630	11
12	Mauritania	504.355	3.484.661	591	12	Kirghizstan	1.893.814	2.777.388	47
13	Yemen	1.076.829	3.311.714	208	13	Syria	11.094.033	1.179.027	-89
14	Sudan	2.076.763	3.288.104	58					
15	Tunis	1.627.979	2.705.031	66					
16	Oman	1.456.019	2.064.783	42					
17	Somali	63.483	728.298	1047					
18	Ethiopia	871.854	726.966	-17					
19	Djibouti	69.844	196.751	182					
20	Comoros	364.757	15.196	-96					
	List Total	**160.332.794**	**359.794.962**	**% 124**			**700.714.772**	**779.817.014**	**% 11**

Source TUİK 2013 [9].

Annual furniture import of Arab countries composed of 22 countries is about 15 billion dollars. While 10 % drop is experienced in the export to these countries in 2011, a significant average increase of 124 % in 2012 to 359 million dollars is meaningful. However, a share with a rate of 2 % in a market of 15 billion dollars is not a desired level. When the export to nearest neighbors and Central Asia countries is evaluated, the export value of 779 million dollars is nearly equal to the half of export of the country. Although export of the country is increased with the rate of 15 % in 2012, an increase of 11 % in the export to nearest neighbors is found low. Such drop is affected by the contraction of export made to Greece (-39) with a decrease tendency for the last 2 years, Iran (-31), Syria (-89), Turkmenistan (-19) and Bulgaria (-11). In order that the sector reaches its expectations in the future, improvement of the commercial relations and increase of market share with the neighboring countries, Middle East, Africa and Arab countries and nearest neighbors shall provide positive contribution to the Turkish furniture export.

Import values in product basis are respectively given in Table 1.7 according to Turkish furniture import 2012 CTSPC coding system. Product numbers of 9405 and 9406 are not included in the list.

Table 1.7. The Turkish Furniture Import for Product Groups

CTSPC Codes	Product Description	Turkey import for the groups of CTSPC (1.000 $)				
			2011	2012	2012 (9 months)	2013 (9 months)
9401	Seats (o/t dentists' & barbers' chairs, etc), &part thereof	405.369.639	465.424.810	410.228.205	329.405.091	359.430.860
9402	Med, surg, dental furniture (e.g. dentists' & barbers' chairs).	27.218.078	32.296.148	26.976.801	16.804.731	16.646.683
9403	Other furniture and parts thereof.	242.083.497	348.733.007	289.724.186	220.818.729	292.593.916
9404	Mattress supports; mattresses, quilts, etc.	63.825.014	94.937.176	90.405.804	63.782.581	85.620.545
	General Total	**738.496.228**	**941.391.141**	**817.334.996**	**630.811.132**	**754.292.004**

Source: TUIK 2013 [10]
Detailed data for the product codes of 12 CTSPC is given in Add 3.

While a meaningful increase in the import of country is in question in 2011, a meaningful decrease is experienced in 2012. However, it is estimated that the increase shall probably continue in 2013 according to data of 2012 and 9 months of 2013. Totally, while furniture import of 817 million dollars is realized in 2012, product group no.9401 forms the greatest import volume with 410 million dollars and product group no.9402 performs the smallest import volume. While export ratios show meaningful increase in Turkey’s product groups, an up and down course in import is remarkable.

Turkey’s furniture import as per the countries is given in Table 1.8.

Table 1.8. Turkish Furniture Import for Countries

NO	Countries	Years (USA Dollar) 2008	2009	2010	2011	2012	September 2013	Difference 2011/2012
1	China	212.442.977	162.477.328	237.880.812	292.961.262	297.721.975	269.336.654	2
2	Italy	104.258.230	65.956.543	68.235.023	92.424.637	83.514.933	93.368.066	-10
3	Germany	104.901.504	60.345.034	75.026.846	87.538.878	76.237.359	77.248.849	-13
4	Poland	40.932.890	40.131.926	38.436.591	50.118.059	48.646.832	40.644.254	-3
5	France	46.835.619	26.036.618	35.836.875	42.243.999	38.614.699	32.602.871	-9
6	Spain	18.477.218	26.830.774	29.294.199	39.591.556	30.708.433	38.612.968	-22
7	Romania	8.991.964	9.988.198	14.214.976	26.531.296	26.868.185	23.253.791	1
8	Indonesia	19.121.243	16.506.623	18.600.945	21.337.381	16.189.597	15.156.971	-24
9	United Kingdom	11.194.433	4.828.113	7.058.769	21.804.148	11.524.227	7.264.780	-47
10	Vietnam	21.313.156	18.507.324	18.167.133	20.558.025	16.318.860	17.710.661	-21
11	Japan	24.904.598	14.842.818	17.769.143	16.904.171	20.753.321	11.626.739	23
12	USA	16.794.825	10.196.551	12.525.357	15.170.042	13.094.596	10.045.462	-14
13	Slovakia	3.596.156	5.077.430	9.015.266	10.386.770	7.213.446	5.013.962	-31
14	Sweden	6.421.948	5.447.414	6.650.275	10.250.722	7.219.781	7.104.224	-30
15	India	2.322.177	1.718.823	7.775.110	9.287.767	10.843.325	9.598.064	17
16	Czech Rep.	7.669.092	3.610.024	5.890.111	8.417.209	9.159.918	6.543.305	9
17	Free zone	9.610.934	6.141.349	9.877.969	8.046.016	5.236.568	3.401.931	-35
18	Austria	7.335.406	4.447.844	7.456.870	7.719.984	6.196.435	4.468.917	-20
19	Taiwan	8.614.700	4.889.546	6.071.174	7.172.312	2.449.000	4.767.886	-66
20	Lithunia	6.030.652	5.271.921	6.661.777	7.063.464	9.049.079	7.061.609	28
21	Bulgaria	4.292.096	3.072.082	5.162.556	7.062.485	6.060.992	7.195.693	-14
22	Hungary	3.871.697	5.528.948	5.006.186	5.687.619	5.625.812	5.690.022	-1
23	Denmark	7.050.836	6.380.398	5.298.606	4.940.249	4.074.143	4.733.588	-18
24	Holland	4.710.960	3.626.534	3.905.500	4.704.001	4.731.002	3.836.788	1
25	Portugal	1.494.894	4.577.991	2.873.229	4.619.282	3.575.526	2.955.112	-23
	List Total	**703.190.205**	**516.438.154**	**654.691.298**	**822.541.334**	**761.628.044**	**709.243.167**	**-7**
	Total 112 Country	**738.204.213**	**537.382.699**	**681.718.701**	**857.018.423**	**816.423.000**	**754.292.004**	**-5**
	Annual Rate %	**%9**	**-%27**	**%27**	**%26**	**-%5**		

Source: TUİK 2013 [11].

Turkey's detailed import data for the product codes of 12 CTSPC is given in Add 4.

Furniture import with a value of about 817 million dollars is made in 2012 from 114 countries. 9 months' data for 2013 shows the probability that 2013 import may give a similar result at the end-of-year values as the year of 2012 import value. It is remarkable that approximately 95 % of import is made from the first 25 countries. Whilst 9 % increase is in question in 2008 according to the evaluation of the last 5 years, a meaningful decrease of 27 % has occurred. An increase of 27 % in 2010 and 26 % in 2011 has resulted in 5 % decrease in 2012. Decrease in the import made from 18 countries among the first 25 is found meaningful. The first 5 countries in 2012 have become China, Italy, Germany, Poland and France, respectively. Compared to the previous year, the countries from which import increased in 2012 rank as Lithuania (28 %), Japan (23 %), India (17 %), Czech Republic (9 %) while the most significant decreases rank as United Kingdom (-47), Free zone (-35), Slovakia (-31), Sweden (-30), Indonesia (-24), Portugal (-23) and Spain (-22). The course of import furniture trade been left under the export trade volume values is positively assessed for the sector which wants to take its place in the world's furniture market.

1.6. Foreign Trade Balance

Table 1.9. The Foreign Trade Balance of Turkish Furniture Industry

Years	Foreign trade balance (1.000, USA Dollar)			
	Export	Import	Trade balance	rate %
1997	78.479	158.367	-79.888	-50
1998	97.357	175.222	-77.865	-44
1999	127.663	145.648	-17.985	-12
2000	163.923	182.744	-18.821	-10
2001	180.683	111.950	68.733	61
2002	260.950	112.426	148.524	132
2003	404.844	147.761	257.083	173
2004	547.242	254.338	292.904	115
2005	645.040	341.596	303.444	88
2006	798.585	540.354	258.231	47
2007	1.032.658	680.169	352.488	34
2008	1.332.922	738.204	594.718	45
2009	1.153.520	537.382	616.137	53
2010	1.363.062	681.718	681.343	50
2011	1.606.993	857.018	749.975	47
2012	1.898.602.	821.357	1.077.245	56
Total	**9.793.921**	**6.483.320**	**3.310.601**	**49**

Source: TUIK 2013 [9], DTM 2012 [12].

Turkey's foreign trade balance for furniture follows a positive course since 2001. Continuously being short in the years of 1997-2000, the sector now has a trade surplus increasing since 2001. The Turkish furniture sector has become one of the rare sectors in the trade of country without having foreign trade deficit in the direction of its last 12 years performance. Excluding 2009, the regular increase in the annual export and import ratios attracts attention and export increase is greater than import increase. However, especially that garden/exterior furniture which is brought from China and other Far East countries and which previously was not used much may cause an increase in import.

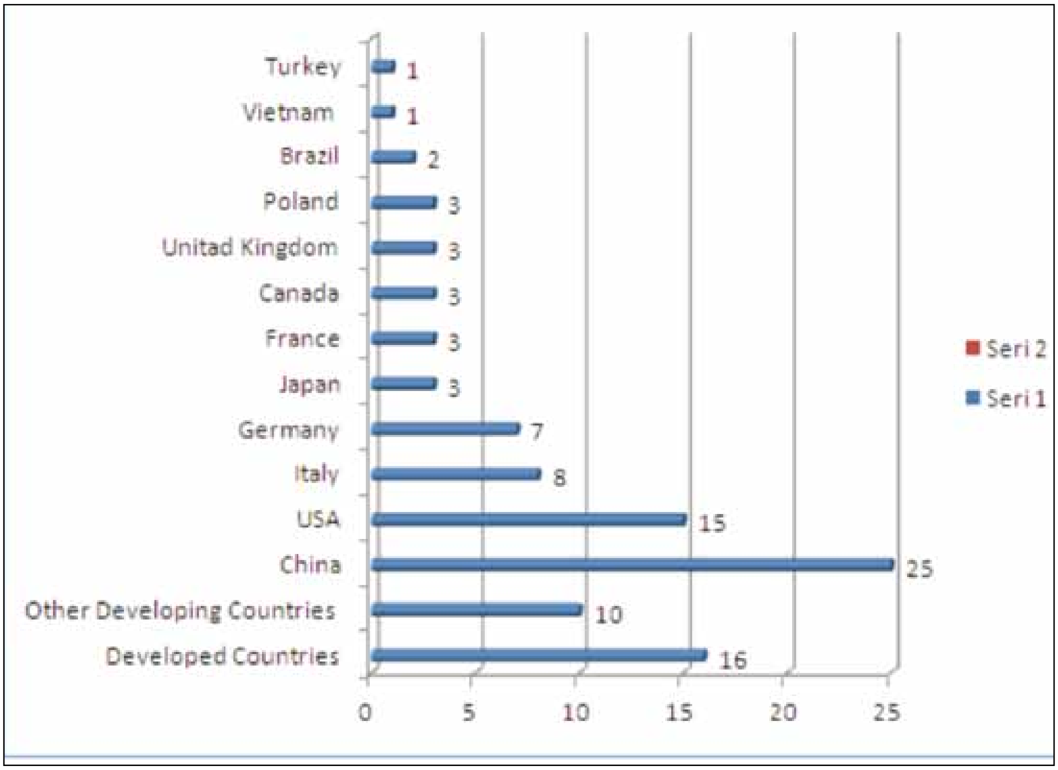
2. STATUS OF THE SECTOR IN THE WORLD MARKETS

In this section, the scope of world furniture sector, the values of foreign trade i.e. export, import, production and consumption capacity are processed.

2.1. World Furniture Production

World's furniture production was about 220 billion USD in 2004. The sum of total 150 billion dollars was presented to the consumer in producing countries, and the part exceeding 70 billion dollars became subject to international trade. While the world's furniture production becomes about 450 billion dollars in 2012, about 160 billion of this becomes in question in export and 154 billion dollars subject to trade in import. Whilst the first 25 countries in the rank predominantly realize world's furniture trade, it may be said that in general 70 countries have an active role with about 200 furniture firms (Csil, 2013). Furniture market is estimated to exceed 1 trillion USD in 2050 [13]. Shares of the outstanding countries in the world's furniture production are given in Figure 2.1.

Figure 2.1. World furniture production



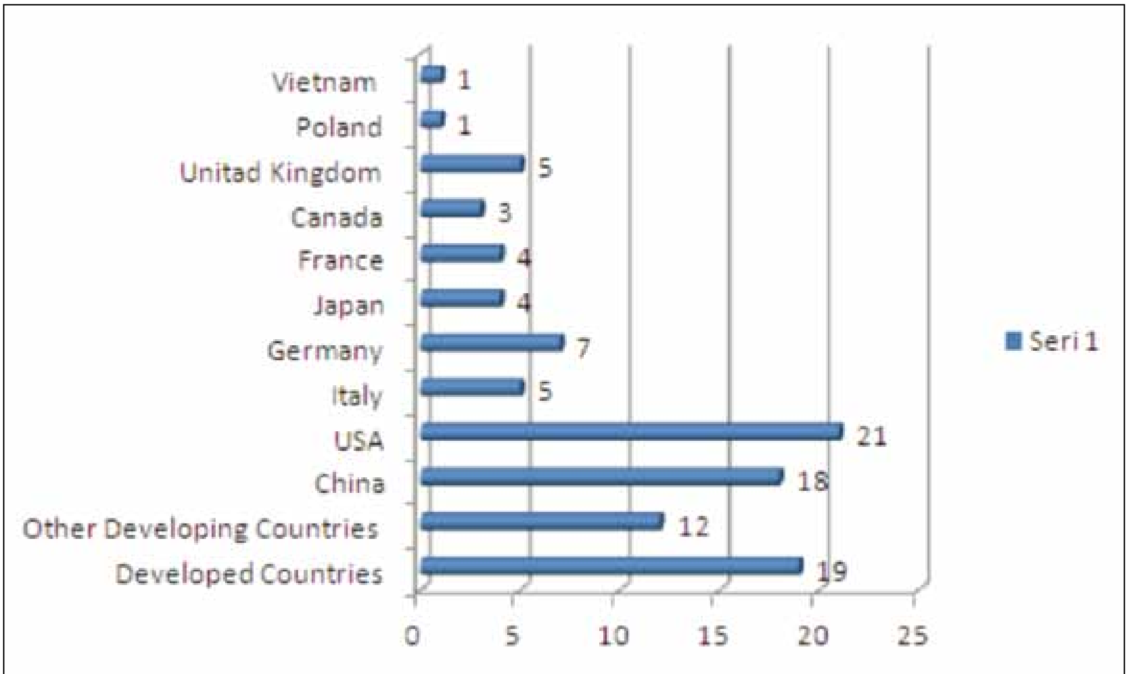
Source: CsiL 2012 [13].

China leads in furniture production by far with a ratio of 25 %. USA is an outstanding country with a share of 15 %. Italy with 8 % and Germany with 7 % follow the first two big producers. These four countries have realized more than half of the world's furniture production. The other big producers, Japan, France, Canada, United Kingdom and Poland have a share of 3 %. Turkey follows Brazil and Vietnam with about 1 % share. The other developed countries acquire 16 %, the other developing countries 10 % share. China, Poland and Vietnam step forward as rapidly developing countries through export basis production and design.

2.2. World Furniture Consumption

World's furniture consumption increases every year in parallel to production. Although the consumption of furniture is high in the socially and economically welfare developed countries, developing countries are also effective in furniture consumption. Worldwide, highest consumers of countries and country groups are given in Figure 2.2.

Figure 2.2. World Furniture Consumption

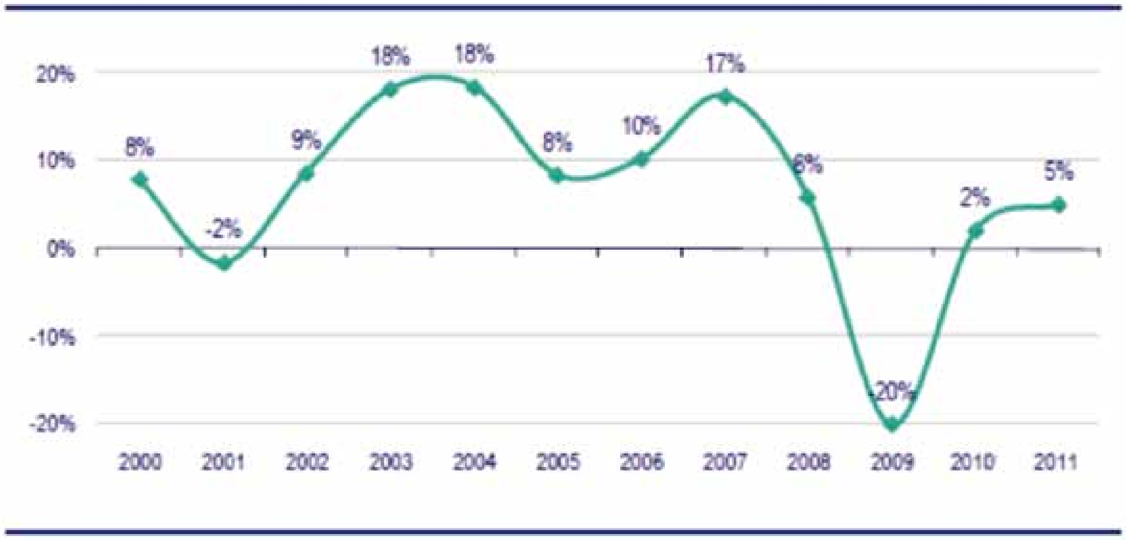


Source: CsiL 2013 [13].

According to the data of 2013, the biggest consumer of 450 billion dollars furniture production is USA with a ratio of 21 % and about 95 billion dollars consumption volume and China follows with a ratio of %18, other developing countries with a ratio of 19 %, other developing countries 12 %, Italy and England 5 %, France and Japan 4 %, Canada 3 %, Poland and Vietnam with a ratio of 1 % with 4, 5 billion dollars consumption volume. According to these values, Turkey is not included among the greatest consumers.

According to 2009 TUIK data, Turkey forms about %1 of the world's furniture production with a value of 3, 5 billion dollars (6, 4 billion Turkish liras) but not in the desired level. Turkish furniture sector foresees to raise furniture production volume to 25 billion dollars in 2023. Last 10 years' development process in the world's furniture trade is given in Figure 2.3.

Figure 2.3. World Furniture Trade (Yearly Trent)



Source: CsiL, 2011 [14].

World's furniture trade has realized a meaningful growth until 2009 after %2 decrease in 2001. However, the global crisis experienced in 2009 has caused a definite decrease of %20 and stable re-growth is attained following the year 2010.

2.3. World Furniture Export

Export values in product basis according to 2011 CTSPC coding system for the world's furniture sector are given respectively in Table 2.1.

Table 2.1 World Furniture Exports for CTSPC 4 Product Groups and the Position of Turkey

CTSPC	No	Exporters	Years (1.000 $) 2008	2009	2010	2011	2012	Difference % 2011 2012
9401 Seats (o/t dentists' & barbers' chairs, etc), &part thereof 9402 Med, surgery, dental furniture (e.g. dentists' & barbers' chairs). 9403 Other furniture and parts thereof. 9404 Mattress supports; mattresses, quilts, etc.	1	China	32.130.978	30.309.118	39.261.424	45.188.795	56.736.056	26
	2	Germany	13.041.284	12.392.211	12.763.658	14.479.882	12.698.414	-12
	3	Italy	14.478.076	10.831.608	10.816.823	11.792.773	10.887.679	-8
	4	USA	6.847.796	5.265.833	6.396.380	6.986.857	7.799.349	12
	5	Poland	9.126.315	7.342.109	7.909.354	9.394.828	8.695.695	-7
	6	Mexico	4.160.510	3.206.276	4.424.475	4.909.452	5.959.697	21
	7	Vietnam	2.694.920	2.434.203	2.978.983	4.264.794	4.946.954	16
	8	Canada	4.717.002	3.032.397	3.624.279	3.888.263	3.989.244	3
	9	France	4.190.379	3.255.974	2.823.943	3.019.958	2.815.501	-7
	10	Holland	1.808.278	1.506.093	1.671.633	2.229.128	2.239.914	0
	11	Czech Rep.	2.748.299	2.161.483	2.489.633	2.811.956	2.617.467	-7
	12	Malaysia	2.686.509	2.233.804	2.556.327	2.589.447	2.663.808	3
	13	Sweden	2.669.944	2.110.539	2.265.896	2.595.894	2.443.271	-6
	14	United Kingdom	2.292.679	1.612.063	1.834.760	2.204.067	2.188.972	-1
	15	Austria	2.607.550	2.082.672	1.979.615	2.203.342	1.800.757	-18
	16	Belgium	2.771.902	2.221.157	2.116.421	2.128.581	1.864.401	-12
	17	Denmark	2.832.016	2.201.058	2.089.322	2.271.070	2.298.557	1
	18	Spain	2.556.723	2.053.541	1.807.296	2.023.149	1.824.177	-10
	19	Turkey	1.387.014	1.198.145	1.414.960	1.658.389	1.899.017	15
	20	Japan	1.342.318	1.034.659	1.449.560	1.413.160	1.369.302	-3
	21	Romania	1.612.295	1.394.690	1.521.015	1.841.658	1.774.584	-4
	22	China Taipei	1.352.318	1.086.435	1.336.612	1.459.665	1.541.785	6
	23	Indonesia	1.934.002	1.666.875	1.967.763	1.767.244	1.809.350	2
	24	Hungary	1.323.104	1.014.058	1.074.285	1.328.388	1.246.270	-6
	25	Portugal	1.413.368	1.273.495	1.311.313	1.501.806	1.753.855	17
	List Total		**124.725.579**	**104.920.496**	**119.885.730**	**135.952.546**	**145.864.076**	**% 7**
	General Total		**139.893.575**	**115.241.156**	**132.126.960**	**149.361.252**	**160.775.826**	**% 8**

Source: Trademap 2012 [15].

When total export is evaluated according to foursome product group, the first 25 country among 227 countries have realized 90 % of about 146 billion dollars export with an increase of 7 %. According to the evaluations of the last 5 years, exportation has tendency to increase excluding 2009 and 8 % increase is in question in the general total. The exporting countries in the first 5 ranks are China, Germany, Italy, USA and Poland. The countries which have most increased their export ratio in the last year are China 26 %, Mexico 21 %, Portugal 17 %, Vietnam 16 %, Turkey 15 % and USA 12 % and China continues to rise by far. Contractions are under consideration in the export of thirteen countries of the first 25 and the drops experienced in the pioneering countries of furniture sector such as Austria (-18), Germany and Belgium (-12), Spain (-10), Italy (-8), France (-7) are found meaningful.

Although export of our country decreased 2 % compared to the previous year and realized in a ratio of 15 % in 2012, it is among growing countries providing the greatest increase. Turkey's export is 1,899 billion dollars according to Trademap data and is 19th in rank with the value of export. Although Turkey's share and location in the general ranking recently increases, it is not at the desired place. About 1, 9 billion dollars share out of 160 billion dollars export market is low for the Turkish furniture sector.

Considering the results in the world's furniture export such as China factor and decreasing export values of European furniture producers, the production centre can be said to shift eastwards. However, excessive increase in workmanship prices influences the power of at China to establish a competitive price although its decisiveness continues in the last years.

2.4. World Furniture Import

The outstanding countries in the world's furniture import according to the foursome product group and position of Turkey is given in Table 2.2.

Table 2.2. World Furniture Imports for CTSPC 4 Product Groups and the Position of Turkey

CTSPC	No	Importers	Years (1.000 $) 2008	2009	2010	2011	2012	Difference % 2011 2012
9401 Seats (o/t dentists' & barbers' chairs, etc), &part thereof 9402 Med, surgery, dental furniture (e.g. dentists' & barbers' chairs). 9403 Other furniture and parts thereof. 9404 Mattress supports; mattresses, quilts, etc.	1	USA	35.158.414	27.272.509	34.820.327	35.971.951	39.514.951	10
	2	Germany	12.505.697	13.297.014	14.516.894	15.761.443	14.906.878	-5
	3	France	9.334.588	7.822.798	8.519.282	9.061.429	8.562.490	-6
	4	United Kingdom	9.257.214	6.855.940	7.568.332	7.553.529	7.528.247	0
	5	Japan	5.577.706	4.951.195	5.567.499	6.338.859	7.016.666	11
	6	Canada	6.177.291	4.918.175	5.987.875	6.349.793	6.856.226	8
	7	Holland	3.908.815	3.159.627	3.326.844	3.969.231	3.629.918	-9
	8	Switzerland	3.286.135	2.875.338	3.031.917	3.562.060	3.413.813	-4
	9	Russia	2.112.019	1.539.320	2.101.804	2.765.344	3.398.591	23
	10	Belgium	4.050.441	3.264.215	3.164.488	3.514.258	3.154.243	-10
	11	Australia	2.424.432	2.128.158	2.415.087	2.927.065	3.072.973	5
	12	Austria	3.011.377	2.627.065	2.576.199	3.047.637	2.846.929	-7
	13	Spain	4.543.060	3.173.345	3.389.467	3.369.447	2.539.713	-25
	14	Mexico	1.911.403	1.272.038	1.740.077	2.039.239	2.404.233	18
	15	Italy	3.136.143	2.544.423	2.791.882	2.909.323	2.390.679	-18
	16	China	1.225.538	1.293.249	1.731.608	2.251.831	2.334.421	4
	17	Arab Emir.	1.474.598	1.411.798	1.384.268	1.742.003	2.271.443	30
	18	Saudi Arab.	52.406	122.192	1.006.849	1.617.088	2.232.349	38
	19	Norway	2.114.955	1.692.954	1.796.437	2.046.310	2.159.512	6
	20	Sweden	2.557.070	1.789.900	2.059.741	2.301.779	2.118.720	-8
	21	Korea Rep.	1.510.972	1.132.662	1.509.564	1.608.965	1.587.914	-1
	22	Denmark	1.812.373	1.379.926	1.493.904	1.572.909	1.521.567	-3
	23	Czech Rep.	1.578.771	1.316.495	1.296.752	1.470.792	1.429.765	-3
	24	Poland	1.829.413	1.373.123	1.301.700	1.521.368	1.334.179	-12
	28	**Turkey**	**776.302**	**567.647**	**738.496**	**941.394**	**817.323**	**-13**
	List Total		**121.327.133**	**99.781.106**	**115.837.293**	**126.215.047**	**129.043.743**	**% 2**
	General Total		**143.876.719**	**115.426.044**	**133.945.925**	**147.989.693**	**153.991.886**	**% 4**

Source: Trademap 2012 [16].

In 2012, 231 countries are involved in the world's furniture import and approximately 154 billion dollars import is realized. 25 countries have realized 84,3 % of the import, while 2 % increase is in question in import ratios in the mean of 25 countries, 4 % increase is under consideration in general total. The first 5 importers appear to be as USA, Germany, France, United Kingdom and Japan as per volume. According to the evaluations of last year, the most significant increases appear in buying countries such as Saudi Arabia (38 %), United Arab Emirates (30 %), Russia (23 %), Mexico (18 %), Japan (11 %), and USA (10 %). On the other hand, the countries with decreasing import rank as Spain (-25), Italy (-18), Turkey (-13), Poland (-12), Belgium (-10) and Netherland (-9). While the import ratios of 14 countries out of the first 25 countries decrease, increase is in question in 10 countries and stability in 1 country.

Turkey has experienced a decrease of 13 % in 2012 with a volume of 817 million volumes and located in 28th line in the ranking. Although import volume of Turkey is low, drop of high increases in 2010 and 2011 are evaluated positively for the country which has an export goal.

3. OBSTACLES AND SUGGESTIONS FOR THE SECTOR

By 2012, the problems of the sector brought in question both the meetings of UCCET Furniture Products Assembly meetings and the Furniture Industry Work Group established in the framework of 10th Development Plan, basic problems directed to increase and develop competition in international markets are collected under 10 titles, status evaluation and suggestion proposals concerning these problems are presented. These obstacles/problems are listed below:

3.1. Unfair competition

Unfair competition is emphasized as the most important problem of the sector in the meetings of 10th Development Plan, Furniture Industry Work Group and UCCET Furniture Products Sector Assembly. The problems causing unfair competition have become prominent:

- ✓ %50-%60 informality experienced in the sector (It is estimated that there exist around 65 thousand furniture manufacture and sales point in the sector most of which are small workshops, and their commodity input, output, employment data, and insurance premiums are not clearly recorded and market audits are not conducted regularly),
- ✓ Tax rates applied for furniture, VAT and SGK taxes (%8 tax rate applied in textile sector and %18 tax rate applied in furniture),
- ✓ Product replication and counterfeiting (troubles experienced in the protection of intellectual property rights),
- ✓ Status evaluation reports prepared by non-specialized expert witnesses on the subject which influences the decision mechanism in conflicts referred to the consumer courts,
- ✓ Hazourdous raw materials to the environment and human health, applications and government audit.

Suggestions: Urgent acts directed to eliminate such problems may be listed as follows.

- ✓ Government audit must be increased / activated; application of laws must be regarded,
- ✓ VAT rates applied in the sector must be equalized to the rates applied in the textile sector,
- ✓ Receiving invoices must be promoted for warranty scope (during sale),
- ✓ The employer and consumer must be made aware,
- ✓ Sector inventory must be prepared on matters such as raw materials and effective mechanisms to provide this must be formed,
- ✓ Legal disincentives must be taken against model theft by facilitating design registration mechanism to provide the prevention of unfair competition and rooting of design awareness, an effective audit mechanism must be established and the human potential present on the subject of design must be improved in cooperation of the industrialist and university and adequate source transfer must be provided (On this matter, the subjects

of establishing and maintaining the design idea and philosophy both in the manufacture sector of the country and furniture industry by the government supported Turkish Design Advisory body founded in 2009 are important),

- ✓ A formation must be provided in expert witness assignments in consumer courts directed to the selection of persons equipped on the subject of furniture,
- ✓ Sensitivity and responsibility must be provided on the subject of raw materials and applications harmful to the environment and human health.

3.2. Occupational Education

Looking at the general structure and basic problems of the sector, one of the most important problems shows up that the new generation is not qualified for the needs of time in the field of general education and occupational education and becomes insufficient to develop creative ideas. The inadequacy in education is accompanied by the lack of qualified labor force, employment and experience. This situation adversely influences the improvement of sector and competitive power. The problems in occupational education are evaluated as the schools, employees and managers.

3.2.1. Qualified Labor Force (Schools): Considering the preference of candidates in the last 15 years, it is observed that universities, academies and occupational high schools for furniture education are preferred last or not to be left out of the education system at all. On the other hand, the existing schools for furniture education which are expected to provide qualified labor force to the sector fall behind to meet the expectations of the sector in terms of quality and quantity. Both engineering formations and sector knowledge of the students graduating from the existing schools which give furniture training fall short, therefore the qualified labor force desired by the sector is not raised. Higher Education Board (YÖK) has closed the Furniture and Decoration Departments within Technical Education Faculties and transformed these to the fields of Wood Works Industrial Engineering. This situation has caused the concerned departments to enter into undergraduate minors not directly representing the furniture sector. On the other hand, limited furniture education in the curriculum of the departments providing industrial design education causes problems in raising the desired qualified labor force.

Suggestions: It is important for the sector to provide the occupational education which contains the current information required for production and design within special departments directed to furniture sector both in occupational high schools and at the level of university. Like in the universities of the developed countries, it is required to open Furniture Engineering and Furniture Design departments at the regions where furniture production is intensive, concentrate on academic studies in the field of furniture industry in the framework of university – industry cooperation, and establish plans and programs directed to the employment in the sector of the raised labor force and knowledge in this field. Occupational furniture training must be made attractive. This condition is considered to be useful in the suggestion of basic problems and in the development of the sector. On this subject, the technology of the schools in question must be renovated, active university – industry cooperation must be provided, quality of academic staff and students must be increased, programs must be updated in compliance with the implementation and cutting edge technology and the sector must be made attractive urgently. Besides, training of the academic staff of the schools in large enterprises may be provided in order to provide them to get information about the current technology. Furthermore, providing the participation of the academic staff in international fairs through some promotions to make them follow new developments shall be useful both for the sector and occupational education. It is important for the sector representatives to be in contact with the Ministry of National Education and Higher Education Board on the subject of the expectations of the industry for the suggestion of occupational furniture education.

3.2.2. Qualified Labor Force (Employees): Qualification of the sector employees is being discussed and it may be said that current technology is not followed.

Suggestions: Sector employees must be informed on current subjects for an effective and efficient production. It is important to widespread occupational training courses on the subjects which require expertise and to employ promotions such as 'Training Allowance' from the point of following the innovations in the fields of technology and implementation, eliminating the probable experience deficit and enhancing the knowledge and skills. Establishing projects by development agencies, activation of public training centers, increasing in-house training services are factors to contribute to the formation of qualified labor force and elimination of experience deficits. Assisting the enterprises in the sector to provide them to raise and provide their own labor force is thought to influence the raising of qualified labor force in long terms. Occupational training centers must be assigned at organized industrial zones (OSB) from the point of rehabilitation of the present employees.

3.2.3. Qualified Labor Force (Managers):

It is observed that the sector is intensively composed of family companies. Institutional development level plays an important role in the formation of processes and systems in the companies, running the improvement mechanisms, early detection of risks formed in the market, taking the counter measures relevantly and in time. The number of leading managers and owners who shall pave the way for learning by experience and continuous development required for institutional development is rather limited in the sector. Personal management, leadership difference or new formations in the present structure cause quick rise of the companies in the market and formation of new brands. Again non-provision of institutionalism is one of the most important reasons for the companies to become inadequate institutions from the point of competition, disintegrate and disappear.

Suggestions: It is considered that training and improvement of those in the sector at manager positions shall gain professionalism to the management of enterprises on subjects such as acceleration of destructive competition and economic liberalization trends caused by globalization, increase in the free circulation of capital, liberalization of trade, increase of international standard fact in the product qualities, customer satisfaction, effective employment and consumption of natural resources. Furthermore, equipped managers shall be useful for the enterprises on subjects such as the provision of effective and efficient qualified labor force and elimination of experience deficits.

3.3. Efficiency, Management and Institutionalism

Very small scale enterprises exist in furniture industry besides large scale enterprises. As a result of differentiation of producers from the point of infrastructure, system, institutionalism and many other aspects, management and organizational deficits have noteworthy dimensions in the sector.

The leading factors which affect efficiency in production are the deficits on the subjects of insufficiently common design and innovation fact both in project formation and production processes and qualified labor force. Although the general occupational education policy of the country directly affects this condition, the other effective factor is the troubles in the management and institutionalism manner and organization structures of the companies in the sector. The companies experience problems in the effective and efficient employment of human resources and product resources. In general, the rights of employees are not met to a great extent due to informality in the sector. This exhibits itself in basic performance results and management quality from product quality to efficiency, from innovativeness to participative management. Upbringing the great majority of those working currently in the sector in general in a master-apprentice style within a workshop culture is one of the greatest problems in the adaptation of the developing technology and information infrastructures to the sector. On this subject, different and innovative management and institutionalism structure shall influence efficiency.

Suggestions: In order to increase efficiency, institutional organization and management effectiveness in the sector; actively benefiting from Development Agencies and institutions such as KOSGEB, contact with General Directorate of Productivity, active participation in Chambers of Commerce and sector associations such as Association of Turkish Furniture Manufacturers (MOSDER), Association of Kitchen Furniture Manufacturers (MUDER) and Office Furniture Industrialist's and Businessmen Association (OMSİAD), providing seminars to managers directed to better analysis of company studies, effective use in the production of the activities not having added values are important matters. However, new structures are needed over the existing regional / urban sector organizations. Effectiveness of the chambers of industry is important in this respect for the suggestion of the problem. In this scope, research of examples suitable for the establishment of private enterprises may be proposed as a model. In this regard, the examples in Italy, Germany, USA and China may be taken as model.

3.4. Design R&D

Design possesses the potential of power which responds to different fields from individual expectations to social expectations, from national expectations to international expectations, from marketers to producers and, more important, to environmental expectations and which has social, cultural, political efficiency at the same time [17]. Because design has the power and capability to direct and manage the world [18]. Two sample models to be given in this context are Italy and England. In the Commission Report concerning the accession of Turkey to European Union [19], it is emphasized that Turkey should regard industrial design and take precautions directed for the legal protection of the products. One of the most effective roles belongs to design in the competiveness of countries in the globalized world. The meaning of design as perceived in developed countries is not yet developed in our country. It is hard to talk about design in furniture sector before 1990s. In the last 15 years, studies directed to design has accelerated for the development of product range and formation of furniture with identity according to the culture, welfare level, consumption habits, regional and social characteristics of the addressed groups under the influence of factors such as entrance of large scale firms to the sector, increase in their number and experience and competition in foreign trade. However, although more importance compared to the previous years is attached to design by the companies, such studies are not specific and don not bear the quality to separate the brands from the others since the spirit and essence of the design is not yet understood sufficiently. The activities carried out on the subject of design do not promise much hope for the future because the counterparts of marketed products are created in a pragmatist approach. In case this situation goes on, it is estimated that some obstacles shall be experienced in the coming periods on the subject of registration and copyrights.

Suggestions: Getting long term foothold in the international arena and provision of increase in unit values may be possible for the Turkish furniture industry only with products of specific design. To perpetuate benefiting from the advantages requires to be an international brand first and to fulfill its requirements. Joint effort of the government, firms and sector organizations is required to form an effective control mechanism and make the adequate source transfer by improving the human potential which exists on the subject of design in the cooperation of university and industry. The subjects to be performed to increase the design awareness in the sector can be listed as follows:

- ✓ Furniture design must be highlighted in the level of universities,
- ✓ Design ideas directed to production must be formed,
- ✓ Significance of design management must be increased,
- ✓ Design contests must be made effective,
- ✓ Outland support must be given and sample models must be obtained,
- ✓ Student projects must be incorporated into the industry (joint study),
- ✓ Design schools must be opened at the regions countrywide where furniture production is widespread, the existing ones must be updated in the direction of 21st century expectations,
- ✓ Encouraging incentives must be given to the sector so that university – industry cooperation does not remain unfulfilled. (Models of developed countries must be examined on the subject of “Design and R&D”. In this respect, the structure, functionality and tasks of the government supported Design Council at England which has become a model to European and especially Far East countries may be taken as a sample. Turkish Design Advisory Council founded by the Decree of Ministry of Cabinet, number 2009/15355 must be provided to pioneer both the furniture sector and general manufacture sector.)

3.5. Advertisement, Marketing and Branding

3.5.1. Advertisement: Since the sector is predominantly composed of SME’s, subjects like advertisement, marketing are tried to carry out within the firm with the existing possibilities/ personnel and causes insufficiency in foreign markets. The most important factor in information age is advertisement formed by information and communication. The main element which determines the access to domestic and foreign markets is advertisement activities, quality and sufficiency of after-sale support network. Whilst national advertisement is provided by the expenses of commercials, international advertisement is realized by participating in foreign fairs.

Suggestions: On this subject, an image must be established that Turkish furniture is a quality product and the enterprises which cause bad advertisement with non-quality products must be prevented. The firms must be supported by the government incentives in this direction and facility, advertisement and trust must be provided in the direction of providing support network, knowledge acquisition and claim of rights after sale in whatsoever country.

3.5.2. Marketing: In general, furniture producers convey their products to the consumers over mediating marketing companies or other mediating institutions. Turkish furniture sector has provided the necessary conditions with some brands for success in the international market and goes on increasing the export figures. Fairs prepared by the sector directly affect the market effectiveness, marketing and advertisement. On the other hand, within domestic market, the furniture demand increasing due to population increase at Turkey, shortening of furniture replacement period caused by getting richer, urbanization keeps the domestic market continuously in motion and alive. However, this condition is not valid in the whole sector. The channels which provide to get the experience, behavior and voice of the customer in market knowledge, brand perception of the consumer, furniture replacement frequency, and many other matters cannot be used effectively. This situation is rather important both from the point of the improvement of the sector and from the point of protecting the consumer rights, consumer satisfaction and preventing unfair competition. Because the sensitivity of firms, having a service infrastructure and warranting their products, which they put forth when selecting the material is rather different than the behavior of the others. Not being able to form the necessary information and service infrastructure to provide the after sale service support effectively, the firm causes suspect in the sector on the subject of sustainability of its activities.

Suggestions: Training and informing studies which improve the marketing and advertisement capability of the sector/firms should be increased and an increase must be provided in the utilization of incentives such as supporting the marketing activities, employment and training assistance, directed to the elimination of such deficits. On the other hand, domestic alternatives must be produced from the point of value added products imported from Europe; imposing a certain quota to economical products from Far East is found meaningful.

3.5.3. Branding: There are many factors which affect the formation of brands. However, the factors which are stated above and which affect the success and development of the sector influence brand formation in the sector. Brand and branding require multidimensional strategic thinking and planning and is one of the most important factors in the competitive power of the enterprises.

Suggestions: Formation of a Turkish Furniture Identity which complies with the world standards and has specific design and competitive prices after the furniture firms mature their brands and products is an important element which shall affect the competition of the sector in international dimensions. Brand formation must be promoted both by the firms and the government and a reward must be given to the brand. On this subject, Turquality must be embraced, advertised and its functionality must be increased. English Royal Brand Rewards, Italian Design Rewards may be an example of this.

Basic goals and recommendations concerning advertisement, branding and marketing may be listed as follows:

- ✓ Must get a foothold in the market with quality Turkish furniture identity,
- ✓ Must be selective in foreign origin products in contract manufacturing,
- ✓ Domestic firms must produce their own product instead of contract manufacturing,
- ✓ Turkish brands must cooperate in foreign markets instead of being in competition,
- ✓ Development of sub industry services must be provided,
- ✓ Structuring must be provided in consultancy services,
- ✓ Government support must be provided in foreign advertisement,
- ✓ A share must be spared to the furniture sector from Turkish promotion fund,

- ✓ Distribution channels must be of world standards level,
- ✓ Brand stores activity must be established,
- ✓ Entrance to effective markets must be aimed,
- ✓ Market share must be increased by directing to nearest neighbors and switching on different marketing tools,
- ✓ Entrance to Russian market must be considered with Turkish chain store,
- ✓ Government support must be provided for shopping centers (AVM) in foreign markets.

3.6. Raw Material

According to the report [21] of Wood and Forest Products Exporter Unions, daily 30 thousand m^3, annually 15 million m^3 industrial woods is needed in the furniture sector. 9 million m^3 of this quantity is met from the domestic market and the remaining part via importation. The sector has used 11 million m^3 industrial woods in 2011 only in the production of panel furniture and it is thought that domestic industrial wood production must be increased to at least 20 million m^3 to reach the goals of 2023 by considering the market species and efficiency of the forests. While particle board / chipboard and MDF is produced at Turkey with advanced technology, the problems encountered in the supply of the raw material required for the production influences the production, decreases the capacity ratios and this condition affects the pricing. Industrial wood is cheaper in rates up to 50-60 % in foreign markets than Turkey and this becomes prominent as a factor which continuously weakens competition especially in export. Competitive market conditions are not formed in our country on the subject of raw material and a significant part of forest resources are directly used as fuel wood. In addition, use as fuel due to reasons such as decrease in the quality of industrial wood as a result of wrong wood chopping, dote as a result of wrong storage, decay is an important problem.

From the other inputs used in furniture production, hardware is intensely imported. Also the supply of materials such as cloth, sponge, feather used in the upholstery sector is predominantly composed of imported products.

Insufficiency of raw material sources is a factor which weakens the international competitive power of the enterprises in Turkish furniture industry. Although Turkey has the supply of suitable basic materials such as wood, chipboard, veneer, hardware and other inputs, it is not possible to obtain good quality domestic inputs in sufficient quantity and with competitive prices.

Another obstacle in the development of furniture industry is the intermediate goods such as locally produced metal accessories which are a poor quality copy of European products. Therefore, the firms face with very few alternatives and directed to use imported inputs. Supply of the raw material from foreign markets and the fluctuation in the foreign exchange rates observed very recently increases the costs. This situation turns the advantage of price competition in the furniture sector against our country.

Suggestions: Since foreign source dependency in the sector on the subject of raw material brings forward the possibility of experiencing problems in the future, the things to be done concerning this subject may be listed as follows:

- ✓ Forestry law and forestry organization must be updated according to today’s needs and to increase the effectiveness and productivity of the forest resources,
- ✓ Measures must be taken for efficient use of forests,

- ✓ Industrial wood must be supplied by establishing industrial plantations,
- ✓ Alternatives must be produced against foreign source dependency in industrial wood production,
- ✓ Provision of plantation of rapid growing tree species,
- ✓ Industrial tree planting must be permitted (Swedish Model) private forestry must be supported,
- ✓ The problem of forest villagers must be solved and infrastructural and legal regulations required for an improvement in the direction of increasing production must be made,
- ✓ Obtaining the forest products expensively and its direct effect on the costs must be prevented,
- ✓ 9 % fund (taxes paid for forestation, Ministry of Forests, Brokerage and TRT) added to 18 % VAT applied to the forest products must be cancelled,
- ✓ Search of high added value new composite materials in the production of wood and panel boards must be promoted in the direction of the troubles experienced for the industrial wood raw material,
- ✓ Monopolization in the production of panel board production and the pricing troubles must be eliminated,
- ✓ Since decreasing 18 mm board thickness used in the production of panel boards to 16 mm shall provide a saving of industrial wood in a ratio of 1/9, planning must be made in the sector concerning the use of 16 mm boards (for example, IKEA produces with 16 mm boards),
- ✓ Alternative ideas must be formed directed to provide the enhancement of quality domestic raw material sources in the furniture having upholstery such as textile, sponge, polyester, feather,
- ✓ Enrichment and quality increase must be provided in the diversity of sheet, metal profile material, the troubles in the sector's furniture production on the subject of suitable sheet and metal profile must be eliminated, government support or know-how support required to bring the prices to appropriate levels must be provided,
- ✓ Activities increasing the added value in the end product must be promoted,
- ✓ Considering the life cycle of the product, employment of materials which harm the human health must not be permitted and the necessary measures must be taken on this subject by increasing the frequency of audits at the production centers,
- ✓ Conformity to EU standards must be provided in the supply of raw materials and the entrance of raw materials without a certificate must be prevented (at least E1 standard must be sought in the framework of Kyoto protocol),
- ✓ On-site surveillance certificate must be asked,
- ✓ Suitable laboratory media where standard tests of environment sensitive products may be done must be provided around the country.

3.7. Sub-Industry

In furniture industry, sub-industry completely works under the orientation of main industry and isn't able to be released from serving in the logic of contract producing. This situation does not make long term transformation possible in the sector and the development of the understanding of making value added works. Although a bottle neck is not expected on the subject of input in all sub-industry products (textile, iron, glass, etc.) used in the furniture sector, it seems possible to experience some troubles in the future if measures are not taken in industrial wood raw material. In our country which races against world's giants on the subject of textile, which is in first ranks in steel production and which leads on the subject of glass, predominant import of semi manufactured products of such main sectors in the production of furniture becomes a contradiction and means that there is a miscommunication between the sectors. Quality accessory materials which are the further needs of the furniture industry are predominantly brought from abroad and domestic sub-industry is not effective in this field.

Suggestions: Large and small scale firms must provide contact for the establishment of the sub-industry and endeavor for the establishment of domestic sub-industry.

3.8. Logistics, Transport

Furniture products must be transported to the buyer undamaged and in full. The firms (especially the exporting ones) other than the firms which produce demounted package furniture can't pack as required due to the reason that their products have different dimensions and the number of products to be exported is small, and their packages are limited to corrugated cardboard and bubble nylon. The packing system used for transporting the furniture to the buyer undamaged is not applied except the mass producing firms considering the number of parcel/unit price ratio. Packing in the product package design discipline required by the branding is of essence for the competition and reliability of the sector. The transporters who are used to carry uneven loads do not show the necessary care while transporting the ready-made furniture; some firms transfer the furniture before delivering it to the buyer, the transportation and transfer works made without care cause damages in the furniture. A well organized distribution system to eliminate such obstacles is needed.

Another important problem concerning logistics and transport is experienced at the customs and the packs are damaged for the purpose of control. Sample product is detained or expertise/specialist is requested from the Exporter Unions in cases of uncertainty experienced at the customs. This condition causes late arrival of the product to the buyer.

Suggestions: As furniture is a bulky product, highway transportation must not be an alternative. It is estimated that wide spreading the other transport alternatives, namely railway, seaway transport shall decrease the costs and increase the arrival velocity of the products to the customer. Ineffectiveness of sea transport in our country of which 3 sides are surrounded by seas causes an increase of 10-15 % in the freight costs. On the other hand, the vehicles used in the transport being suitable to transportation standards and the product delivered professionally in time and undamaged are important matters.

Studies must be made on the subject of training the examiners on duty at the customs or the establishment of specialization customs.

3.9. Public-Sector Relations

Public procurements, duties and responsibilities of State Supply Office (DMO), office furniture produced at TOKİ and prisons cause having problems and uncertainties.

Suggestions: Provision of active participation in furniture procurements of public bodies and institutions and constituting projects according to the user expectations may provide an important source in the development of SMEs. However, such being big procurements makes it difficult for the small and medium sized industry enterprises to participate in these procurements. In this respect, splitting the big procurements and transfer of share to SMEs may help the improvement of the sector. In addition, SMEs may be promoted to found joint purchasing companies, to act jointly and join their forces. Furthermore, the troubles in the arrangement of specifications must be eliminated. Warranty certificate must be sought especially in DMO and TOKİ specifications. In addition, employment of furniture produced in the workshops of the prisons in such purchases makes a negative effect on the work quality of the sector and causes unfair competition. The specifications must be formed without giving any brand name while the specifications indicating the quality of the input used in public procurements are prepared and thus local producer must be supported on this subject.

3.10. Capital / Finance

Capital / finance shortage of the sector and high credit costs are included among important problems. Since the enterprises are forced to provide credits from money markets, especially commercial banks in suitable conditions, they usually finance their activities from their equities. As a result of this, shortage of operating capital is continuously experienced.

Suggestions: Capital markets must be developed to provide strong and sustainable capital. The enterprises must merge, be supported by effective mechanisms or promoted in capital increases and power acquisition. The other alternative is that furniture enterprises may open to Istanbul Stock Exchange (BİST) for new capital acquisition in this period when bank credits are high and loaning is difficult. This situation shall contribute to the elimination of the troubles on the subjects of institutionalism and management and also it is thought to pioneer the sector on subjects such as unfair competition, social security system, taxation, brand reliability, employment of qualified personnel, and improvement in quality and product awareness, provision of customer satisfaction. Advantageous government incentives must be provided to attract foreign capital to this sector as done at some Eastern Bloc countries. Joint studies with international finance institutions, a development and investment bank is proposed for financing the foreign trade.

3.11. Other problems of the sector

After closing transactions are made by the Exporter Unions, further action is noticed in writing about the release of the guarantees to the customs chief engineer's office where the import is made (where securities are retained). Transactions concerning IPP closing and guarantee release are followed at the chief engineers' offices by Customs Regime with Economic Impact services and instructions are given for guarantee return to the customs directorates (where the guarantees are retained). Then Customs Directorate gives instructions to the accountancy. It is stated that the duration passed between the closing letter and guarantee return is averagely 1-1, 5 months. After the closed letters of the permission certificates are received, immediate return of the letters of guarantee must be provided when application is made to the concerned customs directorates with this document.

The problems recently experienced in the sector concerning the bank check book must be eliminated and clear arrangements concerning the subjects must be made.

Poor quality cheap products which are imported from China and Far East countries affect competition in export. Products which are imported from China and Far East countries (especially laminates) must be subject to control in the framework of international conventions. There are implementation and supervision troubles on this subject.

It is required to visit the Chambers of Industry and Commerce for the approval of the documents taken from these chambers for export products. Establishment of the necessary infrastructure to be able to make the sale of MC circulation certificate, Euro 1, Certificate of Origin certificates and document approval transactions in electronic media is important for the firms not to lose time. A study must be made for the provision of the documents in question by the Exporter Unions.

4. SWOT ANALYSIS AND EVALUATION OF COMPETITIVENESS

The sector is internally and externally evaluated according to multi-dimensional uncertainties such as the present status of the sector, export and import dimension, production capacity and use, new formations in domestic and foreign markets, political stability, strong, weak aspects, opportunities and threats are determined, the analyses concerning the future and competitiveness of the sector are presented in this section. The analyses of Strengths, Weaknesses, Opportunities, and Threats (SWOT) is given in Figure 4.1.

Figure 4.1. Turkish Furniture Sector SWOT Analyses

STRENGTHS	THREATS
Geographical location, Open to be developed, Last twelve years positive performance, High number of employee, Sector's increasing technology transfer, Increase of modern and technological Production companies, Furniture production network / potential, Increasing exports to the target markets, Wide distribution network, Material, product diversity.	Shortage of raw materials, Country of the crisis in the EU, Lack of marketing, Branding problem, Energy problem, Low standards, Model copy, Lack of promotional activities, Low-cost manufacturing (3rd World), China (Large Enterprises), Environmentally friendly production (Kyoto Protocol)
OPPORTUNITIES	**WEAKNESSES**
Globalization, Re-formation of the world, EU candidacy, IT and electronic net-works, Smart furniture, Branded / identity products, Customer-oriented product and diversity, Open to cooperation and investment structure, The search for new markets / expansion, Consumption in the European population, The increase in production / development The investment in the environment, Global increase in the consumption of furniture, Volume of 1 trillion U.S. dollars in 2050.	Lack vocational training, Lack of qualified personnel, Design and protection, Unfair competition, High raw material costs, Lack of promotional activities, Low standards and environmental issues, Branding, quality, image, SME density, Fragility of family businesses, Organizational / institutional structure, Routing / state support, Capital / financial failure, Innovation approach.

As expressed in Figure 4.1, Turkey incorporates many strong aspects and opportunities in the world's furniture market with the influence of her geographical position. However, Turkey must solve the existing problems and assess the strong aspects and opportunities to create an effective difference in order to get her share and find quick solution to her weak aspects and threats. The needs of users, culture differences in international markets, expectations from furniture must be well identified in the direction of expectations of 21st century and the sector must get a foothold in the world market by spot-on products. The government must produce supportive policies to the sector which does not have foreign trade deficit and which provides great contribution to employment in the country. The elements expressed in SWOT analysis table must be well analyzed and both furniture sector enterprises and associations and the government must make studies concerning these subjects. Increasing the competitive power in national and international scale, placing emphasis on “Modern Design and R&D” by the government and furniture enterprises is vital. In addition, determination and audit of furniture quality standards is an unavoidable requirement.

The sector has become one of the rare sectors which do not have foreign trade deficit in the last 10 years. Being in rapid development and transformation process, the sector presents an important potential in domestic and foreign markets by means of its brand, quality, small-large scale firms in the sector, geographical position, general growth policy of the country, young population, improvement of national income per capita. In addition, it aims to be 10th greatest furniture producer of the world and 5th of Europe with the expectation of 25 billion dollars production capacity and 10 billion dollars export for 2023 with its export value continuously increasing since 2001 under the influence of compatibility with EU and the approach of zero problem with neighbors in foreign policy. The present view clearly puts forth the growth potential of the sector. If Turkey is able to provide the continuity and development of her existing potential power and strategic position, it is considered that she shall arrive at a better status within the international furniture market.

4.1. Environmental Analysis

Although Turkish furniture sector consists of 1 % share of the world's furniture production with its total production capacity, it is not at the desired level and goal. Turkish furniture sector has exported 1,9 billion dollars furniture to 214 countries by 2012 and is located 19th in the world ranking and 14th in European ranking. It has imported furniture with a value of 817 million dollars from 112 countries and is located 28th in the world ranking and 18th in European ranking. Whilst a decrease of 10 % is in question in the export made to Arab countries in 2011, this has become 360 million dollars with an increase of 124 % in 2012. When Arab countries are importing an annual total of 15 billion dollars, 360 million dollar furniture export from Turkey may be said too low (excluding Syria and Iraq). When the export made to nearest neighbors and Central Asia countries are assessed, 779 million dollars export value equals to half of the export of the country and 25 % increase in 2011, 11 % increase in 2012 points out that trade with neighbors is more effective. According to Trademap data, especially when import ratios are above export values in 2010 and 2011, exhibition of 13 % decrease in 2012 is met positively from the point of the future of the sector. When Turkey's general foreign trade balance is evaluated, it is seen to be import weighted, but furniture sector is export weighted and it is amongst rare sectors not having foreign trade deficit. Turkey's furniture foreign trade has continuously increased for the last 12 years except the small decrease experienced in the economical crisis of 2009.

The existing values show that the world's furniture sector has an increase trend. General perspective of the last 10 years has put forth the growth potential of Turkish furniture sector with its production volume and export volume, but this is not at the desired level. Turkey must solve her problems and increase the production capacity and competitive power to get her share in the world furniture market which is expected to exceed the volume of 1 trillion USD by 2050. There are things which must be done and policies must be produced on this subject both by the sector and the government.

4.2. Analysis of Competitiveness of the Sector

Due to the point where Turkey has arrived in the labor force cost, contract export has gradually ceased to be an alternative and added value exportation by branding has become compulsory. Because that the purchasing power in Turkey market is much more lower compared to the markets such as America and Europe, turnovers of Turkish firms are left too low compared to their foreign rivals. Therefore, the budgets which the brands can spare for their overseas structuring are at very low levels in this direction. Although the government applies some support programs, the sector is budgetary still far away from the competitive power of foreign brands. For example, the total annual turnover of a firm which has a good position in Turkish market is even left under the annual commercial budget of a recognized American or European brand. Therefore the greatest problem in front of export is that purchasing power at Turkey is at lower levels. Another big problem in front of the export is customs duties. For example, although their ties and geographic closeness are very little compared to Turkey, customs duties of ratios between %10-%35 are paid to almost all Middle East countries. Whereas, this varies between %0-%7 for European countries. Although we have some advantage in price competition, the sector loses this advantage by means of customs duties. This situation is valid not for Middle East only, but unfortunately for all the other regions.

In general, although the existing problems of Turkish furniture sector are problems coming from the past, they present parallelism with the general economic appearance of the country. Therefore, many of these problems shall be eliminated by an increase in the level of economic and social development of our country. In addition, the sector is composed of SMEs to a great extent as a typical appearance of the industry of our country. Therefore, most of the problems are typical SME problems. The sector is open to foreign expansion to some extent. However, the great producing mass must first join forces or merge and be transformed from small workshops to large workshops and factories which can realize large and professional production while opening to international markets.

As a result, it is possible to talk about a furniture sector in our country which is open to development and which presents potential. Today Turkey is regarded to be able to compete with countries such as Germany, Italy, and Poland which are seen as powerful furniture producers of Europe with its number of producer firms, available employment power and natural resources. However, the sector is thought to be a strong power both in European furniture market and world market as a result of putting on the agenda the problems handled in the previous section and finding suggestions to them by the related sector organizations and public bodies.

5. IMPROVEMENT OF INVESTMENT CLIMATE, REGIONAL INCENTIVES AND SUPPORTS

In this section, the opinions about the investment climate of the sector, removing the obstacles on this subject and its regional distribution, incentives and supports are presented.

Furniture sector is an important manufacture industry of Turkey both from the point of the employment which it has provided (it employs approximately %23 of the workers employed in manufacture industry enterprises) and with its gradually increasing export value. Looking at its development process, growth and foreign trade dimension evaluations of the last 10 years, it has a structure which rapidly grows and which is open to investment. However, the sector needs support and incentives for its development, competition and to increase its effectiveness in domestic and foreign markets.

Looking at the distribution of the furniture producers in Turkey, it is seen that Bursa, Bolu, Eskişehir, Kayseri, Sakarya, Zonguldak, Trabzon, Balıkesir, Antalya, Burdur and Adana follow İstanbul and Ankara. Kayseri ranks in the front lines according to the furniture producing provinces and export realized. The number of firms in Turkey with more than 200 employees exceeds 40 and 8 (%40) of these firms are operating at Kayseri. However, by using SMEs which form the great majority of the furniture sector at Turkey and subjects such as environment and occupational safety as pressure elements of priority, modular industrial zones which can take joint services may be formed within Organized Industrial Zones or with the support of chambers of industry and small workshops may be provided to aggregate in such zones according to their subjects upon incentives. In the event of providing financial support, they are considered to attain a more functional structure for economy. For example, effectiveness of SMEs may be provided by providing the transportability of Ankara Siteler region or aggregation of the works done in this region to increase effectiveness, establishing 400-4000 m2 workshops where a structure is formed to provide compressed air, dust suction, emission control, natural gas, logistic service, etc. services and supporting with moving incentive, and forcing by occupational safety, environmental and worker health subjects.

High tax rates applied in the furniture sector over the level of European countries becomes an important disadvantage for competition with foreign markets. High SGK premium at Turkey is another factor which influences competition adversely. Therefore, it is required to re-arrange SGK premiums considering the international applications and the facts of the country.

In incentives, priority should be given to incentives and supports directed to increase export. Export incentives may be dealt with in narrow and wide sense. Export incentives in narrow sense cover export subsidies. In wide sense, it contains all regulations which shall eliminate the difficulties which the exporters face in export and assist to make them establish a dynamic system to improve their sales. Accordingly, the most important purposes of export incentives are:

- Expansion of market share,
- Formation of export knowledge,
- Decreasing or removing the limits concerning export,
- Determination of various aid types for actual and potential exporters.

The types of incentives given to export are determined by international conventions. The most important export incentives acceptable by World Trade Organization are:

- Market research,
- International trade boards,
- International trade fairs,
- Trade incentive offices,
- Researches supported by the government,
- Trade finance programs.

Different export incentives were used at Turkey in different periods depending on the changing economical conditions and needs. Cash incentives were removed at the end of 1994 in compliance with international commitments and “Government Support Directed to Export” was brought to support export both in production and market stages. Turkey has adapted her legislation according to EU legislation following the realization of Customs Union. Although incentives are adapted, there exist important differences between Turkey and EU from the point of sources spared for the export incentives and application. Incentives provided by the government are claimed to be very insufficient although there exist different incentive programs. Especially that the incentives in the programs are given a certain time after the firm has made the expenditure, that the expenses are already financed by the firm, (even it means that its return is waited for another certain time); the firm continues its expenditure in this case as much as it can. The existing incentives and incentive programs must be revised to be repayable and a source exceeding the firm’s power must be created in order that the enterprises might compete with the foreign brands at similar levels. For example, for a brand which is selected to compete with a foreign brand with an annual marketing budget of 100 million USD, an incentive of the same ratio must be created, its prepaid investments must be provided and then its expenses must be checked.

Another problem is to decrease the customs duty rates and to make studies to decrease these even to zero with certain countries. Incentives at Turkey for the furniture sector in the direction of new incentive system may be listed as follows. The sector needs incentives and orientation on the subjects of incentives, sanctions and openings on the subjects such as:

- ✓ Discount in insurance programs and indirect taxes,
- ✓ Customs duty exemptions,
- ✓ VAT exception,
- ✓ Insurance premium employer share support,
- ✓ Allocation of investment places suitable for furniture production,
- ✓ Interest support,
- ✓ VAT return,

- ✓ Government aids directed to export (Research, Development Aid, Foreign Fairs and Exhibitions Participation Support,
- ✓ Support for international fairs,
- ✓ Market research aid,
- ✓ Training aid,
- ✓ Employment aid,
- ✓ Support for environmental costs,
- ✓ Furniture recycling plants must be installed and promoted (especially the dust/sawdust from dust suction facilities must be gained to economy and central collecting stations must be established),
- ✓ Patent,
- ✓ Utility model certificate and industrial design registration aid,
- ✓ Branding of Turkish products abroad,
- ✓ Support for brand advertisement activities,
- ✓ Support for activities directed to image salience of Made in Turkey by advertisement,
- ✓ Support on the subjects of opening and operating office, store abroad,
- ✓ Tax, duty and charge exceptions in export and sales and deliveries regarded as export, and services and activities which gain foreign exchange,
- ✓ Credit and insurance programs applied by Eximbank,
- ✓ Supports directed to prevent foreign source dependency of the sector on the subject of raw materials in recent years.

In general, governments have duties against enterprises to create competitive power in international markets. These are encouraging the enterprises with developed standards to make them increase their performance, identifying and modeling beforehand the demandable products, making them focus on customized input production, restricting direct com1.000ation (monopolization) to prevent regional competition.

6. NEW TENDENCIES IN THE SECTOR

It is expected that the effects of economical crisis being experienced at Europe would continue for minimum another 1 year more and the market would gradually recover by 2015. However, it is estimated that Europe shall be far from being an attractive market for at least 2 years more for Turkish firms due to the reason that especially the competition experienced in European market is at a higher level compared to other regions, that many of the firms with which a competition shall take place are European brands and the recovery in the market shall definitely give the priority to them for the sake of recovery. It is considered that it would be useful to assess the new Market formations as North Africa, Middle East and Central Asia countries. A rather significant movement and noteworthy increase in export figures is expected at the last quarter of the year especially starting from September 2013. It is estimated that the demand for furniture shall increase in direct proportion by directing the cash sources kept within the funds again to projects following the decrease in the uncertainties.

A structuring concerning the measurement and control of harmful gases emitted from the indoor furniture in the framework of environmental awareness and Kyoto protocol concerning the furniture sector is not present yet. A laboratory at İnegöl gives limited service on this subject. Raw materials imported and products exported by the producer and exporter furniture firms are subjected to some tests at accredited laboratories, and the firms in question have troubles in export transactions due to the reason that there do not exist laboratories at the provinces such as İnegöl, Ankara Siteler and Kayseri having an important share in furniture production and export. Opening of furniture test laboratories in the regions where furniture production is common and giving accredited reports directed to foreign trade must be provided.

Developments and probable tendencies concerning the sector may be summarized as follows in the direction of the expectations of this century:

- Modern life may present electro-furniture equipped with technology development.
- Smart dwelling and green building formations shall be reflected to the furniture. Concepts like smart furniture, green furniture shall be more often met in the furniture sector.
- Urbanization and rapidly increasing dwellings require new formation and transformation, and human and environment friendly, light, functional, portable, modular furniture which increase the quality of life and provide ease of use are considered to have an effective role in the world market.
- Innovative and functional Suggestions shall be sought for.
- Suppliers shall participate more in the design process, the shareholders having different fields of specialization shall concentrate on joint design management studies (Furniture, Electronics, Information technology, accessory etc.)
- Developed design skill, power of brand, effectiveness of after sale service quality emerge as fields pioneering growth in the sector.

- Recycling and furniture wastes shall be important.
- The subjects of occupational safety shall be more important in the sector. Occupational safety in the furniture production of our country is still not in EU standards.
- It is estimated that providing facilities in the shipping of products to the markets in distant regions shall decrease sale costs due to developments in the fields of package, packing, transport and especially emergence of demounted style furniture.
- As a result of reflection of nano-technology applications to the materials, use of water-proof and dirt-proof cloths, leather, environment-friendly sponges, paints, varnishes shall be common.
- Online sale organizations shall be widespread.
- It is estimated that there shall be shortages on the subject of industrial wood (raw material) if precautions are not taken.
- Other materials, hardware used in the production of furniture are imported in majority. Supply of the materials such as cloth, sponge, feather used in the upholstery sector is again generally composed of imported products. Raw materials of the sector being intensely foreign source dependent may cause troubles in the future.

Smart approaches, such as smart dwelling, smart car, and smart machine which are the output of 21st century and which directly interests furniture sector, are expected to influence the furniture sector. In the direction of the expectations of this century, the sector is advised to include smart furniture production network which produces up-to-date awareness with environment friendly, technological equipment to its design and production range. These new approaches and formations are expected to influence the sector as new fields which should be considered in the domestic and foreign markets. In addition, the excess of small scale firms in the sector, the rise in informality, the fewness of large scale firms, capacity utilization ratio being maximum 70 % create troubles in the sector on the subject of inefficiency in the sector and branding and a new approach is needed. The firms are required to increase capacity utilization, small firms must merge, existing medium and large scale firms must attain a more effective structure in order that the sector may catch 25 billion dollars production and 10 billion dollars export volume.

7. SCOPE OF THE SECTOR IN EU HARMONIZATION PROCESS, OBSTACLES ENCOUNTERED

Turkey has adapted her legislation according to EU legislation following the realization of Customs Union. However, it may be said that there are still troubles on the subjects of applicability.

The Forest Stewardship Council (FSC) Certificate is asked for all wood containing products concerning the furniture in European Union countries. In furniture exports to European Union countries, FSC Certificate is sought and furniture exporter has difficulty to provide this certificate. It is thought that this problem shall be overcome by providing the Ministry of Forestry and Hydraulic Works to give FSC Certificate showing that the trees used in the furniture production are obtained from plantation forests.

Transactions concerning IPP closing and guarantee release are followed at the chief engineers' offices by Customs Regime with Economic Impact services and instructions are given for guarantee return to the customs directorates (where the guarantees are retained). Then Customs Directorate gives instructions to the accountancy. It is stated that the duration passed between the closing letter and guarantee return is averagely 1-1, 5 months. After the closed letters of the permission certificates are received, immediate return of the letters of guarantee must be provided when an application is made to the concerned customs directorates with this document.

It is required to visit the Chambers of Industry and Commerce for the approval of the documents taken from these chambers for export products. Establishment of the necessary infrastructure to be able to make the sale of MC circulation certificate, Euro 1, Certificate of Origin certificates and document approval transactions in electronic media is important for the firms not to lose time. A study must be made for the provision of the documents in question by the Exporter Unions.

A structuring concerning the measurement and control of harmful gases emitted from the indoor furniture in the framework of environmental awareness and Kyoto protocol concerning the furniture sector is not present yet. A laboratory at İnegöl gives limited service on this subject. Raw materials imported and products exported by the producer and exporter furniture firms are subjected to some tests at accredited laboratories, and the firms in question have troubles in export transactions due to the reason that there do not exist laboratories at the provinces such as İnegöl, Ankara Siteler and Kayseri having an important share in furniture production and export. Opening of furniture test laboratories in the regions where furniture production is common and giving accredited reports directed to foreign trade must be provided.

The troubles on the subjects of occupational safety in the sector are still not in EU standards.

8. GENERAL ASSESSMENT

Workshop type, small scale enterprises are predominant in the Turkish furniture industry of which is operating with traditional methods. However, it has become important information and capital weighted branch of manufacture with a production contribution of 3 % within the manufacture industry of the country following 1990s with the participation of medium and large scale enterprises. When, in the measurement of furniture production quantities, the number of producer firms, production quantities, sale prices, export figures are assessed altogether and the size of the construction sector and the informality in the sector are considered, it is estimated that production of Turkey's furniture sector shall reach to 25 billion and export to 10 billion dollars in 2023. Continuously developing since 2001, Turkey's furniture sector ranks 19th with 1,9 billion dollars export capacity to 214 countries by 2012 in the world's furniture export and ranks fourteenth in Europe, and this puts the growth potential of the sector for the future expectations of 2023.

Turkey's furniture industry is estimated to be in the first 10 furniture producer in world ranking and first 5 in Europe. Turkey has to increase her competitive power by solving her existing problems in order to get her share in the world's furniture market which is calculated to reach to a volume of 500 billion USD by 2020. However, obstacles seem to be:

- ✓ Unfair competition (Informality, protection of Intellectual property rights)
- ✓ Education, Qualified labor force, Employment, Experience deficit,
- ✓ Efficiency, management and institutionalism
- ✓ Design, R&D, development of Quality Awareness, taking compulsory precautions,
- ✓ Advertisement, Branding and Marketing,
- ✓ Raw material,
- ✓ Sub-Industry,
- ✓ Logistics, transport,
- ✓ Public sector relations,
- ✓ Capital / Finance

In order that Turkey's furniture industry gets a long term foothold in the international area, active solutions must be provided to the basic problems collected under the following 10 titles and the government must produce supportive policies to the sector.

The sector does not give current deficit for the last 10 years and has no trouble of employment, but it is at the last ranks in education preference areas; this links to advertisement deficit and the occupational education in the sector must be made attractive. Being an important production branch, it is important for the furniture sector to have occupational furniture education both in occupational high schools and at the university level. Furniture engineering departments must be opened in suitable universities. Establishment of mechanisms in the sector to provide university – industry cooperation must be assessed as one of the important activities in this scope. In addition, it is considered that developing and wide spreading in-house training besides lifelong training programs and sparing source to the training of adults shall be useful in the Suggestion of the basic problems and improvement of the sector.

Rapid developments in science and technology are spreading worldwide and actualizing a communication revolution resulting in the formation of global society. Multilateral period of change which such developments start in the economical, political and cultural structures of the societies forces the production methods and policies to change. While competition becomes important rather in production in the industrial society, technology production has gained importance in the information society. Accordingly, comparative superiority shall be shaped according to the possessed technology in the information society of 21st century and the "Technology Competition" concept shall be important besides "Industrial Competition" concept. Our sector is considered to be influenced by this and smart approaches such as smart dwelling, smart car, smart machine which are the output of 21st century and which directly concern the manufacture sector are expected to affect the furniture sector. It is foreseen that nano-technology shall be effective especially in the fields of material science, paint and varnish and this shall affect the time, production speed and cost decreases in furniture sector.

In conclusion, the sector which keeps its goals extremely high for 2023 has to increase its production capacity and market shares besides protecting its present status. The sector must reinforce its production network in the direction of the expectations of 21st century with the extents of new formations, smart furniture, electro-furniture, environment friendly furniture, human and environment awareness.

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ADDITIONS

Add 1 CTSPC Product Groups on the Basis of Article 8 and 12, Furniture Export Value

CTSPC12	Descrioption Code 12	CTSPC Product Groups on the Basis of Article 8 and 12, Furniture Export Value (1.000 USA $)				
			2011	2012	2012 (JANUARY -SEPTEMBER)	2013 (JANUARY -SEPTEMBER)
940110001000	Seats of a kind used for aircraft	228.170	449.936	219.284	132.784	187.665
940110009000	Not leather covered, for use in civil aircraft	198.870	250.676	243.104	222.665	192.848
940120000000	Seats of a kind used for motor vehicles	113.988.745	143.118.820	121.112.008	90.591.049	99.926.118
940130000011	Swivel seats with variable height adjustment:	-	11.868.668	12.795.347	8.594.833	12.717.404
940130000012	Seats, of base metals	-	6.936.002	6.567.832	4.934.613	7.855.131
940130000019	Seats, of other materials	-	11.171.187	13.148.433	9.417.369	11.135.428
940130100011	Mounted, solid, wheel / wood seats can slide and chairs	7.080.745	-	-	-	-
940130100012	Backrest, solid, wheel / may shift base metal chairs and sofa	5.085.606	-	-	-	-
940130100019	Backrest, solid, wheel / seats can slide from other substances, chairs	3.404.390	-	-	-	-
940130900011	Other kinds of wooden chairs	12.279.720	-	-	-	-
940130900012	Other kinds of base metal chairs and sofa	3.829.839	-	-	-	-
940130900019	Other kinds of other materials sofa and chairs	14.981.759	-	-	-	-
940140000000	Beds that can be converted into living mobilyasi (except for camping and garden)	125.506.868	141.488.798	139.567.361	101.143.792	96.974.820
940151000000	Rattan / bamboo furniture from the living -off	96.736	144.540	158.992	157.402	44.088
940159000000	Roten kamişi, sepetçi söğüdü vb. Maddelerden oturmaya mahsus mobilyalar	1.263.242	446.301	342.685	171.841	162.281
940161000000	Roten cane, osier , etc. . Article from the living -off furniture	75.812.539	88.039.028	125.924.377	85.964.645	111.404.655
940169000000	Wooden structure stuffed living off of other furniture	25.567.990	28.687.986	33.089.622	24.176.647	31.592.331

940171000000	Other seating furniture stuffed with metal frame off	6.881.088	8.288.404	11.974.118	8.762.427	10.424.912
940179000000	Intra-frame metal frame stuffed oturmametal not filled living off of other furniture	13.343.395	16.270.573	14.057.804	10.111.515	14.395.224
940180000000	Living off off other furniture other furniture	76.268.250	88.487.942	85.375.833	64.819.226	54.689.569
940190100000	Furniture for living off of aircraft components, parts	63.122	35.375	90.555	85.820	82.392
940190300000	Other living off of wood furniture components, parts	1.795.915	2.500.456	2.338.486	1.824.984	2.140.864
940190800011	Furniture for living off road vehicle parts, parts	39.429.268	61.378.962	57.841.265	40.857.047	61.877.867
940190800019	Other parts of furniture, parts	14.657.678	22.566.868	21.371.700	16.230.229	13.721.607
940210000011	Dental chairs	838.080	412.940	189.079	177.911	63.170
940210000019	Barbers' chairs and so on.	1.936.932	2.171.887	2.190.396	1.658.721	1.869.922
940210000021	Dentist and the barber chair parts, parts	389.784	283.120	664.607	231.465	143.607
940290000011	Tilt, swivel, raise and lower the mechanical-operated tables should be	1.272.560	2.099.942	2.765.284	1.309.244	1.626.625
940290000012	Orthopedic Tables	254.643	1.112.168	823.797	758.101	584.557
940290000013	Mechanical-cribs	6.433.413	5.976.973	9.193.143	5.951.932	10.988.274
940290000019	Other moving furniture, cots, chairs, tables, etc.	8.904.095	12.915.879	15.229.190	10.818.181	17.854.786
940290000021	Types of surgical, dental used in furniture, tables, cots etc. Geometry; pieces	1.440.240	1.636.814	1.353.624	782.307	2.228.824
940310100000	Photos of metal tables (excluding those of heading 90.17)	172.192	-	-	-	-
940310510000	Metal writing table, height = <80 cm.	1.651.663	1.641.268	2.487.375	1.822.774	1.676.267
940310580000	Other metal furniture used in offices, height = <80 cm.	-	12.265.807	10.440.260	6.475.491	9.213.881
940310590000	Other metal office furniture, height <80 cm.	11.125.191	-	-	-	-
940310910000	Metal doors, flying / sliding wardrobes> 80 cm.	14.894.811	18.774.912	17.243.658	12.269.113	12.337.001
940310930000	Metal drawer cabinets, file / plug cabinets> 80 cm.	14.330.153	16.670.813	15.359.865	10.980.375	11.870.547

940310980000	Other metal furniture used in offices, height> 80 cm.		6.957.365	8.473.770	4.977.051	6.656.257
940310990000	Other metal office furniture, height> 80 cm.	4.756.175	-	-	-	-
940320200000	Metal bedsteads	7.653.550	8.731.590	9.679.024	6.815.393	6.385.040
940320801000	Zinc, iron or steel mezzanine dining cabinets	455.313	626.689	890.067	671.917	783.007
940320809000	Metalden diğer mobilyalar	63.042.059	65.016.652	70.546.745	51.677.793	68.560.589
940330110000	Wooden writing desk to desk (height = <80 cm)	6.810.932	7.474.113	8.555.685	6.224.307	6.551.653
940330190000	Other wooden furniture for office (height = <80 cm)	15.501.625	18.076.952	26.139.934	18.558.214	23.399.070
940330910000	Office of the wooden doors, casement / sliding drawer cabinet, file cabinet plug height.> 80cm.	8.815.730	10.750.918	14.223.564	10.530.651	10.164.920
940330990000	Other wooden furniture for offices, height> 80 cm.	15.294.455	16.321.464	23.757.100	17.105.300	18.540.623
940340100000	Wooden ready kitchen units	8.944.858	8.261.173	10.473.886	7.888.174	14.003.922
940340900000	Other wooden furniture of a kind used in the kitchen	13.146.650	13.000.096	17.069.342	12.903.339	13.727.172
940350000000	Wooden furniture of a kind used in the bedroom	191.207.689	247.576.073	372.895.846	260.260.375	327.810.759
940360100000	For the dining room and living room wood furniture	143.145.395	158.174.168	188.393.489	139.624.464	140.282.118
940360300000	Wooden furniture of a kind used in shops	9.386.866	14.486.009	28.580.017	21.364.943	21.718.463
940360901000	Suspended wooden medicine cabinets and bathroom cabinets smaller than the species to be used in	7.316.014	8.014.532	9.683.491	7.105.287	8.615.852
940360909000	Other wooden furniture	80.217.202	103.177.929	110.150.290	83.052.468	105.311.831
940370000000	Of plastics material, other furnishings	25.283.400	30.987.897	37.262.588	28.609.609	35.725.609
940381000000	Rattan / bamboo furniture from the other	127.241	52.907	80.853	79.617	27.588
940389000000	Other furniture of other materials	19.838.816	14.899.444	15.594.921	11.297.148	12.030.103
940390100000	Other metal furniture parts, parts	44.349.031	54.745.351	56.106.164	41.624.097	45.687.432
940390300000	Other than wood furniture components, parts	27.053.295	37.366.321	33.321.077	24.921.928	27.204.331

940390900000	Other furniture and parts of other materials, parts	15.770.662	20.479.474	25.625.577	19.497.534	17.674.753
940410000011	Metal Mattresses	1.663.550	1.159.889	1.262.280	906.406	602.717
940410000012	Wooden Mattresses	346.171	248.738	288.363	187.814	321.740
940410000019	Other Mattresses	3.154.317	1.887.577	2.322.145	1.528.788	1.770.356
940421100000	Cellular rubber mattresses	2.286.012	2.334.010	1.693.161	1.392.848	926.607
940421900000	Of plastics mattresses	2.551.885	2.615.104	2.190.577	1.620.603	1.662.375
940429100000	Metal spring mattresses	30.983.915	36.853.446	38.976.987	27.347.800	31.005.393
940429900000	Mattresses of other materials	8.551.579	8.624.846	10.669.122	7.426.336	9.283.408
940430000000	Sleeping bags	5.886.697	1.057.391	1.257.757	705.780	743.335
940490100000	Filled with feather beds, etc. unfurnished.	1.550.295	2.301.946	2.358.350	1.633.633	844.745
940490900000	Other mattresses, bedding, etc.. things	44.176.077	48.025.660	45.890.314	32.257.523	37.912.632
	General Total	**1.414.675**	**1.658.379**	**1.898.571**	**1.371.231**	**1.595.917**

Add 2 Turkey Furniture Export Value for products of CTSPC 9401-9402 to countries.

Countries	Turkey Furniture Export Values Years (USA Dolar)				
	2010	2011	2012	2012 January September	2013 January September
IRAQ	209.204.897	286.447.623	396.202.880	267.920.063	311.504.273
LIBYA	75.414.762	17.494.230	167.211.289	117.041.794	172.664.550
AZERBAIJAN	82.962.827	108.470.135	131.495.049	94.042.195	121.342.064
GERMANY	135.373.236	168.836.852	152.839.224	112.698.122	103.456.953
FRANCE	73.804.362	91.390.124	85.444.360	60.831.136	76.627.181
SAUDI ARABIA	29.909.884	42.622.461	66.676.562	52.689.470	67.943.702
TURKMENISTAN	47.026.059	76.133.454	61.209.556	44.692.606	65.257.447
RUSSIAN FED.	36.108.658	49.109.839	59.346.904	42.972.022	59.881.200
ENGLAND	42.208.938	40.776.546	49.672.190	34.601.649	42.064.140
HOLLAND	46.635.929	56.552.284	53.155.514	40.342.398	34.226.594
UAE	20.893.841	18.267.312	20.864.737	16.462.427	29.047.084
USA	22.703.757	26.822.602	30.335.122	22.606.754	28.989.113
ITALY	31.069.427	34.100.350	30.344.907	22.767.844	25.095.155
IRAN	91.325.254	110.754.208	71.527.314	60.010.156	23.115.554
KAZAKHSTAN	22.287.678	19.552.230	24.317.979	17.103.879	23.099.969
ISRAEL	19.360.713	23.299.555	23.419.348	17.873.025	22.074.235
GEORGIA	16.818.544	28.539.695	32.126.202	22.651.416	20.161.668
AUSTRIA	19.711.210	25.474.875	22.634.247	17.109.065	18.797.270
NCTR	26.846.026	22.526.384	21.512.284	15.814.292	18.313.924
EGYPT	10.711.628	14.034.612	20.493.500	14.525.938	17.664.095
SPAIN	12.172.889	15.264.377	11.946.444	8.039.820	16.957.149
ROMANIA	21.912.684	19.489.484	18.535.895	12.007.719	16.694.742
BELGIUM	21.037.711	25.439.710	24.620.794	18.625.202	16.322.725
ALGERIA	11.403.460	13.828.285	14.271.911	10.202.616	14.024.608
QATAR	5.088.152	9.656.755	11.375.405	7.668.881	13.662.822
GREECE	42.395.311	32.830.379	19.433.274	14.124.311	12.172.018
UKRAINE	6.110.746	12.394.959	16.592.525	11.639.803	10.560.951
BULGARIA	12.807.725	13.227.870	11.311.682	8.780.615	9.941.125
MOROCCO	6.194.336	8.283.493	9.246.980	6.686.392	9.078.267
JORDAN	9.413.693	13.663.672	11.959.145	9.504.337	8.576.056
JAPAN	4.016.470	5.371.340	7.485.732	4.690.207	8.253.784
KUWAIT	3.424.126	6.719.971	9.479.696	6.674.517	8.029.525
NIGERIA	2.094.341	5.210.057	9.180.009	6.562.518	7.732.665
JORDAN	5.744.755	7.132.132	7.891.506	5.826.060	7.449.332
MACEDONIA	8.839.815	11.602.581	8.756.480	6.895.118	6.819.441
SWIZERLAND	7.037.827	9.215.276	9.745.568	7.144.465	6.565.926
KOSOVO	8.883.186	7.966.736	6.105.224	4.872.546	5.951.087
SOUTH AFRICA REP.	6.271.438	11.029.644	6.860.891	4.996.327	5.911.295
POLAND	6.393.929	6.731.844	7.652.709	5.387.555	5.215.814

DENMARK	5.649.222	6.854.697	5.928.127	4.175.450	4.470.010
BOSNIA	4.407.221	5.509.431	5.651.914	4.321.735	4.422.001
SWEDEN	6.345.137	7.338.700	6.749.978	5.003.095	4.315.591
BRAZIL	4.164.576	10.734.644	6.919.657	5.309.024	3.935.653
SLOVAKIA	3.039.698	3.084.532	2.912.323	2.312.795	3.660.653
UZBEKISTAN	3.481.097	3.049.468	3.196.630	1.984.005	3.548.272
KIRGIZSTAN	2.634.061	1.976.352	2.777.388	1.790.627	3.505.143
CZECH REPUBLIC	6.639.729	7.611.689	4.569.721	3.359.974	3.443.210
BAHRAIN	1.306.387	4.761.770	3.802.670	2.888.664	3.348.751
GHANA	422.957	548.018	1.363.970	1.131.531	3.303.870
TUNIS	1.696.990	1.769.612	2.705.031	1.911.406	3.125.810
YEMEN	1.851.040	1.093.128	3.311.714	2.513.571	3.046.374
AUSTRALIA	2.344.965	3.886.116	4.576.746	3.689.582	2.979.768
GINA	134.945	549.711	956.486	292.328	2.715.444
TAJIKISTAN	1.708.592	3.015.943	3.514.367	2.729.068	2.538.947
MOLDOVA	1.821.651	2.287.165	3.159.571	2.347.182	2.403.282
HUNGARY	3.886.032	2.561.781	2.675.748	1.987.715	2.310.953
MEXICO	495.502	836.786	2.009.211	1.393.831	2.207.978
EQUATOR	527.222	2.273.407	982.497	651.309	2.203.473
ALBANIA	4.249.395	3.567.377	2.804.569	2.068.829	2.151.594
KAYSERI FREE ZONE	2.695.931	3.452.823	2.752.991	2.166.511	2.053.945
BELARUS	740.373	1.271.278	2.924.870	1.712.398	1.875.084
AFGHANISTAN	4.678.336	4.477.508	5.050.919	4.171.894	1.838.151
INDIA	3.040.977	4.167.731	4.364.676	3.568.216	1.821.908
CROATIA	1.745.108	2.556.861	5.828.870	5.262.326	1.804.025
FINLAND	1.129.237	1.483.570	1.365.893	989.352	1.803.202
CANADA	1.343.345	1.720.424	1.892.567	1.433.856	1.787.600
NORWAY	2.750.088	2.376.886	2.393.567	1.750.317	1.670.667
MALTA	1.740.404	2.227.464	1.863.574	1.492.541	1.580.718
OMAN	1.189.003	1.610.151	2.064.783	1.639.296	1.538.728
CHINA	736.066	1.056.851	647.114	502.274	1.488.387
ESTONIA	751.570	654.640	880.972	552.841	1.386.147
SOMALI		63.483	728.298	37.587	1.366.056
AEGEAN FREE ZONE	1.017.470	1.517.958	2.071.376	1.614.736	1.313.864
PAKISTAN	791.249	344.346	2.177.174	2.142.307	1.296.749
ANGOLA	229.295	943.309	1.605.831	993.984	1.288.148
KENYA	903.437	1.906.003	2.047.936	1.654.015	1.150.922
SIRBIA	1.549.381	1.733.201	2.354.402	1.882.283	1.110.993
SINGAPORE	366.379	656.931	599.155	440.140	1.101.237
GABON	97.351	270.371	691.538	193.182	1.100.501
SUDAN	1.523.811	2.077.409	3.288.104	2.269.788	1.100.312
IRLAND	2.161.795	1.373.615	1.079.056	907.883	1.038.888
LETONIA	587.779	1.062.329	1.374.817	959.192	1.010.887
TANZANIA	492.435	1.099.473	822.103	357.094	956.718
ANTALYA FREE ZONE	1.289.601	4.863.982	1.603.055	1.400.841	945.779

SOUTH KOREA	999.641	824.721	524.084	437.888	928.981
VENEZUELA	116.265	523.506	1.141.643	1.044.229	926.911
SLOVENIA	1.771.859	1.527.099	1.060.132	760.700	904.498
PORTUGAL	3.940.686	3.146.495	1.348.520	1.159.238	869.368
ETHIOPIA	421.884	872.668	726.966	700.325	844.335
NEW ZEALAND	396.486	579.278	783.771	581.757	799.030
COLOMBIA	190.462	385.912	998.972	798.106	762.701
PANAMA	67.765	229.539	659.076	450.938	721.017
NIGER	366.870	627.033	379.606	317.174	714.049
EQUATOR	134.432	442.110	475.111	370.197	706.961
MAURITANIA	102.062	505.015	3.484.661	2.923.890	700.264
MONTENEGRO	616.876	487.048	893.646	776.514	697.844
SURIYE	16.899.629	11.176.945	1.179.027	911.882	652.934
SENEGAL	730.402	655.536	469.831	282.958	648.939
LITHUANIA	926.367	689.150	1.136.512	706.491	637.733
IVORY COAST	696.042	992.225	1.118.140	927.851	626.404
TAYLAND	241.659	412.263	430.117	257.859	533.639
MONGOLIA	105.681	156.444	678.105	255.872	529.089
CAMEROON	191.790	381.308	532.312	249.990	505.992
MERSIN FREE ZONE	139.316	323.074	75.908	65.151	496.097
İST.DERI FREE ZONE	317.269	761.286	1.120.566	788.166	479.419
CHILE	329.927	260.701	923.125	785.671	469.900
DOMINIC REP.	47.424	230.087	215.673	204.836	468.325
ENDENOSIA	156.439	462.303	345.606	162.438	465.377
ICELAND	720.001	751.866	430.100	338.759	434.912
HONG KONG	169.961	69.714	170.776	125.167	431.882
BRUNEI	-	-	41.823	5.054	410.533
KOCAELI FREE ZONE	1.334.304	923.965	459.664	404.736	400.869
MALAYSIA	160.271	316.096	254.079	140.977	395.419
MOZAMBIQUE	382.346	456.416	471.907	247.813	388.784
SURINAM	160.400	337.151	270.109	247.568	367.834
PERU	3.235	13.024	185.021	148.085	362.510
ARGENTINA	366.045	801.669	604.727	460.701	360.713
URUGUAY	357.762	411.050	296.864	240.950	351.889
BURSA FREE ZONE.	18.302.153	5.653.755	264.825	205.045	320.145
MADAGASCAR	37.059	115.660	134.584	134.584	316.301
DJIBOUTI	149.049	70.057	196.751	102.169	278.514
BURKINA MOROCCOO	63.794	103.916	191.749	166.124	265.431
İST.AHL.FREE ZONE	4.100.962	666.499	270.489	245.651	265.423
CONGO	1.418.365	825.177	483.865	122.551	233.524
PHILIPPINE	114.961	157.179	81.264	61.474	230.264
BENIN	187.555	124.109	238.443	116.334	228.371
LIBERIA	21.184	109.887	261.247	194.854	218.140
UGANDA	254.106	130.791	380.331	271.927	187.451

CHAD	209.151	76.731	80.667	55.011	185.639
NEW CALEDONIA	199.374	280.210	297.175	210.193	176.996
CURACAO	-	-	-	-	176.174
İST.TRAKYA FREE ZONE	457.278	332.461	539.170	420.868	165.430
EUROPE FREE ZONE	53.473	61.730	184.913	112.401	159.790
MALI	118.445	482.518	206.818	198.691	159.434
TAIWAN	79.443	167.026	69.406	8.782	147.266
LUXEMBOURG	230.925	366.856	497.946	451.498	136.761
MAURITIUS	155.591	146.077	256.546	229.021	125.685
TOGO	134.803	164.542	221.550	188.925	104.021
DENIZLI FREE ZONE	355.283	358.756	109.301	92.493	98.161
PARAGUAY	19.714	50.888	11.945	-	91.920
ZAMBIA	67.989	331.735	189.943	22.526	91.205
CONGO DEMOKRATIC. CUM.	177.695	268.703	230.227	224.970	91.159
SRILANKA	50.304	16.013	127.624	53.770	88.186
GUYANA	480	3.033	7.847	4.670	76.081
VIETNAM	23.584	167	7.726	3.885	62.865
PALESTINIAN (GAZE)	77.724	47.435	437.205	435.609	62.567
CAMBODIA	283.406	23.813	112.692	66.465	61.011
ZIMBABVE	9.563	36.360	169.550	5.550	60.677
NEPAL	-	1.697	42.326	-	58.464
TRINIDAD AND TOBAGO	91.359	57.736	109.110	74.536	56.156
BANGLADESH	116.293	50.369	120.628	120.022	47.208
MALDIVES	65.085	281.330	28.862	20.584	40.394
TÜBITAK FREE ZONE	104.267	237.156	325.002	302.648	36.343
BARBADOS	76.178	46.949	53.816	32.441	34.830
BURMA (BIRMANYA/ MYANMAR)	57.859	53.296	118.022	47.788	29.095
ADANA YUMRT.FREE ZONE	-	40.544	4.850	1.000	27.713
MIDDLE AFRICA	36.717	4.421	4.099	506	26.379
JAMAICA	139.851	7.800	729	478	25.794
GAMBIA	47.399	59.968	157.969	34.439	25.524
SIERRA LEONE	901	77.809	500	500	25.127
KOSTUNICA	33.411	29.144	136.584	92.535	24.570
RUANDA	2.153	17.416	151.047	129.514	22.620
MALAWI	45.557	27.813	-	-	20.951
CAYMAN ISLANDS	-	16.555	-	-	18.596
SEYCHELLES	760	-	285	-	18.455
HONDURAS	8.231	42.374	65.516	65.516	17.587
LAOS	104.348	-	-	-	17.134
NAMIBIA	-	-	-	-	15.756
FIJI	-	12.702	30.431	30.431	13.492

MENEMEN FREE ZONE	9.728	3.951	38.818	5.012	12.943
DOMINIC	11.358	6.666	7.312	7.312	12.488
ST.KITTS VE NEVIS	-	-	1.747	1.747	12.398
ENG.VIRGIN ISLAND.	35.093	5.250	9.374	2.000	11.485
CAPE VERDE	30.014	-	-	-	11.040
ARUBA	-	-	45.765	21.342	9.816
MACAO	-	-	-	-	9.075
COMOROS	21.726	368.439	15.196	11.699	8.055
HAITI	17.119	23.987	-	-	8.049
SAMSUN FREE ZONE	9.757	1.370	-	-	7.715
PAPUA NEW GINA	29.703	16.842	58.499	38.494	7.536
FRENCH POLYNESIA.	4.112	11.685	17.451	7.206	6.814
GUATEMALA	77.274	13.809	161.289	160.399	6.062
UNSURE COUNTRIES	9.514	37.761	20.891	10.684	5.484
GUINEA-BISSAU	60.533	49.892	23.686	23.686	3.421
BOTSWANA	-	1.909	3.179	-	3.396
MAYOTTE	2.950	-	3.988	3.988	2.753
BURUNDI	12.701	225.992	250	-	2.245
BOLIVIA	4.445	33.329	13.093	13.093	1.659
EAST TIMOR	-	-	-	-	661
BERMUDA	162	2.696	886	886	142
USA VIRGIN ISLAND.	19.630	10.124	-	-	-
ANDORRA	-	1.026	-	-	-
BAHAMIAN	-	-	41046	41046	-
EL SALVADOR	-	-	83896	83896	-
ERITREA	469.109	3.961	-	-	-
FRANCE SOUTH REGION.	-	178	567	567	-
GAZIANTEP FREE ZONE	-	12.898	-	-	-
GRENADA	100	15.689	-	-	-
HOLLAND ANTILLES	5.861	109	61.316	61.316	-
CUBA	2.845	846	14.501	9.570	-
MARSHAL ISLANDS	-	1.642	-	-	-
NICARAGUA	-	15.998	60099	23.429	-
RIZE FREE ZONE	427	-	-	-	-
SAO TOME AND PRIN.	18.167	-	12.370	12370	-
ST.LUCIA	-	-	43168	-	-
ST.VINCENT AND GRENADINES	115	-	-	-	-
SWAZILAND	-	-	1275	-	-
TRABZON FREE ZONE	301	-	-	-	-
VATICAN	-	-	11156	11156	-
General Total	**1.414.675.148**	**1.658.378.769**	**1.898.571.570**	**1.371.231.643**	**1.595.917.065**

Add 3 CTSPC Product Groups on the Basis of Article 8 and 12, Furniture Import Value

CTSPC12	Descrioption Code 12	CTSPC Product Groups on the Basis of Articles 8 and 12, Furniture Import Values Years				
			2011	2012	2012 (January September)	2013 (January September
940110001000	Seats of a kind used for aircraft	463.794	995.192	2.288.729	2.102.706	701.155
940110009000	Not leather covered, for use in civil aircraft	548.023	2.505.461	296.100	293.865	1.176.134
940120000000	Seats of a kind used for motor vehicles	14.604.070	17.930.642	17.718.368	14.375.015	13.898.878
940130000011	Swivel seats with variable height adjustment:	-	2.469.185	2.468.183	1.841.755	3.339.672
940130000012	Seats, of base metals	-	12.729.212	10.847.325	8.736.107	8.623.732
940130000019	Seats, of other materials	-	16.817.645	15.395.138	11.379.349	13.984.993
940130100011	Mounted, solid, wheel / wood seats can slide and chairs	2.805.026	-	-	-	-
940130100012	Backrest, solid, wheel / may shift base metal chairs and sofa	6.096.681	-	-	-	-
940130100019	Backrest, solid, wheel / seats can slide from other substances, chairs	13.359.925	-	-	-	-
940130900011	Other kinds of wooden chairs	434.410	-	-	-	-
940130900012	Other kinds of base metal chairs and sofa	1.298.531	-	-	-	-
940130900019	Other kinds of other materials sofa and chairs	3.733.662	-	-	-	-
940140000000	Beds that can be converted into living mobilyasi (except for camping and garden)	8.292.979	11.247.194	8.568.070	5.964.075	7.807.375
940151000000	Rattan / bamboo furniture from the living -off	2.911.559	3.481.083	3.832.667	3.689.438	2.869.295
940159000000	Roten kamişi, sepetçi söğüdü vb. Maddelerden oturmaya mahsus mobilyalar	3.044.577	2.426.160	1.781.574	1.675.022	2.072.479
940161000000	Roten cane, osier , etc. . Article from the living -off furniture	45.468.692	65.064.294	62.618.657	48.187.204	52.356.717
940169000000	Wooden structure stuffed living off of other furniture	24.052.987	24.238.754	18.694.326	16.449.272	17.878.311
940171000000	Other seating furniture stuffed with metal frame off	48.522.578	69.078.625	56.953.706	50.569.881	56.951.511
940179000000	Intra-frame metal frame stuffed oturmametal not filled living off of other furniture	38.125.210	51.761.999	45.087.255	40.037.764	41.948.379
940180000000	Living off off other furniture other furniture	38.274.212	21.894.335	22.320.026	17.503.637	21.983.946
940190100000	Furniture for living off of aircraft components, parts	877.767	1.482.480	730.921	429.934	993.504
940190300000	Other living off of wood furniture components, parts	654.151	378.479	551.288	337.137	1.201.033
940190800011	Furniture for living off road vehicle parts, parts	129.976.149	133.689.611	117.695.381	89.333.543	88.554.285
940190800019	Other parts of furniture, parts	21.824.656	27.234.459	22.380.491	16.499.387	23.089.461
940210000011	Dental chairs	1.041.896	1.241.582	2.526.679	1.548.857	1.614.361

940210000019	Barbers' chairs and so on.	988.245	1.492.862	1.106.822	863.176	597.409
940210000021	Dentist and the barber chair parts, parts	345.827	770.450	475.385	380.671	216.200
940290000011	Tilt, swivel, raise and lower the mechanical-operated tables should be	2.102.906	5.269.228	3.011.864	1.729.298	2.009.362
940290000012	Orthopedic Tables	312.333	144.112	137.466	15.138	153.784
940290000013	Mechanical-cribs	6.684.492	2.786.226	2.157.486	1.047.695	694.522
940290000019	Other moving furniture, cots, chairs, tables, etc.	13.537.749	17.511.347	14.852.033	9.182.994	8.839.212
940290000021	Types of surgical, dental used in furniture, tables, cots etc. Geometry; pieces	2.204.630	3.080.341	2.709.066	2.036.902	2.521.833
940310100000	Photos of metal tables (excluding those of heading 90.17)	10.231	-	-	-	-
940310510000	Metal writing table, height = <80 cm.	616.248	1.076.456	1.049.355	958.982	1.882.832
940310580000	Other metal furniture used in offices, height = <80 cm.	-	1.050.856	920.704	556.077	813.397
940310590000	Other metal office furniture, height <80 cm.	1.021.445	-	-	-	-
940310910000	Metal doors, flying / sliding wardrobes> 80 cm.	1.948.659	3.003.789	140.502	62.983	249.701
940310930000	Metal drawer cabinets, file / plug cabinets> 80 cm.	121.834	403.242	240.828	205.477	60.821
940310980000	Other metal furniture used in offices, height> 80 cm.	-	1.046.830	708.169	525.445	804.375
940310990000	Other metal office furniture, height> 80 cm.	1.124.136	-	-	-	-
940320200000	Metal bedsteads	10.920.664	14.100.047	12.008.439	8.805.085	10.280.033
940320801000	Zinc, iron or steel mezzanine dining cabinets	164.289	350.146	459.406	168.532	1.305.802
940320809000	Metalden diğer mobilyalar	33.607.176	57.996.900	46.143.887	35.376.895	50.063.434
940330110000	Wooden writing desk to desk (height = <80 cm)	902.364	1.411.541	866.679	430.779	1.013.683
940330190000	Other wooden furniture for office (height = <80 cm)	2.056.475	3.284.044	2.419.593	1.351.691	2.568.265
940330910000	Office of the wooden doors, casement / sliding drawer cabinet, file cabinet plug height.> 80cm.	1.224.131	1.559.397	1.743.676	1.367.508	3.249.662
940330990000	Other wooden furniture for offices, height> 80 cm.	973.604	1.011.107	1.231.480	1.077.171	1.202.408
940340100000	Wooden ready kitchen units	18.046.131	16.486.279	18.500.317	14.866.580	19.106.134
940340900000	Other wooden furniture of a kind used in the kitchen	3.194.513	3.501.067	3.014.738	2.440.841	2.262.994
940350000000	Wooden furniture of a kind used in the bedroom	18.765.582	31.506.531	25.913.206	19.114.663	23.772.375
940360100000	For the dining room and living room wood furniture	28.271.238	37.953.724	30.612.495	22.889.645	25.657.942
940360300000	Wooden furniture of a kind used in shops	9.272.215	17.539.213	12.436.092	9.156.530	18.565.864
940360901000	Suspended wooden medicine cabinets and bathroom cabinets smaller than the species to be used in	657.982	544.441	837.603	697.445	1.071.489
940360909000	Other wooden furniture	46.824.714	63.638.221	56.424.703	43.529.370	46.511.073
940370000000	Of plastics material, other furnishings	7.917.086	10.006.365	8.770.726	6.694.070	10.905.606
940381000000	Rattan / bamboo furniture from the other	796.464	961.896	1.069.151	1.006.482	1.042.868
940389000000	Other furniture of other materials	26.032.536	37.167.426	28.940.346	25.110.895	25.581.945

940390100000	Other metal furniture parts, parts	13.166.805	25.129.105	17.299.091	11.622.219	21.814.421
940390300000	Other than wood furniture components, parts	9.599.490	11.732.140	12.038.095	8.388.691	16.003.538
940390900000	Other furniture and parts of other materials, parts	4.847.485	6.272.244	5.934.905	4.414.673	6.803.254
940410000011	Metal Mattresses	47.722	129.265	54.876	50.746	33.270
940410000012	Wooden Mattresses	424.297	564.371	989.978	777.042	771.945
940410000019	Other Mattresses	186.179	398.318	88.032	77.749	77.102
940421100000	Cellular rubber mattresses	911.587	1.303.060	982.104	742.745	801.851
940421900000	Of plastics mattresses	1.724.555	4.289.762	3.792.060	2.507.499	4.541.050
940429100000	Metal spring mattresses	1.252.748	2.781.803	3.244.907	2.490.718	2.805.784
940429900000	Mattresses of other materials	2.500.399	1.097.879	1.026.931	766.584	828.205
940430000000	Sleeping bags	665.986	1.313.438	1.214.700	1.070.977	1.184.876
940490100000	Filled with feather beds, etc. unfurnished.	2.475.827	3.703.194	2.495.073	1.787.543	1.576.888
940490900000	Other mattresses, bedding, etc.. things	53.635.714	79.356.086	76.517.143	53.510.978	72.999.574
	General Total	**738.496.228**	**941.391.141**	**817.334.996**	**630.811.132**	**754.292.004**

Add 4 Turkey Furniture Import Value for products of CTSPC 9401-9402 to countries.

Countries	For products of CTSPC 9401-9402 to countries, Turkey Furniture Import Value Years (USA Dolar				
	2.010	2.011	2.012	2012 January-September	2013 January-September
CHINA	276.235.812	343.857.404	297.720.918	241.626.145	269.336.654
ITALY	68.985.449	93.429.766	83.514.285	62.905.150	93.368.066
GERMANY	75.180.263	87.802.196	76.248.596	54.080.798	77.248.849
POLAND	39.413.200	51.446.910	48.646.330	35.744.433	40.644.254
SPAIN	29.577.231	39.841.349	30.707.204	22.414.372	38.612.968
FRANCE	35.973.646	42.482.914	38.614.313	28.721.877	32.602.871
ROMANIA	14.632.244	27.122.903	26.868.328	20.089.141	23.253.791
VIETNAM	18.771.134	20.609.653	16.318.301	15.770.660	17.710.661
INDONESIA	18.723.289	21.438.737	16.189.246	14.728.272	15.156.971
JAPAN	17.770.831	16.905.265	20.752.380	16.180.457	11.626.739
USA	12.569.102	15.349.867	13.094.007	9.102.802	10.045.462
INDIA	8.592.588	11.852.954	10.842.507	8.314.096	9.598.064
FREE ZONE IST.THRACE	10.525.516	17.962.353	14.289.074	8.410.691	9.427.637
IST.FREE ZONE	846.732	3.409.714	6.208.626	4.668.291	8.639.933
ENGLAND	7.246.817	21.955.887	11.524.458	9.119.156	7.264.780
BULGARIA	5.424.232	8.120.823	6.060.722	4.394.485	7.195.693
SWEDEN	6.700.632	10.371.011	7.217.744	5.130.239	7.104.224
LITHUANIA	6.663.319	7.065.148	8.049.680	5.559.007	7.061.609
CZECH REPUBLIC	5.960.118	8.430.892	9.158.529	7.367.684	6.543.305
HUNGARY	5.496.201	6.412.715	5.626.552	3.875.480	5.690.022
SLOVAKIA	9.015.856	10.386.770	7.199.233	5.419.313	5.013.962
TAIWAN	6.071.174	7.196.148	5.700.168	4.147.767	4.767.886
DENMARK	5.693.145	5.579.410	4.073.780	2.803.092	4.733.588
AUSTRIA	7.490.583	7.773.744	6.195.155	5.371.725	4.468.917
MALAYSIA	2.624.190	3.678.369	4.758.827	4.043.898	4.309.118
HOLLAND	3.924.409	4.712.738	4.730.842	3.680.016	3.836.788
SOUTH KOREA	9.932.241	8.127.091	5.236.133	3.687.188	3.401.931
PORTUGAL	2.966.738	4.684.125	3.575.091	2.872.179	2.955.112
SLOVENIA	2.929.307	3.623.848	3.925.907	3.048.972	2.896.378
BELGIUM	2.037.597	2.331.030	2.365.269	1.708.516	2.701.666
TOYLAND	3.749.403	3.103.438	2.449.241	1.781.992	2.465.473
KAYSERI FREE ZONE	2.893.189	4.723.032	2.693.920	2.039.678	2.293.136
SWITZERLAND	993.841	1.625.981	1.136.943	699.655	1.173.033
SAMSUN FREE ZONE	130.786	1.388.631	784.125	407.648	917.776
EGYPT	768.997	972.936	1.039.092	670.448	911.053
RUSSIAN FED.	1.171.637	1.239.805	985.974	730.006	783.695
ISRAEL	630.962	1.035.609	701.587	454.556	753.360
PHILIPINESS	1.086.440	1.152.345	824.061	619.432	728.672
MEXICO	208.804	314.380	243.891	204.517	654.938

BOSNIA HERZOGOVIA	608.458	778.246	1.136.418	860.406	616.890
LEETONIA	756.252	1.119.242	1.103.016	848.356	573.613
ANTALYA FREE ZONE	1.155	151.958	2.746.018	2.222.857	511.077
NORWAY	70.754	660.447	661.477	112.001	446.791
GREECE	628.205	459.082	446.626	286.455	357.666
ESTONIA	564.998	1.290.940	528.719	369.338	338.543
UAE	135.640	133.159	195.149	140.780	338.541
IRLAND	402.679	506.274	180.516	146.675	301.979
SINGAPORE	76.104	3.948	33.639	12.536	296.431
CROTIA	214.858	75.729	185.995	121.367	188.910
HONG KONG	497.788	130.188	352.212	335.783	182.311
FINLAND	493.886	859.313	364.765	291.992	167.866
SYRIA	213.317	129.881	63.525	19.685	167.792
BRAZIL	110.128	174.701	112.570	93.995	144.260
CANADA	677.836	1.371.147	614.586	513.981	135.823
IRAQ	155.342	96.553	192.047	192.047	132.514
UKRAINE	155.827	172.243	196.894	94.019	120.293
NCTR.	50.738	68.983	381.392	332.996	107.312
İST.AHL.FREE ZONE	617.631	21.962	30.390	28.249	105.835
JORDAN	13.155	10.503	37.477	36.471	104.967
BURMA (BIRMANYA/MYANMAR)	333.517	358.370	355.413	317.392	100.457
BELARUS	148.633	33.977	51.608	51.608	89.126
SYRBIA	117.186	276.276	27.733	21.265	87.826
BAHRAIN	435.890	997.492	227.273	184.714	80.903
MACEDONIA	1.336	21.107	12.042	12.042	80.289
TUNIS	16.831	27.019	13.576	2.324	76.223
SOUTH AFRICA REP.	73.530	68.697	60.333	47.614	74.250
PAKISTAN	129.097	411.515	51.147	33.126	53.633
GEORGIA	36.180	49.182	32.402	23.795	48.657
IRAN	70.471	236.119	66.610	61.998	45.089
MOROCCO	14.270	3.062	8.258	8.258	35.139
BANGLADESH	-	17.651	25.727	22.969	28.416
ALBANIA	-	19.565	99.688	80.169	25.167
TURKMENISTAN	377	-	53.282	53.282	23.460
ADANA YUMRT.FREE ZONE	-	-	-	-	23.318
COLOMBIA	29.839	48.190	8.032	8.032	20.466
SAUDI ARABIA	21.419	64.212	202.640	129.717	17.431
QATAR	700	10.781	1.293	1.293	15.480
KOSOVO	41.485	-	5.138	5.138	15.228
SIERRA LEONE	3.121	96.481	34.617	21.846	14.034
UNCERTAIN COUNTRIES	-	19.875	31.993	4.572	12.081
MOLDOVA	-	-	11.495	226	11.498
TÜBITAK FREE ZONE	102.703	155.408	8.850	-	10.951
SAN MARINO	-	-	-	-	10.522
AUSTRALIA	209.316	148.451	3.803	2.140	9.857
NEW ZEALAND	5.486	-	-	-	8.336

GAZIANTEP FREE ZONE	-	-	15.881	15.881	7.720
SRILANKA	15.309	1.701	14.480	14.480	4.870
HONDURAS	-	-	7.681	-	3.598
VENEZUELA	5.476	-	-	-	3.385
KENYA	-	404	-	-	2.299
BURSA FREE ZONE.	201.061	15.795	1.535	1.535	2.273
ARGENTINA	-	6.670	1.110	424	2.186
MERSIN FREE ZONE	-	-	-	-	2.163
URUGUAY	105.900	-	-	-	1.645
SENEGAL	-	-	-	-	1.254
KUWAITH	-	1.398	-	-	1.179
MAURITIUS	-	-	178	-	1.099
LUXEMBURG	485	6.024	450	-	1.068
MADAGASCAR	-	2.259	1.605	1.452	505
NEPAL	-	307	-	-	474
EUROPE FREE ZONE	178.547	-	8.097	4.153	-
AZERBAIJAN	12.579	885	14.866	14.866	-
BOLIVIA	1.816	-	-	-	-
BURKINA MOROCCO	10.905	-	-	-	-
ALGERIA	-	1.146	-	-	-
EAGEAN FREE ZONE	10.590	1.172	787	787	-
CAMERON	63.977	-	-	-	-
KAZAKHSTAN	8.729	222.172	-	-	-
KIRGIZSTAN	7.314	-	-	-	-
KOCAELI FREE ZONE	1.491	5.355	-	-	-
COSTARICA	15.491	1.009	6.756	6.756	-
NORTH KOREA	-	3.750	151	-	-
LIBYA	826	284.467	-	-	-
MALI	-	585	-	-	-
MOZAMBIQUE	1.034	-	-	-	-
NAMIBIA	-	630	-	-	-
NIUE ISLAND	-	-	448	448	-
NICARAGUA	5.215	-	-	-	-
PITCAIRN	-	-	5.121	-	-
TAJIKISTAN	-	781	-	-	-
OMAN	-	-	3.699	-	-
NEW CALEDONIA	-	-	111	111	-
ZIMBABWE	118	19.629	329	329	-
JORDAN	5.572	-	24.288	2.567	-
ICELAND	-	19.182	-	-	-
General Total	**738.496.228**	**941.391.141**	**817.334.996**	**630.811.132**	**754.292.004**

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