

Turkey Carpet And Rugs - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

Turkey Carpet And Rugs Market Analysis

The Turkey Carpet And Rugs Market size is expected to increase from USD 2.17 billion in 2025 to USD 2.31 billion in 2026 and reach USD 3.35 billion by 2031, growing at a CAGR of 5.28% over 2026-2031.

Driving forces behind the steady trajectory include a weakened lira that improves export competitiveness, government-funded urban renewal initiatives that expand domestic replacement cycles, and ongoing premiumization that lifts average selling prices. Robust export sales, especially to the United States and the Gulf Cooperation Council, reinforce the industry's dual-engine growth model by buffering local slowdowns. Gaziantep's well-established machine-made cluster keeps production costs low and helps meet quick-turn foreign orders, while Istanbul's logistics advantages enable faster multimodal shipments to Europe. Meanwhile, investment in closed-loop recycling and solution-dyed synthetics positions suppliers to align with increasingly stringent sustainability requirements in key destination markets. Although competition from hard-surface flooring continues to pressure share in new builds, Turkish manufacturers mitigate the threat with differentiated texture, acoustic, and customization features.

Turkey Carpet And Rugs Market Trends and Insights

Rising Residential Renovation & Urban-Rejuvenation Projects

Publicly funded seismic-risk programs accelerate full-unit reconstruction schedules, thereby compressing traditional renovation

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cycles and generating bulk carpet tenders that exceed ordinary retail demand. Municipal coordination with contractors allows established manufacturers to secure multi-building orders, leveraging scale and flexible credit terms. The projects often specify complete interior packages, creating opportunities for higher-margin premium flooring in new up-market apartments. Neighborhood-wide rebuilding concentrates order volumes geographically, enabling cost-effective distribution and installation logistics. Moreover, compliance with updated safety codes enhances perceptions of quality, which supports upselling into stain-resistant or antimicrobial ranges. Because the initiatives span multiple provinces, they lessen regional sales volatility by staggering project timelines.

Surge in Exports to High-Value GCC & US Buyers

Currency depreciation sharpened price competitiveness, but exporters increasingly succeed through design agility rather than simple cost advantages. Turkish suppliers blend European aesthetics with Middle Eastern motifs to cater to both Gulf luxury consumers and U.S. trend seekers, capturing USD 784 million from American buyers in 2024. Brand-name U.S. producers such as Karastan outsourced area-rug lines to Turkish factories, evidencing trust in local quality and reliability. Repeat orders from GCC retailers validate the region's appetite for premium, culturally aligned designs. Exporters also benefit from preferential trade frameworks linked to Turkey's customs-union relationship with the European Union, which lends regulatory familiarity valued by North American partners. Higher per-unit pricing in these markets cushions margin pressures arising from raw-material volatility. Consequently, the Turkey carpets market continues to diversify revenue streams beyond continental Europe.

Volatile Crude-Linked Fiber Prices Pressuring Margins

Polypropylene and nylon costs fluctuate with global oil benchmarks, complicating quotes denominated in foreign currency while inputs are sourced in lira. Larger producers negotiate annual supply contracts or deploy financial hedges, but smaller firms lack the scale to absorb sudden spikes, forcing opportunistic inventory builds that strain working capital. Exporters face an additional layer of risk because extended shipping times lock prices for weeks before raw-material purchases settle. Recycling gains only partially offset volatility because secondary feedstock volumes remain limited relative to total demand. In response, stakeholders lobby for state-backed hedging facilities and greater transparency in domestic petrochemical pricing. Persistent commodity swings could suppress the headline 4.39% CAGR if mitigation measures fall short.

Other drivers and restraints analyzed in the detailed report include:

Shift Toward Polypropylene & Solution-Dyed PET for Cost Efficiency
Government Incentives for Gaziantep's Machine-Made Carpet Cluster
Competition from Hard-Surface Flooring Alternatives

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Tufted offerings commanded 67.12% of Turkey carpets market share in 2025 because rapid needle-punch loops enable cost-efficient mass production and reliable quality for large residential projects. Economies of scale within Gaziantep's cluster drive unit costs lower than imported alternatives, reinforcing domestic preference. Woven constructions retain niche appeal in mid-range hospitality, as their dimensional stability supports high-traffic corridors, while needle-punched variants serve technical sectors like automotive trunk liners. Yet knotted and hand-knotted rugs are forecast to grow at an 8.35% CAGR, fueled by revived consumer interest in authenticity, storytelling, and long-term value retention. Digital channels allow artisans to reach affluent diaspora buyers, sustaining community livelihoods and preserving cultural motifs. Consequently, suppliers balance high-volume tufted lines with small-batch handcrafted collections to capture both ends of the price spectrum.

Knotted production remains labor-intensive, with lead times stretching several months, yet premium gross margins justify artisan training programs subsidized by local chambers of commerce. Middle-income homeowners increasingly mix statement handmade pieces with machine-made runners, expanding addressable demand beyond elite circles. Manufacturers experiment with semi-mechanized looms to speed weaving while preserving irregular texture sought by collectors. Flat-weave kilims evolve into wall art and upholstery fabric, broadening applications outside conventional floor covering. Retailers curate limited editions, fostering urgency and higher turn rates per square meter. Such hybrid product portfolios improve resilience against macro shocks, ensuring the Turkey carpets market maintains both volume stability and premium upside.

The Turkey Carpet and Rugs Market is Segmented by Product Type (Tufted, Woven, Needle-Punched, Knotted/Hand-Knotted, Others), End-User (Residential, Commercial), Distribution Channel (B2B/Direct, B2C/Retail), and Geography (Turkish Regions). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Merinos (Erciyes Holding) Dinarsu (Zorlu) Royal Hal Festival Hal kasmir hal? Saray Hal Yasin Kaplan Carpet Sanko (Isbir Sentetik) Eko Hal Balta Group Mohawk Industries Shaw Industries Tarkett Interface Milliken & Co. Oriental Weavers Atlas Carpets Kaplan Kardeler Ravanda Carpet Bayteks

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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