EVALUATION OF GLOBALIZATION STRATEGIES AND INTERNAL ANALYSIS OF THE TURKISH CLOTHING INDUSTRY

TÜRK KONFEKSİYON ENDÜSTRİSİ İÇ ANALİZİ VE KÜRESELLEŞME STRATEJİLERİNİN DEĞERLENDİRİLMESİ

Selin Hanife ERYÜRÜK
İstanbul Teknik Üniversitesi
Tekstil Mühendisliği Bölümü
e-mail: eryuruk@itu.edu.tr

Fatma KALAOĞLU
İstanbul Teknik Üniversitesi
Tekstil Mühendisliği Bölümü

Murat BAKSAK
İstanbul Teknik Üniversitesi
Endüstri Mühendisliği Bölümü

ABSTRACT

In recent years, the textile and clothing industry has suffered difficulties all over the world. The most successful advances lost their importance over time so that yesterday's competitive advantages became today's minimum standards. Although Turkey has had a reputation for high quality service and lower costs than most of its partners, the globalization of the textile and clothing industry and the liberalization of the trade resulted in important restructuring in the sector. This article presents an internal analysis of the Turkish clothing industry to investigate whether industry is forming and executing strategies to compete in the global environment and provides insights into current strategies.

Key Words: Clothing industry, Globalization process, Competitive strategies, Internal analysis, Global environment.

ÖZET

Son yıllarda tekstil ve konfeksiyon endüstrisi tüm dünyada zorluklarla karşılaşmaktadır. En başarılı gelişmeler zaman içinde önemini yitirmiş, dünün rekabetçi avantajları bugünün asgari standartları haline gelmiştir. Türkiye yüksek kaliteli hizmet ve rakiplerine nazaran düşük fiyat avantajlarına sahip olmasına rağmen, tekstil ve konfeksiyon endüstrisinin küreselleşmesi ve ticaretin serbestleşmesi sektörün önemli ölçüde yeniden yapılanmasına neden olmuştur. Bu makale Türk konfeksiyon endüstrisinin küresel ortamda rekabet edebilmek için strateji oluşturma ve uygulamasını incelemek ve güncel stratejilerini göz önüne sermek amacıyla iç analizini sunmaktadır.

Anahtar Kelimeler: Konfeksiyon endüstrisi, Küreselleşme süreci, Rekabet stratejileri, İç analiz, Küresel çevre.

1. INTRODUCTION

The world has been undergoing a very important structural and economic transformation. In the last decade in particular, globalization was the focus of this process and it had a very strong impact on the economies of countries. The Turkish clothing industry has also experienced the effect of this new global positioning process. The textile and clothing industry is one of the world's most important global industries. The development of many countries in the world is dependent on this industry.

Turkey's textiles and clothing industry is one of the most important sectors of the Turkish economy and has been its "locomotive" since the early 1980's. Table 1 shows the textile and clothing export and import values of Turkey between 1980 and 2009. As may be seen from the table, after 2000 the value of textile and clothing exports taken as a percentage of total exports decreased. Clothing export values decreased from 26.1% in 2000 to 12.6% in 2009 and the textile export decreased from 10.2% in 2000 to 5.3% in 2009 (1).

Strategically, throughout the 1970s and early 1980s, companies tried to gain competitive advantage by improving productivity and reducing costs. In the 1980s, competitive advantage meant delivering flawless product quality, while in the 1990s, providing superior customer service became the objective of leading-edge firms. In the 2000s, the focus on customer service has continued but the emphasis is now on adding value. Today, organizations must constantly be searching for new ways to meet their customers' needs (2). This study involved internal analysis to determine the strategies of the Turkish clothing industry. Specifically, the internal analysis involved identifying manufacturing, material management, outsourcing activities, research and development, marketing, branding and retailing activities. Within the given framework, an attempt was made to

identify globalization strategies, strategic similarities and differences for competitiveness and continual development of the Turkish clothing industry. This internal analysis involved identifying the strengths and weaknesses of the organizations. It is also argued that different attitudes towards strategy and innovation profiles entail different prospects for future survival (3).

Table 1. Turkish textile&clothing export values between 1980 and 2009.

YEAR	TOTAL EXPORT (1000 $)	CLOTHING EXPORT (1000 $)	PROPORTION OF CLOTHING INDUSTRY %	TEXTILE EXPORT (1000 $)	PROPORTION OF TEXTILE INDUSTRY %	TEXTILE + CLOTHING EXPORT (1000 $)	TEXTILE + CLOTHING PROPORTION %
1980	2.910.000	106.000	3,6	671.000	23,1	777.000	26,7
1981	4.703.000	302.000	6,4	915.000	19,5	1.217.000	25,9
1982	5.746.000	367.000	6,4	1.069.000	18,6	1.436.000	25,0
1983	5.728.000	544.000	9,5	1.055.000	18,4	1.599.000	27,9
1984	7.134.000	989.000	13,9	1.181.000	16,6	2.170.000	30,4
1985	7.958.000	936.000	11,8	1.151.000	14,5	2.087.000	26,2
1986	7.457.000	1.069.000	14,3	1.043.000	14,0	2.112.000	28,3
1987	10.190.000	1.728.000	17,0	1.133.000	11,1	2.861.000	28,1
1988	11.662.000	2.127.000	18,2	1.334.000	11,4	3.461.000	29,7
1989	11.625.000	2.448.000	21,1	1.338.000	11,5	3.786.000	32,6
1990	12.959.289	2.898.349	22,4	1.424.249	11,0	4.322.598	33,4
1991	13.593.539	3.219.350	23,7	1.374.357	10,1	4.593.707	33,8
1992	14.365.414	4.009.615	27,9	1.369.322	9,5	5.378.937	37,4
1993	15.345.000	4.157.997	27,1	1.457.490	9,5	5.615.487	36,6
1994	18.107.000	4.490.043	24,8	1.944.818	10,7	6.434.861	35,5
1995	21.637.041	6.188.502	28,6	2.130.665	9,8	8.319.167	38,4
1996	23.224.465	6.344.252	27,3	2.352.142	10,1	8.696.394	37,4
1997	26.261.072	7.088.669	27,0	2.730.421	10,4	9.819.090	37,4
1998	26.973.952	7.644.051	28,3	2.811.763	10,4	10.455.814	38,8
1999	26.588.264	7.145.053	26,9	2.733.641	10,3	9.878.694	37,2
2000	27.774.906	7.250.960	26,1	2.845.184	10,2	10.096.144	36,3
2001	31.334.216	7.332.107	23,4	3.060.647	9,8	10.392.754	33,2
2002	36.059.089	8.945.787	24,8	3.203.744	8,9	12.149.531	33,7
2003	47.252.836	11.171.096	23,6	3.943.426	8,3	15.114.522	32,0
2004	63.167.153	12.643.690	20,0	4.952.092	7,8	17.595.782	27,9
2005	73.476.408	13.411.464	18,3	5.477.039	7,5	18.888.503	25,7
2006	85.534.676	13.558.054	15,9	6.146.614	7,2	19.704.668	23,0
2007	107.153.918	15.560.170	14,5	6.363.918	5,9	21.924.088	20,5
2008	132.027.196	15.234.868	11,5	6.640.492	5,0	21.875.360	16,6
2009	102.138.525	12.856.658	12,6	5.363.616	5,3	18.220.274	17,8

Source: Undersecretariat of the Prime Ministry for Foreign Trade

2. LITERATURE REVIEW

The pressures of the competitive market oblige clothing enterprises to monitor their micro- and macro-environment on a continual basis. In an earlier publication a survey was conducted to examine niche strategies for fiber and yarn producers, mill producers, sewn good manufacturers, auxiliary and companies (4). The study resulted in an overall niche strategy model in addition to sector models (fiber and yarn producers, mill producers, sewn good manufacturers, auxiliary companies).

Llach et al. had addressed the strategic and technological types, in order to evaluate the strategic similarities or differences among the firms of a textile&clothing cluster in Girona, Spain (5). The results showed that the subsector in which any given firm compete influences its strategic and technological positioning. Karabegović and Ujević (6) suggested maintaining or creating more complex machinery and equipment, sewing robots and functional units in medium-developed industrial areas and they emphasized the significance and application of intelligent systems as a basis for improving companies' positions within the European textile industry. Au and Wong analyzed the global textile and clothing (T&C) exports from developed and developing countries under the Multi-fibre Arrangement and Agreement on Textile and Clothing from 1990 to 2004 and revealed that there existed a gradual shift of increasing T&C exports by developing countries (7).The results showed that developed countries were seriously affected in the past 15 years and some developing countries would likely become potential global leaders in T&C exports. Choi and Powell studied the competitive global environment and reviewed the nature of new product development. They introduced several examples of new product development process models and strategies of companies and products in the textile and apparel industry (8).

Ağaç (9) prepared a survey included questions towards reaching the characteristic information and determining the branding problems of Turkish ready-to-wear industry. At the end of the research it was determined that the most important problems of ready-to-wear establishments were inabilities of finding qualified personnel both in fashion-brand design and brand management subjects, the problems encountered in design and product quality, insufficient financing, insufficient brand promotion studies and public relations studies, complexity of studies of brand establishing and brand registry and the time spent for these studies. Grandys (10) presented a study that has two parts. Part one discusses the existing anthropometric tables in Poland, presents modern ways of carrying out new surveys and provides grounds for this action. Part two explained in the context of markets Europeization why managers have to expand their knowledge resources and outlines the main points where the knowledge is subject to verification. Eryuruk et. al. (11) aimed to evaluate the external analysis of the Turkish clothing industry to see whether or not the clothing enterprises utilized

globalisation market strategies, important factors effective to implement these strategies, perceived problems and executing strategies to compete in the global environment as well as modeling of the current situation of the strategic actions. Also Eryuruk et. al. (12) presented logistics as a strategic solution and investigates important problems and necessary solutions according to the needs of Turkish clothing industry.

The literature review revealed that a strategic analysis of the Turkish clothing environment in the global environment was a topic worthy of investigation. The study under discussion was therefore undertaken in order to identify manufacturing, material management, outsourcing activities, research and development, marketing, branding and retailing activities of the industry as well as the strategic similarities and differences for competitiveness and continual development of the Turkish clothing industry.

3. METHODOLOGY

The purpose of the research was to present an internal analysis of the Turkish clothing industry, to identify the strengths and weaknesses of the organizations and to identfy globalization strategies, strategic similarities and differences for competitiveness, and the variables contributing to the success, and continuing development of the Turkish clothing industry.

The research design for this study consisted of a case study form of methodology involving 50 Turkish clothing manufacturers. Qualitative and quantitative data were gathered via a structured questionnaire which was distributed to members of the top-level management teams of each of the randomly selected clothing firms in Turkey. Interviews with executives provide reliable data and ensure the adequate response rate for the questionnaire and hence the quantitative component. The accuracy of the answers was evaluated in the light of top-level management bias and the results assessed accordingly. A contact list was obtained from two sources: ISO (Istanbul Chamber of Industry) and ITKIB (Representation of Turkish Textile and Ready-made Garment Exporters Association). The preliminary analyses were conducted by means of using frequency analyses, histograms and percentages. Paired-Samples T Test, One-way Anova and arithmetic mean were used to evaluate the non-parametric independent variables. Statistical analyses were carried out using SPSS 15. Although the study was exploratory by nature, hypothesis tests were used to determine the relationships. The questionnaire content is shown in Figure 1 (13).
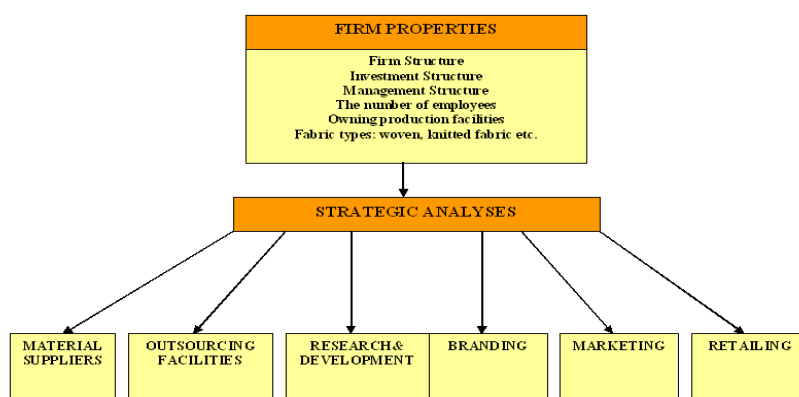

Figure 1. Internal analyses questionnaire content

4. RESULTS

4.1. Company Profile

Table 2 provides background information of the interviewees such as gender, education and working periods.

96 % of the firms were financed using *all domestic capital*, and 4% of the firms had capital investment of *all foreign capital*. The management of the firms surveyed was mostly by the owners of the companies (78%). 34 % of companies had *more than 500 workers*, and 24 % employed *between 100 and 250 workers*. 82 % of these companies had *manufacturing facilities,* 84 % had material suppliers and 76% had *outsourcing facilities* (Figure 2). To successfully compete in the global environment, research & development activities had received a great deal of attention from the companies and 72% of companies had *research & development activities*. In order to have top positions in the world's textile & clothing exports, the branding and fashion sector had been perceived as having great importance. 58% of companies had *branding facilities*. 54% of companies surveyed in this study utilized *globalization strategies* to gain competitive advantages. 48% of the companies had *marketing departments* as well as *sales departments*. About a third of the firms (34%) had *national/international retailing activities* as a part of their strategic approach (Figure 2).

4.2. Evaluation of Production Facilities

Companies mostly focused on *sub-contractor based production for global brands* (Table 3), the total being 60%. Fourty-two companies out of fifty (84%) had *material suppliers* and thirty-eight companies have *outsourcing activities* (76%). Figures 3 and 4 show the types of activities for material suppliers and outsourcing facilities. In the garment industry *trimmings suppliers* are very important hence this occupied first place in material supplier type. Since most of the firms in the industry have pursued outsourcing strategies to delocalize production and to reduce costs twenty-nine of the thirty-eight companies surveyed used outsourcing facilities.

Table 2. Interviewee profiles

Gender	Frequency	Percentage (%)		Education	Frequency	Percentage (%)
Women	21	42,00%		Primary School	3	6,00%
Men	29	58,00%		High School	2	4,00%
TOTAL	50	100,00%		Undergraduate	37	74,00%
				Graduate	8	16,00%
				Total	50	100,00%

Working Period of Interviewee in the firm	Frequency	Percentage (%)		Working Period of Interviewee in the sector	Frequency	Percentage (%)
0-5 year	24	48,00%		0-5 year	15	30,00%
6-10 year	15	30,00%		6-10 year	11	22,00%
11-15 year	5	10,00%		11-15 year	10	20,00%
more than 15 year	6	12,00%		more than 15 year	14	28,00%
Total	50	100,00%		Total	50	100,00%

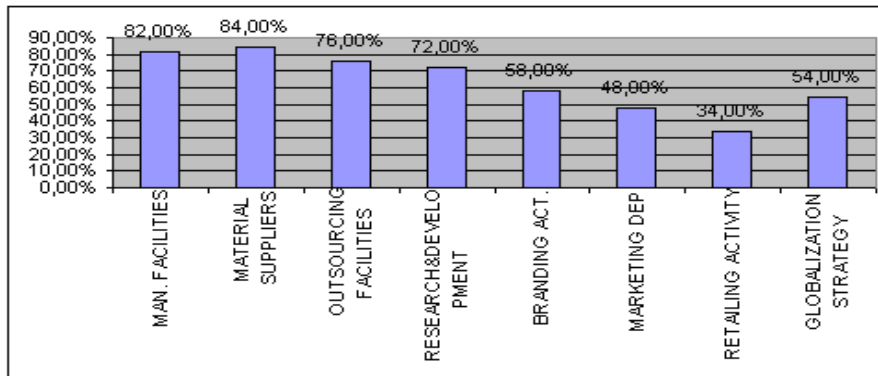**Figure 2.** Companies production activities

Table 3. Production facilities

Production activity type/types	Quantity	Percentage
Sub-contractor based production for the well known global brands	30	60%
Sub-contractor based production for the national brands	13	26%
Production and marketing in Turkey for own brands	17	34%
Production and marketing abroad for own brands	18	36%
Production and marketing for the global brands and for its own	9	18%
brands		
Production of own brands using the sub-contractors.	11	22%
Marketing activities abroad in addition to sales		
activities for other national and international brands		
No manufacturing facilities	4	8%

The Reliability Analysis procedure was used to calculate used measures of scale reliability and provided information about the relationships between individual items in the scale. Reliability statistics gave high Cronbach's Alpha values of 0.839 for material suppliers and 0.866 for outsourcing suppliers. The following factors were seen to be very important in the selection of material and outsourcing suppliers: *quality in product and service, speed in production* and *on time delivery* (Table 4 and 5).

One-way Anova hypothesis tests were used to test H_0 hypothesis (H_0: There is no significant difference in the perception of *material suppliers' selection factors* according to the material supplier evaluation scores of firms.). It was seen that there was a significant difference in the perception of *quality of product and service* and *speed in production* according to the material supplier evaluation scores of firms. When hypothesis tests were applied for the outsourcing evaluation, it was found that there was a significant difference between *quality of product & service, speed in production, on time delivery and past experiences* and outsourcing facilities evaluation scores of firms. From the data presented in the Table 6, it can be seen that over 80% of companies had complaints about *late deliveries of material suppliers and outsourcing facilities*. *Problems with service and product quality,* and *cost problems* were other problems highlighted by the firms. The biggest problems, which led to delays during the production stage, were *raw material quality problems*, *late deliveries of outsourced production facilities of suppliers* and *late raw material supply (yarn, fabric or trimmings)* (Table 7). Reliability statistics yielded a high Cronbach's Alpha value of 0.912 for the production problems.
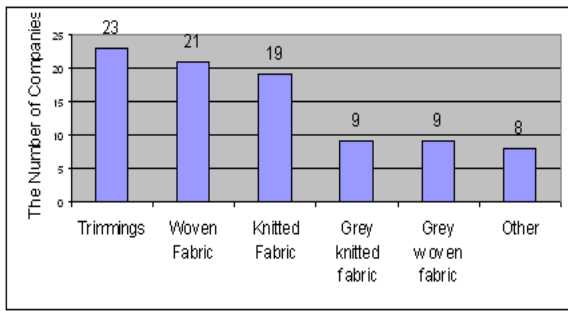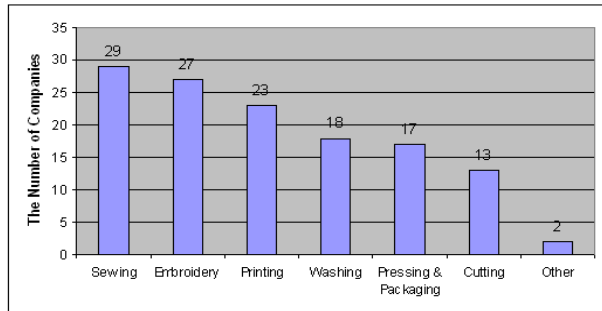
Figure 3. Material suppliers

Figure 4. Outsourcing facilities

Table 4. Effective factors in the selection of material suppliers

Item Statistics	Mean	Std. Deviation	N
Quality in product and service	4,7381	0,7345	42
Speed in production	4,6429	0,8785	42
Low price	4,0238	1,0238	42
Production flexibility	4,4048	0,7345	42
Trust between firms	4,4048	0,9122	42
On time delivery without any problem	4,7857	0,4704	42
Use high technology in production	3,4048	1,3263	42
Past experiences and to be expert in the subject	4,1190	1,0866	42

Table 5. Effective factors in the selection of outsourcing facilities

Item Statistics	Mean	Std. Deviation	N
Quality in product and service	4,8611	0,4245	36
Speed in production	4,7222	0,6595	36
Low price	4,1944	0,9508	36
Production flexibility	4,1389	1,0185	36
Trust between firms	4,4444	0,8765	36
On time delivery without any problem	4,6667	0,9258	36
Use high technology in production	3,4444	1,2523	36
Past experiences and to be expert in the subject	4,0833	1,1052	36

Ranking of scale of 1 to 5, with 1 being the least important and 5 being the most important

Table 6. Complaints about material suppliers and outsourcing facilities

COMPLAINTS ABOUT MATERIAL SUPPLIERS							
PARAMETER	Late deliveries	Problems with service and product quality	Cost problems	No guarantee that intellectual property rights will be respected.	No flexibility in the system of production	Ignored clauses in contract	Other
PERCENTAGE (%)	88.10%	61.90%	45.24%	45.24%	16.67%	16.67%	2.38%
COMPLAINTS ABOUT OUTSOURCING FACILITIES							
PARAMETER	Late deliveries	Problems with service and product quality	Cost problems	No flexibility in the system of production	Ignored clauses in contract	No guarantee that intellectual property rights will be respected.	Other
PERCENTAGE (%)	76.32%	71.05%	44.74%	28.95%	26.32%	7.89%	2.63%

Table 7. Production problems

Production Problems	Arithmetic Mean
Raw material quality problems	3.78
Late deliveries of outsourced production facilities of suppliers	3.56
Late raw material supply (yarn, fabric or trimmings)	3.54
Quality problems of dye houses	3.46
Late deliveries of dye houses	3.34
Quality problems in the finished products	3.22

Ranking of scale of 1 to 5, with 1 being the least important and 5 being the most important

Thirty-six companies out of fifty (72%) had *research and development activities* inside their firms. Thirty companies had *design and fashion activities* (83.33%) and twenty-six companies had *product development and innovative product strategies* (72.22%). When the question "How many personnel in research and development activities?" was asked, it was found that 23 firms had between *0-10 persons*, 8 firms had between *11-20 persons* and only 5 firms have between *21-50 persons* in their research and development departments. This showed that only a small number of companies gave importance to research and development activities by having more personnel in their research and development departments.

Twenty-nine companies out of fifty (58%) had *branding activities* in their companies. Only eight firms worked with an *advisory firm* and 20 had internal brand experts. 24 firms had *design departments inside their*

companies. Only two firms had *design departments outside of the companies* and three firms had design departments *both inside and outside of the companies*. Nineteen companies defined their product price level as *medium* whereas twelve companies define their product price level as *high*. Also, twenty-four firms (48%) had *sales departments in addition to marketing departments.* These results measured the level of importance which companies gave to becoming a global brand and showed that only a few companies were managing their branding efforts more professionally. The companies that emphasized their branding activities were working with advisory firms and had seperated the marketing department from the sales department. The question *"Are your products bought by an intermediary corporation?"* was answered by 66% of companies as *direct sales to the customers with own shops*. More rarely they used *wholesalers(46%)*, *sales to the retailer channels(42%)* and *sales to the agencies* (40%).

The results of the research showed that only eighteen firms (34%) had ***national/international retailing activities***. Eighteen out of fifty companies answered the question "Which method did your company use to enter the foreign markets?" as *retail stores belonging to the company* (66.67%), *franchising* (61.11%*), having corner in well known shops* (44.44%), *collective investment* (16.67%) and *license agreement* (11.11%). Table 8 shows strategies selected to achieve competitive advantage in the target market.

Table 8. Strategies to gain competitive advantages in a target market

Strategies	quantity
Product quality	15
To develop a new product type	14
Product price strategy	12
Psychological properties of the customer	10
Branding strategy	9
Consumption/usage properties research	9

4.3. The evaluation of participation in strategic activities:

Value-added strategies have been getting increasing attention due to the need to maintain an edge in a competitive environment. For this reason we evaluated the participation of companies in the previously stated strategic activities which are elaborated upon in this section.

The evaluation of participation in the strategic activities encompassed production structure, management activities, and the number of employees for both knitted and woven clothing manufacturers. The results showed that most of the companies had manufacturing facilities and as a result *material* and *outsourcing suppliers*. Only seven out of fifty companies did not have outsourcing activities because of their sub-contractor based production structure. When the Anova test was used to test H_0 hypothesis (H_0: There is no significant difference in the participation of *strategic facilities* according to production structure) it was found that there was a significant difference in the participation of manufacturing facilities (sig. 0.000), material supplier usage (sig. 0.024), branding (sig. 0.006) and retailing (sig. 0.001) activities according to production structure. *Manufacturing and material supplier usages were* seen mostly in the firms because of their sub-contractor based structure. 33 firms had production structures of *branding and marketing* and they used branding and retailing strategies. 17 firms had *sub-contractor based production structures* and they also used branding and retailing strategies.

In order to avoid loss of business arising from the risks in the global environment, it is necessary to improve the firm's capacity for inventing and developing new products, in other words, to give importance to research and product development activities. 72% of the companies (31 companies) had ***research and product development activities.*** When the management structure of companies was investigated, it was found that fifteen of these companies were managed by *the owner of the company and family members*, and sixteen of the companies were managed by *professional managers*. Fourteen companies had *more than 500 employee*s, six companies *between 250-500 employees* and eight companies *between 100-250 employees*. To successfully compete in the global environment, *research & development activities* had received a great deal of attention from the companies and the type of management, company size or production structures did not affect this criterion. On the other hand, fourteen companies did not have research &

development activities. These companies mostly had *sub-contractor based production structures* or only *marketing activities*.

The fact that Turkey does not have a widely-known trademark is one of the weaknesses of the Turkish textile and clothing sector, and has limited its development. In recent years the companies have started to focus on ***branding activities***, but these efforts are not enough. Only twenty-nine (58%) out of the fifty companies surveyed had branding activities; twenty-four of twenty-nine companies had brands already in existence and the remaining five companies were trying to launch their brands. Of these companies, twenty-four companies had *more than 100 employees*. The number of knitted and woven clothing manufacturers was the same. These results showed that, big companies had started to be aware of the fact that building a brand and undertaking a strategy connected with it was the key factor to achieve a higher level of competence. The companies without branding activities had only sub-contractor based production structures.

Twenty-four out of fifty companies (48%) had ***marketing departments in addition to sales departments***. Nearly all of these companies had brands or they were trying to build their own brands but they also had sub-contractor based production structures. As a result, the companies having branding activities were trying to manage their marketing activities more professionally by separating this department from the sales department. ***National/international retail activities*** were also evaluated in the course of the survey. Only 34% (17 companies) had national/international retail activities. All of these companies had their own brands and they also provided the production capacity for well-known global brands. Only two companies had *less than 100 employees* and the rest mostly had *more than 500 employees*. Only one firm had *knitted garment manufacturing*, seven firms had *woven garment manufacturing*, seven firms had *both woven and knitted garment manufacturing* and two firms had no manufacturing facilities, only marketing, designing and branding activities. More than half of these companies had management teams comprised of *the family members*. The results demonstrated that it was generally the big woven

garment producers managed by the owners of the companies which had retailing activities.

As a result, nearly half of firms stated that they use **globalization strategies** to gain competitive advantage. The paired samples T-test was used to test the hypotheses between strategic activities usage and strategic activities participation level. There was high correlation between *outsourcing facilities usage, research & development activities* and *globalization strategies* usage when compared with the strategic activities participation level of companies. Although companies stated these optimistic comments about the usage of globalization strategies, the results of the questionnaire clearly proved that the Turkish clothing producers surveyed did not have enough knowledge to build and manage *branding, marketing* and *retailing* properly because only half of the own brand companies had *retailing and marketing strategies* to establish their brands.

5. CONCLUSIONS

The analysis of Turkish clothing producers and their globalization strategies, the similarities and differences in striving for competitiveness and the ongoing development of the industry led to the following conclusions.

Our first research objective was to define the structural conditions of companies. Companies mostly focused on *sub-contractor based production for well known brands* with a proportion of 60%. 82% of these companies had

manufacturing facilities and as a result 84% of them had material suppliers and 76% had *outsourcing facilities. On time delivery, quality in product and service* were common important factors when selecting both material suppliers and outsourcing facilities. 80% of companies had complaints about *late deliveries of material suppliers* and *outsourcing facilities. Problems with service* and *product quality,* and *cost problems* were also highlighted by the firms. Firms stated that the biggest problems during the production stage resulting in lost time were *raw material quality problems, late deliveries of outsourced production facilities of suppliers* and *late raw material supply (yarn, fabric or trimmings).*

In order to avoid loss of business arising from the risks in the global environment, 72% of the companies had *research and development activities* inside their firms. In recent years the companies had started to focus on *branding activities,* but these efforts were not enough. Only 58% of companies had *branding activities* in their companies. Especially big companies started to be aware of the fact that building a brand and undertaking a strategy connected with it, is the key factor to achieve a higher level of competence. Also, the companies having branding activities were trying to manage their marketing activities more professionally by separating this department from the sales department. The results of the research also showed that in the clothing sector, branding activities largely lacked important elements such as marketing

and retailing activities which had curtailed producers' success in launching global brands. Only 34% had *national/international retailing activities.* These were primarily large woven garment producers managed by the owners of companies. Small and medium sized clothing producers were less inclined to focus on retailing activities. To sum up, nearly half of firms stated that they were using *globalization strategies* to gain competitive advantages. However, more than 80% of the firms were trying to improve their manufacturing structure by improving *material and outsourcing facilities.* Also, most of the firms had invested limited resources in *research and development activities.* Efforts expended on branding, marketing, retailing strategies were insufficient to create a global brand.

The findings of this study make a useful contribution to the industry as well as academia to analyze the current situation of the clothing companies, notice important problems, realize the variables contributing to the success and as a result to specify globalization strategies for the continuing development of the Turkish clothing industry. There are some limitations to the interpretation of the results of this study, and we leave them as topics for future research. Methodologically, the data collected here were based on the interviews with owners/executives of clothing companies so the accuracy of the answers must be checked considering their biased approach. In future work, other sources of evidences can be presented to overcome this limitation and compare the results.

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