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Global Trends in Furniture Production and Trade and the Turkish Furniture Industry

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Abstract

New trends and their reflections show themselves also in furniture production and trade. The close relationship of furniture with fashion causes easier exposure of the trends in various fields from furniture design to production technology, procurement methods to renewal and changing interval. The study analyzes the impact of global furniture trends on the industries. For this purpose, status of the Turkish furniture industry, which has gained a fast development process, is being examined in terms of production capacity and trade volume, and it is tried to determine the impact of trends on development strategies. The priorities for ensuring sustainability in development are also discussed. In 2012, the global furniture production has been realized as US$ 450 billion, it's been clearly understood from the export figure of US$ 160 billion and import figure of US$ 154 billion that the international trade increases gradually. As mainly the first 25 countries in the list perform the global furniture trade, it can be said that 70 countries have an active role in the industry with roughly 200 companies. Although Turkey has more than 1% share in the global furniture production with its total production capacity and although new technologies and modern business practices have become common, it is possible to tell that the impact of global furniture trends is on top of the reasons why the market share is not at the desired level and there is no Turkish furniture image in the world yet.

Keywords: Turkish furniture industry, Global furniture trends, Furniture foreign trade, furniture production in Turkey, furniture export of Turkey, furniture import of Turkey.

Introduction

Trends and reflections rapidly developing with the impact of the globalization experienced in every area today also show themselves in furniture production and trade. Exposures arising from the trends are more apparent in the furniture industry compared to the other industries. The close relationship of furniture with fashion causes the impact of the trends to be seen easier in various areas from design to production technology of furniture, procurement methods to renewal and changing intervals. On the other hand, the developing technology and business administration practices oblige following up the trends [Kurtoglu and Dilik 2014]. The study analyzes the impacts of the trends developed in the world on the furniture industry. For this purpose, the status, production capacity and the trade volume of the Turkish furniture industry, which has gained a quick development process, are examined and the impact of the trends on development strategies is assessed. In addition to this, the priorities for ensuring sustainability in development and the trends are discussed.

When the development of the global furniture production during the last ten years is examined, it's seen that the production volume and its share in the international trade have grown apace. This can be seen from the export figure of 160 billion dollars and import figure of 154 billion dollars within the international trade part of the global furniture production of approximately 450 billion dollars, according to 2012 Turkish Statistical Institute (TUIK) and Trademap data. As the furniture industry is among the top five fastest growing industries of the country, it can easily be seen that this development in the world is also available in the Turkish furniture industry. Furthermore, the furniture industry appears on top of the industries with positive foreign trade balance while it continues to grow. With an estimated furniture production value of 11,6 billion liras, Turkey has a market share of more than two percent in the global furniture production. But this market share is not at the desired level considering the existing technological infrastructure of the industry [Trademap 2012, TUIK 2014, Turkey Furniture Products Assembly Industry Report 2013, Anonymous, 2012]. On the other hand, the Turkish furniture industry quickly discovers the new technologies and modern operational practices in the world and aims to increase its market share in the global furniture production. It can be argued that the impact of the global furniture trends is on top of the reasons why no Turkish furniture image is established and the desired level of development is obtained in the world yet. However, the Turkish furniture industry appears to have a remarkable effort in catching and discovering the trends in line with the developments in the world. As a matter of fact, it hosts trend works and innovation exhibitions (like ZOW on March 19-22, 2015 in Istanbul, Turkey Innovation Week on December 4-6, 2014 in Istanbul etc.) featuring the international furniture trends, which are held in the important centers of the furniture world during the recent years [DTM 2012, Imm Cologne 2014].

Materials and Methods

This study, using literature research and an observation based method, the impacts and reflections of the global trends in the field of furniture and decoration on the Turkish furniture industry are analyzed. For this purpose, the Industrial Commodity Statistics generated by the UNSD (United Nations Statistics Division), as well as national or international industry reports and market researches related to the furniture industry are used as a data source. With the data obtained within this scope, the development of the Turkish furniture industry in terms of production and foreign trade volume in line with the strategic targets, as well as the development status of the furniture industry in the world and in Turkey have been analyzed with production and foreign trade values. In addition to this, the status of the global trends and properties in furniture in the Turkish furniture industry has been discussed with sub-sector and product based assessments.

Results and Discussion

Place of furniture industry in the global economy and its development

The furniture industry is one of the most important economic industries in the world with a production value of 450 billion dollars in average together with primary and secondary components. Although half of this furniture produced is sold and consumed within the own production region, it's seen that a significant part (176 billion dollars) is sold outside the production region, in other words is subject to foreign trade. The global furniture industry features a significant number in terms of employment. The industry expands its area each passing day with an employment of 260.000 people, as well as with the furniture produced in the entire world [Trademap2012, Imm Cologne 2014]. In parallel to the economical and technological development, the furniture industry also strives for development and change against the changing demand levels and quantities. For this purpose, organizations and exhibitions with strategic themes, which were organized with a limited amount before, are now organized in great numbers in various countries. Through these exhibitions, both the furniture produced is evaluated in terms of design, diversity, innovation etc., and information related to the status of the industry is provided about the trends in every field from design to production, sales and marketing to after-sales service. Italy, hosting 10 of average 60 international exhibitions organized every year throughout the world, is on top of the exhibition organizations. Italy is followed by China organizing 9 exhibitions every year and Germany organizing 6 exhibitions every year [Gaggenau 2015, UNcomtrade, 2012]. Turkey strives for enabling its activities in this industry with 2 international and 4 national exhibitions organized every year.

Considering the global furniture production data for the last five years, it's seen that China directs the industry in various aspects. As it can be seen from Table 1, only China produces one fourth (25%) of the furniture produced in the entire world. China is followed by the USA (15%), Italy (8%) and Germany (7%) [Trademap, 2012, *CSIL 2011,*

CSIL 2013]. When the distribution rates in the furniture foreign trade are examined, it's seen that China is once again on top of the list with 30.9% and followed by Germany (9.6%), Italy (7.3%), Poland (5.2%), USA (5%), and Canada (2.3%). Turkey ranks 21st among the exporting countries with 1%. USA is on top of the list in import with 22.7%. Germany (10%), France (5.9%), UK (4.8%), Canada (4.3%), and Japan (3.9%) follow USA in the list of the highest furniture importing countries. Turkey ranks 25th in the global furniture import with 0.7%.

COUNTRIES	PRODUCTION (%)	EXPORT (%)	IMPORT (%)
China	25	30,9	1,5
USA	15	5	22,7
Italy	8	7,3	2
Germany	7	9,6	10
Poland	3	5,2	1
UK	3	1,5	4,8
France	3	2,2	5,9
Japan	3	0,9	3,9
Canada	3	2,3	4,3
Turkey	1	1	0,7
Other Countries	29	34	43,2

Table 1: Countries and their shares in Global Furniture Production, Export and Import [Trademap, 2012, CSIL 2011, CSIL 2013].

The effectiveness of the European Union countries compared to the other countries in the world is clearly observed. Their trend determining positions particularly in kitchen furniture and furnished furniture attracts notice. Germany and Italy are at the forefront compared to other European countries both in production, import and consumption. When the European furniture industry is examined within the scope of fields of activity, 35% of the industry is consisted of the producer companies that produce house furniture and furnishing, and furniture for office and outdoor. The associations and unions, fairs, offices and exhibitions operating in this field constitute a section of 30%. Lighting fixture and lighting material producers and household furniture producers have a share of 27% in the industry, while the auxiliary material, semi-finished product and accessory producers have a share of 6% in the industry [Imm Cologne 2014].

Development of the Turkish furniture industry

While listed as a sub-industry under the wooden works industry until 2009, the Turkish furniture industry is defined as a main industry by the Union of Chambers and Stock Exchanges of Turkey within the scope of the targets of the 9th Development Plan. It has become one of the industries without a foreign trade deficit with an increasing export value since 2001, exporting to 214 countries today with an export figure of 1.9 billion

dollars. The industry appears to have important strategic plan targets both for ensuring sustainability in this development, and achieving the targets for the development plans. For the foreign trade vision anticipated by Turkey for the year 2013, the furniture industry aims to be one of the furniture producers in the top 10 of the world and in the top 5 of the Europe with a production expectation of 25 billion dollars and export expectation of 10 billion dollars [Anonymous 2012]. While the per capita income in Turkey was 6.500 dollars in 2005, it has increased by 74% to 11.318 dollars in 2013. Accordingly, the share of the furniture industry has increased in the national income and it has allowed the industry to receive the investments required for the growth of the industry. Considering that the annual furniture consumption per person is 40 dollars in Turkey, 75-80 dollars in Europe, and more than 100 dollars in the USA, however, one can tell that the industry has lack of demand [Anonymous 2012, Turkey Furniture Products Assembly Industry Report 2013]. According to the export data based on the countries of TUIK, the Turkish furniture export has increased by 15% to approximately 1.9 billion dollars in 2012 and the Turkish companies exported to 209 countries. It is remarkable that approximately 84% of the export is made to the first 25 countries. While there is a significant increase in the furniture import of Turkey from 738 million dollars in 2010 to 941 million dollars in 2011, there has been a significant decrease in import with 817 million dollars in 2012. According to this data, the export rates of Turkey based on the product groups display a significant increase. It draws attention that there is no regular increase or decrease in import.

YEAR	2007	2008	2009	2010	2011	2012*
PRODUCTION (Million $)	7.800	9.000	10.500	12.500	14.000	16.300
DEMAND (Million $)	6.600	7.500	8.500	10.000	11.000	12.300
EXPORT (Million $)	1.020	1.316	1.138	1.344	1.583	1.819
IMPORT (Million $)	657	696	518	738	941	817

Table 2: Basic Data for the Turkish Furniture Industry (Million $) (2012 data is temporary) [Turkey Furniture Products Assembly Industry Report 2013, TUIK 2014].*

Global trends and properties in furniture

The trend concept has a very broad extent and generally used for defining a behavior performed, action taken and technological development or a product expected by the majority of the society in fashion, technology or business fields during the last five to ten years, particularly during the last two years. For example, kitchen furniture trend, office furniture trend or mobile phone trend. The trend is mostly confused with fashion. One of the most fundamental reasons why this concept is confused with the word "fashion" is its impact on the masses. The most important difference between trend and fashion is time. While fashion covers events during a certain period of time, trend does not have such a limitation and even the changes in fashion are shaped with the influence of trends. In this case, fashion can be defined as an outcome of trend [Kurtoglu and Dilik 2014].

The use of vivid and striking colors and multi-purpose characteristics of the furniture can be listed as the most remarkable qualities of the trend determined in furniture during the recent years. It's also seen that the IT technology has an increasingly important place in the furniture world. In addition to their main intended purpose, the furniture has to have distinctive and remarkable properties. Actually, according to the visions of the furniture designers, almost everything in the house including seats, television and coffee table are now controlled remotely. Electronic parts placed inside the furniture, LED lighting technique saving energy and giving more light, and rubber derivative flexible construction materials are among the components frequently seen in this kind of furniture. Another current trend, quickly spreading as details that create a difference, is defined as "Global Style". This new trend, briefly meaning people transferring some designs they saw at the foreign countries during their holiday or in the media to their own living spaces, dominates the furniture and design industry, and also provides new opportunities to the industry [Kurtoglu and Dilik 2014, Imm Cologne 2014, Gaggenau 2015, Hafele 2011, Ergun et al. 2008]. In this context, the new trends expected to dominate the house furniture in 2015 with the impact of the global trends would integrate a single material to several different functions, feature environment-friendly designs, and decorate the walls, unusually big paintings and mirrors. It's also anticipated that integrating the multimedia systems into the decoration would become one of the outstanding applications. For example, designs covering the entire wall where the television is integrated into the wall board are expected to become popular over the usual television units on the wall (Picture 1).



*Picture 1: A house decoration example designed according to the global trends [*Blum 2015*]*

The solid wood, which was popular until the end of the 80s in furniture with the impact of global trend and then became less popular, is indicated to be used frequently with the impact of the ecological approach available in every field. Natural colors and natural finishes are preferred while adapting these furniture, which would create a rustic effect, from past to today. For the expected impact of the trends on the bedroom furniture, designing the bed together with the wall instead of bedrail appears as one of the most interesting approaches in the recent years with the use of materials in the entire design. As the retails customers increasingly look for more personal solutions, this naturally causes the furniture industry to generate innovative ideas. We particularly see a very rich

product variety for the kitchens. The collections now feature units with surface materials furnished with brand new patterns, as well as multisite and multiscope placement of Hi-Tech combining ease of use with energy efficiency. The life trends of the year 2014 indicate units with more flexibility and "smarter" functions, integrating modern flat screen televisions with interior architecture. For example, the target of the German kitchen industry appears applying these ideas, while determining good work flow, sufficient storage area and high movement comfort as three fundamental principles of a practical kitchen. Shortening the intervals between the purchases with easy replacement of the units when the designs become old fashioned also provides an advantage for the kitchen industry. As the new houses are mostly small and tight, they do not have a sufficient storage area. Therefore, several possible solutions such as better use of height and depth in the kitchens, where storage is required too much, are being developed [BLUM 2015, Gijs 2013]. About the impact of the global trends on the materials used in furniture; the effort on adapting the light materials, the indispensable material for the planes, ships and automobiles, into every field continues with full pace for a long time. However, it's been found out that this trend does not apply too much in the furniture industry, other than the exception of IKEA using light materials in high quantities. To date, the "lightness" factor did not trigger any industrial shift compelling the development of a new production technology. But this situation is expected to change with the furniture where materials with internal spaces, perfectly hiding the cables and connectors of lighting, home entertainment systems and electronic remote controls, are used. On the other hand, it's seen that the digital printing techniques, triggering innovation in every field with laser cut sidebands, are in forefront of the furniture industry with unlimited opportunities. But it's found out that this situation exposes the furniture industry to these questions: Who will carry out the printing job in the future? Decorators? Panel producers? Or furniture producers? Considering that all of them are investing to digital printing presses, one can say that the situation becomes increasingly unclear.

Summary and Conclusions

In our era where the needs such as quality and functionality stand out, the impact of global trends on the development of the furniture industry is clearly evident. The Turkish furniture industry has set the target of being the 10th biggest furniture producer in the world and 5th biggest furniture producer in Europe for the year 2023, 100th anniversary of the establishment of the Republic of Turkey. As in the development of the global furniture industry, following and anticipating the global trends appears to be important for the Turkish furniture industry in achieving the targeted development.

As a result, the impacts of the global trends observed on the development of the furniture industry can be summarized as follows:

- Emerging and spreading of modern electro-furniture equipped with technology as a requirement of the modern life.
- Reflection of smart house and green building on furniture. The increase in the importance of recycling and furniture wastes.

- Seeing smart furniture and environment-friendly furniture applications more.
- Quick increase of the human- and environment-friendly, light, functional, easily portable, modular furniture, which increase the life quality and provide ease of use in line with the urbanization and increasing housing understanding, in the global market.
- Suppliers attending to the design process more, stakeholders with specialties in different fields focusing more on joint design management works (furniture, electronic, IT technology, accessory etc.).
- Quicker development of advanced design skill, brand power, after-sales service quality effectiveness as the fields leading the growth in the industry.
- Developments in the fields of packing, packaging and transporting fields to increase the international action, facilitating the shipment of the products to distant regions, reducing the sales costs.
- Quickly increasing the use of dirt and stain free fabrics, leathers, environment-friendly sponges, paints and varnishes as a result of the reflections of nano-technology applications in the material.

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