

The Global Competitiveness of Turkish Carpet Industry: Comparative Advantages of Tufted and Woven Carpet*

Yunus Emre TOPCU**

Abstract

Countries with scarce resources should specialize in industries in which they are more productive. The carpet industry is an industry where Turkey is at the top of the list in exports. The woven and tufted carpet industry has a large part of the world carpet trade. The aim of this study is to analyze the competitiveness of Turkey in the weaving and tufted carpet industries and to compare it with China, Belgium and India. As a result of the study, Turkey has a comparative advantage in the weaving and tufted carpet sector. It has a comparative advantage in both sectors in Belgium and India. However, China's comparative advantage is not found in both sectors.

Keywords: Carpet Industry, Comparative Advantages, Global Competitiveness, International Trade, Balassa Index

Türk Halı Sektörünün Küresel Rekabet Gücü: Tüfte ve Dokuma Halıda Karşılaştırmalı Üstünlükler

Öz

Kıt kaynaklara sahip ülkeler daha verimli oldukları endüstrilerde uzmanlaşmalıdırlar. Halı sektörü Türkiye'nin ihracatta üst sıralarda olduğu bir sektördür. Dokuma ve tüfte halı endüstrisi dünya halı ticaretinin çok büyük bir bölümüne sahiptir. Bu çalışmanın amacı Türkiye'nin dokuma ve tüfte halı endüstrilerindeki rekabet gücünü analiz etmek ve Çin, Belçika ve Hindistan ile kıyaslamaktır. Çalışma sonucunda Türkiye dokuma ve tüfte halı sektöründe karşılaştırmalı üstünlüğe sahip olmuştur. Belçika ve Hindistan'da her iki sektörde karşılaştırmalı üstünlüğe sahiptir. Ancak Çin'in karşılaştırmalı üstünlüğü her iki sektörde de bulunmamaktadır.



Özgün Araştırma Makalesi (Original Research Article)

Geliş/Received: 31.05.2022

Kabul/Accepted: 06.04.2023

DOI: <https://dx.doi.org/10.17336/igusbd.1123954>

* This study was presented online as an oral presentation at the GUICEFM 6th International Conference on Economics and Finance, jointly organized by Istanbul Gelisim University and the University of the West of England on 12-13 May 2022.

** Asst. Prof. Dr., Faculty of Economics and Administrative Sciences, Bartın University, Bartın, Türkiye. E-mail: ytopcu@bartin.edu.tr ORCID <https://orcid.org/0000-0003-4324-1376>

Anahtar Kelimeler: Halı Sektörü, Karşılaştırmalı Üstünlükler, Küresel Rekabet, Uluslararası Ticaret, Balassa İndeksi

1. Introduction

Countries develop strategies to improve competitiveness. Their purpose is to improve the contribution of certain industries to the national economy by giving them a voice in the global market. To this goal, specific industries are occasionally promoted, and policies for the broader economy are enacted. Supporting industries that lack a competitive advantage and lack specialization, on the other hand, results in inefficient use of scarce resources. On the other side, identifying industries that lack specialization is a result, and regulations can be implemented to address this. (Karabay and Saricoban, 2021, p. 22-31).

The carpet industry, which constitutes the sub-sector of the textile industry, has an important industry in the Turkish economy (Bashimov, 2017, p. 40). The carpet industry plays an important role in the process of economic development due to its employment opportunities, added value in the production process and share of exports (Sahin, 2015, p.156).

In addition to commercial uses, the demand for the carpet industry has been increasing with the global household sales recently. Increasing urbanization rate and disposable income are among the important factors of growth. With the growth of the construction industry, it is predicted that the demand for home decoration products, including carpets and rugs, will become sustainable.

Global carpet-rug production has a size of 42 billion dollars in 2019. It is predicted that global production will grow by more than 4% annually on average and increase the market size to 65 billion dollars by 2030. China is the global leader in carpet and rug production with a 22.7% market share, followed by the USA with 21%. The third-largest global production player is Turkey with a 7% share. The size of carpet rug production in Turkey is at the level of 3.2 billion dollars in 2019. The estimated annual average growth rates in carpet and rug production until 2030 are 2.7% in the USA, 7.8% in China and 9.9% in Turkey. It is predicted that Turkey, which is one of the world's largest manufacturers of carpets, will more than double its sectoral size by 2030 and reach 7 billion dollars (Ministry of Trade of Turkey, 2022). Turkey is the second-largest exporter country in the world in 2020, following China, which is the export leader (UNComtrade, 2022).

According to the Harmonized System (HS), which classifies products in international trade, the code 57 for carpet industry has been determined. There are 5701, 5702, 5703, 5704 and 5705 HS codes in a sub-category separated by carpet type. According to the 57 HS code, in 2020, 15.1 billion dollars of carpet exports were realized in the world. Shares according to sub-categories are given in Figure 1 (Trademap, 2022).

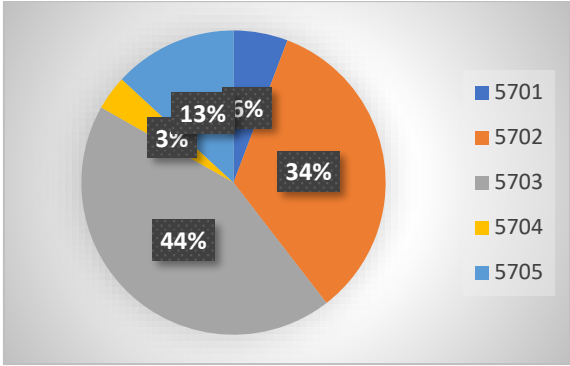


Figure 1. Export shares of 4-digit HS codes in 2020

As seen in Figure 1, the share of 5702 and 5703 HS codes in total exports in 2020 reaches 78%. 5702 HS code represents woven carpet and 5703 HS code represents tufted carpet. In other words, carpets and tufted carpets are prominent in international trade (Trademap, 2022).

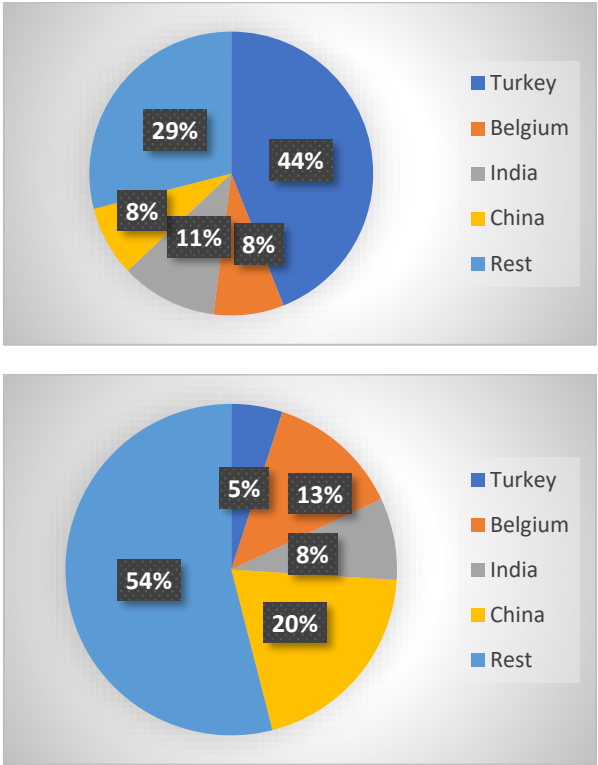


Figure 2. Market Share of Woven and Tufted Carpet Industries (2020)

Figure 2 shows the global market shares in the woven and tufted carpet sectors, respectively. Turkey is the market leader in woven carpet with 44%. In tufted carpets, Turkey has the sixth largest market with a 5% share, while China is the market leader with a 20% market share (Trademap, 2022).

Considering the intensification of global competition and the importance of the carpet industry for Turkey, it is very important to evaluate the current situation, competitiveness and challenges of the Turkish carpet industry. In addition, the heavy exports of woven carpets and tufted carpets in the sector show the importance of making an assessment for these two sub-sectors.

Although there are studies in the literature to determine the competitiveness of carpet industry, there is no study to analyze tufted and woven carpets.

The aim of this study is to analyze and determine Turkey's global competition in the tufted and woven carpet sector with different methods and to compare it with its rival countries China, Belgium and India. Revealed comparative advantage (RCA), revealed symmetric comparative advantage (RSCA) and normalized revealed comparative advantage (NRCA) methods are used for the years 2011 to 2020.

2. Literature Review

Competition analyses made directly on the carpet industry find little place in the literature. The carpet sector was also examined in the competition analyses made for the textile sector in general.

Although Turkey's RCA has decreased since 1992, it was in the first place in global competition until 1997. In 1997, the leadership passed to Iran, Turkey continued to be in second place until 2008. According to the gravity model, a 10% genuine depreciation of the US dollar against foreign currency results in a 0.2 percent drop in imports. This study indicates that handcrafted cover conversion scale import throughput is often low (Bilgin et al., 2011). Yasmin and Altaf (2014), in their study, examined the comparative advantages in the carpet industry for Pakistan, India and China. 2-digit and 4-digit HS codes were used in the study. The study was conducted for the periods 1996-2009 (2 digits) and 2004-2009 (4 digits). In the study in which the method of RCA was used, the equality test of the RCA means was also applied. Although India is the country with the highest RCA index on average, according to the 2-digit HS code, China has a statistically significant advantage according to the test of equality of averages. According to the 4-digit HS codes, no country could establish a comparative advantage over the other, except 5703. In 5703, Pakistan has a comparative advantage.

Sahin (2015), examined the international competitiveness of the Turkish and Chinese textile industries. RCA method and SITC codes (two-digit and three-digit) are used for the period 1995-2013 in the study. As a result, Turkey has more competitive advantage than China in the carpet industry. Bashimov (2017), examined the global competition in the carpet industry on Turkey, China and India. Two-digit HS code was used in the study conducted for the period between 2000-2014. The study's techniques included the export market share index, RCA index, and Lafay index. As a consequence of the investigation, Turkey's competitive power in the carpet sector has been assessed to be higher. From 2003 to 2014, Abbas and Waheed (2017) looked at Pakistan's trade competitiveness in 14 main agriculture and manufacturing industries. RCA method and HS codes are used for the analysis. Pakistan has comparative advantage in the carpet industry. However, analysis show distorted competitiveness in labor-intensive products such as carpet.

Singh and Gautam (2019), examined export performance and RCA of India for Handloom Industry. RCA and trade balance index is used for the period 2008-2017 in the

study. According to result of RCA (two-digit HS code), India has strong competitive advantage for carpet industry. On the other hand, TBI result show that India net importer in carpet industry. Saki et al. (2019) looked at how competitive US textile and clothing products and categories are on a worldwide scale. The study employs the RCA and NRCA techniques. Saricoban and Yalcin (2020), in their study, aimed to determine the competitiveness of Turkey in the carpet industry. Belgium, China, India and the Netherlands, which have high market shares in the carpet industry, were included in the study. The study was conducted for the period between 2008-2017. Six product groups under the 659 code of the SITC Rev.3 classification were analyzed by the method of RCA. According to the results of the study, it has been determined that Turkey has a competitive advantage in 4 product groups, China in 2 and India in 5 product groups.

3. Materials and Methods

The measurement of comparative advantages is an important research topic in international trade. Many approaches have been developed for this. The most widely known is the RCA, developed by Balassa (1965). Many studies have been conducted for many different industries with the RCA index (Kathuria, 2013; Rossatto et al, 2018; Saki et al., 2019; Gordeev, 2020; Elsalih et al., 2021).

In this study, the RCA index was used. In addition, the NRCA index and the RSCA were measured, which removes some criticisms of the RCA index (Hoang et al., 2017; Kılıçarslan 2021; Cele et al., 2022). Comparative advantage indexes were measured in the 2011-2020 time period.

3.1. Revealed Comparative Advantage Index

RCA, which is used to determine the competitiveness of countries in international trade, was developed by Balassa (1965). The RCA index is shown in equation (1) (Balassa, 1965, p.99-123):

$$RCA_{it}^j = \frac{(X_{it}^j)}{(X_t^j)} / \frac{(X_{it}^w)}{(X_t^w)} \quad (1)$$

where X is exports, t is year, i is a commodity, and j is a country. X_{it}^j is export of commodity i of country j in year t; X_t^j total exports of country j in year t; X_{it}^w export of commodity i of the world in year t; X_t^w world total exports in year t.

When the index is greater than one, the country has a comparative advantage in the commodity. When the index value is less than one, the country has a revealed comparative disadvantage.

RCA is divided into four categories (Hinloopen and Marrewijk, 2001). Accordingly, if $0 < RCA \leq 1$, it shows that there is no comparative advantage. $1 < RCA \leq 2$ means "weak" comparative advantage, $2 < RCA \leq 4$ "moderate" comparative advantage, and $4 < RCA$ "strong" comparative advantage.

3.2. Revealed Symmetric Comparative Index

Dalum et al. (1998) and Laursen (1998) suggested the RSCA index for the calculation of comparative advantage. RSCA Index is another index that gives symmetrical results. This index is shown in equation 2:

$$RSCA_{it}^j = \frac{RCA_{it}^j - 1}{RCA_{it}^j + 1} \quad (2)$$

The $RSCA_{it}^j$ shows the RSCA index in the commodity i of country j in period t . The value of the RSCA index is between -1 and 1. The value of the RSCA index greater than 0 indicates comparative advantage, and the value of the RSCA index less than 0 indicates comparative disadvantage (Naseer et al., 2019, p. 66-74).

3.3. Normalised Revealed Comparative Advantage Index

According to Yu et al. (2009) proposes the NRCA index as an alternative and improved measure of the RCA index. The NRCA index is expressed as the normalized form of deviations from expected levels in real trade flows (Hoang et al., 2017, p.53-67). The NRCA index is symmetrical around zero, and its deviation from zero indicates a country's comparative advantage or disadvantage (Saki et al., 2019, p. 462-478). An NRCA index greater than zero indicates that the country has a comparative advantage. Conversely, an NRCA index less than zero indicates that the country is at a comparative disadvantage. The higher the NRCA score, in other words, the higher it is above zero, the greater the comparative advantage of a country. The country with the highest NRCA score is the most competitive (Elsalih et al., 2021, p. 275-294). This index is shown in equation 3:

$$NRCA_{it}^j = \frac{E_{it}^j}{E_t^w} - \frac{E_{it}^w \cdot E_t^j}{E_t^w \cdot E_t^w} \quad (3)$$

The $NRCA_{it}^j$ shows the NRCA index in the commodity i of country j in period t . E_{it}^j is the export of commodity i of country j in year. E_t^w represents the world total exports. E_{it}^w represents world export of commodity i in period t . E_t^j represents total export of country j .

4. Result

4.1. RCA Results

Table 1 shows the result of the calculations of the RCA index for woven and tufted carpet industry. Turkey has had the highest comparative advantage in the woven carpet industry for all years. Although Turkey's competitiveness shows a fluctuating trend in the ten-year period, it is quite strong in global competition. India and Belgium are other countries that have a strong position in the global competition of woven carpets. India's global competition is on an increasing trend while Belgium's is on a decreasing trend. China, on the other hand, has not had a comparative advantage in the global woven carpet industry for all years.

When it comes to tufted carpets, Turkey is the country with the strongest position in global competition, except for 2018. While Turkey has moderate comparative advantage in 2018 and 2019, it has strong comparative advantage in other years. While it is seen that there is a constantly changing competition between Belgium and India in the tufted carpet sector, Belgium had the highest comparative advantage in 2018. The strong competition of Belgium and India until 2015 has been moderate-weak and strong since 2016. While China had weak comparative advantage between 2001-2015, it has not had comparative advantage since 2016. All of the countries showed a decreasing trend in comparative advantage.

Years	Woven Carpet Industry				Tufted Carpet Industry			
	Turkey	China	India	Belgium	Turkey	China	India	Belgium
2011	40,8	0,9	4,5	9,2	23,3	1,4	9,5	9,1
	S	N	S	S	S	W	S	S
2012	47,7	0,8	4,8	8,0	18,5	1,3	9,8	9,5
	S	N	S	S	S	W	S	S
2013	45,6	0,8	4,9	6,2	17,3	1,0	7,1	8,1
	S	N	S	S	S	W	S	S
2014	45,1	0,7	5,2	5,9	19,7	1,4	10,3	9,2
	S	N	S	S	S	W	S	S
2015	41,5	0,7	5,9	6,2	21,2	1,6	12,7	12,7
	S	N	S	S	S	W	S	S
2016	40,2	0,7	6,5	6,0	7,4	0,4	3,9	2,9
	S	N	S	S	S	N	M	M
2017	41,4	0,7	6,2	5,6	8,2	0,5	4,5	4,2
	S	N	S	S	S	N	S	S
2018	41,3	0,7	6,6	5,1	2,4	0,5	1,0	4,1
	S	N	S	S	M	N	W	S
2019	45,7	0,6	6,7	4,7	3,2	0,2	1,7	1,4
	S	N	S	S	M	N	W	W
2020	46,8	0,5	7,4	4,3	5,1	0,3	3,3	2,3
	S	N	S	S	S	N	M	M

Source: Author's calculation. W: Weak, M: Moderate, S: Strong.

Table 1. RCA Results of Two Industry

4.2. RSCA Results

RSCA results for woven carpets are given in Figure 3 and RSCA results for tufted carpets are given in Figure 4. Turkey, Belgium and India have comparative advantage in both sub-carpet industries for all years. While China does not have a comparative advantage in woven carpets, it does not have a comparative advantage in tufted carpets between 2011-2015 and 2016-2020.

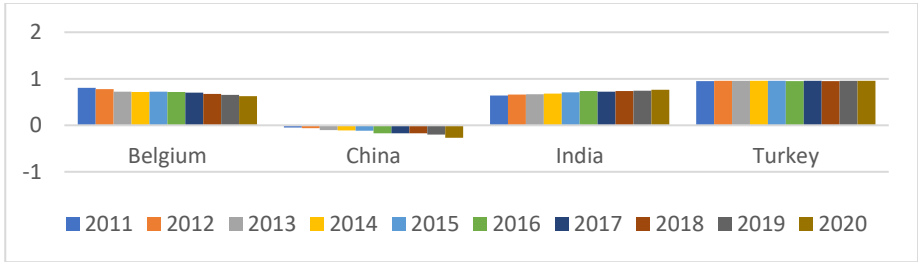


Figure 3. RSCA of Woven Carpet Industry

Belgium and China have a declining trend in global competition in woven carpet. Turkey has a stable trend while India has an increasing trend in woven carpet. In tufted carpet, all countries have a decreasing trend. However, a significant increase in competitiveness is observed for all countries in 2020.

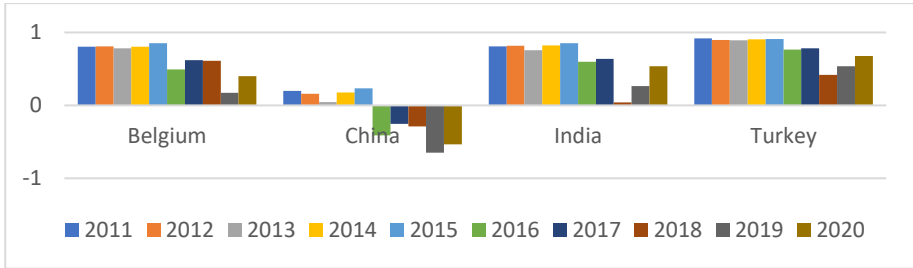


Figure 4. RSCA of Tufted Carpet Industry

4.3. NRCA Results

NRCA results for woven carpets are given in Figure 5. Turkey, Belgium and India has had comparative advantage in woven carpet industry for all years. However China has had no comparative advantage in woven carpet industry for all years. While Turkey and India have an increasing trend in the global competitiveness of woven carpet, Belgium and China have a decreasing trend.

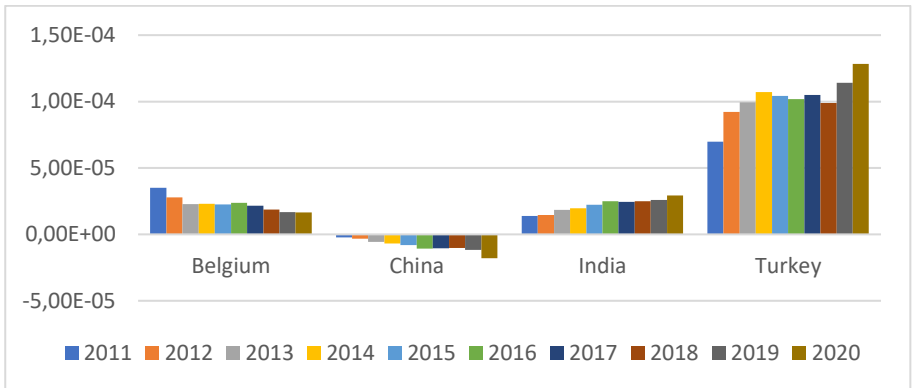


Figure 5. NRCA of Woven Carpet Industry

RSCA results for tufted carpets are given in Figure 6. Turkey, Belgium and India has had comparative advantage in tufted carpet industry for all years. However China has had no comparative advantage in tufted carpet industry since 2016. In tufted carpet, all countries have a decreasing trend in global competition. While the competitiveness of Turkey and India is almost non-existent in 2018, Belgium's competitiveness is quite low in 2019.

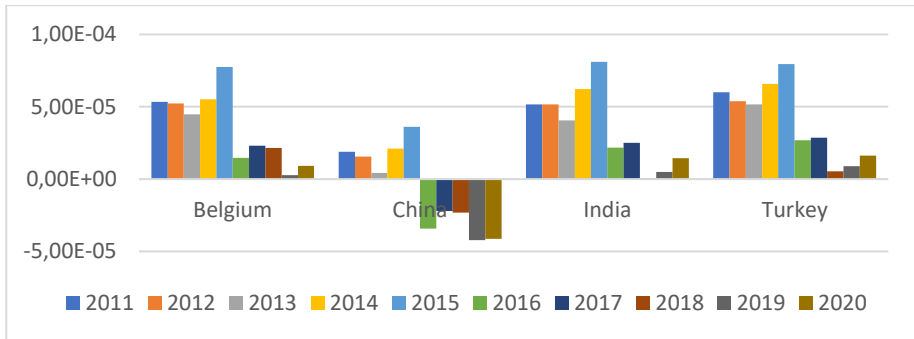


Figure 6. NRCA of Tufted Carpet Industry

5. Conclusion

The study used RCA, RSCA and NRCA methods for the years 2011 to 2020 to assess the revealed comparative advantages and competitiveness of woven and tufted carpet industries in the Turkey and top exporting countries (China, India, Belgium). A high index result means that the product is so important to the country's export economy. Because higher index means higher comparative advantage. Three different index results were consistent with each other.

Turkey has been the country holding the highest comparative advantage among these four countries in the woven and tufted carpet industry. This result of Turkey is not a surprise for the woven carpet industry, where it is the market leader. However, Turkey has a relatively superior competitive power in the tufted carpet market, where it has only a 5% share of the world market and ranks sixth. Turkey can shift its scarce resources to tufted carpet and gain a much larger market share. This is important because the tufted carpet sector is the sub-sector with the largest export share in the carpet sector. Turkey can achieve its market share success in woven carpets for tufted carpets as well.

Looking at Turkey's competitors, Belgium and India have a comparative advantage for the two carpet industries. However, it is far from being a threat in global competition for Turkey in woven carpets. However, India, which has a rising trend in competitiveness in the woven carpet industry, can be expected to be in a better position in the future. In the tufted carpet industry, Belgium and India seem to be important competitors in the global market. China is another country whose results are surprising. China, which has the highest market share after Turkey and India in the woven carpet export market, does not have a comparative advantage. However, China, which is the leader in the tufted carpet export market, has not had a comparative advantage in tufted carpet since 2016.

As a result, Turkey, Belgium and India should continue to specialize in the weaving and tufted carpet industry, but China should shift its resources to different industries where it will be more productive. Policy makers and industry representatives in Turkey should decide to transfer more resources to tufted carpet and pay attention to their important rivals Belgium and India.

REFERENCES

- ABBAS, S., & WAHEED, A. (2017). Trade competitiveness of Pakistan: evidence from the revealed comparative advantage approach. *Competitiveness Review: An International Business Journal*. 27(5), 462-475.
- BALASSA, B., (1965). Trade Liberalization and "Revealed" Comparative Advantage. *The Manchester School*. 33(2), 99-123.
- BASHİMOV, G. (2017). Halı sektöründe karşılaştırmalı üstünlük: Türkiye, Çin ve Hindistan örneği. *İktisadi Yenilik Dergisi*, 4(3), 39-51.
- BILGIN, M. H., DEMİR, E., LAU, M. C. K., KIN-MAN TO, C., & ZHANG, Z. M. (2011). The Turkish handmade carpet industry: an analysis in comparison with select Asian countries. *Journal of the Textile Institute*, 102(6), 514-526.
- CELE, L. P., HENNESSY, T., & THORNE, F. (2022). Evaluating farm and export competitiveness of the Irish dairy industry: post-quota analysis. *Competitiveness Review: An International Business Journal*. 32(7).
- DALUM, B., LAURSEN, K. and VILLUMSEN, G., (1998). Structural change in OECD export specialization patterns: de-specialization and 'stickiness'. *International Review of Applied Economics*. 12(3), 447-467.
- ELSALIH, O., SERTOGLU, K., BESİM, M., (2021). Comparative advantage of crude oil production: evidence from 28 oil-producing countries. *The Journal of International Trade & Economic Development*. 30(2), 275-294.
- GORDEEV, R., (2020). Comparative advantages of Russian forest products on the global market. *Forest Policy and Economics*. 119, 102286.
- HINLOOPEN, J., MARREWİJK, C., (2001). On the empirical distribution of the Balassa index. *Weltwirtschaftliches Archiv*. 137(1), 1-35.
- HOANG, V., TRAN, K., TU, B., NGUYEN, V., NGUYEN, A., (2017). Agricultural Competitiveness of Vietnam by the RCA and the NRCA Indices, and Consistency of Competitiveness Indices. *AGRIS on-line Papers in Economics and Informatics*. 9(665-2018-3598), 53-67.
- KARABAY, G., & SARIÇOBAN, K. (2021). Research on Competitiveness in Technical Textiles: Comparison of Countries Having the Lion's Share of Technical Textile World Exports and Turkey. *Fibres & Textiles In Eastern Europe*, 29(6), 22-31.
- KATHURIA, L. M., (2013). Analyzing competitiveness of clothing export sector of India and Bangladesh: Dynamic revealed comparative advantage approach. *Competitiveness Review: An International Business Journal*. 23(2), 131-157.
- KILIÇARSLAN, Z., (2021). Comparative Analysis of The Competitiveness in The Steel Sector: The Case of Top 10 Steel-Producing Countries. *Erciyes Üniversitesi İktisadi ve İdari Bilimler Fakültesi Dergisi*. 60, 755-773.
- LAURSEN, K., (1998). Revealed comparative advantage and the alternatives as measures of international specialization. *DRUID Working Paper*, No. 98- 30.
- MINISTRY OF TRADE OF TURKEY, Kolay İhracat Platformu, <https://www.kolayihracat.gov.tr/>
- NASEER, M., ASHFAQ, M., HASSAN, S., ADİL, S. A., ARIYAWARDANA, A., (2019). Outlook on the global trade competitiveness of Pakistan's mandarin industry: An application of revealed symmetric comparative advantage framework. *Outlook on Agriculture*. 48(1), 66-74.
- ROSSATO, F., SUSAEТА, A., ADAMS, D., HIDALGO, I., DE ARAUJO, T., DE QUEIROZ, A., (2018). Comparison of revealed comparative advantage indexes with application to trade tendencies of cellulose production from planted forests in Brazil, Canada, China, Sweden, Finland and the United States. *Forest Policy and Economics*. (97), 59-66.

ŞAHİN, D. (2015). Türkiye ve Çin'in tekstil ve hazır giyim sektöründe rekabet gücünün analizi. *Akademik Bakış Uluslararası Hakemli Sosyal Bilimler Dergisi*, (47), 155-171.

SAKI, Z., MOORE, M., KANDILOV, I., ROTHENBERG, L., GODFREY, A., (2019). Revealed comparative advantage for US textiles and apparel. *Competitiveness Review: An International Business Journal*. 29(4), 462-478.

SARIÇOBAN, K., & YALÇIN, M. (2020). Türkiye'nin halı sektörü ihracat rekabet gücünün belirlenmesi ve halı ihracatında söz sahibi ülkeler ile bir karşılaştırma. *Tekstil ve Mühendis*, 27(118), 98-110.

SINGH, V. K., & GAUTAM, A. (2019). Export performance and revealed comparative advantage of India for handloom industry. *Indore Management Journal*, 11(01), 21-36.

TRADEMAP. Trade statistics for international business development. www.trademap.org,

UNCOMTRADE, (2022). United Nations Commodity Trade Statistics Database. United Nations – Department of Economic and Social Affairs. <https://comtrade.un.org/data/>.

YASMIN, B., & ALTAF, S. (2014). Revealed comparative advantage of carpets and textile floor covering industry in Pakistan, India and China. *Journal of Economic Cooperation & Development*, 35(4).

YU, R., CAI, J., LEUNG, P., (2009). The normalized revealed comparative advantage index. *The Annals of Regional Science*. 43(1), 267-282.

Özet

Ülkeler rekabet güçlerini artırmak için politikalar geliştirmektedir. Belli sektörlerin uluslararası pazarda söz sahibi olmasını ve ülke ekonomisine katkılarını artırmayı hedeflemektedirler. Bu amaçla bazen belirli sektörler desteklenmekte ve ekonominin tamamına yönelik politikalar uygulanmaktadır. Ancak rekabet avantajı olmayan ve uzmanlaşma göstermeyen sektörlerin desteklenmesi kıt kaynakların verimsiz kullanılmasına neden olmaktadır. Öte yandan, uzmanlaşma göstermeyen sektörlerin tespiti de bir sonuçtur ve buna yönelik politikalar uygulanabilmektedir (Karabay ve Sarıçoban, 2021).

Tekstil sektörünün alt sektörünü oluşturan halı sektörü, Türkiye ekonomisinde önemli bir yere sahiptir (Bashimov, 2017). Halı sektörü sahip olduğu istihdam olanakları, üretim sürecinde yarattığı katma değer ve ihracattaki payı nedeniyle ekonomik kalkınma sürecinde önemli bir rol oynamaktadır (Şahin, 2015).

Küresel rekabetin yoğunlaşması ve halı sektörünün Türkiye için önemi göz önüne alındığında, Türk halı sektörünün mevcut durumunu, rekabet gücünü ve zorluklarını değerlendirmek oldukça önemli görülmektedir. Ayrıca sektörde dokuma halı ve tüfte halı ihracatının yoğun olması bu iki alt sektör için ayrı bir değerlendirme yapmanın önemini göstermektedir.

Literatürde halı sektörünün rekabet gücünü belirlemeye yönelik çalışmalar olmasına rağmen, tüfte ve dokuma halıları analiz eden bir çalışma bulunmamaktadır.

Bu çalışmanın amacı, Türkiye'nin tüfte ve dokuma halı sektöründeki küresel rekabetini farklı yöntemlerle analiz ederek belirlemek ve rakip ülkeler Çin, Belçika ve Hindistan ile karşılaştırmaktır. Açıklanmış karşılaştırmalı üstünlük (RCA), açıklanmış simetrik karşılaştırmalı üstünlük (RSCA) ve normalleştirilmiş açıklanmış karşılaştırmalı üstünlük (NRC) yöntemleri 2011-2020 yılları için kullanılmaktadır.

Çalışma sonucunda dokuma ve tüfte halı sektöründe Türkiye bu dört ülke arasında en yüksek karşılaştırmalı üstünlüğe sahip ülke olmuştur. Ancak Türkiye, dünya pazarından sadece %5'lik bir paya sahip olduğu ve altıncı sırada yer aldığı tüfte halı pazarında nispeten üstün bir rekabet gücüne sahip olmuştur. Bu önemlidir çünkü tüfte halı sektörü, halı sektöründe en büyük ihracat payına sahip alt sektör olarak görülmektedir.

Türkiye'nin rakiplerine bakıldığında, Belçika ve Hindistan iki halı endüstrisi için karşılaştırmalı üstünlüğe sahip olmuşlardır. Tüfte halı endüstrisinde, Belçika ve Hindistan, küresel pazarda önemli rakipler gibi görünmektedir. Dokuma halı ihracat pazarında Türkiye ve Hindistan'dan sonra en yüksek pazar payına sahip olan Çin'in, karşılaştırmalı üstünlüğü yoktur. Bununla birlikte tüfte halı ihracat pazarında lider olan Çin, 2016 yılından bu yana tüfte halıda da karşılaştırmalı üstünlüğü bulunmamaktadır.

Sonuç olarak, Türkiye, Belçika ve Hindistan dokuma ve tüfte halı endüstrisinde uzmanlaşmaya devam etmeli, ancak Çin kaynaklarını daha verimli olacağı farklı endüstrilere kaydırmalıdır. Türkiye'deki politika yapıcılar ve sektör temsilcileri, tüfte halıya daha fazla kaynak aktarmaya karar vermeli ve önemli rakipleri Belçika ve Hindistan'a dikkat etmelidir.