

COUNTRY PROFILE: TÜRKİYE GARMENT INDUSTRY AND LIVING WAGE



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**Temiz
Giysi
Kampanyası**

Adil ve sürdürülebilir bir tekstil sektörü için

**Clean
Clothes
Campaign**



TEAM

COUNTRY PROFILE – TR

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1 INTRODUCTION



This research was conducted to investigate the working conditions and wages in the supply chains of global fashion brands, ensuring that their transformation processes are fair and do not leave workers behind in terms of rights and wages, in accordance with the *United Nations Sustainable Development Goals*. This report presents the findings of this research, aiming to shed light on whether the transformation of fashion brands is indeed fair.

The research involved interviews with 296 workers across different levels of the supply chain: in first-tier (*Tier 1*) factories, where brands do business directly, and in second-tier (*Tier 2*) factories, which operate through contracts with Tier 1 suppliers; hence have no direct contact with brands in terms of labour conditions and wages. By analysing wage policies of brands in the Turkish garment industry, this report aims to provide a profile of the sector in Türkiye in 2024.

Another objective of the report is to calculate a just living wage based on the vital costs of living in Türkiye for 2024 and 2025. To achieve this, a desk research was conducted to assess the living expenses. It is important to note that Türkiye is in an economic crisis at the time of the report's preparation. Unorthodox economic policies are being implemented in the country, leading to deteriorating price stability. Key indicators such as inflation, and the hunger and poverty line are reported by state institutions, often using data that does not reflect reality. To ensure the validity of the report and provide a more accurate picture, these indicators have been analysed by using measurements made by independent organizations.

This report analyses the wage policies of global brands within their supply chains and their impact on the lives of garment workers in Türkiye. It takes the contexts of multiple actors and conditions in the fashion supply

UNIVERSAL DECLARATION OF HUMAN RIGHTS, ARTICLE 23.3:

Everyone who works has the right to just and favourable remuneration ensuring for themselves and their family an existence worthy of human dignity, and supplemented, if necessary, by other means of social protection.

chain into consideration. The report provides a comparative analysis of wages with living conditions in the country, as well as insights into wage policies across supply chains.

1.1. Research Methodology

This research, which examines labour wages in the supply chain of global brands, is based on both desk research and field research findings. The field research was conducted to identify current wage policies within the supply chain of brands. The desk research provides an overview of the sector, an analysis of the country's economic indicators, as well as calculations of living cost.

The field research is based on interviews with 296 textile workers living and working in various districts of Istanbul, Malatya, Batman and Şanlıurfa. The study was conducted between June-October 2024. In total, 296 textile workers—171 men and 125 women—were interviewed in person.

Two different methods were used for the field research. To gain an accurate understanding of conditions in the sector and reach workers independently, half of the interviews were conducted using the 'snowball method'. The researchers went to the regions where textile factories are located and approached worker randomly during lunch breaks or after work to ask them questions. The remaining interviews were carried out in supplier *Tier 1* factories that are directly linked to global brands. To ensure adequate representation, the number of workers interviewed in each factory ranged between 3 and 25.

Since the main objective of the research is to analyse the remuneration policies of global brands, the only criterion for selecting participants was that their workplaces produce for a global brand. To determine this, in the supply chain lists published by global brands on their websites were reviewed. In the first stage of the field research, workers in production facilities listed as suppliers were reached. Afterwards, the factories and workshops that are not included in the supplier lists but produce for these brands were reached through the statements of the workers.

During the field research, workers were informed about the purpose of the research, and it was explained that the data would be processed anonymously and in accordance with the rules of the Personal Data Protection Law (KVKK). The verbal consent of all workers was obtained before the interviews.

The interviewed workers are employed in 62 different workplaces (workshops and factories), producing for 80 different brands. Therefore, the sample included in the study is diverse and provides a strong representation of wage policies within global brand supply chains.

In addition to field interviews, a desk study was conducted, including literature review and media monitoring. This study offers an overview of the textile sector in Türkiye and an examination of laws and practices related to wages in the industry. In addition, key economic indicators such as minimum wage, inflation, poverty line, and cost of living are also discussed. The following sections of the report present the findings obtained from this research

The interviewed workers are employed in 62 different workplaces (workshops and factories), producing for 80 different brands.



Photo Source: Çihan Demirci/AA

OVERVIEW OF THE GARMENT SECTOR

GARMENT
612,149
worker

TEXTILE
396,920
worker

The textile and garment sector is one of the important sectors for many countries in the process of economic development due to added value created in the production process and its high share in export revenues. In Türkiye, the garment sector has become one of the most important branches of manufacturing industry, particularly following the neoliberal economic policies introduced in the 1980s.

Between January and August 2024, Türkiye's garment and apparel sector exported approximately 12 billion dollars* with a decrease of 8.9% compared to the same period of the previous year. Despite this decline, the sector accounted for 7% of Türkiye's total exports.¹

According to 2024 data, while Türkiye's export rates have declined compared to previous years, Türkiye remains the 6th largest exporter of garment products to the world and 3rd largest in exports to the European Union.²

According to official data, 1.22 million people are employed in the sector.³ However, researches suggests that actual employment figures are much higher than

the official records. The increase in informal labour is driven by several factors, including the structure of the sector, the high number of small-scale enterprises, the weakness of inspection mechanisms and the pressure for low-cost production. In addition, studies highlight a high rate of migrant labour force in the sector.

Based on 2024 May data, the number of people employed in the garment sector were 612,149 and in the textile sector is 396,920.⁴ The number of foreigners with work permits in textile manufacturing was 9,798 people in 2023, while in the garment manufacturing, it were 11,941.⁵ However, studies in the field indicate that the actual number of migrant workers is tens of times higher than the recorded figures.

2.1. Contribution of Garment Production to the National Economy

This section presents data on the share of the garment sector in *Gross Domestic Product (GDP)* and exports. It compares the contribution of the garment/footwear sector data for the years 2020–2023 to GDP.

CONTRIBUTION OF THE GARMENT/FOOTWEAR SECTOR 2020–2023

YEAR	GPD ⁶	TOTAL EXPORTS ⁷	GARMENT EXPORTS ⁸	FOOTWEAR EXPORTS ⁹	GARMENT/ FOOTWEAR EXPORTS	SHARE OF GARMENT AND FOOTWEAR EXPORTS IN TOTAL EXPORTS
2023	\$ 1,108,022,373,259.51	\$ 255,412,194.424	\$ 19,253,722.265	\$ 1,268.682	\$ 19,254,990.947	7.5%
2022	\$ 907,118,435,952.69	\$ 254,169,747.663	\$ 21,205,484.300	\$ 1,310.617	\$ 21,206,794.917	8.3%
2021	\$ 819,865,253,669.66	\$ 225,214,458.038	\$ 21,188,730.063	\$ 1,081.829	\$ 21,189,811.892	9.4%
2020	\$ 720,338,498,174.74	\$ 169,637,755.310	\$ 17,504,971.819	\$ 829.418	\$ 17,505,801.237	10.3%

* US Dollar

Türkiye's GDP was recorded at USD 1.108 trillion in 2023, with a total export value of USD 255.8 billion.¹⁰

In 2023, Türkiye's total garment and footwear exports amounted to USD 19,254,990.947, representing 7.5% of the country's total exports.

With an export value of USD 19.3 billion in 2023 and a share of 7.5% in total exports, the garment and apparel sector ranked third among Türkiye's top export industries, followed by the automotive sector (16.1%) and the chemicals sector (13.8%).¹¹

Between 2018 and 2023, Türkiye's merchandise exports grew at a compound annual rate of 7.6%, while global merchandise exports grew by 4.1%. As a result, Türkiye's share in global exports increased by 0.16 points over the past 5 years.

While imports began to rise after 2019, the increase accelerated considerably in between 2021 and 2023. In this period, the compound annual growth rate of imports was 15.4% in Türkiye compared to the global rate of 3.1%. Consequently, Türkiye's share in global imports increased by 0.41 points between 2019 and 2023 and by 0.3 points in 2021 and 2023.¹²

In 2023, brand LC Waikiki (LCW) was the leading exporter in Türkiye's garment and apparel sector.¹³

The February 6, 2023 earthquakes had significant impact on export activity in the affected provinces. Total exports from these regions decreased by 13% compared to the previous year. The sharpest declines were recorded in Osmaniye with 53%, Adiyaman and Kahramanmaraş with 30% and Hatay with 28%.

Investments in Türkiye's garment and apparel sector in Anatolia exceeded TRY 5.62 billion between January and August 2023, generating an additional 56,687 jobs. The province with the highest level of investment was Çankırı, where TRY 844.5 million in investments created 594 additional jobs. Following Çankırı, the provinces with the highest investments were Diyarbakır with TRY 598.2 million, Batman with TRY 312.1 million and İstanbul with TRY 287.9 million, respectively. These provinces were followed by Malatya, Ordu, Mardin, İzmir, Kırşehir and Yozgat. According to data of 2023, the top 10 provinces with the highest number of company investments are as follows:¹⁴



CITY	NUMBER OF INVESTMENTS
İSTANBUL	105
MARDİN	95
MALATYA	92
BATMAN	87
DİYARBAKIR	76
ŞIRNAK	37
ADIYAMAN	35
BİTLİS	32
ŞANLIURFA	28
KAHRAMANMARAŞ	20

2.2. Major Export Destinations of Garment Industry

In 2023, Türkiye's top export destinations for ready-made clothing and apparel were Germany, Spain and the Netherlands. Compared to the previous year, exports to Germany decreased by 16.1% to USD 3 billion, while exports to Spain decreased by 12.4% to USD 2.3 billion. Exports to the Netherlands, on the other hand, increased by 3.1% to USD 1.8 billion.

Between January and December 2023, Türkiye exported a total of USD 12.8 billion worth of garments and apparel products to its top 10 export destinations. These countries accounted for 66.3% (USD 19.3 billion) of the sector's total exports.

The top 10 countries to which Türkiye exports the highest amount of garment and apparel goods are shown in the table below: ¹⁵

THE COUNTRIES WITH THE MOST GARMENT AND APPAREL EXPORTS

UNIT: \$1000

ÜLKE	2022	SHARE %	2023	SHARE %	2022/23 RATE OF CHANGE %
Germany	3,633,943	17.2	3,047,754	15.8	-16.1
Spain	2,572,971	12.2	2,254,717	11.7	-12.4
Netherlands	1,707,067	8.1	1,759,616	9.1	3.1
England	2,010,223	9.5	1,535,261	7.9	-23.6
France	1,173,028	5.5	1,098,937	5.7	-6.3
USA	1,008,629	4.8	889,041	4.6	-11.9
Italy	823,138	3.9	731,16	3.8	-11.2
Poland	400,097	1.9	591,491	3.1	47.8
Israel	517,167	2.4	526,401	2.7	1.8
Kazakhstan	249,896	1.2	368,409	1.9	47.4
TOP 10 COUNTRIES TOTAL	14,096,158	66.6	12,802,786	66.3	-9.2
GARMENT AND APPAREL EXPORTS	21,156,096	100	19,316,151	100	-8.7
SHARE OF TOP 10 COUNTRIES %	66.6		66.3		

SOURCE: Exporters' Association Records

Between 2006 and 2023, the ratio of the informal economy to national income in Türkiye was estimated to range between 16% and 68% over 71 quarters. Since 2015, the informal economy has been on a downward trend, reaching and estimated 16% in 2023. ¹⁶

2.3. Government Incentives and Practices for the Sector

The Turkish government provides various export incentives¹⁷ to support the garment and textile sector including:

- Free Zone Incentives
- Capital Support for Product Development Projects
- Capital Support for Strategic Focus Areas Projects
- Support for Domestic Fairs with International
- Qualification
- Support for Fairs Abroad
- Support for Market Research Projects
- Support for the Purchase of Market Research Reports and Statistics
- Support for Sectoral Qualified Trade Delegation and

- Buyer Delegation Programmes
- Support for Membership to Electronic Commerce (e-commerce) Sites
- Employment Assistance
- Supporting Office – Store Opening, Operation and Brand Promotion Activities Abroad
- Support for the Development of International Competitiveness
- Design Support
- Turquality Support

To assist businesses impacted by the Kahramanmaraş-based earthquakes on February 6, 2023, the government extended all export support and project deadlines by one year.

Within the scope of the *Resolution on Export Supports for the year 2023*, expenses related to the registration and protection of brands abroad were supported by up to TRY 1.357 million, overseas warehouse rental expenses and storage service expenses up to TRY 7.239 million, rental expenses of overseas units up to TRY 3.619 million, and promotion expenses up to TRY 7.239 million.¹⁸

STRUCTURE OF THE GARMENT INDUSTRY

In 2013, the number of exporting *Small and Medium-Sized Enterprises (SME)* was 54,948. By 2022, this number increased to 106,690. Since the 2023 change in the financial criteria in the SME definition could not be applied to 2022, the export amount of enterprises with financial criteria ranging between TRY 250–500 million (net sales revenue / financial balance sheet) was recorded in the accounts of large enterprises. Due to these changes made in the SME definition in 2023, the adjusted number of exporting SMEs reached 108,642.¹⁹

3.1. Number of Registered Garment Factories

Statistics of the Social Security Institution for December 2022 show that there are approximately 71,959 workplaces operating in the garment production, textile and leather sectors in Türkiye. The vast majority of these enterprises (43,607 workplaces) consist of garment production facilities. While 738,426 people are employed in garment production facilities, the total number of people employed in textile, garment and leather goods production facilities is approximately 1,304,927.²⁰

3.2. Geographical Distribution

Türkiye's textile and garment production is geographically distributed across various regions, with different provinces specializing in specific aspects of the industry. Yarn production is concentrated in Kahramanmaraş, İstanbul, Gaziantep, and Bursa, while in Denizli towel, bathrobe, and home textile manufacturing is located. The city of Uşak plays a significant role in yarn, blanket, and textile recycling, whereas Çorlu and Çerkezköy specialize in textile finishing. In Adana cotton weaving and finishing processes stand out, while Gaziantep has established itself as a hub for nonwoven

surfaces and machine carpet manufacturing. İstanbul leads in apparel and knitting production, followed by Tekirdağ, Kahramanmaraş, and Bursa in terms of circular knitting capacity. When it comes to cotton production, Şanlıurfa ranks first in cotton production.²¹

FREE ZONES²²

There are a total of 18 free zones in Türkiye:

Southeastern Anatolia Region: Gaziantep

Mediterranean Region: Adana-Yumurtalık, Mersin, Antalya

Central Anatolia Region: Kayseri

Aegean Region: Denizli, Ege, İzmir

Marmara Region: Bursa, Kocaeli, Europe, İstanbul-Trakya, İstanbul AHL, İstanbul Industry and Trade, TÜBİTAK-MAM

Black Sea Region: Samsun, Trabzon, Rize

In 2023, 99,023 people were employed in free zones.

3.3. Size of Enterprises

According to the 2022 Sector Balance Sheet Statistics of the Central Bank of the Republic of Türkiye (CBRT), the structure of the garment sector is predominantly composed of smaller enterprises. Of the 15,325 workplaces examined under the manufacturing sector's garment category (coded 14), 54.7% are classified as micro-enterprises, while 29.6% fall into the small enterprise category. Medium-sized enterprises make up 13.5% of the sector, whereas only 2.2% of workplaces are categorized as large-scale enterprises. This distribution highlights the significant presence of small and micro businesses in Türkiye's garment industry.²³

THE SIZE OF GARMENT COMPANIES IN TÜRKİYE			
SCALE DISTRIBUTION	NUMBER OF ENTITIES	NUMBER OF EMPLOYEES	PERCENTAGE
MICRO	8,377	21,937	54.7%
SMALL	4,542	85,131	29.6%
MEDIUM	2,074	205,873	13.5%
LARGE	332	186,521	2.2%
TOPLAM	15,325	499,462	

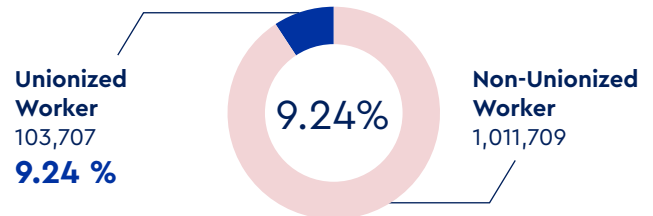
SOURCE: Central Bank of the Republic of Türkiye (CBRT)

3.4. Union Organization in the Sector

This section provides information on the access of trade unions to the workplace, the minimum number of workers required for union organization in a factory, and the minimum number of workers that must be represented in a factory to be able to engage in collective bargaining. The table shows the trade unions active in this field in Türkiye, and the number of members each union has. These factors determine the extent to which workers can organize and negotiate improved working conditions.

WORKERS' UNIONS

As of July 2024, there are a total of 18 trade unions operating within the weaving, garment and leather industries.²⁴ Out of 1,121,416 workers employed in these sectors, only 103,707 are registered union members, representing a unionisation rate of 9.24%.



LABOR UNIONS IN THE WEAVING, READY-TO-WEAR, AND LEATHER SECTORS IN TÜRKİYE

	WORKERS' UNIONS	NUMBER OF MEMBERS
1	ÖZ İPLİK-İŞ(All Weaving, Spinning, Tricotage, Garment, Apparel and Leather Workers Union)	40,723
2	TEKSİF (Turkish Textile, Knitting, Clothing and Leather Industry Workers' Union)	47,867
3	DOKU ÖR-İŞ (Weaving and Knitting Workers' Union)	17
4	TÖBGİS (Tricotage Knitting, Dyeing, Clothing and Yarn Industry Workers' Union)	7
5	TEKSTİL (Textile Workers Union)	12,306
6	BADİS (Independent Resistance Workers Union)	1,252
7	DOKUMA İŞ (Weaving, Knitting, Dyeing, Tricotage and Clothing Workers Union)	49
8	ÖZ TEKSTİL-İŞ (Öz Textile, Weaving, Garment and Leather Industry Workers' Union)	52
9	HÜR TEKSTİL-İŞ (Hür Textile Weaving, Yarn, Tricotage, Leather and Clothing Workers' Union)	19
10	GİYİM-SEN (Apparel Workers' Union)	14
11	DEV TEKSTİL (Progressive Textile Workers' Union)	119
12	TEKSTİL DERİ (Textile and Leather Workers Union)	17
13	ÖZTÜM TEKSTİL İŞ (All Weaving, Yarn, Tricotage, Garment, Apparel and Leather Workers' Union)	7
14	DETEKS-İŞ (Leather, Weaving, Garment and Textile Workers' Union)	2
15	BİRTEK-SEN (United Textile, Weaving and Leather Workers' Union)	1,179
16	TEKSTİL GÜÇ-SEN (Textile Workers' Power Unity Union)	70
17	LTİS (Leader Textile Workers Union)	5
18	ÖZGÜR-SEN (Freedom Workers' Union of Textile Workers)	2
	TOTAL NUMBER OF WORKERS IN THE SECTOR	1,121,416
	TOTAL NUMBER OF UNIONISED WORKERS	103,707
	RATE	9.24%

EMPLOYER UNIONS²⁵:

Turkish Textile Industry Employers' Union
All Employers' Unions Confederation

Turkish Confederation of Employer Unions
Uşak Textile Employers' Union

3.5. Barriers to Organization and Collective Bargaining

Freedom of association and collective bargaining are fundamental rights of all workers and are often described as 'empowering rights'. However, low levels of unionisation in many countries, including Türkiye, seriously hinder the possibility of equitable wage increases through collective bargaining between workers and employers. Employers are frequently hostile to trade unions and use a variety of tactics to suppress organization efforts, including intimidation, discrimination, dismissal, blacklisting, and even physical violence against workers.

Since state policies in Türkiye are mostly supportive of employers, union organization is further suppressed. One major legal barrier is the 1% threshold imposed by the state: for a union to engage in collective bargaining, it must not only organise workers within a factory but also achieve sector-wide membership above 1%. This requirement acts as a systemic obstacle, effectively slowing down or even preventing unionisation and reinforce mechanism of exploitation.

Legal Regulations on Trade Union Rights

Türkiye's labour law provide formal protections of workers' union rights. According to Article 17 of Law No. 6356 on *Trade Unions and Collective Labour Agreements*, any worker over the age of 15 may join a trade union freely, in accordance with the work in which they are employed, without seeking permission. Article 25 of the same law prohibits employers from dismissing or treating workers differently due to their union membership or participation in union activities outside working hours. If an employer violates this provision, they must compensate the affected workers. Similarly, Article 18 of *Labour Law* No. 4857 prohibits employers from dismissing employees for unfair reasons, requiring them to either reinstate wrongfully terminated workers or provide financial compensation. Trade unions can be organised with at least 7 members.²⁶ Additionally, Article 118 of the *Turkish Penal Code prescribes prison sentences of six months to two years for employers or officials who prevent workers from joining trade unions.*

However, despite these legal protections, cases in practice clearly show how employers violate these laws. Employers often circumvent the law, finding ways to dismiss workers involved in union organising. Reports show that almost every month, dozens of workers who participate in the trade union struggle are dismissed on various false excuses and groundless justifications. Even during the Covid-19 pandemic period, when dismissals were prohibited, thousands of workers were dismissed for union organization on the basis of "Code-29", i.e. accusing them of "behaviour that does not comply with the rules of morality and good faith". Because of such legal loopholes workers were deprived of their severance and other rights to compensation.

Trade unions can be organised with at least 7 members.



REPRESENTATION OF TRADE UNIONS IN COLLECTIVE LABOUR AGREEMENTS

For a trade union to be authorized to negotiate a collective labor agreement, it must appoint workplace representatives from among its members and notify the employer within 15 days. The number of representatives is determined according to the number of workers in the workplace, and as follows:

Up to 50 workers: 1 representative
Between 51-100 workers: Maximum 2 representatives
Between 101-500 workers: Maximum 3 representatives
Between 501-1000 workers: Maximum 4 representatives
Between 1001-2000 workers: Maximum 6 representatives
More than 2000 workers: Maximum 8 representatives

One of these representatives may be appointed as the chief representative. Their role remains valid for the duration of the union's collective bargaining authorisation.

STRUCTURE OF EMPLOYMENT AND LABOUR FORCE

The garment sector has faced significant employment losses due to economic pressures, particularly since the COVID-19 pandemic. A decline that started in the second quarter of 2022 has led to substantial job losses. By the last quarter of 2023, the textile sector had lost approximately 13,000 jobs, while the ready-to-wear sector recorded a staggering loss of over 90,000 jobs since late 2022. The last quarter of 2023 marked the most rapid decline since the pandemic, with an additional 31,000 job losses.²⁷

4.1. Types of Informal Employment

An increasing number of workers in the garment sector are employed informally and without a formal labour contract/status. This is most prevalent among home-based workers and workers in small workshops, but also in factories. Many workplaces employ both formal and informal workers, with the latter lacking job security, regular wages, and legal protections.. This situation increases economic insecurity for workers and their families and pushes many into vulnerable living conditions.

1 One in Two Workers works and lives in precarious conditions

One of the most striking aspects of informal employment is its scale. According to Ahmet Hamdi Topbaş, Chairman of the *Turkish Textile Industry Employers' Association* (TTSİS), as stated in the newspaper *Cumhuriyet*, nearly half of all textile workers are unregistered.²⁸

In September 2020, 32.2% of Türkiye's workforce lacked social security registration, though this figure had decreased by 3.8% percentage points from the previous year.

Estimates indicate that between 2006 and 2023 (71 quarters), the informal economy contributed between

16% and 68% of Türkiye's national income. However, since 2015, the informal economy has been shrinking, reaching an estimated 16% 2023.²⁹

2 Day Labour and Subcontracting

The widespread use of short-term orders in the garment sector has created a new form of precarious employment in recent years. Subcontractor firms, which are similar to past private employment agencies supported by the state, provide daily unregistered workers in the textile sector. These daily labourers usually find employment in two ways: The first is through subcontractor firms. Alternatively, workers can find daily work by waiting at unofficial waiting points in central locations of neighbourhoods close to workshops. There, employers pick them up in the morning. Such waiting points are common in neighbourhoods such as Güngören, Bağcılar, Esenyurt, Sultangazi in Istanbul. At the same time, many day labour advertisements can be also found randomly by walking on the streets in these and similar industrial areas. Along these, social media platforms like Facebook, serve also as hubs for finding daily textile work, where subcontractor companies establish for example designated groups for day labourers.

A 2022 report by *Clean Clothes Campaign Türkiye*, based on interviews with workers and employers, investigated the causes of informal employment in the garment sector in order to understand the roots of the problem.³⁰ The report reveals that the sector relies on informal employment primarily as a cost-cutting strategy. By avoiding formal contracts and social security obligations, businesses exploit cheap labor and shift economic insecurity onto workers.



Out of Sight:

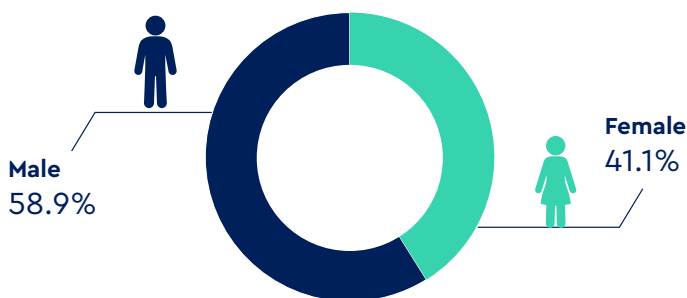
Informal Employment in Garment Industry

4.2. Gender, Age and Ethnic Composition of the Labour Force

The table below shows data according to the Social Security Institution (SSI), as of November 2020, about permanent and temporary employees within the scope of 4/A* and their distribution in the public and private sectors, as well as the gender distribution of employees in textile production and clothing manufacturing. According to the data, the total number of insured employees in the sector was 1,058,882 ³¹

NUMBER OF COMPULSORY INSURED		
	Manufacture of Textile Products	Manufacture of Clothing
Permanent	456,071	600,308
Temporary	691	1,812
Public	458	5,070
Private	456,304	597,050
Male	332,759	290,995
Female	124,003	311,125
Total	456,762	601,120

RATIO OF INSURED EMPLOYEES TO FEMALE AND MALE IN TEXTILE AND CLOTHING MANUFACTURING



Studies indicate that 66% of the workers in garment workshops are between the ages of 21 and 55, reflecting a labour force primarily composed of adults in their prime working years.³²

Workers in Istanbul's garment workshops are predominantly of Turkish and Kurdish ethnic origin. Workers of Kurdish origin who migrated to Istanbul in the 1990s reported facing ethnic discrimination in terms of employment and renting a house.

With the increasing number of refugees in Türkiye since 2011, child labour exploitation has gained a new dimension. The Syrian civil war in Syria and the influx of refugees from countries such as Iraq, Afghanistan, Turkmenistan, Uzbekistan and Somalia have contributed to the rise of exploitation of refugee child labour in Türkiye. Many employers seeking to lower labor costs have increasingly turned to refugee and migrant children as a cheap workforce. Refugee children, who work under even worse conditions than other workers, work longer hours for lower wages, receive their salaries late and incomplete, are subjected to mistreatment and negative discrimination, and are forced to work under discriminatory practices, including hate speech. Refugee and migrant child labourers are frequently employed in informal areas such as the garment and footwear sector, services, agriculture, husbandry, recyclable waste collection and construction works.³³ The widespread use of child labor not only exposes these children to exploitative working conditions but also deprives them of their right to education and healthy development, exacerbating their social and economic vulnerability.

The Syrian civil war in Syria and the influx of refugees from countries such as Iraq, Afghanistan, Turkmenistan, Uzbekistan and Somalia have contributed to the rise of exploitation of refugee child labour in Türkiye.



Photo Source: BBC NEWS Turkish / Syrian Child Workers in Turkey

* 4A is a type of social insurance covering private sector employees in Türkiye



Since 1967, Türkiye has been a state party to the International Labour Organization (ILO) **Equal Remuneration Convention No. 100**



4.3. Gender Based Discrimination

According to Article 5 of *Labour Law No. 4857*, a lower wage cannot be paid for a job of the same or equal value based on gender. The presence of special protective provisions for women in the workplace does not justify pay discrimination.³⁴

Since 1967, Türkiye has been a state party to the International Labour Organization (ILO) *Equal Remuneration Convention No. 100*.³⁵, which mandates equal pay for equal work.

Field research conducted by the Clean Clothes Campaign Türkiye during the Covid-19 period highlighted a gender-based division of labour in textile and garment workplaces. 67.7% of workers surveyed expressed that women and men occupy different positions in their workplaces. According to the interviews, this difference in position usually arises due to the workload. Women are often assigned lighter tasks such as quality control and overlock sewing, while men tend to work in physically demanding positions such as middleman or machinist roles.

The Gender Pay Gap is defined as the ratio of the difference between the gross wages or earnings of men and women relative to the gross wages or earnings of men. According to calculations based on annual average gross earnings statistics:³⁶

- High school graduates experience the highest gender pay gap at 19.6%.
- Primary school graduates or those with no formal education have the lowest gap at 14.5%.

Based on annual average gross wage-salary data:

- Higher education graduates experience a 17.1% wage gap.
- Primary school graduates and below experience a 12.4% wage gap

A joint survey conducted by ILO Türkiye and TURKSTAT found that the overall gender pay gap in Türkiye is 15.6%. The wage gap widens with age. While this gap is 3.8% at the beginning of working life, it increases sharply to 25.9% in the 40s, disproportionately affecting women. This gap remains at a similarly high level in the following age groups.³⁷

The research also touches upon the gender-based wage gap effects of the Covid-19 pandemic: "The social and economic effects of the crisis further deepen wage gaps. Because sectors such as services, retail sales and tourism, where women work the most, are the sectors most adversely affected by the crisis. Therefore, women, let alone struggling for managerial positions, may have to switch to short-term precarious forms of work or even quit their jobs in order to spend more time at home."

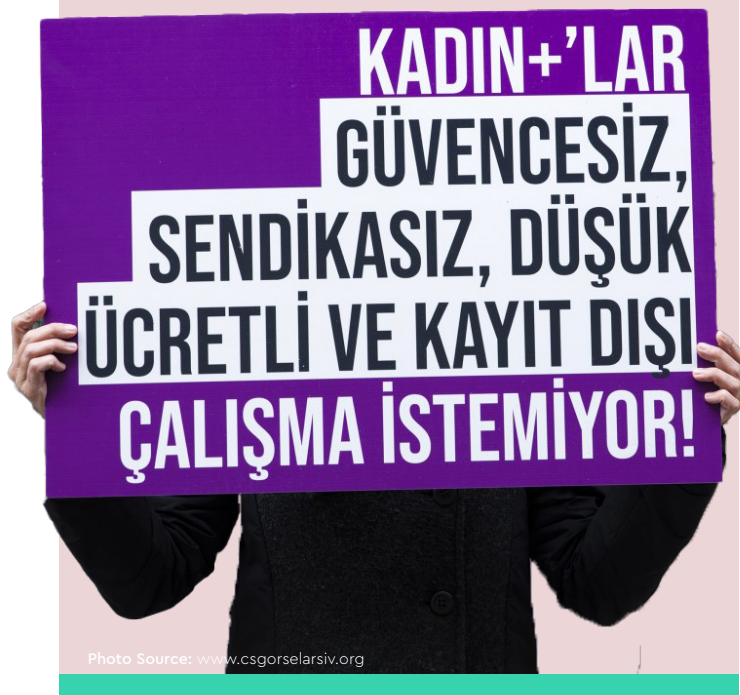
According to the research³⁸ conducted by Saniye Evren in 2021, the discrimination experienced by employed women workers can be summarised as follows:

- Although the garment industry is one of the industrial sectors with the highest concentration of women among industrial sectors, male workers receive higher wages than female workers, even if they perform similar jobs.
- Jobs traditionally assigned to women are generally seen as lower paid, part-time, or makeshift positions. On the other hand, sectors and occupations considered as men's jobs are recognised as more skilled and qualified jobs.
- Informal employment is more prevalent among women, according to data. This increases their economic vulnerability and job insecurity.

According to the research conducted by DİSK-AR based on TURKSTAT data, the gender wage gap in Türkiye is 20.7%³⁹, indicating that women earn significantly less than men, reinforcing systemic inequalities in the labour market.

According to the research conducted by DİSK-AR based on TURKSTAT data, the gender wage gap in Türkiye is ³⁹

20.7%



4.4. Labour Shortage in the Garment Industry

Employers in Türkiye have difficulty face significant challenges in finding workers to work in the garment sector. According to 2023 data, the occupation with the most severe labour shortages is the sewing machinist role. In 2022, additional roles such as **weaver, apparel machinist, apparel worker and flat sewing machinist** were added to the list of occupations facing shortages.

The top three reasons for the difficulty in hiring skilled garment workers are:

1. Insufficient number of applicants for the profession.
2. Lack to find employees with the required professional skills or
3. Lack to find employees with sufficient work experience..

Despite labour shortages, there are vocational training courses on garment and its sub-branches in centres that support vocational training courses such as İSMEK.⁴⁰

The vocational and technical courses provided by the Directorate of Lifelong Learning of the Ministry of National Education provide 147 vocational and technical courses in the field of Clothing Production Technology.⁴¹

While it may seem relatively easy to find employment in the garment sector, the working conditions are physically demanding. According to research on this subject, the relationship between working in the garment industry and physical discomfort is remarkable.










The main causes of discomfort in the garment industry are as follows:

- The work requires frequent bending (forwards, sideways, backwards), standing up, squatting and reaching.
- Excessive repetitive movements.
- The work speed is too rapid.

Due to this physically demanding conditions, workers frequently experience the following (in order of importance):



COMMONLY ENCOUNTERED ILLNESSES ⁴²

-  1. Lumbago,
-  2. Foot and leg pains as well, and leg pains,
-  3. Back pain,
-  4. Shoulder pain,
-  5. Eye disturbances,
-  6. Hand, arm and elbow pains, burning,
-  7. Neck flattening,
-  8. Musculoskeletal system problems,
-  9. Hearing loss

4.5. Unemployment Rate

According to the Household Labour Force Survey, the number of unemployed individuals aged 15 and over increased by 61 thousand in October 2024, reaching a total of 3,175 million. This resulted in an unemployment rate increase of 0.1 percentage point, reaching 8.8%. Unemployment rate for males and females was estimated as 6.9% and 12.3%, respectively.

The youth unemployment rate (Age 15-24) decreased by 0.3 points compared to the previous month to 16.6%. The unemployment rate in this age group is estimated to be 12.6% for males and 23.9% for females.⁴³

According to the DiSK-AR report, the seasonally adjusted narrow-defined unemployment rate announced by TURKSTAT for the 3rd quarter of 2024 was 8.7%, showing a slight 0,1-point decrease from the previous quarter. However, the seasonally adjusted idle labour force (broad-defined unemployment) rate increased by 3.1 points to 25.6% in the same period. The gap between narrow- and broad-defined unemployment rates has widened to nearly 17 percentage points, reflecting labour market precarity and hidden unemployment

The data also show that only 1 in 5 women participates in formal, full-time employment, highlighting persistent gender disparities. The broad-defined unemployment rate reached 35.7% for all young people⁴⁴, pointing to severe difficulties in job access for young people.

As of the 3rd quarter of 2024, Türkiye ranked 4th in unemployment among OECD countries, following Spain, Colombia and Greece. The average unemployment rate in OECD countries was recorded as 4.9%. ⁴⁵



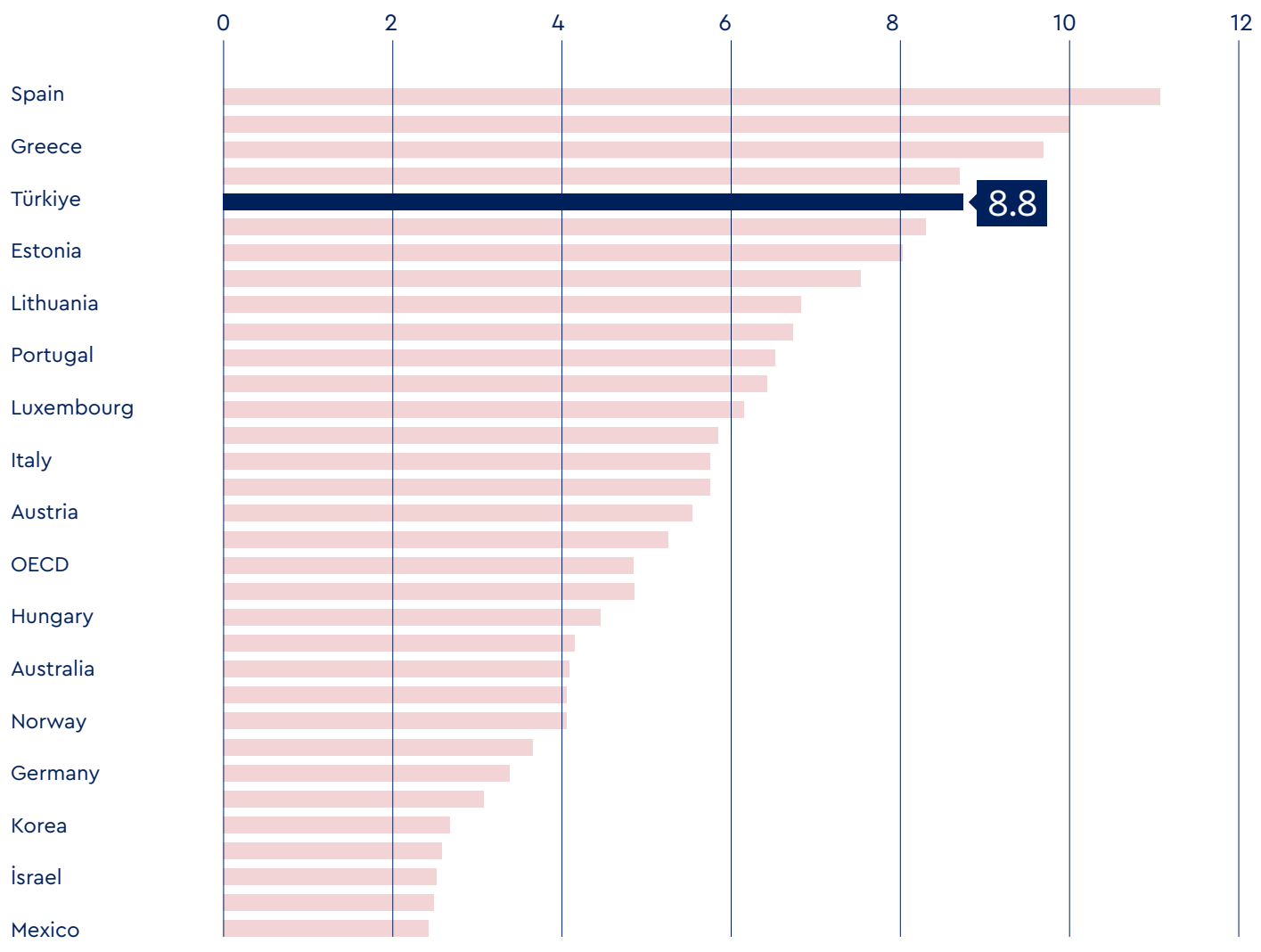
Photo Source: GETTY IMAGES /www.t24.com.tr



Türkiye 2024
unemployment
rate is 8.8%.

Photo Source: www.bianet.org

UNEMPLOYMENT RATE 2024 / TOTAL % OF LABOUR FORCE



5 WAGE RELATED PRACTICES IN THE SECTOR AND THEIR EFFECTS

5.1. Legislation on Minimum Wage

The minimum wage is determined annually by the *Commission for Minimum Wage Determination*. The Commission is composed of 5 members each from workers' and employers' side as well as 5 representatives from the Ministry of Labour. The wage applies across all sectors and is usually determined daily, but adjustments are made for monthly, weekly, hourly, piece-based, or task-based payments.⁴⁶

By law, the minimum wage is newly set every two years at the latest. In practice, the minimum wage was determined in 6-month periods between 2007 and 2015, while it was determined once a year from 2016 until 2022. In 2022 and 2023, it was determined every 6 months, while in 2024, it started to be determined once a year.

At the end of 2023, the gross minimum wage was set at 20,002.50 TRY (548.30 Euro*) for 2024 (including social security premium deductions and income tax), which was announced as net 17,002.12 (466.04 Euro). This represents an increase of 49 % compared to the previous year. While in previous years the increase in the minimum wage was based on the inflation rate of the TURKSTAT, 2025's increase was below the inflation rate.

For 2025, the minimum wage for 2025 was finalised by the *Minimum Wage Commission* at the time of writing this report. The minimum wage for 2025 was set at 26,005.50 TRY (712.84 Euros) gross and 22,104 TRY (605.89 Euros) net. This represents a 30% increase in the net minimum wage, yet it stays below the demand of the *Türk-İş Confederation*, which had requested 29,543 TRY (809.80 EUR).

The table shows the legal minimum gross and net wages since 2010:

MINIMUM GROSS AND NET WAGES			
	Gross Minimum Wage (TRY)	Net Minimum Wage (TRY)	Net Minimum Wage Increase%
2010**	729	576.57	-
2011**	796.5	629.96	9.26%
2012**	886.5	701.13	11.30%
2013**	978.6	773.01	10.25%
2014**	1,071.00	846	9.44%
2015**	1,201.50	949.07	12.18%
2016	1,647.00	1,300.99	37.08%
2017	1,777.50	1,404.06	7.92%
2018	2,029.50	1,603.12	14.18%
2019	2,558.40	2,020.90	26.06%
2020	2,943.00	2,324.71	15.03%
2021	3,577.50	2,825.90	21.56%
2022**	5,004.00	4,253.40	50.51%
2023**	10,008.00	8,506.80	34.00%
2024	20,002.50	17,002.12	49.00%
2025	26,005.50	22,104.00	30.00%

** Between 2010 and 2015, and in 2022 and 2023 the minimum wage was determined in 6-month periods. In order to provide a clearer understanding of the minimum wage increase by years, the minimum wage in the first six months of each of the years in question is taken into account in the table.

For 2025, no political party or trade union has made a request to determine the minimum wage. However, in the third meeting of the minimum wage negotiations, the *Türk-İş Confederation* demanded a minimum wage of 29,543.00 TRY (809.80 Euro). Despite this, the minimum wage was determined unilaterally by the government.

* Converted with the December 2024 InfoEuro exchange rate.

5.2. Current Regulations on Social Insurance Premiums

NET WAGES			
	2023 (first 6 months)	2023 (last 6 months)	2024
Gross Minimum Wage	10,008.00	13,414.50	20,002.5
SSI Premium 14%	1,401.12	1,878.03	2,800.35
Unemployment Insurance Premium 1%	100.08	134.15	200.03
Total Deductions	1,501.20	2,012.18	3,000.38
Net Minimum Wage	8,506.80	1,402.32	17,002.12

COST TO THE EMPLOYER (TRY/MONTH)			
	2023 (first 6 months)	2023 (last 6 months)	2024
Gross Minimum Wage	10,008.00	13,414.50	20,002.5
SSI Premium 15.5% (Employer Share)	1,551.24	2,079.25	3,100.39
Unemployment Insurance Premium (Employer) 2%	200.16	268.29	400.05
Total Cost to the Employer	11,759.40	15,762.04	23,502.94

5.3. Inflation

Inflation data is published monthly by TURKSTAT (Turkish Statistical Institute), but significant discrepancies exist between official figures and the inflation perceived by the public.

TURKSTAT announced the 12-month average inflation rate for December 2024 as 44.38%.⁴⁷ Likewise, for December 2023, it set this rate as 60.45%.⁴⁸ However, the *Inflation Research Group (ENAG)*, which was conducted by academics and economists, announced the average inflation rate as 83.40% for December 2024 and 86.76% for December 2023.⁴⁹

5.4. Poverty Threshold

The economic crisis, following the pandemic, has significantly deepened poverty. Many researches indicate that many workers earn below the poverty line, with an income close to the starvation threshold. According to the monthly hunger and poverty calculations (November 2024) made by the *Türk-iş Confederation*, the starvation threshold for a family of four in Türkiye is 20,562.00 TRY (563.62 Euros) and the poverty threshold is 66,976.00 TRY (1,835.90 Euros).⁵⁰

In the *DİSK-AR Minimum Wage Survey (2025)* report, the poverty threshold for a family of four for the period October 2024 is 72,156.00 TRY.⁵¹

These data shows that all minimum wage workers live far below the poverty line and even below the starvation threshold.

2024 December Inflation (12-Month Average)

TURKSTAT → **44.38%** 
Turkish Statistical Institute

ENAG* → **83.40%** 

* ENAG: A research group composed of academicians and economists, known as the Inflation Research Group.

2024 Hunger Line **20,562 TRY**
(For a family of four)

2024 Poverty Line **66,976 TRY**
(For a family of four)

2024 Minimum Wage **17,002 TRY**

These data show that all workers earning the minimum wage live far below the poverty line, and even the hunger line.

5.5. Poverty Indicators

The calculation of the material and social deprivation rate is based on various variables at the household and individual level. The variables questioned at the household level are car ownership, being able to make economically unexpected expenditures, to cover the cost of a one-week holiday away from home, to pay rent, housing loan and interest-bearing debts, to eat a meal with meat, poultry and fish every two days, to meet the heating needs of the house and to replace furniture when it gets old.

The variables questioned at the individual level are: being able to replace old clothes with new ones, to have two pairs of decent shoes, to get together with acquaintances at least once a month, to participate in paid leisure time activities, to spend some money to feel good about oneself and to have internet access for personal purposes.

The rate of those who cannot fulfil at least seven of these variables fall under the "material and social deprivation rate". While in 2022, the rate was 16.6%, survey results for 2023 define it at 14.4%, with a decrease of 2.2 points.⁵²

The *Multidimensional Poverty Index*, published by the *United Nations (UN) Development Programme*, comparatively addresses poverty in the following categories:

MATERIAL AND SOCIAL DEPRIVATION RATE TURKSTAT (Turkish Statistical Institute)		
2022	Material and Social Deprivation Rate	16.6%
2023	Material and Social Deprivation Rate	14.4%

POVERTY INDEX
Nutrition
Child mortality
Year of study
School attendance
Fuel for cooking
Cleaning
Drinking water
Electricity
Housing
Assets

The *UNDP Multidimensional Poverty Index* measures poverty across nutrition, education, housing, and basic services. Türkiye has been absent from these global reports since 2018 due to data unavailability, highlighting a significant gap in poverty measurement in Türkiye.⁵³

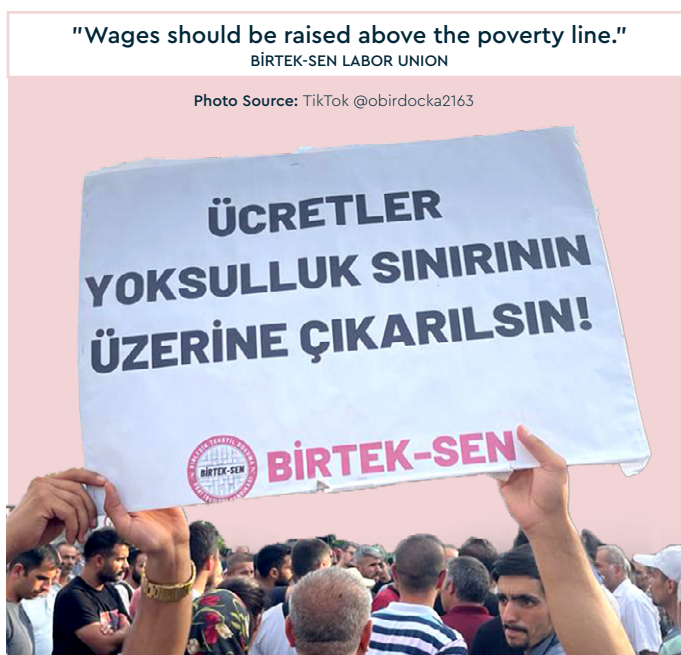




Photo Source: www.milliyet.com.tr

5.6. Overtime Labour

Overtime labour refers to the work exceeding 45 hours per week under the conditions specified in the *Labour Law*.

If a contract sets the weekly working time below 45 hours, any work beyond this limit up to 45 hours is considered overtime. However, working hours cannot exceed 11 hours under any circumstances.⁵⁴

The wage for each hour of overtime is calculated by increasing the normal hourly wage by 50%. If the work does not exceed 45 hours but exceeds the contracted weekly working time, the wage for each additional hour is increased by 25%.

In jobs where wages are paid per piece or based on the amount of work done, overtime pay is determined according to the number of units produced during extra hours.

By mutual agreement, the standard 45-hour weekly working time can be distributed differently across the week, as long as daily working hours do not exceed 11.

THE LABOUR LAW

To protect workers' physical and mental health, sets and annual upper limit of

270 overtime hours.

This system, known as the 'equalisation practice,' allows for intensified working weeks, followed by reduced working hours in subsequent weeks to maintain the 45-hour average. For example, if a worker in a six-day work week, works 60 hours per week for four weeks (45 hours of normal time + 15 hours of overtime), their hours must be reduced to 30 per week for the next four weeks to restore the average (45 hours of normal time-15 hours balancing =).⁵⁵

To protect workers' physical and mental health, the *Labour Law* sets and annual upper limit of 270 overtime hours. The employer may not require the employee to work beyond this limit within a one-year period.

LABOUR INSPECTIONS

Legally obligatory duty of the labour inspectorate

Labour inspection is a legally mandated duty carried out by the Labour Inspectorate to oversee the implementation of legislative provisions related to working conditions and the work environment. It includes areas such as working hours, wages, occupational health and safety, workers' welfare, child and youth employment, informal labour, unemployment, employment and labour market practices.⁵⁶ Labour inspectors operate under the *Ministry of Labour and Social Security* under the *Directorate of Labour Inspection Board*.

How labour inspections are organised in the country

The labour inspections of the *General Work Plan* are organised in two categories of "work execution" and "occupational health and safety". The *Ministry of Labour and Social Security* conducts inspections in two ways: "programmed" and "non-programmed". Programmed inspections target specific sectors or risk groups, while non-programmed inspections are carried out in response to notifications, complaints, or specific incidents.

Publication of inspection reports

The details of the inspection reports are not made publicly available by the Ministry. However, the Ministry is obliged to compile an annual *General Evaluation Report on Labour Inspection* and submit it to the *Directorate General of the International Labour Organization (ILO)*. This report is also shared with the public.

Findings

In 2023, the Ministry carried out a total of 5,013 inspections related to occupational health and safety, of which 3,115 were programmed inspections and were 1,898 non-programmed.⁵⁷ Occupational health and safety inspections carried out in the weaving, garment and leather sector were 507 programmed and 117 non-programmed inspections.⁵⁸ There inspected enterprises in this sector employed 66,239 male, 36,857 female and 4 young workers.⁵⁹

The 2016 report from the *Ministry of Labour and Social Security Labour Inspection Istanbul Group Presidency*,

following a programmed inspection aimed at improving working conditions of workers in the ready-to-wear sector *identified several common problems* and risks faced by workers in the garment sector:

PROBLEMS AND RISKS FACED BY WORKERS⁶⁰

1.	Informal employment
2.	Actual wage-recorded wage difference
3.	Violation of the daily and weekly working time limits stipulated by law
4.	Intensive overwork
5.	Failure to observe rest time limits
6.	Violation of the regulations on annual paid leave
7.	Failure to pay wages through a bank
8.	Violation of the obligation to employ disabled workers
9.	Employment of non-permitted foreign workers
10.	Non-implementation of legislation protecting women workers
11.	Payment of overtime, general holiday and week holiday wages without being reflected in the records

Regarding work execution inspections, a total of 3,578 inspections were carried out in 2023, of which 3,495 were programmed and 83 were non-programmed. None of the 286 inspections conducted in the weaving, garment and leather sector were programmed. 64 of the non-programmed inspections were related to collective dismissals. The enterprises inspected in this sector employed 47,538 male, 22,738 female, 15 young and 2 child workers.

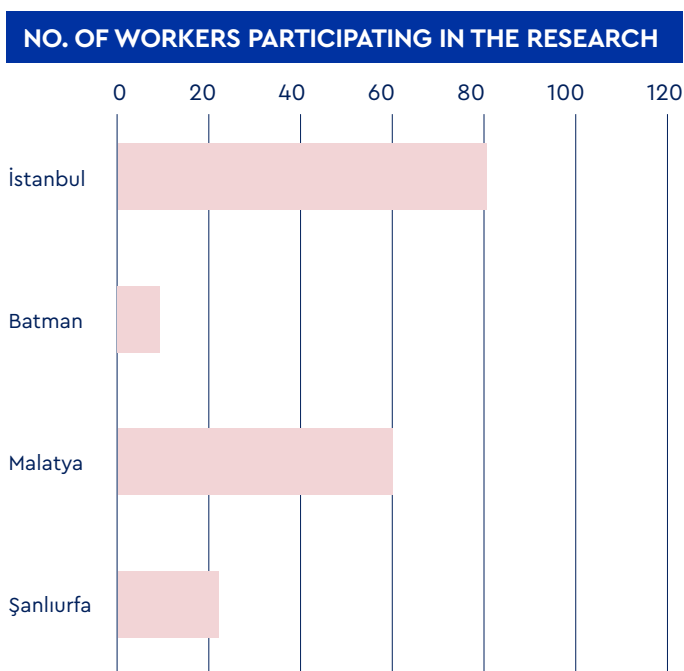
Until 2021, the Ministry provided data on occupational accidents and their outcomes in its Working Life Statistics. However, in the 2022 and 2023 reports there is no data on occupational accidents to be found.

In 2021, out of a total of 42 occupational accidents investigated, 18 resulted in death, 36 resulted in injury and 4 resulted in loss of limb.⁶¹ One of these accidents occurred in the weaving, garment, and leather sector and was classified as machinery-related.⁶²

7 FIELD RESEARCH

7.1. Research Locations

In the field research conducted in Istanbul, workers were reached using the "snowball method". Interviews took place with workers in Bağcılar, Güneşli, Mahmutbey, and Güngören. The scope of the research was later extended to other provinces within the supply chain of the targeted brands, including Batman, Malatya and Şanlıurfa.



Istanbul remains a complex centre of Türkiye's garment industry, with more than 60% of the country's garment production still taking place there. The workshops and small-scale factories scattered in certain districts throughout the city have a complex and multi-layered production structure due to their dispersed and unorganised nature. These districts are also significant as they are places where workers both live and work.

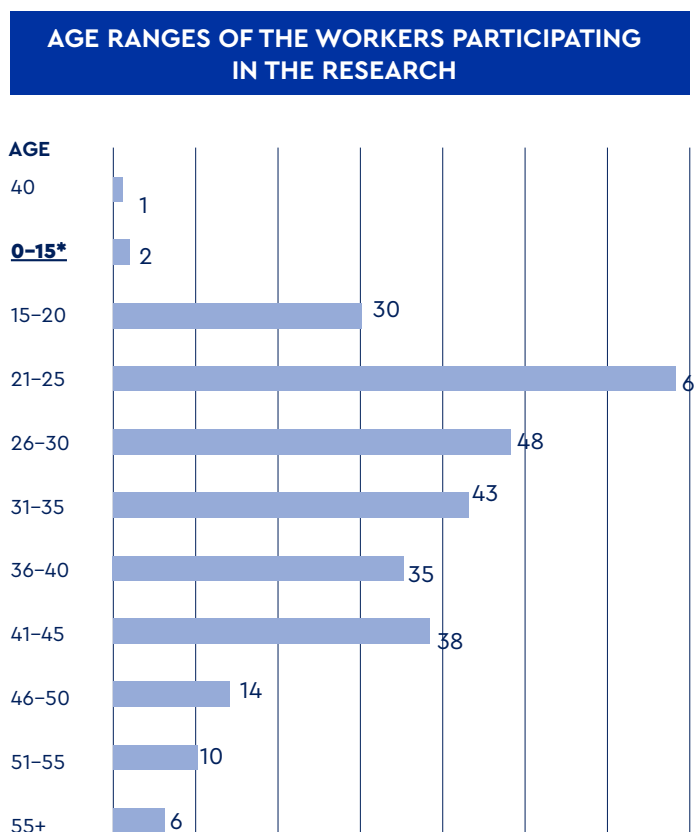
In contrast, production in Batman, Malatya and Şanlıurfa is more structured and large-scale. These regions benefit from government trade incentives, and working conditions differ significantly from those in Istanbul.

In these organised production zones, the control of employers over the labour force is quite high. The employers themselves are organised and use this organization as a means of pressure on workers. For example, a worker who leaves a workplace on bad terms and is blacklisted may face serious difficulties in finding a job in another factory in that same city.

7.2. Demographic Profiles of the Interviewed Workers

A total of 125 female and 172 male garment workers were interviewed. 48% of the interviewed workers stated that they were married and 52% stated that they were single.

The distribution of workers according to age groups:



* If under 15 years old, refer to the note on the next page.



Note: Individuals under the age of 15 were not directly questioned, as doing so would not be pedagogically appropriate. Instead, their experiences were documented through careful listening and note-taking. This approach was adopted to ensure a more ethical evaluation of the experiences of this age group.

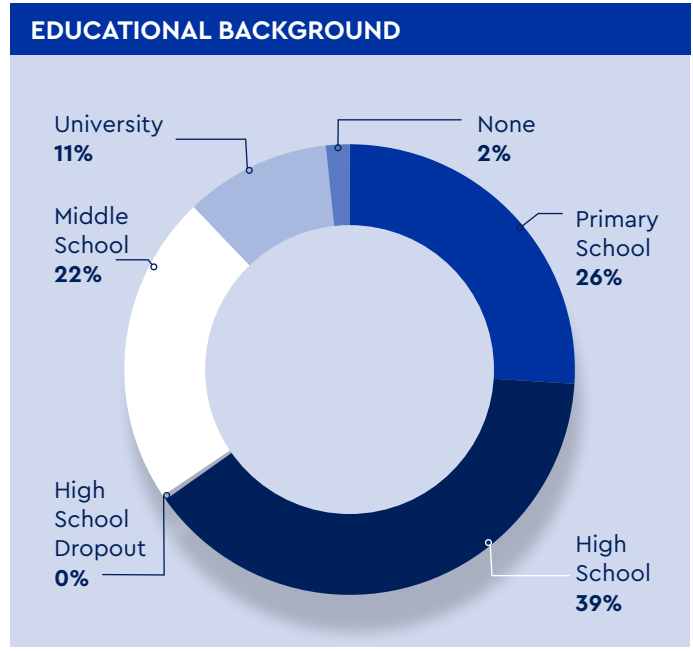
A more comprehensive report on this subject:

Childhood Lost In Textile
The Issue of Child Labour in the Turkish Garment Sector

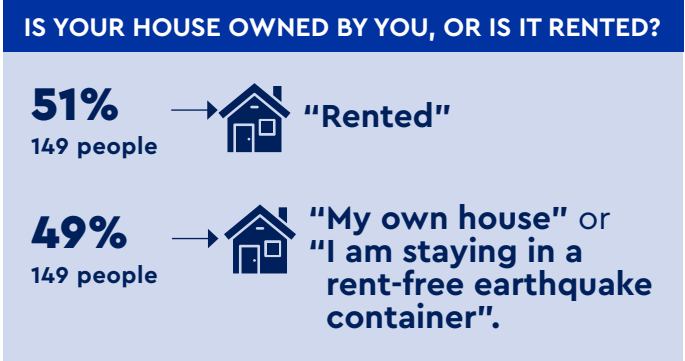
Although efforts were made to ensure equal participation of men and women in the interviews, this goal was not fully achieved. One of the main reasons for the limited participation of women was their caregiving responsibilities, which stem from gender-based inequalities in the division of domestic labor. This issue has been documented separately in a broader report focusing on gender.

Women Workers:
Paid Work, Unpaid Domestic And Care Services

Details on the educational background of the interviewees are detailed in the table below.



The interviewees were also asked whether they own or rent the house they live in, to which:

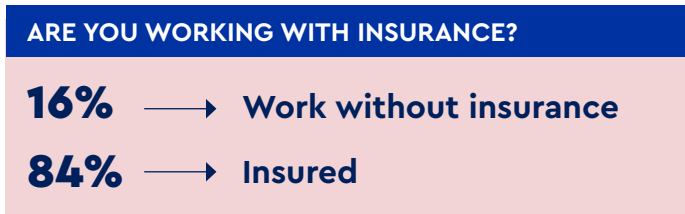


7.3. Main Findings of the Field Research

The interviewees were asked detailed questions about their wages, daily lives, educational backgrounds, union membership, insurance status, how they receive their salaries and whether their workplaces were subject to inspections or not.

Of the interviewed workers, **16% (48 people) reported they work without insurance, while 84% (247 people) stated they were insured.** Uninsured workers were asked about the reasons for this situation, yielding different responses. While a group of workers stated that they worked as weekly or daily labourers, some of them stated that their employers did not provide them with insurance despite their requests. All of the uninsured workers were working and living in Istanbul.

An analysis of uninsured workers' salary ranges revealed that the lowest salary was 6,000 TRY and the highest was 30,000 TRY, with an average salary of 21,000 TRY. The majority of insured workers, especially those living in Anatolian cities, stated that they receive the minimum wage. Many of them expressed that their wages were insufficient to meet their living expenses and emphasised the systemic pressure on wages.



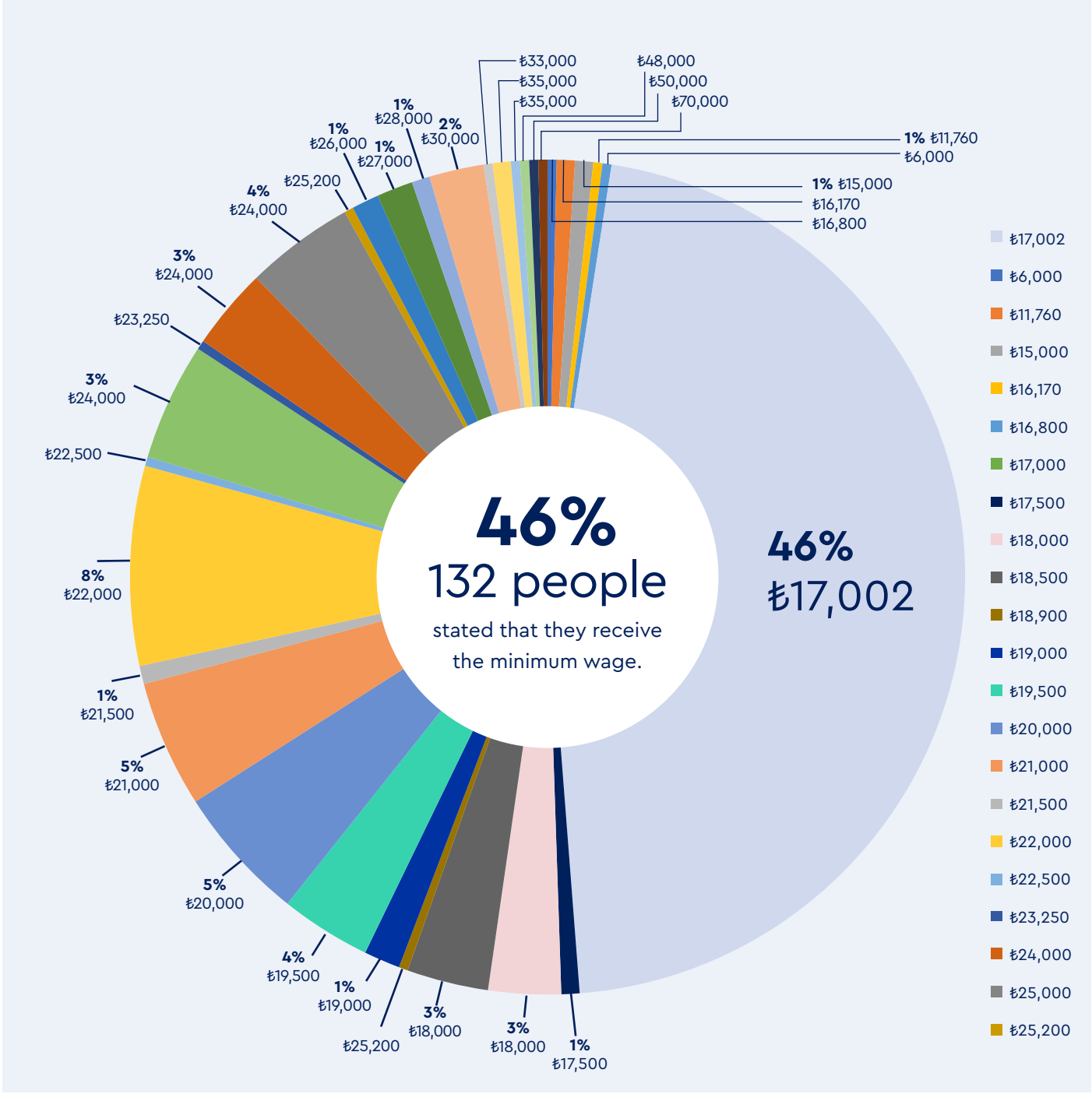
Salary and Payment Methods

Workers were also asked about their salaries and how they were paid. While 285 workers disclosed their salaries, 11 workers did not answer this question for various reasons. Among those who stated their salaries, 46% (132 workers) reported receiving the minimum wage, while 7 workers stated that they received a salary lower than minimum wage.

Salaries of 123 interviewed workers ranged between 17,500 TRY and 25,000 TRY, 23 workers' salaries are above 25,000 TRY. Some of those earning minimum wage reported working beyond legal working hours to achieve this amount.

MONTHLY WAGES OF THE WORKERS PARTICIPATING IN THE RESEARCH

*285 workers (11 workers did not respond to this question for various reasons).







Working Conditions and Challenges


Workers were asked 'What is the most difficult part of your job?'. Almost none of the workers expressed satisfaction. The most common difficulties mentioned were long working hours, insufficient wages, pressure and mistreatment at work. In addition, problems frequently mentioned included excessive heat in the working environment, pain caused by standing or sitting for a long time, distractions and other health problems caused by repetitive tasks, exposure to chemicals and textile dust.





SOME WORKERS SHARED THE FOLLOWING STATEMENTS:

 The most difficult part of the job is dealing with the details – packaging, sizes and so on. You have to do all these things separately, which is exhausting after a while. Because I am standing all day, sometimes I experience pain. My foot hurts, my back aches.

 Working in the same position, looking at the same point all the time. And I think the worst thing is to work without seeing daylight for a long time.

 I push myself to work hard to get more money. I try to work non-stop. My eyes hurt from standing at the machine.

 The foremen yell, my wrists ache from using scissors too much, and my eyesight is getting worse.

 My job itself is not difficult, but there is a lot of pressure, shouting and disrespect



Factory Inspections

Workers were also asked whether their factories were inspected and whether the inspectors engaged with workers. While 69% (202 people) stated that inspections occurred, 17% (50 people) stated that there were no inspections, and 14% (40 people) stated that they do not have information about this issue. Among those aware of inspections, some noted that inspectors met with workers individually, while others expressed that the inspectors only visited the office of the employers. However, to the question "Has anything changed as a result of the audit?" all workers answered "No, nothing has changed".

Has anything changed as a result of the audit?

"No, nothing has changed".

Worker Health and Safety

During the research, questions related to occupational health and safety were also addressed. While some workers reported using protective equipment such as masks and gloves, others stated that no protective equipment was provided. When asked whether exit doors were kept open while working, almost all workers confirmed that exit doors were open.



Photo Source: www.emekvegül.net

It is a legal requirement to employ an occupational health specialist in factories in Anatolia.



Photo Source: www.trt.com.tr

Working conditions during summer, most workers answered "It gets very hot".

Regarding occupational health and safety training, workers in Anatolian factories answered "yes", whereas workers in Istanbul answered "no". This discrepancy is due to legal obligation for factories in Anatolia to employ occupational health specialists due to their large scale, whereas most workers in Istanbul are employed in smaller workshops, which often do not comply with such regulations. When asked about working conditions during summer, most workers answered "It gets very hot". You can review the detailed report on working conditions and Occupational Health & Safety here:



Labour And Risk:

Occupational Health And Safety In Türkiye

Trade Union Organization

When questioned about union membership, 76% of the workers (223 workers) stated that they were not members, while 24% (72 workers) stated that they were. Among non-members, 15 stated they did not know what a trade union was. Many workers cited fear of dismissal as a reason for not joining a union, pointing to examples of colleagues who had lost their jobs due to union involvement.



Photo Source: www.birgün.net

Textile workers who were dismissed due to being union members, 2022.



Photo Source: www.direnisteyiz31.org


Textile workers who were dismissed due to being union members, 2024.





Workers' Perspectives


In response to the final question, "Is there anything you would like to add?", many workers opened up and shared their feelings about their current conditions:


IS THERE ANYTHING YOU WOULD LIKE TO ADD?

 In Kadıköy, people dress their dogs in clothes worth 15,000 TRY. Here, the retirement pensions of workers is 10,000 TRY. Inspectors come, we eat beans inside, they go and eat kebab outside. They see the situation, but do nothing. Just today, one of them came to inspect in the morning – maybe from England or Germany. He didn't even speak to anyone. The younger generations do not want to work under these conditions anymore. Why should the officer at the post office get more than me? Here I am sending goods to England; I should be paid more. We work with dye, dirt, chemicals, and toxic gases inside. But those who can protect themselves protect themselves, we are comfortable here, there are many others who are not comfortable, that's what makes me sad.

 Textile workers have no rights. If they dismiss you, they won't give you compensation. We work on holidays. In the past, when we had contracts with Zara, we at least got holidays off. Now we work on holidays too. Keep working, keep working..."

 We are struggling to make a living. There is a huge wage gap between the East and the West. My brother gets 20,000 TRY a week in the West, I get 17,000 TRY.

 I want the minimum wage to increase. I want the boss to have a little soul. The rest is health

 We are slaves of the 21st century. Even the slaves in ancient Egypt had it better than us. We are in such a terrible situation. Factories in Eastern Anatolia don't even pay our wages properly. No wage is enough for anything. I don't know what else to say.



LIVING WAGE

A Living wage is the income a worker should receive within legal working hours to ensure a life worthy of human dignity. Unlike the minimum wage, [Living wage is a basic human right](#) and should cover a family's basic food needs (3000 calories per day for an adult), clothing, health, education, rent and bills, transportation, and savings. A living wage has been calculated in the [Living Wage Across Borders](#) study developed by the European Production Oriented Countries Group of the Clean Clothes Campaign. This calculation follows the [Asia Floor Wage](#) method, incorporating field data. In

2022, we conducted a living wage calculation for a family of four. Adjustments were made for 2023 and 2024 by adding the minimum wage increase rates for these years to the calculation. However, for 2025, as the minimum wage increase was unilaterally announced and was below inflation, the calculation was instead based on TURKSTAT inflation data. Accordingly, the estimated living wage is:

- 26,297.29 TRY for 2023
- 54,514.28 TRY for 2024
- 78,707.72 TRY for 2025

LIVING WAGE FOR THE YEAR 2022	8,976.69 TRY * 0.5054 (50.54% minimum wage raise)	13,513.51 TRY
LIVING WAGE FOR THE YEAR 2023	13,513.51TRY * 0.946 (94.60% minimum wage raise)	26,297.29 TRY
LIVING WAGE FOR THE YEAR 2024	26,297.29 TRY * 1.073 (107.30% minimum wage raise)	54,514.28 TRY
LIVING WAGE FOR THE YEAR 2025	54,514.28 TRY * 1.4438 (44.38% TURKSTAT inflation rate)	78,707.72 TRY

FOOD HEALTH EDUCATION RENT
CLOTHES TRANSPORTATION SAVINGS

The Living Wage should be determined to cover a family's basic food needs (with 3,000 calories per day for an adult), clothing, healthcare, education, rent (including utilities), transportation, and the ability to save.



WAGE INDICATORS

	TRY	EUR *
According to official statistics, the subsistence minimum for a household of 4 people / 2.5 consumption units (2.5 × 1 person)	78,707.72 TRY (2025)	2,157.48 EUR (2025)
Average net salary of interviewed workers (during regular working hours)	20,027.52 TRY (2024)	548.98 EUR (2024)
Minimum net salary of the interviewed workers (during regular working hours)	6,000.00 TRY (2024)	164.46 EUR (2024)
Maximum net salary of the interviewed workers (during regular working hours)	70,000.00 TRY (2024)	1,918.78 EUR
Current legal minimum wage (Gross) 2025	26,005.50 TRY	712.84 EUR
Current legal minimum wage (Net) 2025	22,104.00 TRY	605.89 EUR
Demands for the legal minimum net wage	29,543.00 TRY ⁶³	809.80 EUR
Turk-is Poverty Threshold (November 2024)	66,976.00 TRY ⁶⁴	1,835.89 EUR
BİSAM Poverty Threshold (November 2024)	72,524.00 TRY ⁶⁵	1,987.97 EUR
Istanbul Development Agency (November 2024) Living costs for 4 people in Istanbul	75,717.00 TRY ⁶⁶	2,075.49 EUR

CONCLUSION AND RECOMMENDATIONS

This report provides an in-depth analysis of the Turkish garment industry's role in the global supply chain, labour conditions and economic indicators. Türkiye remains a key export centre worldwide, especially for the European Union countries.

A review of the report's desk research highlights significant discrepancies between data from TURKSTAT and independent sources. Although the sector contributes substantially to the national economy with its export figures, the same level of progress is not achieved in terms of sectoral development. The lack of a sustainable strategy for combating unregistered employment or improving precarious working conditions is clearly evident. The vast majority of workers in the sector work for the minimum wage.

Widespread unregistered employment in the sector leaves workers without social security protections and drives wages down. This is especially common in smaller-scale enterprises operating as second tier (*Tier 2*) suppliers to brands. A structural transformation of the sector, ensuring formal employment and just working conditions, is imperative for a sustainable future.

For the garment sector to be truly sustainable, trade union rights – protected by the constitution – need to be respected and supported. However, the government-imposed threshold for trade unions to

organise at least 1% of the entire industry prevents workers from forming new unions and limits smaller, active unions from organising in workplaces and engaging in collective bargaining. Despite brands claim in their codes of conduct that they will respect freedom of association, they often remain silent on the challenges of unions or difficulties in union organization in the workplace.

Both desk research data and field studies reveal that inspections on occupational health and safety are inadequate, exposing workers to serious risks. This indicates that the state does not fully enforce occupational health and safety regulations. To prevent workplace accidents and occupational diseases, sector inspections should be carried out regularly and effectively. Moreover, brand inspections should not only focus on product control, but also assess whether workers have healthy and fair working conditions.

Field surveys show that many workers in the sector started working as children and that child labour remains a significant issue.

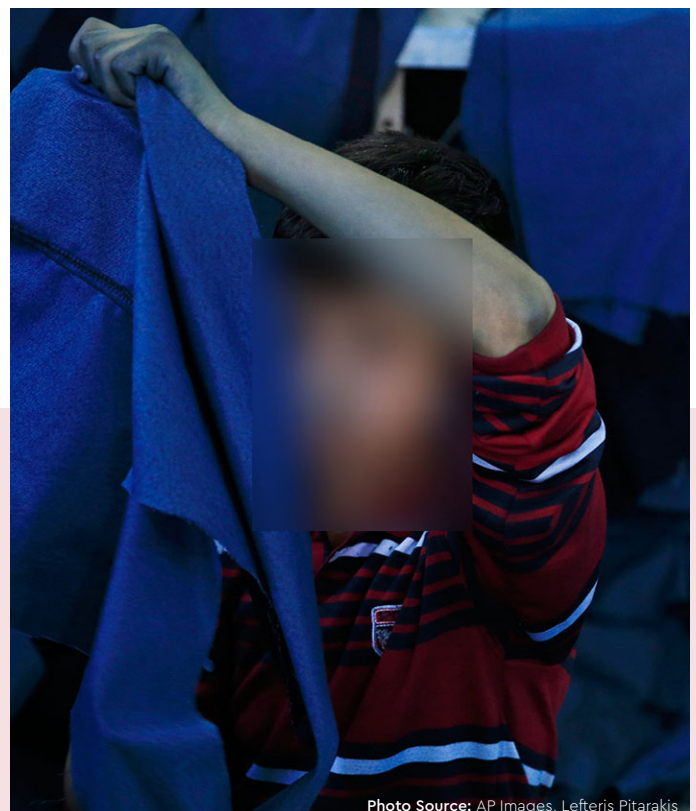


Photo Source: AP Images, Lefteris Pitarakis

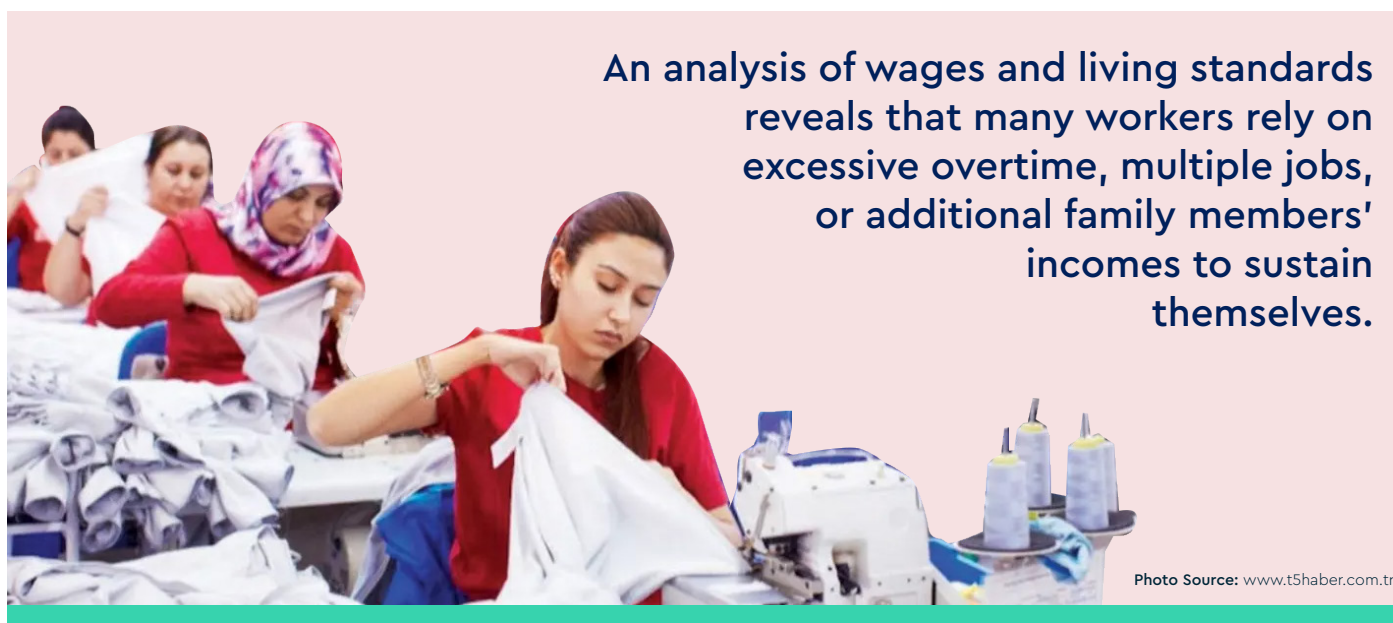


Photo Source: www.t5haber.com.tr

Field surveys show that many workers in the sector started working as children and that child labour remains a significant issue. To ensure that the sector operates within the legal framework, child labour should be prevented with stricter penalties. As part of the fight against child labour, it is important to increase effective inspections and to establish the necessary social support mechanisms for child workers to continue their education.

While Green Transition Support programs, introduced in alignment with the development goals of the European Union and the United Nations, represent a positive step, they must be expanded into a more comprehensive Just Transition approach. Just Transition aims to achieve a balance between environmental sustainability and social justice. It advocates the protection of workers and communities during the transition from fossil fuels to renewable energy, especially in the fight against the climate crisis. In this process, it is crucial that no one is left behind, new job opportunities are created and social protection measures are strengthened.

In the garment sector, Just Transition aims to create a balance between labour rights and environmental impacts. A sustainable transformation must be achieved for garment workers who face low wages, precarious working conditions and environmental damage. In this process, protecting workers' rights and

ensuring healthy and safe working conditions should be considered as fundamental and critical elements.

Despite the garment sector's economic contributions, sustainable growth is unattainable without ensuring that workers receive wages and working conditions that uphold human dignity. Both employers and brands must act in accordance with *Article 23.3 of the Universal Declaration of Human Rights*⁶⁷, committing to provide fair wages and decent working conditions.

An analysis of wages and living standards reveals that many workers rely on excessive overtime, multiple jobs, or additional family members' incomes to sustain themselves. This reality underscores the deep impact of the economic crisis and the rising cost of living felt to a great extent by workers. **It is essential that workers receive a living wage** in order to live a dignified and healthy life.

The current economic conditions in Türkiye, particularly high inflation rates, make it increasingly difficult for workers to meet basic needs. With a calculated **living wage for a family of four at 78,707.72 TRY**, the disparity between this figure and the current minimum wage is immense. This gap causes workers to face serious obstacles not only in making a living but also in accessing their basic rights such as healthcare, education, and social participation.

RECOMMENDATIONS

1. Establish and Enforce Living Wage Standard:

- The minimum wage should be raised to a living wage level, ensuring that workers can meet their basic needs.
- Cost of living indicators from independent research should guide wage adjustments
- Employers should be legally obliged to comply with these wage standards.

2. Index Wage Increases to Inflation:

- Wage increases should be made regularly in line with inflation rates to preserve workers' purchasing capacities
- This practice would improve workers' quality of life and help addressing economic inequalities.

3. Freedom of Association :

The 1% threshold for trade unions must be removed so that workers can be fairly represented in factories and bargain for their rights. Employers must be made aware that it is a crime to prevent workers' right to organise in trade unions.

4. Organised Inspection : The Ministry of Labour should include the textile sector in its regular inspection planning and conduct regular and systematic oversight. Additionally, awareness campaigns should be implemented to educate both workers and employers on occupational diseases and workplace safety.

5. Fight against unregistered employment:

Every worker has a constitutional right to social security. State inspections on unregistered employment should be intensified and there should be stricter penalties as a result of the inspections. These penalties should not be limited to monetary fines but should also include effective legal consequences, such as imprisonment, to reinforce that unregistered employment is a serious offence. Additionally, penalties must be applied consistently and fairly to uphold a sense of justice. To promote formal employment, the state should introduce appropriate adjustments in insurance premium and tax rates as well as incentive programs.

6. Implement Long-Term Economic Policies:

- Long-term policies should be developed to combat inflation and reduce income inequality.
- These policies should focus on improving workers' living standards and ensuring economic stability

7. Responsibility of Brands: Brands must ensure that workers in their supply chains have safe and decent working conditions, as outlined in their codes of conduct. They should ensure that workers receive a living wage that is sufficient for them and their families. Brands must also respect freedom of association and support their suppliers in engaging in collective bargaining with trade unions. Additionally, they must ensure full compliance with both local and international laws and conventions, while effectively monitoring and guaranteeing their proper implementation throughout the supply chain.

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- ⁶⁷ "Everyone who works has the right to just and favourable remuneration ensuring for themselves and their family an existence worthy of human dignity, and supplemented, if necessary, by other means of social protection."



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