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A S T U D Y O F T R A D E C H A N N E L S  
I N T H E  
T E X T I L E I N D U S T R Y

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## CHAPTER I

### INTRODUCTION

The definition of the problem to be analyzed here is: " A comparative study of Trade Channels in the Textile Industry of Private and State Sectors".

It is a comparative treatment of the trade channels used by private and state sectors in the textile industry. It embodies the institutions in the trade channels and their practises.

Today one of the major policy decisions facing any manufacturer is that of determining the channels of distribution that he will use in marketing his products. The Channel of distribution problem has become the heart of marketing. This policy decision has to be analyzed from three different aspects. First, in deciding the channel, the type and/or kind of outlets must be determined. Second, the number of outlets are important. Third, the cooperation to be provided to those outlets and to be received from them should be stated and specified.

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In consideration of these aspects this paper is restricted to the manufacturers mainly since these are primary problems of manufacturers. So, as to make a comparative study Sümerbank Complex is taken as the manufacturer in the State sector and five private firms from Istanbul area and two other private firms from Adana area are taken to represent the manufacturers of the private sector. These are, "Santral Mensucat", "Akfil", "Bozkurt", "Akin Tekstil", "Altinyıldız" from Istanbul and "Bossa", "Güney Sanayii" from Adana region.

The topic as to its nature is limited in some sense. That is only one section of marketing function is analyzed. It is further limited in the sense that neither marketing nor its parts as a notion are clearly understood by most of the Turkish entrepreneurs.

It is unfair to say that there is no practice or a development towards it but it is very new. Therefore; it was hard to get detailed information. Another difficulty arose from the lack of cooperation on the part of the person whom you are interviewing. It is by no means an unfriendliness but just a reluctance to talk about their business.

The paper is limited mainly to Istanbul area.

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But information on few Adana manufacturers is included. With respect to product, the paper is concerned about textile manufacture only. The second chapter gives general information on the textile industry. The shares of the market of private and public sectors are specified. This chapter includes the cotton, woolen and silk textile manufacture development in Turkey at present. In the third chapter the institutions in the channels that are the wholesalers and retailers are examined. In the fourth chapter the private sector manufacturer's policy of trade channels are examined. Information on the sales organization and policy of the firms are given. The fifth chapter contains the same information as in chapter 4 but about the state sector. In the sixth chapter & seventh chapters general conclusions and recommendations as to the subject are given.

The methodology used throughout the work was mainly interviewing. In addition to it both published or unpublished material on the textile industry by the Chambers of Commerce & Industry and certain company reports, government reports were used. Very few of the material was in English. The interpretation of the Turkish data is made by me. The copies of questionnaires used in interviews are prepared again by me..

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Since there was almost no written material on the trade channels policies, that information is wholly based on oral data. This work can be counted as a pioneer work in its limited sense since there was no other study made in the same context.

## CHAPTER II

### GENERAL OUTLOOK OF THE TURKISH TEXTILE INDUSTRY

#### Present Capacity and Actual Production

In order to understand the situation of the Turkish Textile Industry, certain figures as to raw materials and production will be given in this section.

In our country the private textile plants are gathered mostly in Adana, İstanbul and İzmir. Very few of these plants were established according to scientific productivity requirements. According to the international productivity standards those establishments having less than the minimum 30,000 spindles and 800 looms are considered far from being economic. Considering this fact, all of the private textile plants with the exception of one were established under the minimum productivity measures.

The reason for this fact is that the Government during the last fifteen years has been very permissive with respect to the import of industrial equipment. The entrepreneurs, encouraged by this attitude, and already under the influence of high domestic demand have established such plants without considering the future conditions. In doing so, they

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have also made use of the easy bank credits.

With the influences of inflationary forces in the economy the afore-mentioned establishments have increased in number to 115 and their capacities have reached to the level which are shown on the table below: (for cotton textiles)

TABLE I:

THREAD	Spindles (number)		
	Public	Private	Total
At Present:	212,888	550,580	763,468
Being set up:	--	59,416	59,416
Total:	212,888	609,996	822,884
	Production Capacity (Tons)		
At Present:	27,675	71,575	99,250
Being set up:	--	7,725	7,725
Total:	27,675	79,300	106,975
TEXTILE	Looms (number)		
At Present:	4,660	11,148	15,808
Being set up:	1,927	--	1,927
Total:	6,587	11,148	17,735
	Production Capacity (Tons)		
At Present:	163,100	390,180	553,280
Being set up:	67,445	--	67,445
Total:	230,545	390,180	620,725

Source: T. İş Bankası, İktisadi Araştırmalar Müdürlüğü; Türkiye'de Pamuk İpliği ve Pamuklu Dokuma Sanayii Hakkında Rapor, 1966, p.5

Coming to the actual production: "The 12% of the thread manufacture of Turkey is used in manufacture of sewing thread, in carpet weaving and in tricot knitting and the rest

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88% which amounts to 94,138 tons is used in the cotton textile industry. If we accept on the average of 125 gram/meter leakage (2.5%) the above figure is almost equal to 734,280,000 meters."<sup>1/</sup>

The beginning capacity of the weaving plants is 620,725,000 meters and since there is not an excess thread stock in the market, the difference between the thread manufacturing capacity and the weaving capacity is used by the hand-loom. The figures as to cotton textile manufacture in our country, excluding those woven by the hand looms, are as follows:<sup>2/</sup>

	Million meters
1957	496.3
1958	674.3
1959	763.3

However these figures are not very reliable because in certain parts double counting have been made, i.e. one kind of cloth had been measured both at its raw stage and after it had been exposed to certain treatments.

There is one thing which is certain, that is the total capacities of present plants are above the normal demand for cotton textiles. In order to verify this sentence, the estimated figures of National Income and private consumption can

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<sup>1/</sup> The Union of Chambers' Report, August 1960, Page 4

<sup>2/</sup> The Union of Chambers' Report, August 1960, pp. 5-6

be made use of.

The average figure spent for clothing according to the American and European norms is 14% and the share of the cotton textile in this amount is 5.1%. According to this calculation 1,647 million lira of 32.3 billion TL is spent for cotton textile consumption.

Assuming an average retail price of 3.00 TL for one meter of cotton textile this sum corresponds to 549 million meters which is 185 million meters less than the above mentioned production figures of 734 million meters. In ~~another~~ words, there is an excess capacity in the private sector about 185 million meters.

#### The Consumption Situation

If we assume that the population of Turkey is around 31 million at present the cotton textile production per head is about 21.1 meters and the consumption per head is about 18.3 meters; so we see a production excess of 2.8 meters. It is doubtful whether this productive capacity can fully be utilized by a reduction in prices. Consumption will not increase in the same proportion that prices are reduced and moreover certain difficulties will arise due to its application. In reality, even those plants which are working in accordance with the productivity basis are selling at minimum profit rates. Any reduction in prices will force those firms which are not productive

to leave the market. Although these will be forced to leave the market slowly, their sudden withdrawal may not be desirable. It seems that the production excess of 2.8 meters per head be shifted to export.

### The Raw Material Condition

Including all the regions, the cotton production in our country is as follows:

TABLE II

<u>Years</u>	<u>Tons</u>	<u>Index (1948-1952=100)</u>
1956	165,000	
1957	135,000	
1958	180,000	
1959	190,000	151.1
1960	192,000	159.5
1961	212,000	161.2
1962	245,000	178
1963	246,000	205.7
1964	326,000	200.6

Source: Konjonktür, Ocak-Aralık 1965

The cotton export, on the other hand is as follows:

TABLE III

<u>Years</u>	<u>Tons</u>
1957	60,629
1958	34,468
1959	97,488
1960	80,039
1961	89,709
1962	104,754
1963	134,934
1964	151,609

Source: Konjonktür, Ocak-Aralık 1965

The cotton production being in line with the international standards, and a premium of 6.20 TL being granted to the cotton export have stimulated both the export activities

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and raised the domestic prices. On account of this, the cotton required as raw material is bought at higher prices. The cotton producer takes advantage of this high selling prices and prefers to sell on credit basis in order to further increase the price. Thus, this increases the prices of manufactured goods because the manufacturer includes this high price in his costs. This is a point which requires close attention.

In our country, every year at the time the new crop is taken, the cotton prices decrease to the level of world prices. However, on the one hand there is the raw material requirements of the domestic factories which lead to the withdrawal of cotton in large amounts from the market, and on the other hand there is the cotton export. As a result, the price of cotton increases and export ceases. This is because the cotton is no longer in the hands of the manufacturer but in the hands of the speculators. Under such circumstances, export is only possible if measures are taken by the Government, to keep the prices at the level where the cotton first came into the market.

In order to maintain a reasonable price level, an intervention by the Government may be thought of. Such an intervention can be undertaken by the Agricultural Sales Cooperatives. Although the Government may play a regulatory role in the case, it may also present certain unfavorable effects as experienced in the other fields of etatism. Apart from this,

another remedy can be thought of. For example, imports of low quality cotton can be undertaken in order to meet the domestic demand and thus to avoid the price increases. Such low quality cotton can be used in the manufacture of cotton-flannel and the like, which are medium-coarse fabrics. Hence, an import of low quality cotton will enable the country to export "Akala" cotton and gain foreign exchange due to price differences.

### Raw Material Prices

The capital structure of the private firms are not very strong. Since they are not able to make allocations from their capital structure for working capital, they have to meet this need by short-term commercial loans at high interest rates. Since the cost of capital can be added onto the cost of production these enterprises do not pay much attention to cost of financing which effects the selling prices to a large extent. As a result the goods are introduced at a high price to the market.

For this industry, May, June and July are not very active months from the point of sales. The sales activity starts in August and continues to increase until February but decreases from the end of March and onward.

In Adana Commodity Exchange, the average price of "Akala I A" cotton is about 5.47 kuruş for cash sales and 6.15 kuruş for credit sales in April. In May, this monthly average

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is 5.45 kuruş for cash sales and 6.40 kuruş for credit sales. There are certain transactions where the price is about 4.80 kuruş.

In İzmir Commodity Exchange, the average selling price of Akala I A in April is about 6.20 kuruş for cash sales and 6.60 kuruş for credit sales. Almost the same average prices hold for May too. In June there is always a slight decrease in prices and this continues until the beginning of July. Sometimes in July the average price may go up as far as 6.05 kuruş for cash sales and 6.10 kuruş for credit sales.

There is one interesting point, however, the export price does not vary much although there are slight differences between the prices in the two Exchanges. Usually the CIF price in İzmir Exchange is about 66¢/kg. and FOB price in Adana Exchange is about 58¢/kg.

After giving a background information on the raw material situation of the cotton textile industry, it will be easy to examine the actual textile industry.

The following table shows the number of textile plants and the number of spindles and looms in various regions:

TABLE IV

	<u>No. of Plants</u>	<u>No. Of spindles</u>	<u>No. of looms</u>
Istanbul Region	74	162,464	3,972
Çukurova-Hatay	14	181,176	3,190
Ege Region	16	81,154	2,045

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	<u>No. of Plants</u>	<u>No. of spindles</u>	<u>No. of looms</u>
Mid-Anatolia	7	26,660	696
Other Regions	8	13,948	636

Source: T. İş Bankası, İktisadi Araştırmalar Müdürlüğü, Tekstil Sanayii Hakkında Rapor, 1965, p. 4

In the public sector these plants in the textile branch are gathered under the direction of Sümerbank. Sümerbank is a State Economic Enterprise whose capital is wholly owned by the state.

The following table shows the factories manufacturing thread and various textiles which are affiliated with Sümerbank (1963):

TABLE V

<u>Name of Factory</u>	<u>No. of Spindles</u>	<u>No. of looms</u>
Kayseri	35,880	1,105
Adana	10,100	322
Malatya	25,200	716
Nazilli	29,236	828
İzmir	32,644	864
Denizli	36,584	504
Erzincan	15,080	320
Ereğli	24,016	383
Bakırköy	29,160	455
*Antalya	21,600	360
*Bergama	12,000	144
*Manisa	21,056	238

\*Not wholly owned by Sümerbank

Source: Türkiye'de Pamuk İpliği ve Pamuklu Mensucat Sanayii, Ticaret ve Sanayi Odaları Birliği, Ankara, 1963, p.44

The following table lists the factories in whose capital Sümerbank participates:

TABLE VI

Name of the Factory	Share of Sümerbank (%)
Balıkesir	19
Aydın	15
Bergama	54
Manisa	65
Antalya	43
x Karaman	58
x Maraş	65
x Adıyaman	92
x Eskişehir	75
x Nevşehir	75
x Not yet in operation	

Source: T.C. Maliye Bakanlığı, Kamu İktisadi Tesebbüslerine Ait Özel Rapor, Cilt I, 1961, p. 238

At present in our country, there are 10 factories in the Public sector and 104 in the Private sector. The capacities of each sector is as follows:<sup>1/</sup>

	Thread (Tons)	Textile (meter)
Sümerbank and Participations	26,474	150,589
Private Firms	64,047	361,286
TOTAL	90,520	511,885

The following table shows the distribution of the number of spindles in Turkey in 1963:

<sup>1/</sup>These figures are of 1964 figures. They have been obtained during the interviews by the Sümerbank people.

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TABLE VII

No. of Spindles	No. of Factories	Spindles	Average No. of spindles	%
1- 5,000	24	52,066	2,170	6.20
5,001-10,000	27	190,968	7,073	22.78
10,001-15,000	9	99,428	11,048	11.86
15,001-20,000	5	89,288	17,858	10.64
20,001-25,000	6	129,428	21,571	15.44
25,001-30,000	4	112,116	28,029	13.36
30,001-35,000	3	92,840	30,946	11.08
35,001-40,000	2	72,464	36,232	8.64

Source: T. İş Bankası, İktisadi Araştırmalar Müdürlüğü, Türkiye'de Pamuk İpliği ve Pamuklu Dokuma Sanayi Hakkında Rapor, 1966, p.5

The next table shows the distribution of the number of looms in Turkey by 1963:

TABLE VIII

No. of Spindles	No. of Factories	Looms	Average No. of looms	%
1- 100	93	2,219	24	11.02
101- 200	19	2,751	145	13.66
201- 300	9	2,317	257	11.50
301- 400	10	3,429	343	17.02
401- 500	4	1,845	461	9.16
501- 600	3	1,688	563	8.38
601- 700	1	619	619	3.08
701- 800	1	716	716	3.56
801- 900	3	2,535	845	12.58
901-1000	1	913	913	4.54
1001-1100	-	-	-	-
1101-1200	1	1,105	1,105	5.48

Source: T. İş Bankası, İktisadi Araştırmalar Müdürlüğü, Türkiye'de Pamuk İpliği ve Pamuklu Dokuma Sanayi Hakkında Rapor, 1966, p. 6

If the recent statistics of Turkey are examined, it is possible to observe that there are 33 million sheep and

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the production of uncleaned wool is around 45-46 thousand tons/year. The value of this is 222,007,000 TL ( with 1959 production figures) and occupies 10% of the farm sector in the National Income. More than 90% of the production is coarse wool. The number of sheep which yield the merino wool needed for the Kamgarn industry is 450,000. There are two points to be noticed here:

- 1) 39-40 thousand tons of coarse wool produced for Streichgarn industry is consumed in the domestic market. The remaining 6-7 thousand tons should be exported under normal conditions.
- 2) The merinos wool needed for the Kamgarn industry is about 7,500 tons and it is imported. ( \$ 20,500,000 have been paid for the import of this amount in 1959.)

The production of wool for the last 12 years both in our country and in the world is shown in the below two tables:

TABLE IX

Wool Production in Turkey (Uncleaned)  
(Tons)

<u>Years</u>	<u>Production</u>
1950	30,491
1951	33,080
1952	35,323
1953	36,916
1954	36,144
1955	36,726
1956	38,608
1957	40,151

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<u>Years</u>	<u>Production</u>
1958	41,950
1959	46,445
1960	47,359
1961	42,000

## The World Production (Million Pounds)

<u>Years</u>	<u>Turkey</u>	<u>World</u>	<u>Merino</u>
1934-1938	52	3,788	1,579
1955-1956	81	4,904	1,900
1956-1957	85	5,102	2,081
1957-1958	88	5,047	2,042
1958-1959	92	5,347	2,211
1959-1960	102	5,599	2,328

Source: T. İş Bankası, İktisadi Araştırmalar Müdürlüğü,  
Yapağı Hakkında Rapor, 1961, pp. 8-9

Turkey comes first among those countries where the number of sheep per kilometer square is the highest. ( 37 sheep/km<sup>2</sup> in 1956) However, the yield per sheep is very low with respect to the other countries due to malnutrition. Especially, after the Second World War the yield in some countries increased a great deal. For example, in Australia, an increase of 31% has been observed in the number of sheep and a 57% increase in wool production. These rates for New Zealand are 40% and 68% and for South Africa 1% and 23% respectively. For Turkey these percentages have moved in the reverse order. Although the number of sheep increased by 80% the wool production could only increase by 63%.

In the world wool production there is a 5% increase

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if the two periods of 1958-59 and 1959-60 are considered. 6% of this increase came from the increase in merino wool. The sources of the increase in the general production are the increase in Australia and New Zealand.

In the recent years, the wool consumption shows a continuous increase. There is a stability in the purchases of both the private and Sümerbank factories. At present, there are 5298 looms. 1281 of them are in the factories and 3988 of them are in individual hands. The following table shows the manufacture of woolen textile from 1950 to 1960:

TABLE X

Woolen Textile Manufacture  
Meters (Add 000)

<u>Years</u>	<u>Production</u>
1950	6,004
1951	8,842
1952	6,262
1953	6,521
1954	8,021
1955	8,581
1956	7,934
1957	10,088
1958	12,237
1959	30,000

Source: T. İş Bankası, İktisadi Araştırmalar Müdürlüğü,  
Yapığı Hakkında Rapor, 1961, p. 12

52% of the present looms are used in weaving the rough Streichgarn, 11% in thin Streichgarn and 37% in kamgar. The total capacity of the present looms is 91,000,000 meters

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As can be observed from the table the industry is operating below the capacity. This is especially present in the Kamgarn industry.

Kamgarn industry is operating at a 3.3% capacity. On the other hand, Streichgarn is operating nearly at 82% capacity. Our yearly rough Streichgarn need is around 39 thousand tons since the production is about 45 thousand tons there is an excess supply of 6-7 thousand tons. This amount is exported.

Our yearly merino wool production is 400 tons which is far from meeting the need of the Kamgarn industry which is 7,500 tons. Therefore, every year merino wool is imported. The following table shows the amounts imported from 1955 to 1960:

TABLE XI

<u>Years</u>	<u>Import (Tons)</u>
1955	2,143
1956	1,846
1957	2,262
1958	3,237
1959	7,500
1960	5,528

Source: Odalar Birliđi, Yün Sanayi Hakkında Rapor, 1961, p. 56

After 1954, when foreign exchange shortage began the exact amount of merino wool could not be imported. Due to this impossibility a certain kind of rough wool which is

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quite similar to merino wool was started to be used in the Kamgarn industry. Especially this was the situation in 1957-58 and had caused the prices to increase very rapidly. This condition led to the 1959 crisis. In 1959, imports started again but the producers with a speculative attitude withheld their products expecting higher prices. However, the domestic demand was met by imports and thus the producer was left in a bad condition.

It is evident that Turkey has to import high quality wool in order to manufacture good quality woolen textiles. A large portion of the domestic wool production is used in the manufacture of blankets, in carpet thread and in the cloth used by the armed forces.

On the other hand the import of wool is controlled since 1955. The stocks at hand are not enough for the factories to work at full capacity. Also the import of woolen textiles and Kamgarn products are controlled and limited.

In 1960, merino wool was imported at 91-99 penny/lbs (1,82-1,98 dollars/lb) Good quality woolen and the Kamgarn textiles' retail prices are around 16-17 US Dollar/pound. These retail prices have no relation to cost of production. They reflect the market conditions.

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Due to restrictions on wool imports, the market value of domestically produced wool qualities have risen. The price of domestically produced wool per pound is a triple of the world prices for wool, i.e. it is 60.- TL/pound. A lower quality wool is 12.- TL/pound. this is numbered as 50-56 quality wool. The price of 48-50 quality wool which makes up 60% of the domestic production is around 14 TL/lb.

In our country the only enterprise which produces synthtic silk is owned by Sümerbank which is named "Sümerbank Gemlik Sun'i İpek ve Viskoz Mamulleri Sanayi Müessesesi". This factory was established in 1938 in order to satisfy the demand of the time. The factory produced 1 ton of rayon filament per day. Later it was observed that the demand was exceeding supply and thus the capacity of the factory was doubled in 1949 by adding a complete line of Viscon machine.

At present , the factory produces 1,5 ton rayon filament per day, 1,8 ton Viscon-staple fiber, 0.7 ton selon and 1400 kg sulphric carbon per day.

Sulphric carbon is one of the raw materials needed for the Gemlik factory therefore the factory owns a seperate plant to produce sulphric carbon. This plant produces 450-

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500 tons of sulphric carbon per day. This amount is adequate for the need of the Gemlik factory and the surplus is sold in the market.

Gemlik synthetic silk factory is a small factory. The machinery and equipment used are very old and they have been in operation since 1937. The innovations and technical developments in those fields were not adopted by the Gemlik factory.

The quality of rayon produced does not satisfy the need of the market. The production is not efficient since the machinery used requires more workers to be employed which leads to an increase in costs.

The quantity of rayon produced in Turkey is 0.03% of the world production and ranks last among the European countries which produce rayon. The United States ranks first, Japan second, United Kingdom third in the total rayon and acetate production.

Since production is very inefficient in Turkey, the production is not able to satisfy the total demand and the gap is covered by imports.

Those mills which use silk-cocoon are gathered in

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those areas where silk-worms are fed. These areas are in and around Bursa. Those cocoons which are produced in other parts of Turkey are brought to Bursa.

The plants established around Bursa and Istanbul to produce natural silk have started using synthetic silk raw materials since the raw material of natural silk was not enough to satisfy the demand and was also very expensive.

Since the living standard has increased today, the demand for silk materials has increased also. On the other hand although the present silk production plants cannot procure the raw materials which will satisfy the demand have increased in number. As a result, since the import of machinery and equipment for these plants is hard, certain machinery and equipment are manufactured domestically. Hence, in Bursa, Istanbul, Gaziantep, Izmir such plants have been established.

The following table shows the production of silk textile plants in 1955:

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TABLE XII

City	Silk Production			
	No. of Plants	No. of Looms	Synthetic silk (Mt.)	Natural Silk (Mt.)
Bursa	442	3860	10,827,854	190,607
İnegöl	8	56	114,951	---
İstanbul	31	448	997,318	877
Tosya	1	11	12,700	---
Denizli	11	4936	12,800	---
İzmit	1	17	1,000	---
Aydın	13	1220	--	---
Milâs	1	119	--	---
Manisa	1	436	--	---
Kütahya	1	4	--	---
Mardin	1	12	43,200	---
Konya	26	63	--	---
Gaziantep	85	2439	--	---
Kilis	23	616	--	---
Urfa	--	205	42,200	---
Diyarbakır	--	---	30,000	---
TOTAL	633	---	12,081,303	191,488

Source: T. Ticaret Odaları, Sanayi Odaları ve Ticaret Bor-saları Birliği, Türkiye'de İpek ve İpekli Mensucat Sanayii, 1958, p. 59

The rayon consumption in Turkey has started to increase since 1948. In 1947 the cocoon prices showed considerable increase which could not be attributed to any known cause. The prices went up to a level which can be stated as a record. As a result of this the difference between natural silk prices and rayon prices has increased. Thus the situation led to a depression in silk business and the Bursa factory stated production of rayon in large scale.

Hence 1948 is the beginning of a new era in rayon

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consumption. Since 1948 the consumption of rayon is increasing.

When the table below is examined it is possible to see that the silk consumption per head is below the woolen and cotton textile consumption per head.

TABLE XIII

	Textile Consumption per Head (Kg)					
	1950	1951	1952	1953	1954	1955
Cotton Textile	2,10	2,40	2,50	2,68	2,77	2,86
Thick Woolen	0,92	1,04	1,07	1,17	1,15	1,02
Thin Woolen	0,17	0,18	0,13	0,28	0,28	0,09
Synthetic Silk	0,06	0,08	0,08	0,10	0,10	0,10

Source: T. Ticaret Odaları, Sanayi Odaları ve Ticaret Borsaları Birliği, Türkiye'de İpek ve İpekli Mensucat Sanayii, 1958, p. 90

In order to protect domestic natural silk production and the Gemlik factory, the Government had taken some precautionary measures. These measures had certain unfavorable effects rather than favorable effects which hindered the development of silk industry.

In summary we can say that, there are 20 private firms engaged in natural silk production in our country.

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These factories are in Istanbul, Bursa, Bilecik and Adapazari. In 1955, 104,058 kg. natural silk was produced by these plants and 445,138 kg. synthetic silk was produced in Gemlik factory which is wholly owned by the state. The synthetic silk factory is inadequate in producing the raw material for silk industry. Although the production of natural silk is possible the rise in price of cocoon in recent years has led produces to be expensive and thus the natural silk fabrics are no more consumption goods.

It is not possible to make a sound demand projection in our country for silk. The quantities domestically produced and imported can give only an idea about the consumption. We can roughly say that those looms which weave silk, the stocking plants and the tricot plants need 5000 ton synthetic silk annually if we say they work 8 hours/day and 300 days/year.

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## CHAPTER III

### INSTITUTIONS IN THE CHANNEL

#### Nature of the Institutions in the Channel and the Channel Alternatives

There are two major groups of middlemen operating in the textile channel of distribution. These are wholesalers and the retailers. Mostly these middlemen take title to the goods they handle. So, in general, a statement can be made as to most of the middlemen operating in this channel are "merchant middlemen". Both the wholesalers and the retailers in the channel can be listed under this heading.

The wholesalers in the channel have an organized association by the name of "Wholesalers' Association". At present, there are about 1000 wholesalers in the market. This number includes all the wholesalers working in the different channels of distribution. But only 300 of them are registered at the Wholesalers' Association. Therefore, it is hard to get an exact figure for these wholesalers who are operating in the textile channel of distribution. It is said that they are about two-hundred.

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Although the aim in establishing the Wholesalers' Association was to help them in every respect such as carrying on market researches, giving financial aid, helping with transportation and some other similar functions, their aim had not been realized fully. This is due to the lack of interest on the wholesalers' part and the lack of funds on the Associations' part. However, it is only a newly organized association so there is still hope that it will get better in the coming years.

At present, the Association has a Market Research Department. This Department tries to gather information and related numerical data both about the wholesale market covering Turkey and also about the Anatolian wholesalers. So, whenever a wholesaler wants to do business with an Anatolian wholesaler, he can consult the Department about his financial position, his selling territory, promptness of payment and about some other similar things. It is the only Department which is functioning properly. It seems that this function is one of the most important functions so, in the coming years it will be better and the Association will give better aid. This is being worked on. In this Department all the information on the wholesalers and all the records are confidential so anyone doing a research

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can not get exact data from them about the wholesalers.

The wholesalers are also registered at the Chamber of Commerce. The Chamber of Commerce had classified the wholesalers with respect to their annual sales. There are four classes. The first class, the second class, the third class and the fourth one is the one above the first which is named the "extraordinary class".

The retailers, on the other hand, do not have an organized association. They are only registered at the Chamber of Commerce. There are, at the present 1927<sup>1</sup> retailers operating in the textile market, 242 of them are in the woolen textile market and the rest in the cotton and silk textiles markets. The retailers are also classified by the Chamber with respect to their registered capitals. Their classification is same as the wholesalers'.

The textile market consists of mainly these two middlemen. There are also manufacturers' agents who act like a travelling salesman trying to introduce their textiles to the wholesalers and retailers.

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1/ The figures are given by the Industry Department of the Chamber of Commerce.

These agents are very few in number. These agents even, sometimes, go to individual customers. This is discussed in chapter II in more detail.

The textile channel of distribution is the one which is referred as customary channel for consumers' goods. The goods follow the route of Producer to Wholesaler to Retailer to Consumer.

Now the institutions will be discussed individually.

## Wholesalers

Wholesalers are those institutions who buy from the manufacturer for the purpose of resale. As in every channel of distribution, the wholesaler in the textile industry, too, is an essential middleman between the manufacturer and the retailer.

Nowdays the wholesaling function is losing its importance with respect to the earlier times. This has two reasons. First, now the textile plants started to sell directly to the retailers and secondly, they have established their own retail stores. This point can be considered in

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favor of the ultimate consumers since it will cost less for the consumer because the cost of wholesaling is eliminated. Looking it from another point of view, thus in the distribution channel of textile industry the retailers are assuming more of a responsibility and probably in the near future will hold more important position than the wholesalers.

However this is only the present tendency in the channel and it is important to note the fact that it is not of a strong trend yet. It can be considered as a beginning of a new phase in the development process of distribution channels. Furthermore, it is only a point to show difference between the past and the present.

Another interesting point which is also in relation to the above one is that no more the Anatolian merchant comes to Istanbul to buy goods. It was a traditional activity that the Anatolian merchant coming to the big cities which are Adana, Izmir and Istanbul and buying their needs. These three cities are the market centers for textile industries. Now, instead, the Anatolian merchant places orders to the textile plants themselves. At the time the market is open which is at the beginning of August, their demand is directly fulfilled by the manufacturer. Only small-scale merchants from Anatolia who

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have lesser amount of demand come to the big cities. The manufacturers fill only those orders which are of substantial amount. This point will be referred more detailly in the next chapter where the activities of manufacturers will be discussed.

Therefore; it is seen that this also reduces the activities of the wholesalers. In the past the channel consisted of more members as the following: Manufacturer \_\_ Large Wholesaler (Istanbul) \_\_ Anatolian Wholesaler \_\_ Retailer \_\_ Consumer. At present, for the sales to Anatolia, the large wholesaler is almost excluded from the channel. Even in some cases the Anatolian wholesaler is eliminated because there are retail establishment of large size which perform both the wholesaling and the retailing functions. This is an exceptional case because such a retail outlet requires large amount of capital but these are specific cases which exist today.

In general, it is possible to distinguish between two kinds of wholesalers in the textile distribution channel. One, are those who only carry on wholesaling function. That is buying from the manufacturer for the purpose of resale.

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These further can be subdivided into two and one will be those carrying on retail function and the other those who do not. The second type of wholesalers are those who also do manufacturing. These in the channel are called in Turkish "amil"<sup>1</sup>.

This group, too, can be divided into two. One will be those whose manufacturing & wholesaling functions are carried by two different organizations or companies but owned by the same person or by the same group of people. The other is that both the manufacturing and the wholesaling functions are carried by one company. Such a distinction is necessary to make because the reason of establishing two companies by the same group of people is due to tax regulation. When the companies' functions are enlarged, they are included in a higher tax bracket. In order to evade it the remedy was to establish two separate companies. From the legal point of view these two companies are perfectly two legal entities but, financially they are not very different from each other.

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1/ There is not an exact translation for the word. Later in the chapter their function will be explained and the word will have a clear meaning.

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Geographical dispersion of the wholesale institutions show us that almost all of them are gathered at the same locality in Istanbul. This is Sultanhamam. This place is the market place for the wholesalers of the textile industry. However, the retail institutions do not show us the same pattern. They are well dispersed over the city. Moreover, this pattern does not hold true when the country as a whole is considered. Because in the large Anatolian cities there are not more than two or three wholesalers. In those cities where there is a textile plant, the wholesaler does not have much of function because retailer can directly buy from the factory. The wholesalers in those areas work as to sell to the region. They do not have much business in their own cities. They are sometimes called the "regional wholesalers"<sup>1</sup>.

Most of the wholesale institutions are established as general partnerships. They are usually family companies. Nonfamily partnerships are rare. They are either "The Father and Sons" or "The Brothers ....". In case of "The Father and Sons" the largest share of the capital is owned by the father. In the other case it depends.

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1/ They are known as the "Sectional Wholesalers" in the Western countries.

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It does not follow a definite pattern, either one partner has the largest share or they all have equal shares, As it is known in the general partnership type of companies at least two partners are required by law to establish that company.

Some of the wholesalers operate in accordance with supply and demand and some do not. However in most cases supply and demand are not in equilibrium. There is always an excess of supply and a shortage of demand . This forces the wholesalers to keep their stocks. The textile market is one of those which is quite uncertain and effected by the economic and political instabilities. Those group of wholesalers who only carry on wholesaling function watch more closely the forces of demand and supply. The demand is calculated according to the needs of the retailers.

Those wholesalers who only carry on the wholesaling function are sent catalogs by the textile factories which contain samples of cloths that they manufacture. The wholesaler send these catalogs to the retailers who have before asked for certain kind or had orders. Afterwards the orders are placed by the retailer to the wholesaler and than to the manufacturer. Apart from this, sometimes the retailers can have special orders.

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In such cases the wholesaler communicates the order to the manufacturer and asks for specifications. If both the retailer and the wholesaler confirm the specifications the order is placed.

In cases of where the wholesaler is also a manufacturer which can be referred as "integrated wholesalers"<sup>1</sup>, those cloths manufactured by themselves are sold by themselves only. It is better to call those who have established one company for both the manufacturing and for the wholesaling functions, an "integrated wholesaler" since the other kind which has two seperate companies established, act just like a manufacturers' sales branch. Because an individual customer can come up to these stores and place orders as well as retailers.

These "integrated wholesalers" are usually large-scale wholesalers and they have no retail sales. Some of these do not have their own weaving looms but they either rent or let others who have looms do the fabric for them. This way the weaving costs less than when they do themselves.

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1/ "integrated wholesalers": it is a phrase which has been recommended by me in order to differentiate the two types.

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This is because these people who own looms do not pay either income or corporations taxes due to being classified as not professionals. Secondly, their working hours are not limited. They do not have to work for eight hours per day. At the same time they work on it themselves, it is a kind of family business. It is possible to see either the father or the son weaving. Thirdly, these people charge price per meter which is inexpensive. Also, there is the fact that if they charge a high price, they know that they will not be able to do business any more because the competition among these small craftsmen is fierce.

Low cost is one reason why manufacturers prefer these individual weavers. Another reason is that during certain months of the year, the work is dense so they have to hire additional looms.

In most cases, these integrated wholesalers go further and have the finishing for the material done at some other place. So, it is seen that wholesalers who do not own a manufacturing plant can also go into manufacturing business by either hiring looms or having the cloth woven and have the finishing made at different places. In this case they only have the thread made by themselves.

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These wholesalers have the trouble of not adjusting the supply and demand. Most of the time the demand is uncertain and can not be forecasted. If demand is less than supply the supply has to be adjusted e.g. by lay-offs in the manufacturing department in order to decrease costs and production. However, this become to be a more expensive operation since there is not an unemployment insurance. The employer has to pay a compensation for the worker who is laid-off. This leads to higher costs which decreases the competitive and hence the profit decreases which is not surely wanted by any of them. Also there is another problem, a laid-off employee is likely to be a candidate for recruitment by another employer.

In order to remedy this unstable demand and supply conditions the wholesalers pile up stock with respect to their financial power. If demand is less, they bear the loss and if the demand is more than expected then they have goods ready at hand.

Although this action does not seem to be a very scientific attitude it can be justified as long as no forecast is possible about the future. However, this should not mislead the reader that no forecast had been undertaken by the wholesalers.

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The method used was to project the past patterns. However, it is hard to find two successive years which show similar patterns when their sales record is analyzed. This is especially true for the years after 1954-55. Another factor which had effects on the supply side and made forecasting hard was the inflationary forces. As a result of inflation in the country the textile plants increased in number and the capacities of the existing ones were expanded. As it was previously mentioned in Chapter II, the total capacity of all textile plants in our country is in excess of the demand. The condition especially holds true for the manufacture of cotton fabrics.

The wholesale sales<sup>1</sup> are dense between August and December for the woolen textiles and for some cotton textiles such as cotton-flannel, cloth used in tapestry, cloth for underwear, poplin for raincoats and some others. For the cotton textiles used in summer clothing the sales are dense between February and June. Of course, the market for thread opens earlier than for textiles.

Wholesalers do not prefer to be engaged by contracts to customers or to the retailers.

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1/ There are no statistics to show the trend of sales.

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Only in cases where the retailer demands quite a substantial amount of goods they go under such undertakings. The reason why they do not want to be engaged is that the retailer in such cases wants to have his own trademark put on the goods. This is neither preferred by the manufacturers nor by the wholesalers. Manufacturers then prefer to have their own sales branch or office rather than giving the goods to a retailer. Another point to be noticed here is that if the retailer breaks the engagement then the manufacturer has to spend additional effort to make his brand name known in the market.

Sometimes, the manufacturers who establish sales branches and the integrated wholesalers make sales to other wholesalers too. In the case of manufacturers' sales branch these sales consist of only thread not the textile itself. In the case of the latter one, both the textile and the thread can be sold to other wholesalers.

One more point which requires attention in the operations of the manufacturers' sales branch and of integrated wholesalers is that they are now able to enter government adjudications. These are sales to public institutions such as to the army. In the past, the government used to buy its needs only from Sümerbank but now

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they open an adjudication and everyone including Sümerbank can bid a price. It can be said that thus Sümerbank has lost the advantage of being a monopolist in this case which is of course a credit to the private sector.

When the costs and profits of the wholesalers are analyzed, it will be seen that very little can be said about them since expense figures are not available and profit figures are secret. A very general outlook can be derived with average figures.

Today in the textile wholesale market there are almost no sales and purchases with down payment. About 90% of the sales and purchases are on credit basis. The purchases are done by securities of 4-6 months of maturity. Sometimes securities with a maturity date of 8 months are also transacted. The invoice is prepared on credit basis. In case of advance payment a discount is given to the wholesaler which varies between 6-10%.

The sales to the retailer are also on credit basis. The maturity varies between 4-6 months but there are securities with 7-10 months of maturities. A discount is given to the retailer if the payment is done in advance.

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The most important expense item for wholesaler is transportation. The manufacturer quotes the prices excluding transportation. The responsibility and costs of the manufacturer end at his factory. The transportation expense varies between 5-10 krş. per meter and the profit margin is added on it thus the selling price is reached. The profit margin is about 2-5 % for goods on credit basis<sup>1</sup>.

The goods are delivered at the wholesalers' store to the retailer. The transportation cost is to be borne by the retailer.

The wholesalers in most cases can be said to act as the retailers' buying agent. In the first place they buy in larger lots than a retailer would, this helps the retailer as a reductions of cost of transportation. Secondly, since the wholesalers buy different kinds of textiles, they secure a more quicker delivery to the retailer.

Wholesalers send the catalogs which are sent to him by the manufacturer to the retailer so that the orders are placed by having better access to all kinds of textiles that the wholesalers handle.

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<sup>1</sup> / All figures are derived from personal interviews.

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In this respect as well as helping the retailer, the wholesalers also aid the manufacturers by making their goods known in the market.

Wholesalers help the retailers by extending credit. This is the only financial aid offered by the wholesalers.

It is obvious that the wholesaler does not give much aid to the retailer. However, it is widely believed by the wholesalers that the competition among themselves is fierce. Therefore, it seems that one wholesaler with better service and more aid will likely to draw more customers. As it is known price is not the only tool with which you can play for competition. For instance, market research can be undertaken no matter how hard is to get information and statistical data.

There are few problems in the textile wholesale market which are common almos to all. First of all the wholesalers agree that a better commercial control is required over the manufacturers because although there is an excess of supply, the price still goes up every day. If the supply is in excess of demand, is it not possible to look for ways to export finished or semifinised materials?

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Another problem area is that the wholesalers can not solve their own problems with the Ministry of Commerce due to beuracracy and not being well known. There are certain people who act as a kind of middleman and they can solve the problems with Ankara but charge quite a sum of money.

It seems that the problems can be solved by having better managerial control over the operations of both the wholesalers and the manufacturers.

## Retailers

Retailers are those institutions in the channel which sell directly to the ultimate consumers. Retailing institutions have developed and increased in number and size after the establishment of the Republic. Since there is not an organized association of retailers in Turkey, it is not possible to get any statistical data as to the development of these institutions.

In contrary to the wholesalers losing their importance, the retailers are gaining importance.

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There are two main reasons for their growth and taking over the wholesaling function. One, Direct sales minimizes the financial burden on the manufacturer, and therefore, the manufacturer prefers it. Second, the retailer is able to obtain the textile at a cheaper price so the retailer prefers it. Also there is one more reason that is certain large-scale retail stores place special orders directly to the manufacturers. The retailer in such cases uses its own brand name in selling the fabric. "Vakko" is an example of such a retail store. In addition to special orders, this type of retail stores usually buy directly from the manufacturer. However, the number of large scale textile retailer is few in the market. The majority is classified as "first-class" retailers whereas the above mentioned type is an "extraordinary class" retailer.

There is one more factor which needs consideration in reviewing the importance of the retailer. That is, the manufacturers' sales branches are getting numerous. This also helps the expansion of the textile retail market.

In the retail textile market, yet, there are not many large-scale retailers, such as department stores, chain stores, supermarkets. Therefore, in the textile market the retailers are individual independent retailers.

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This type can be compared with those of the West called the "Limited-Line Stores". That is, the limited-line stores handle only one kind of merchandise. Of course there are exceptions. For example, "Vakko", "Lion" and "Atalar" are retailers who are trying to establish the idea of a department store in the market.

There is one more interesting point to note in the textile retail market. Some of the retailers today have a tendency to sell women's and men's ready-to-wear. This fact is justified by the retailer as adjustment to the customer demands. But, yet, there is not a developed ready-to-wear market. However the development in the last three years is worth mentioning<sup>1</sup>.

Geographical dispersion of the textile retail stores show almost a uniformity in Istanbul. Unlike the wholesale market the retail stores are not gathered at a certain locality. But like the wholesale market this pattern changes when the country as whole is considered. If the large cities are excluded, there are not specific

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1/ Sales figures are confidential. Therefore, it was not possible to get figures for ready-to-wears.

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retail stores which are only selling cloth and fabrics. A typical retail outlet in a small Anatolian town sells many different goods. This makes hard to find out the exact number of textile retailers over the country. However, it is possible to make a census of the textile retailers in the big cities and a census of those stores which sell a variety of merchandise and this seems possible only if an organized retailers' association is established.

The organization type of the retailers is partnerships. They are like the wholesalers' organizations, family companies. The operation of the retailers is simple. They place their orders to the wholesalers after going over the catalogs. For the fabrics which are bought for everyday use, like cloth for underwear and pyjamas, no catalog is required. Apart from this, retailers can place any special order either to the wholesaler or directly to the manufacturer.

They make purchases on credit basis. The maturity time is between 4-6 months. Certain retailers first negotiate the sales specifications, payment type before placing any order to a wholesaler. Some retailers are applying sales on credit basis methods.

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This action is taken in order to reach these customers with lower purchasing power and secondly, certain co-operatives were established during the last two or three years which sell inexpensive fabrics and ready-to-wear to their members. An example to such a co-operative is the "Military Consumption Co-operative". These co-operatives make purchases directly from the manufacturer at discounts and therefore afford to sell at lower prices. Another reason why they can afford to sell at lower prices is that they are financed by the organization with which they are affiliated. For instance, the "Military Consumption Co-operative" is financed from the general budget of the army. So, the retailers' efforts to sell on credit basis is to meet the competition. Some retailers still go further and offer discounts to civil servants and military people.

Like the wholesalers the retailers do not want to be engaged to any wholesaler. This is because in certain years the sales are not much but no matter what the sales are they have to purchase the specified amount in the contract. This they do not want. They prefer to be more independent.

The retailers take delivery at the wholesalers' stores.

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They bear the transportation expenses. The responsibility of the wholesaler ends at his store.

The aid to the retailer from the wholesaler is very limited as mentioned before. They only make payments on installement basis. The retailers prefer those wholesalers who show credit easiness and those who buy the textiles which are favored by the consumers.

This is the general outlook of the institutions in the distribution channel of the textile industry.

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## CHAPTER IV TRADE CHANNEL POLICIES OF PRIVATE SECTOR

In this chapter the Trade Channel policies of the Turkish private textile manufacturers will be studied. The Chapter in general, will consist of four basic sections, namely, first, policy makers and factors playing a role in policy decisions. Second, selection of the type of outlets which includes the extent of market analysis review of existing channels and appraisal of the cost and profitability of the channels. Third, deciding on the number of outlets which includes policy decision on either exclusive, or selective distribution. Lastly, the coordination and the control of the channel members.

As stated in the first chapter of this paper the information is based upon the findings of interviews with several large textile manufacturers. In addition to oral data several published materials were utilized.

The carding factories and the thread manufacturers procure their raw materials either from the producers or they themselves indulge in raw material production.

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This case is especially true for cotton textile manufacturers. In purchases made directly from raw material producers, the manufacturers pay in advance and make a commitment prior to harvest time.

In cotton thread manufacture, the thread manufactured is either partly or wholly used by the same manufacturer in weaving or is sold to other weaving factories. If the thread manufactured is a final good, it is transferred to wholesaler for distribution to the rest of the channel.

The wholesalers can either buy on cash or on credit basis from the factories. The sales' specifications and whether the market is going to be a buyers' or sellers' market depend upon several factors.

For wool producers the picture is a little bit different. The shearing season of goats is May. During the first weeks of May the shearing starts. Those who do goat-breeding get advances as cash or in kind from the mohair wholesalers before starting shearing. After shearing is finished, since there are no warehouses to store the mohair the storage is done in the homes of the breeder.

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If he is not involved in any commitment with the wholesaler, he takes his goods to the nearest market place which is usually the nearest town. He receives either cash or exchanges for other goods. Thus, the mohair is transferred from the producer to the first hand merchant. From him it is transferred to the second-hand merchant who is the exporter. Sometimes the exporter himself comes to these market places or sends a member of his firm and can do the purchasing without using any other middlemen. But the common practise is that a commission man is the middle man for the mohair before it passes to the exporter. If the producer is not sure of himself that he can readily sell his goods, than he sends the mohair to a city commission man and gets an advance. The producer is paid the balance after the goods are sold. In this kind of transactions the role played by commission man is completely dominated by demand & supply. When the demand is in excess of supply, the goods are sold completely and the price rises. When the demand is low just the opposite happens.

There are different sales specifications for each manufacturer. These specifications include a number of provisions. Among them are: credit sales, cash sales, trade discounts, packaging, how & where the goods will be delivered,

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insurance, transportation fees and some others. All these provisions vary from one manufacturer to another. In general credit sales are wide spread and for short term credits and in case of downpayment discounts are granted. In conclusion, it is possible to state that the afore-mentioned sale provisions change in accordance with the market conditions.

In 1964<sup>1</sup>, in the private textile industry 79,738 people were employed. The number of workers was 72,063. 42,226 of these are men (58.6%) and 29,837 are women (41.4%). From the rest of the personnel 3,336 are either foremen or supervisors, 368 are technicians 171 are engineers and 3,800 are administrative personnel.

At the beginning of 1964, 85,745 people were employed in the cotton textile industry and at the end of the year the number was decreased to 79,738. Thus the labor turnover is like the following:

$$\frac{85,745 - 79,738}{85,745 - 79,738} \times 100 = 7.3\%$$

<sup>1</sup> / Sanayii Dergisi 1964, Istanbul Sanayi Odası, 1964

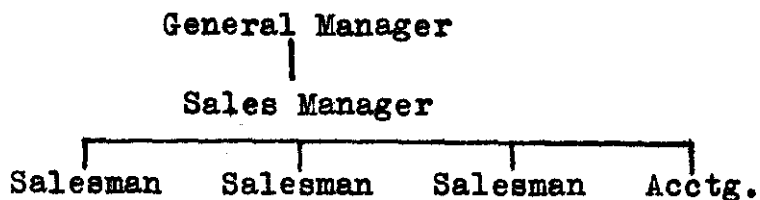
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When the statistics of the Ministry of Industry are examined, it is seen that in 709 establishments, the average work day was 304.6 in one year. 50.1% of the 709 establishments work by one shift, 29.9% work in two shifts and 20% work in three shifts.

The sales organization of a typical private textile plant is as follows:



Since the private textile factories are not very large and are of small capacity when compared to those in the public sector, their organization is also of small scale.

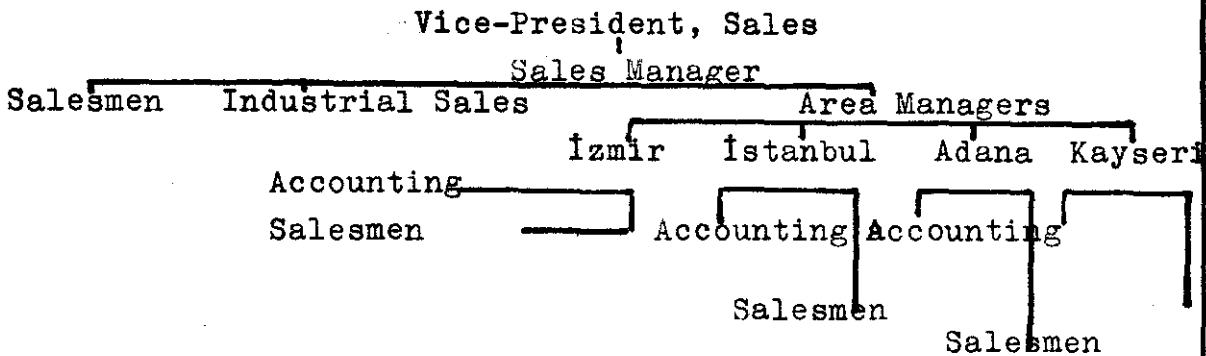
Usually, there is one sales manager who has technical knowledge as well as being commercially trained. He is responsible to the general manager of the enterprise. He manages the sale of all kinds of goods. The salesmen who are responsible directly to the sales manager are always in the market. They have a close contract with the wholesalers. Some of the salesmen are technically trained for sales. In enterprises where the sales organization chart is as explained, the sales manager also assumes the

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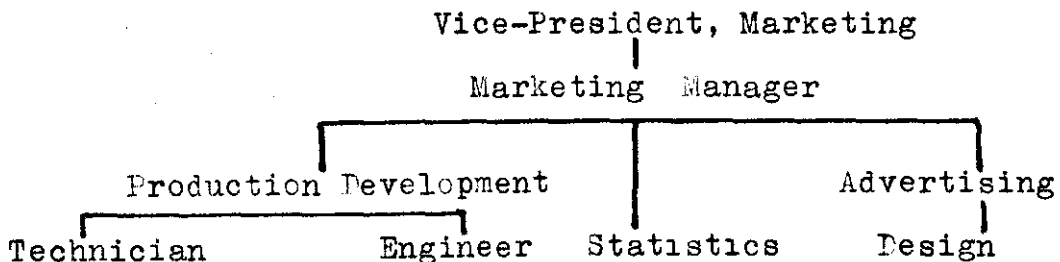
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responsibility for advertising and publicity.

Naturally there are exceptions to this common type of organization. As an example to the exceptional cases we can site the organization of "Santral Mensucat". First of all this enterprise has seperated the sales and marketing departments and each department is directly responsible to a Vice-President. Under the Vice-President there are the department managers. The following is the organization of the Sales Department:



As can be seen from the sales organization chart the sales department is solely responsible for only sales. The following is the organization chart for marketing dept.



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This department on the other hand is responsible of those functions which help the development of sales, such as advertising.

The policy makers in most of the private textile plants are the general manager, and the works manager. The sales policy of the companies in most cases is set by the general manager. This fact is attributable to companies being of small scales and family corporations. Naturally, the general manager when deciding upon a set of policy consults the related personnel. This personnel being the Sales manager and the financial manager. Often criticisms and recommendations are welcomed by the general manager. However, the final decision and the pattern are done by him.

Like in the case of the sales organization there are variations from this classical pattern. For example, in Altinyıldız Woolen Textile Plant, the sales policy of the company is determined by the Works Manager. It is more or less done in a practical way. There is a commission man who is directly responsible to the Works Manager and he explores the market and finds the customers. Their policy is designed in this manner because the company manufactures textiles only upon order by the customers. This also in

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some sense implies a market oriented approach to policy making. Although it is in no way in line with a scientific market research, it yields an idea about the market. As it is expressed by them, the company does not carry on any systematic market research. Another variation from the typical pattern is seen in the case of Santral Mensucat. This type of policy determination is very new in textile business. The people at the Vice-Presidential level in Santral Mensucat have formed a "Sales Committee" whose sole responsibility is to determine the sales policy. The chairman of the committee is the Sales Manager. The committee does not have regular meeting times but they meet at the beginning of every fiscal year and hold meeting during the year when they feel necessary. The Salesmen of the company and the research department bring the necessary data to the meeting. Along with the sales policy the price policy is determined also.

In summary, it is possible to say that the general theme in policy making is that either the Sales Manager or the General Manager are the sales policy makers in private textile industry. There are modifications of this model. A more developed model is the committee form.

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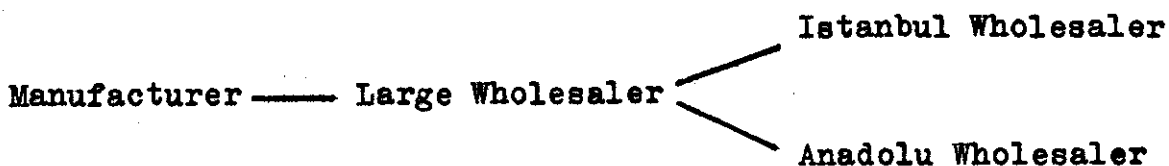
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The factors considered in determining the sales policy are the economic factors and the consumer demand. For this reason some of the private textile plants carry on formal research. This work can not be considered a market or a marketing research. It is only an investigation among wholesalers.

Few of the private textile plants have their own retail stores. Most of them directly sell to the wholesalers.

If a channel is to be drawn it will be like the following:



This model is again a classical model. In most cases the large wholesaler is shipped and the sales are directly done to Anatolian Wholesaler and to Istanbul Wholesaler. Manufacturers are reluctant to sell directly to retailers. The reason is that the retailers are many in number and thus their demands are varied. It is hard to satisfy all of them. However this does not mean that no sales are made to retailers. Most of the retail sales are done to those stores which also handle ready-to-wears. In such cases these retailers place special orders with the manufacturers.

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Generally manufacturers do not do business on orders. But there are exceptions. For example Altinyıldız Woolen Textile Plant operates only on the bases of orders. These orders are taken by the salesmen of the company. Beside this kind of operation, also industrial sales are wholly based upon orders. These industrial sales include sales to public sector, i.e. to army, police force and etc.

Although most of the private textile companies do not have their own retail stores, they have established sales representatives. In order to do so, first of all, Turkey was divided into several regions. Frequently the division is as follows: Ege, Güney Anadolu, Orta Anadolu. In every region there is one city in which a head-office for the region is located. Usually, in Ege it is Izmir, in South it is Adana and in Middle Anatolia it is Kayseri. In these cities warehouses are located as well as one or two stores which handle the wholesale sales for the region. There are travelling salesmen in these regions. The Salesmen travel through their region once in every month and take orders if there are any. Beside a flat salary, these salesmen receive a commission which is a certain percentage of regional sales. These centers are especially important for displays and advertising.

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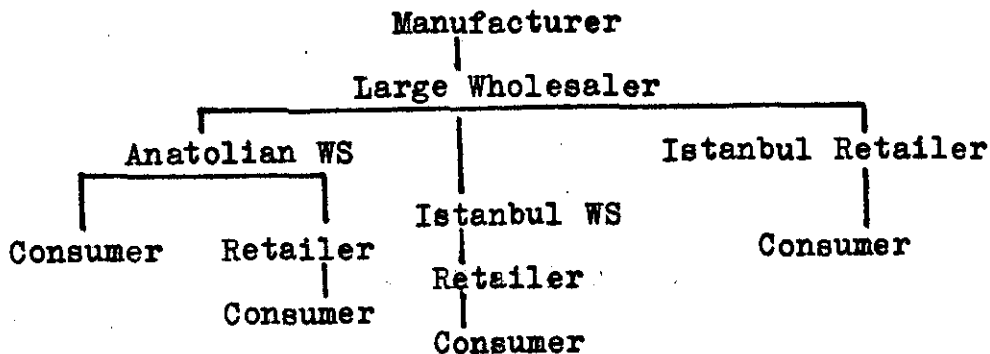
It is hard to convey a message by print-media in Anatolia. A more effective medium is either the radio or the display areas in those retail stores.

Manufacturers keep stocks in these centers. If the factory is located in Adana as is the case for Bossa and Güney Sanayii, a center is established in Istanbul.

The classical channel type which is being used by most of the private textile manufacturers is as follows:

Manufacturer — Large Wholesaler  $\left\{ \begin{array}{l} \text{Anatolian WS.} \text{---} \text{Retailer} \text{---} \text{Cons.} \\ \text{Istanbul WS.} \text{---} \text{Retailer} \text{---} \text{Cons.} \end{array} \right.$

But at present this type can be modified as the following:



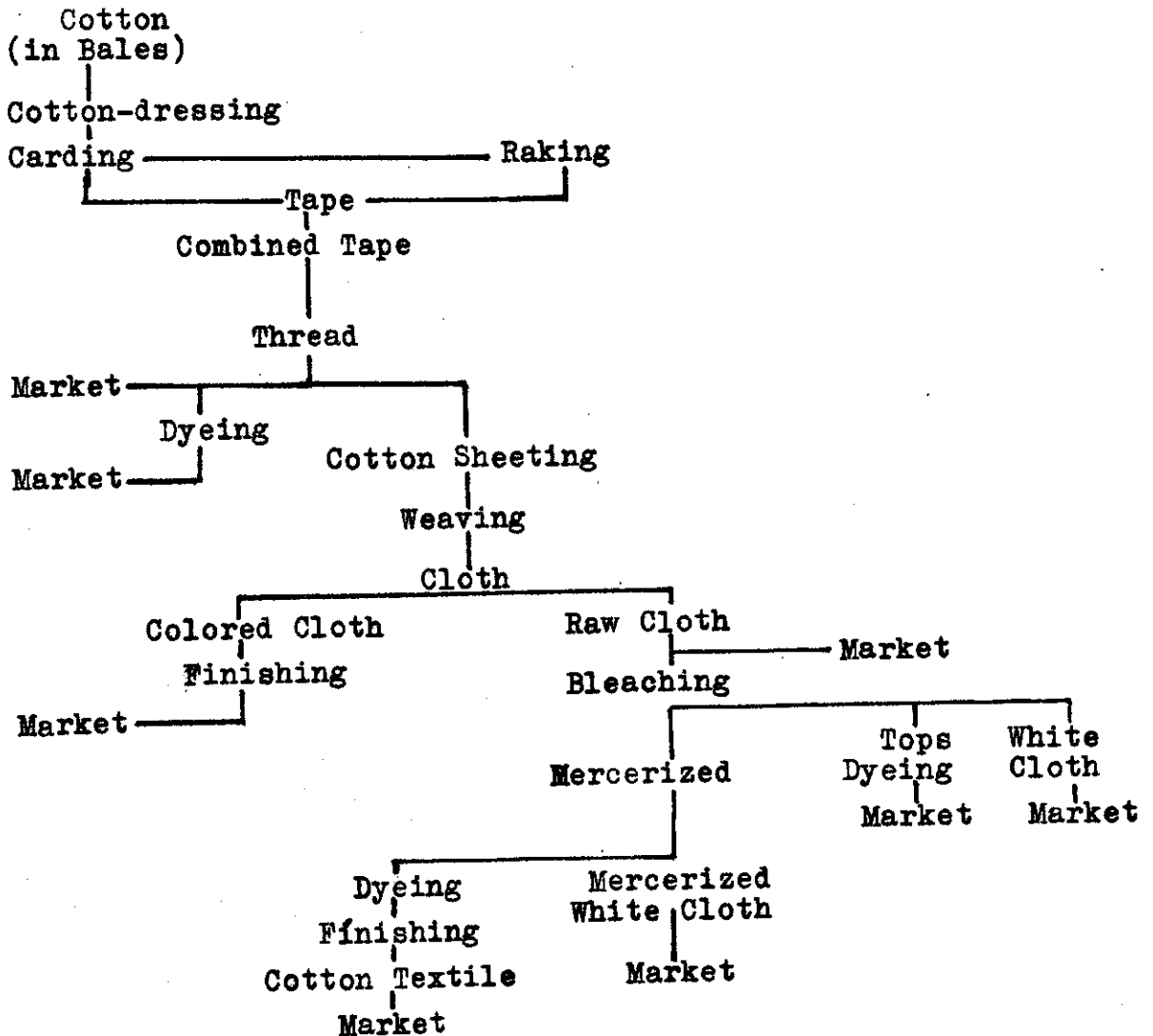
This channel type is used for the final goods, i.e. the processed material. However, the semi-processed or raw cloth is also offered to the market.

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Such a schema of the cotton thread & cotton textile manufacture will be something like the following.



During this development process at four different stages either the thread or the raw cloth is offered to the market. At those stages since the material is not completed yet,

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the goods are semi-processed called industrial goods. These industrial goods are either bought by the wholesalers of those or by the manufacturers. Therefore at these points there is a complete transfer of title of goods. Either the wholesaler or the manufacturer takes title to the goods before the process of manufacture is completed.

It has almost become a tradition to use the afore-mentioned channel types. No significant change was observed in them for the last 10 or 15 years. Manufacturers prefer to sell to wholesalers rather than directly to retailers. Therefore; in this context, there is no change for the wholesalers losing their significance in the channel. It is only that in older times direct sales to retailers were almost non-existent. Recently, this kind of sales increased. Just because of this the wholesaler has a fear that he will lose his importance.

When the price structure used in the channels is observed, it is seen that most of the sales are based on credit terms. In general, the private sector textile sales is 85% by credit and the rest by cash. However this situation may vary according to the market conditions. If the market condition is not very favorable and if there is a

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shortage of money, payment made in a month is considered as a cash sale. But under normal market conditions downpayments are made in ten days.

The maturity of credits extended by manufacturers is between 4-8 months. A 6 month maturity is considered normal. But recently after 1966 there seems to be shortening in the periods of maturity. Until January '66 a 4 month maturity was not observed frequently but after that it has become to be used more often.

Each private textile manufacturing concern prepares a sales specification on which the prices, credit terms and other provisions are explicitly stated. These specifications are fixed by the time the sales policies are determined. Furthermore, they are at any time subject to change and modification. Such a specification can be seen in Appendix I. This sales specification belongs to Bozkurt Mensucat Sanayii A. Ş. On the front page, information as to the central bureau and as to the branch offices are given. On the second page the factory is giving information about the new branch office opened at Adana and adding to it that the transportation charges will be borne by the manufacturer up to the branch office.

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On the 3rd. pp. a price list is given which includes all kinds of fabrics manufactured by them. Lastly, on the last page, conditions of sale are listed.

At the same time this specification is listed in the "Commerce" newspaper it is put into enforcement.

In Appendix II, 2 more of those sales conditions issued in the "Commerce" paper are given. The complete translation of the first is below:

## Güney Sanayi Fab. Mamulleri (Adana)

1. Our prices have a 121 days maturity term.
2. If the bill is paid within 35 days, a 7% discount will be granted.
3. Goods are delivered at the factory. If wanted by the customer goods will be insured on delivery.
4. At sales made from Istanbul office, the transportation charge from Adana to Istanbul will be paid by the customer.
5. Any stamp duties will be borne by the customer.
6. Our prices are guaranteed for 1 month. Our rights are reserved about any change in these conditions without notification.

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Most of the time prices are paid before their due dates or on the maturity dates. The attestation by a public notary of an unpaid bill of exchange is very rare. The percentage is about 1%.

As can be seen from the sales conditions the goods are delivered fob factory. The transportation charges are borne by the wholesalers. But if the purchase is made from a branch office, than the transportation fee up to the branch office is borne by the manufacturer.

The price is determined by the market forces. It has no relation to the costs of production. There are no differential prices. The prices applied by the private textile manufacturers are like monopoly prices, This case is especially true in the woolen & Silk textile manufacture. Very rarely, it is possible to see a differential price policy in cotton textile manufacture. In sales to Anatolia, differential prices are applied in cotton textiles. The reason for this is the purchasing power of the Anatolian villages. But, here it is worth noticing that the quality of the cloth sold to the Anatolian villages, is also not very high . If a factories' lines of production are so drawn up that it includes large sales to Anatolia, the tastes of the villager is surely very important.

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Those goods designed to be sold over the Anatolian market are not very much in demand in Istanbul, Ankara, İzmir and other large cities' markets. Therefore, in a way it is not a differential price policy which is applied. Just a very few kinds of textiles are both demanded in Anatolia and in those large rural areas. In that case there is not a big price difference.

In Appendix III, which is another issue of "Commerce" paper, 11 private textile factories and five Sümerbank factories<sup>1</sup> have published their prices. It is only possible to observe that only one private firm has made a discrimination among its goods as "Köylü Divitin" (for peasants) whose price is not very different than those of the same kind of material. Therefore, it is possible to reach the conclusion that the textile prices in the private sector is more or less like monopoly prices, although there may be few variances.

There is very limited cooperation among the channel members from the point of manufacturers. The only aid given is financial. That is, credit sales are very wide spread.

1 / Sümerbank factories are underlined with red line.

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One other help which is given is to extend the credit limits of wholesalers in case the money market is tight. Some manufacturer also give aid as to display equipment to retailers when trying then goods to get known in the market. As an example, it is possible to cite the Bossa Factory which distributed little dolls wearing the new kind of poplin cloth and having a bandage across their chest as " Miss Bossa". Some manufacturers have published calenders and distribute them among their customers. Very rarely co-ordinated advertising is undertaken by the manufacturers and wholesalers. They advertise the goods with the name of certain whole saler or retailer. This kind of advertising programs are undertaken by Akfil Textile Factory.

In selecting the types of outlet a very limited market research is done by the manufacturers. They consider the information on general market conditions prepared by the Chamber of Commerce and Business Indicators study done by the Planning Office.

On principle there is no limit to the number of wholesalers with which they will carry on their business. Normally a factory such as Santral Mensucat works with 800-900 wholesalers. In addition to these they have their own retail stores.

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The principle lying behind is: the more you work with the more you will sell. However, since the wholesalers are registered by an organization, it is possible to get information about them. This information is mostly about their financial situation. Those who are not financially sound are eliminated. In selling to wholesaler they do not bind themselves. The agreements are made only for one year. In addition the manufacturers' rights are reserved about whenever he wants to drop a certain wholesaler from the channel he can do so within due course.

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## CHAPTER V TRADE CHANNEL POLICIES OF PUBLIC SECTOR

This chapter will deal with the marketing operations of Sümerbank with special emphasis on the trade channel policies. The chapter will cover general information on Sümerbank in the first section. The following sections will deal with only marketing operations.

Sümerbank was founded in 1933 by the law No. 2262 replacing Industrial Credit Bank and State Credit Department. It is a State Economic Enterprise and one of the largest of those. It owns 23 factories and employs 32 thousand personnel. 11 of these factories manufacture woolen textiles, 6 cotton textiles and worsted yarn-Kangarn and 1 rayon. This makes 18 out of 23 factories dealing with textile manufacture. Rest of the factories deal with other business such as cement production, brick manufacture , ceramic, etc.

Sümerbank is responsible to undertake the following duties:

— To establish new industrial units besides those which it took over from the State Industrial Chamber.

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To prepare the required plans & projects for the establishments of the new units.<sup>1/</sup>

— To participate in the capital stocks of those establishments which are essential for the development of the country's economy and to give all the available technical help needed by these establishments.

— To extend credits to industrial enterprises.

— To indulge in banking operations.

— To train all the personnel employed by Sümerbank factories and give scholarships to the engineers in order to recruit them after their education is completed.

The initial capital of Sümerbank in 1933 was TL. 20.000.000 but now it has reached to TL. 500.000.000.

The sales in 1962 was TL. 916.153.000<sup>2/</sup>. 77% of these sales figure which amounts to TL. 705.105.441.- comes from the textile manufacture section. The textile section of Sümerbank has the very best means of manufacture but the efficiency is very low. They can hardly meet the sales and the Sümerbank's share in the national textile market is decreasing continuously.

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<sup>1/</sup> In App. IV it is possible to see the factories owned & operated by SB.

<sup>2/</sup> 1962 Profit and Loss statement of Sümerbank.

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Appendix V includes the general organization chart of SB. As can be observed, there is a Board of Directors and the President. The two Vice-Presidents, one being technical & the other administrative are restricted in number to two by law. This law applies to all state Economic Enterprises. Textile manufacture departments are under the technical Vice-President. The Purchasing Department is also directly responsible to the Vice-President. However, the Sales Department is under the responsibility of the Administrative Vice-President.

Sümerbank has established the Purchase & Sale Directory which has the sole authority and responsibility in purchases of raw materials and all sales. This Directory is in a way an autonomous body but its autonomy is no more than the autonomy of Sümerbank. There is always a requirement of consultation in policy determinations with the related people in the General Directory.

Appendix VI gives a simplified chart showing the existing organization of Alımsatım, which has evolved over the years to its present state. It is a unique type of company in that it handles only two of the major functions of a business -- purchasing & sales of SB's textile mills. In reality, some of the textile mills buy raw materials

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through another purchasing group in Istanbul, while other factories sell directly to retail outlets.

As can be observed from the organization chart (App. VI) of Alimsatım responsibilities are not clearly within the control of one man. The three assistant directors share the responsibilities. In reality the sales function of Alimsatım is more important than purchase function but on the organization chart the Sales Department has only three regional directors. It seems that the sales all over Turkey are administered by these three directors.

In Appendix VII, it is possible to see a proposed organization chart for Alimsatım prepared by a marketing consultant group.

The Sales policies are determined by a written Sales Regulation. This sales Regulation indicates the responsibilities & duties of Alimsatım. For example in the third article of the Regulation the sales authority of Alimsatım is stated as follows:

Article 3 - The Purchase & Sales Directory undertakes the sale of every kind of thread & textile (raw, finished, tailored, ready-to-wear) manufactured by the textile industrial enterprises upon an agreement made by the

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Purchase & Sales Directory and the sales of all by-products demanded by the Purchase & Sales Directory<sup>1/</sup>.

The Alimsatım has the power to make sales to the governmental Departments, regional Administrations, State Economic Enterprises. The miscellaneous needs of these Enterprises are procured through the retail outlets for which conditions are set by the Alimsatım. The Alimsatım has also the power to deal in export business.

As it is obvious from this Regulation & the responsibilities of Alimsatım, the operations at SB are centralized. This plays a role in policy determinations and creates red tape. The authorities delegated to Regional Directors and Store managers are very limited.

To sum up it is possible to say that the policies are established by the General Directory in Ankara. The factors playing a role in policy determinations are manifold some of which are not outspoken but easy to guess.

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1 / Translated from Sümerbank Alım ve Satım Müessesesi ile Tekstil Sanayii Müesseseleri Satış Yönetmeliği

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Before going into the details of sales made through Alimsatım it will be wise to have a look at the duties & responsibilities of the Sales Manager whose place is indicated on the Organization chart (App. V). The principal duty of the Sales Manager is to fix the domestic sales policy, export policy and the official sales policy in compliance with the general aims and policies of SB. He makes the plans & programs and applies them after they are approved.

Also he has to coordinate the Sales promotion activities related to export sales. In addition he carries on formal and informal research.

In App. VIII, there is a complete & formal job description for the sales manager including his uthorities, & responsibilities & powers. This also is fixed by the General Regulation set for all State Economic Enterprises. Naturally the sales activities are modified in accordance with the related company's field of operation.

The sales manager has also the duty of carrying on the price policy.

After defining the duties and responsibilities of the Alimsatım and the Sales Manager, the sales

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specifications used by SB in general will be discussed.

For official sales the orders are put on the mills through Alimsatım. The payment is done to Alimsatım. For such orders an agreement is made which is usually written and signed by both parties. The contents of such an agreement would include, the delivery date & place, the price, \_\_\_ cash or credit sale & etc. The delivery usually is either made at Alimsatım's Wharehouses or at a specified place.

For sales made according to a written agreement the delivery takes place at the factory. If the goods are loaded on a truck or like and then delivered, the expenses incurred is either included in the selling price or taken from the customer upon delivery.

For goods such as raw materials, auxiliary materials sent to Alimsatım, the Alimsatım takes delivery at the State Railway cars or at the transportation vehicle. Thereafter the full responsibility of the goods are upon Alimsatım including insurance expenses and risks. When the raw materials are sent to the Alimsatım, an inventory control man is sent there for control purposes from Alimsatım.

The raw materials can only be sent upon the instructions of Alimsatım.

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If any goods are sent without the directions of Alimsatım, the transportation expenses and risks are borne by the producer, and Alimsatım may either accept or reject goods.

The producer prepares four copies of bill of lading for every shipment. Such a bill of lading includes, the quality & the kind of the goods, the weight (net&Gross) of the goods. One copy of the bill of lading with the invoice is given to Alimsatım, another copy is sent to the party who will make the shipment and another copy is put in the bales with a "x" mark & sent with the goods.

Upon delivery of goods to Alimsatım control is made of the weight, quality of package. If there are any damages or deficiencies it is payed by the sender or the producer.

As can be clearly seen from the above facts the purchases for any SB factory are made by Alimsatım. The purchase organization of Alimsatım is composed of seven different groups which are formed according to the kinds of materials to be purchased and a customs & Transportation Directory and a Laboratory. The purchase by this organization are made in compliance with the Articles of the Sales Regulation.

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The following table gives an idea of the purchases and the sources of purchases made by Alimsatım in 1964.

TABLE XIV

SOURCES	TL.	%
Domestic market	25,944,408.24	38,44
Foreign market	20,678,015.42	30,64
Others	13,235.42	0,02
Transportation&customs	20,851,918.11	30,90
<b>TOTAL</b>	<b>67,487,577.19</b>	<b>100,00</b>

Source: Başbakanlık Yüksek Denetleme Kurulu p.30 SB Alım ve Satım Müessesesi 1964 Yılı Raporu.

The table below shows the orders of enterprise compared to the purchases in 1964.

TABLE XV

The Enterprise Groups:	Estimate TL.	Actual	%
Cotton Textile Factories	29,194,500.-	21,378,969.38	73,23
Woolen " "	7,413,800.-	10,154,319.00	136,96
Gemlik, Beykoz	8,351,500.-	8,060,071.45	96,51
Hempen Fibre	1,378,000.-	208,847,75	15,15
Cement, Ceramic, Filyos	3,598,500.-	4,522,284.05	125,67
General Directory	—	169,383.07	—
The Istanbul Branch	—	125,127.06	—
Participations	9,921,900.-	22,868,575.10	230,48
<b>TOTAL</b>	<b>59,858,200.-</b>	<b>67,487,577.19</b>	<b>112,74</b>

Source: Ibid, p.31

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The purchases made from foreign markets are composed of dyes, chemical stuff and wool. Any purchase from the outside market is subject to quota and liberation list. In addition to purchases listed above, naturally some machinery and equipment are also bought from outside. In 1964, ₺ 8.1 mil. goods were drawn from the customs and sent to the proper places. ₺ 2.4 mil. of this ₺ 8.1 mil. belongs to the Purchase Organization itself, ₺ 2.5. mil. to the SB factories and ₺ 2.2 mil. to the General Directory.

The following figures give an idea of distribution of foreign purchases in 1964.

Merinos Factory	3,385,281.22
General Directory	2,204,383.41
Sivas	101,071.62
Defterdar	17,700.00
Purchase Org.	2,418,135.36
TOTAL	<u>8,126,671.61</u>

When wool purchases are made from the foreign market a group of experts from the Ankara Branch of Alım-satım supervise the operation. If the purchase is made from the domestic market either the same experts group from Ankara supervise the purchase or a group from the factory performs the job.

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Cotton purchases actually are done by the Adana branch on behalf of Alımsatım. Also İzmir branch can make purchases. The one thing lacking in raw material purchases is the control of standardization. Although the quality is checked upon, no one cares very much whether the goods are standardized or not. Thus, this leads to the manufacture of goods inferior to those produced by private firms.

Among the woolen textile factories, Merinos Factory uses foreign wool but İsparta & Diyarbakır factories use domestic wool.

Coming to the selling function of Alımsatım, it is seen that the goods are marketed both by the retail stores of their own and by the independent private retail stores. Alımsatım sells the goods through a cost-plus-pricing policy. The margin added on the cost of production is determined beforehand by the management Committee of Alımsatım. These pricing principles are also fixed by the Sales Regulation. Alımsatım is empowered to make the necessary price changes when the market conditions require it. In case a sale is made at a loss, Alımsatım can do it and fix a price which may be 20% below the cost of production.

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The factory prices are fixed again on the basis of cost-plus-pricing. The margin on factory prices is also determined by Alimsatım. For sales which are to made at factory prices, Alimsatım can add a proper margin for transportation and insurance.

The wholesale prices too are fixed by Alimsatım. These are found by adding insurance & transportation on the cost at factory and reached to cost at store. Onto this a certain wholesaler profit margin is added and wholesale prices are reached. In order to reach the retail prices Alimsatım adds on a certain retail profit margin on the wholesale prices.

The principle behind these policies is to reach at a price level which is acceptable by the market and reasonable for the consumer. In order to provide this the market demand and the competitor's prices are taken into consideration. With this principle in mind, first of all, the wholesale prices are determined & thereafter taking into consideration the transportation & insurance charges and the necessary margins; the retail prices and the factory selling prices are determined.

In general, Alimsatım undertakes these kinds of sales; free sales, contract sales and consignment sales.

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The free sales are composed of those sales made at factories, and at stores. From the stores either wholesale or retail sales can be made. The contract sales are among the related enterprise & Alimsatım. Sometimes it can be to mop up the idle capacity at the factories. In such cases, the buyer places an order of which the characteristics are specified by the buyer upon a factory which has idle capacity.

The sales of those factories in whose capital SB participates by more than 50% are made on consignment basis at the Alimsatım retail stores.

Other than these three kinds of sales, there is also the official sales made to Government regional Administrations, to State Economic Enterprises and to Charitable Societies. The prices for these sales are fixed according to a protocol made between Alimsatım and the Official Department. It is usually somewhere between the factory & wholesale prices.

Alimsatım may also engage in export sales. The goods which are to be exported are fixed by the General Directory at Ankara.

In fixing export prices, the world market prices are considered.

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The invoices of such sales are prepared directly by Alimsatım.

The table below shows the export sales of SB from 1958 to 1961:

TABLE XVI  
Years

Meters

1958	Woolens	Cottons
1958	42	13,200
1959	0	2,019,270
1960	209	13,004,710
1961	7149	3,450,740

---

Source: A survey of Marketing Problems of SB,  
Daniel F. Nugent, Jr.

Alimsatım is also empowered to apply certain measures for wholesales & retail sales. For example for wholesales, different premium systems, credit sales, payment convenience, differential prices are exercised. For retail sales; installement sales, discounts, premium sales are exercised.

Alimsatım owns about 200 retail stores. The Appendix IX shows the distribution of retail stores & factories of SB over Turkey. The retail stores can undertake both wholesale & retail sales.

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The table below shows the 1964 sales of SB:

TABLE XVII

Sales	Value TL.	%
Official Sales	161,071,300.-	21,5
Sales through Central Office	78,832,500.-	10,5
Wholesale from Retail outlets	259,061,900.-	34,6
Retail Sales	250,073,500.-	33,4
Miscellaneous	253,500.-	—
TOTAL	749,292,700.-	100.-

Source: *ibid* p. 19

The sales volume in 1964 was TL. 749,3 million.  
In 1963 it was TL. 723,1 million.

In 1964 The Cotton Textile sales were about TL. 402,4 million. 58% of this sale was wholesale, 24% was retail sales, 15% official sales. The woolen textile sales amounted to TL. 221,6 million.

As can be observed from these ratios wholesale covers a larger portion of SB sales. However, this is against the spirit with which this institution was founded. The principle set for SB its commercial operations was to provide high quality goods to the Turkish consumer and while doing it create a sound competition in favor of

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consumers by increasing retail sales volume. In general, this aim was reached but in recent years a tendency is seen in SB sales which is a trend towards more wholesale business. The wholesaling is encouraged by means of discounts and premium sales. Alimsatım's sales volumes to wholesalers in 1961 were TL. 110 million in cotton goods and 35 million TL. in woolen goods. These yielded far less profit than the retail sales.

Alimsatım owned 211 retail outlets at the beginning of 1960 but during the year, 61 of those stores were closed because they were unprofitable. Today, there are 156 retail outlets, 54 of which are still unprofitable.

The number of personnel is quite many in SB and it is still increasing at present. In order to cover the expenses of these, the sales volume has to increase. It's generally beleived that closing more retail stores will increase the expenses and will more rapidly lead to liquidation of SB's textile branch.

It will be useful to talk about the characteristics of retail outlets of SB here. First of all, there are more people who are not directly involved in selling at retail stores. This, naturally, causes high store expenses. Secondly, the annual sales of a retail store

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are not very high to cover the personnel expenses.

Generally, at a retail store there are:

- 1) A manager
- 2) A controller (in 70%)
- 3) A cashier
- 4) A packaging-man
- 5) A janitor

"A typical retail store around Ankara region has an annual sales turnover of 0,24-2,45 (wholesale&retail) and 2,4-13,5 retail sales turnover. SB, in wholesale & retail sales must show a sales turnover of 8<sup>1/</sup>.

At a typical retail outlet a customer spends more time waiting for the receipts to be completed than the actual buying time.

In Anatolian retail stores, the sales show very high seasonal fluctuations which leads to creation of excess capacity since the number of store personnel stays the same during slack seasons. During the year a 7 months time is considered a slack period.

1 / SB, Marketing Çalışmaları İlk Dönem Raporu., Milletler-  
arası Kalkınma Teşkilatı, Ankara, Turkey.  
Haziran 1963. pp. 16-17

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The retail outlets in large rural areas show other characteristics. Until August the sales are under normal but very regular. After August the sales start to go up and during October & November constitute 11% of the total sales.

At Alimsatım there is not a scientific market or marketing research carried on. The ones made can be called investigations. However, SB people is very much willing to form a marketing Research Department.

Alimsatım does not involve in ready-to-wear manufacture although many suggestions were made which would also help to increase sales. However, Alimsatım management beleives that previous attempts proved unsuccessful in Eastern Turkey & most of the consumers will not buy ready-to-wear clothing. On the contrary there is a present trend toward ready-to-wear industry, especially in Istanbul area. A consumer research on this context may disprove the management's contention. These finished goods may represent a substantial portion of Alimsatım's sales volume. Similiar opportunities exist in creating new products like nylon raincoats or worsteds containing blends of polyester fibers which have been found successful by some private textile manufacturing firms.

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In the field of research, each month a large report is issued by the Cotton Department, consisting of many statistical tables and review of competitive conditions, which covers prices & sales conditions through Turkey.

SB carries on advertising and display programs. It is handled partly in Ankara under the Publications group and partly in Istanbul under the direction of Alimsatım. They have displays in store interiors and windows. In Istanbul there is a group of five girls and one man as a supervisor, whose duty is to create displays and change them on regular schedule which is maintained by the Director of Istanbul region.

Beside domestic sales promotion activities SB carries on export promotion operations. Most of the export business came from Germany, but, regretdly, this was lost in late 1960 when the Hamburg Office was closed for political reasons. Some mail-orders continue and a very few rugs are now sold to Germany through a German firm. There is a tendency for SB & Alimsatım officials to look on foreign trade primarily as an opportunity to reduce stocks. This approach is based upon dumping strategy.

Within the recent months two trips have been sponsored by the Turkish Government to different African

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nations in an effort to spread good-will & to examine trade potential. It is expected that Alımsatım will persue the initial contacts made by its two represantitives on such tours.

Alımsatım uses salesmen for sales done to independent private retailers or to wholesalers. However, this salesmen group require some technical knowledge. These people go around and ask the needs and demands of wholesalers&retailers and the result of their investigation is used in material designs, color and style. In order to give technical knowledge tothe salesmen, a training program is devised but the notion of training is new in Sümerbank & Alımsatım. The training course includes also retail clerks. Opinions vary on the quality of the course or its presentation. Another program is contemplated which will enable personnel from Alımsatım & other units to attend local or foreign universities & business seminars.

There is very little cooperation or almost none with the channel members. Since Sümerbank gives more emphasis to its own retail stores, they somewhat neglect the independent retailer or wholesaler. Unlike the private textile manufacturer, Alımsatım is not in a position to give much financial aid to the channel members. Very limited discounts is exercised.

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If the credit sales are considered a convenience, they exercise it quite excessively. This can be seen when the Balance sheet is analyzed. If the Customer's Account is looked at, it is seen that, there is a figure of 123,329.695.41 (1964)<sup>1/</sup>.

It is composed of:

A. Official Departments:

Navy	1,128,670.-
Etibank	50,277.-
Emniyet Gn. Md.	210,000.-
Air Force	1,457,931.20
Ist. Levâzım Amirliği	18,200.-
Army	12,190,411.61
Şeker Sigorta	3,141,885.63
Others	<u>6,163,344.28</u>
	24,359,919.72

B. Cooperatives & Pension Funds 56,464.07

C. Domestic Market Customers 41,964,468.12

D. Foreign " " 23,427.06

66,404,278.97

So, it is seen that Accounts Receivable is quite loaded. The

<sup>1/</sup> Başbakanlık Yüksek Murakebe Heyeti, Sümerbank Alım ve Satım Müessesesi 1964 yılı Raporu, pp. 42-43.

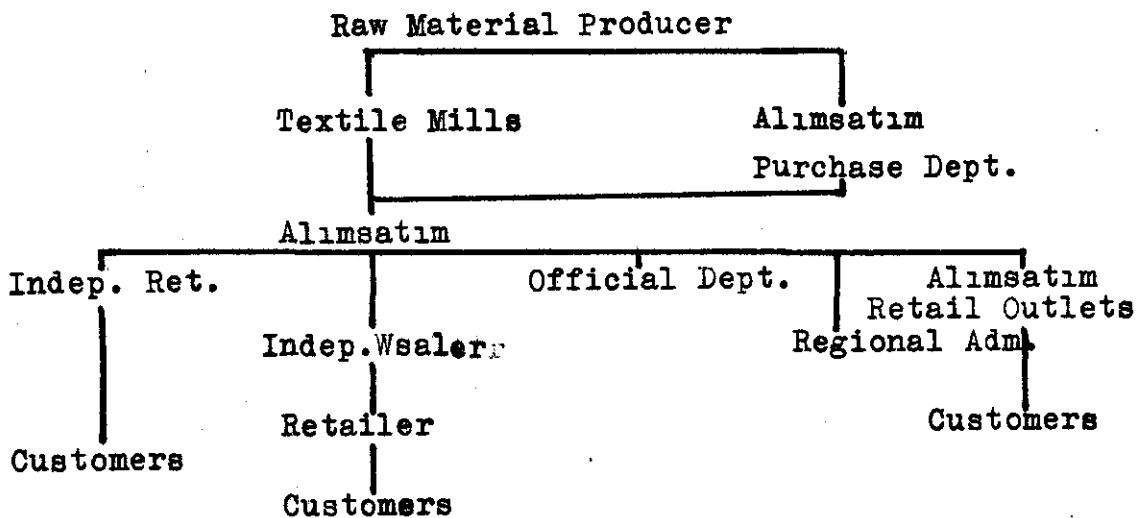
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Article "C" which is the domestic Market Customers is mostly composed of independent wholesalers & retailers.

In conclusion, if a channel of distribution is to be drawn for Sümerbank goods it will be something like the following:



This channel type is generally for finished textiles. Naturally, at different stages of manufacture, the goods are offered to the market like it is the case in the private textile manufacture. (Ch. IV p.62)

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## CHAPTER VI

### CONCLUSION

In this chapter conclusions and the findings of chapters, II, III, IV and V will be analyzed. It will be more like in the form of a summary of the chapters. The findings will be given point by point and any recommendation will be done in the next chapter which will correspond to the findings listed in this chapter.

As it is understood from the first chapter, the textile industry is one of the largest promising sectors in Turkey. Especially cotton textile industry, from the point of capital, number of employed and production volume is one of the largest industries. After the second world war a sharp development was observed in this sector and thereafter Turkey ceased to import cotton thread & cotton textile. Even export business started.

The table below gives a comparative picture of both the private & public sectors' cotton and woolen production:

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TABLE XVIII

	<u>Tons</u>	<u>Production</u>		
		1962	1963	1964
Cotton Thread	Tons	94,124	95,767	100,076
Public	"	28,124	28,835	29,859
Private	"	66,000	66,932	70,217
Cotton Textile	Meter(000)	533,208	547,487	554,999
Public	"	158,208	164,494	169,011
Private	"	375,000	382,993	385,988
Wool Yarn	Tons	19,936	20,094	20,415
Public	"	3,199	3,094	2,951
Private	"	16,737	17,000	17,464
Woolen Textile	Meters(000)	23,020	23,647	23,931
Public	"	4,640	4,447	4,446
Private	"	18,380	19,200	19,485

Source: Türkiye'de Pamuk İpliği ve Pamuklu Dokuma Sanayii  
Hakkında Rapor T. İş Bankası A. Ş., June 1966, p.8.

This table gives a clear idea of the shares of public and private sectors in Cotton & Woolen textile industries.

In the textile industry, the private firms are smaller in scale with respect to public sector firms.

The export business especially in cotton textile should be fostered. In order to solve the export problem, the raw material prices should be more stable and should be more in compliance with the world market prices.

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Both the public and private sector procure their raw materials either from the producers or from the wholesalers. Mostly, Smerbank factories purchase their raw material from producers. Their purchase usually is done by Alim Satım branch offices in certain regions. The private firms too buy their raw material through their branch offices or they send a representantive from the head-office to make the purchase.

In raw material purchases, private firms make use of a commission man but this is not so for Smerbank factories. Therefore, this part of the channel is somewhat different for public & private firms.

The organization of sales departments for private & public firms are completely different. Smerbank has established an autonomous body - Alim Satım - for purchases & sales. However, in private firms the sales are conducted either by a department or by a sales manager. There are cases in the private sector where a marketing department is also organized.

Both the private firms and Smerbank have divided Turkey into certain regions where they have a branch office. Most of the private firms have offices in İzmır, Adana and

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Kayseri whereas SB has only Istanbul, İzmir & Ankara offices.

Few of the private firms work on only special orders buy Sümerbank manufactures textile on order basis only for contract sales made to Official Departments.

Private Firms use wholesaler and retailer in order to offer their goods to the consumer. Few of them have their own retail outlets. However SB with its retail stores can sell at lower prices to the consumer. They do not need to use a wholesaler or a retailer because their retail outlets are very widespread. Therefore, at this point too, the channels of distribution the two sectors are completely different.

Private Firms prepare their own sales specifications whereas Sümerbank's sales specification is fixed by a Sales Regulation.

The price policies of both sectors are also different from each other. The private sector firms determine their prices by taking into account market forces. SB price policy is cost-plus-pricing where a certain margin is added onto the cost of production. Sümerbank can sell at a loss & permitted to do so by the Sales Regulation but private firms very seldomly sell at a loss.

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Both the private firms and Sümerbank factories do export business. But the volume of export sales in private sector is not very large and the volume Sümerbank export sales has recently decreased.

Sümerbank undertakes more sales to Official Departments, to Regional Administrations. The private firms only enter adjudications.

Credit sales are very wide spread both in the private and public sectors.

Few of the private firms carry on formal research. The rest & Sümerbank carry on some informal investigations by means of their salesmen.

Private firms put more emphasis on advertising and sales promotion than Sümerbank. The sales promotion activities carried by Sümerbank are very limited indeed.

Both the private firms and Sümerbank pay little attention to training the sales personnel.

Sümerbank being a state economic enterprise is less efficient and has more red tape than the private sector firms. It must be added that Sümerbank is a very large concern and it is not very proper to make a comparison of its operations with the private sector firms which are

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smaller in size & employ less people.

In conclusion, it is possible to say that although Sümerbank has a better means of reaching the consumer, it is not selling as much as the private firms. It is not as profitable as the private firms. The thing lacking is the efficiency on the part of Sümerbank. Although the SB have the retail outlets, they have become a nuisance due to being very costly. The store expenses are high because overhead expenses are high.

Wholesalers in the trade channels have an association which has the aim of carrying on market researches; giving financial aid, helping with transportation, & etc.

The retailers on the other hand do not have an organized association.

Wholesalers can also indulge in manufacturing business. Then they would be named "Amil".

Although the wholesalers fear that they are losing their importance in the channel, it is not true. Because manufacturers still prefer to do business with wholesalers rather than directly with retailers.

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It seems private sector has more business with the institutions in the channel since they unlike Sümerbank do not have their own retail outlets. This does not mean that the volume of business done by Sümerbank is an amount to be neglected. As stated in the fifth chapter, in recent years there is a tendency on the part of Sümerbank to do more wholesaling.

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## CHAPTER VII RECOMMENDATIONS

In this chapter various recommendations with respect to the subject will be given.

1. In order for the textile industry to be more productive, factories have to be established at the optimum capacity. Those which are under the optimum should be tried to be brought up to the optimum. Along with this, the workers' productivity must be increased and the cost of production must be lowered. However, the lowering of costs of production should in no way lead to lowering of quality. Raising the quality is required for increasing the export possibilities.
2. In order to increase the vocational skills and abilities of the workers, thus increasing labor productivity, either permanent or temporary training programs should be established.
3. The Wholesalers' Association must be reorganized so that it can extend more help to all wholesalers.
4. Wholesalers of different industries must be grouped

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together in the Association so that the specific problems pertaining to each group can be specified.

5. A better registration system at the Wholesalers' Association is required.

6. The Market Research Department of the Wholesalers' Association must be revised so that it can carry on scientific market & consumer surveys.

7. Retailers, too, may set up an organized form of association among themselves.

8. The individual private firms must look for new channels in introducing a new product. That is a channel study has to be under taken as well as market surveys.

9. The private firms must give more aid to wholesalers such as coordinated advertisements, helping with store displays, financial aid.

10. There seems to be in the Simerbank complex a shortage of marketing experts. Therefore, a marketing director should be recruited & placed either as an independent manager or can be tied to the sales department.

11. In the retail stores, more emphasis should be placed on the ready-to-wear. Hence the overhead will be decreased to some extent which will help the stores to be more profitable.

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12. Since the distribution channels are not very efficient for Sümerbank, the share of Sümerbank in the textile industry is decreasing. Therefore, SB should give more emphasis on retail trade.
13. Since the unprofitability of the some SB retail stores is due to too much personnel employed in these stores, the number of extra store personnel should be reduced.
14. Sümerbank should undertake a more vigorous attitude towards advertising which in turn will push the goods into market in a faster way.
15. Last, but not least, a more dynamic approach is imperative for increased profits & better sales results. The public should be given foremost attention in an effort to measure their wants, reactions & demands.

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Atay, Feyyaz; Vice-President, Alım ve Satım Müdürlüğü  
Atıcı, Arif; Expert on Textiles, Chamber of Industry  
Bornovalı, Lütfi; Toptancı Tüccar (Wholesaler)  
Edin, Osman; Marketing Manager, Santral Mensucat  
Ertürk, Arif; Toptancı Tüccar, (Wholesaler)  
Güngör, Necati; Toptancı Tüccar (Wholesaler)  
Hakan, Sezai; General Manager, Akfil  
Hersek, Kemal; Sales Manager, Bozkurt A.Ş.  
Oba, Kâmil; Technical Vice-President, Sümerbank  
Oktay, Vahi; Chamber of Industry  
Sadıkoğlu, Nazım; General Manager, Altınyıldız  
Talay, Sadullah; Toptancı Tüccar (Wholesaler)  
Türker, Erol; Economic Research Department Manager, T. İş Bankası A.Ş.  
Şerifoğlu, Cemal; Executive Vice-President, Bozkurt A.Ş.  
Yıldırım, Mehmet; Toptancı Tüccar (Wholesaler)  
Yükselen Rıdvan; Manager of Cotton Products Department, Alım Ve Satım Müdürlüğü.

# APPENDIX : I



## BOZKURT MENSUCAT SANAYİİ A. Ş.

**TAMİM No.**  
**1966/3**

### MERKEZ

Fincancılar, Nasır Han Kat 3 No. 509 - 511  
İSTANBUL

### TELEFON

Müd. : 27 37 91

Satış }  
Muhas. } 27 47 43

71 56 62

Fabrika : 71 63 15

71 63 48

Anadolu Mümessilliği : Adana, Vakıflar Çarşısı No. 39 - 50  
Telefon : 6 7 3 9

İzmir Şubesi : Necatibey Caddesi No. 20  
Telefon : 3 5 8 4 5



# TÜRKİYE PAMUKLU MENSUCAT VE PİYASA HAREKETLERİ

## ÇİFTÇİLERİN TARLALARI İLE Mİ OLMASI DOLAYISILE

# PIYASALAR GENAKIN GEÇTİ

## Değişmeyen fiatların sağlamlığını göğü görüldü, piyasada para darlığı devıyor

**P**AMUKLU mensucat ve alüminum tekstil piyasalarında geçen son bir haftanın parası şu olmuştur: Hemen bütün Türkiye'de ilgili piyasalar ve bilhassa toptan öncesi gibi ağır çalışmışlardır. Bazılarına göre, seyyar pazarlarda da iş hacmi tadır. Ancak alış-verişlerin gözle görülebildiği satışlar, perakendeciler olmakta, bu satış kollamaktadır. İki haftadanberi devam eden ağırlığın sebepleri pek meçul değildir.

İlgililer de biliyor ki, havaların tamamen bahara ve hattâ yaza dönmesi, büyük lesini, tarlasının başına sevk etmiştir. Bu hal, piyasaları hattâ köylü pazarlarını hırmaktadır. Şehirlerde ise, yazlıklar ve bayramlıklar çoktan temin edilmiş durumda piyasasının ellerindeki son mallar, müşteri bekler duruma girmiş ve toptancılar istira kalmışlardır. Bununla beraber bazılarına göre haziranın on beşinden sonra, diğer carlara göre de, Ağustos ayından itibaren piyasaların tekrar kimildamağa başlayaca

tadır. Toptancılar yeni iş imkânları bulacaklardır.

Diğer taraftan asıl önemli mesele, fiatların istikrarını muhafaza edişi ve son iki hafta zarfında bir yükselme kaydedilmeyişidir.

**G**ENEL olarak eşya ve diğer mamuller fiatlarında yükselişlerin peyderpey devam etmekte olduğu şu sıralarda, manifatura çeşitlerinin uzun bir süre eski fiatlarını muhafaza edebilmesi zor kabul edilmektedir. Fakat fiat meselesi, ince bir meseledir. Fiatlara kumanda eden pazarlardan ve piyasalardan ziyade fabrikalar olduğundan ve piyasalardan ziyade fabrikaların bileceği bir iştir.

Şimdilik yeni bir ayarlama görülmemiştir. Önümüzdeki bir iki iş ayı zarfında, durum kendisini gösterecektir.

Öte yandan piyasanın parasızlığı olanca ağırlığı ile göze batmakta, devamlı şikâyetler olmak tadır. İnşaat malzemesi gibi, harekete geçmiş olması gereken piyasalar da, manifatura çarşısı gibi durgunluktan kurtulamamıştır. Birbirini takviye etmesi icap eden piyasalarda iş olmayışı, umumi parasızlık yaratmakta, mallar beklerken, işçisi ve sanatkârı sıkıntı çekmektedir.

Çukurova Fab. Mamulleri (Tarsus)

## ■ MENSUCAT ÇEŞİT SON FİATLAR ■

Şark Sanayi Fab. (İzmir)

36076	Krepon
36190	Grizet
35189	Flanel
45205	Karamanol
46243	Fantazi baskı
72252	Reps baskı
51239	Velür Baskı
(*) 51272	Elbiselik renkli
(*) 51272	Elbiselik kasarlı
51272	Elbiselik
55242	Şorteks
56349	Yazlık
64152	Arma poplin
(*) 70131	Reks poplin
40209	Diagonal
66251	Drill
72187	Kaşmir
72187	Lüks kaşmir
(*) 66158	Pijamalık
69141	Jakarteks
49262	Elbiselik
25417	Frize
62348	Kotele
80288	Süper moleskin
(*) 66289	Yıldız moleskin
58365	Moleskin
40235	Serj
(*) 47240	Briyante
(*) 44222	Krep

SÜMERBANK'ın Brandahl-tan diktirilmiş Kamyon örtülükleri		
Eb'adı (Mt)	Fabrika (TL)	Toptan (TL)
5x 8	605,48	622,—
8x10	1.139,10	1.226,—

## BOZKURT FABRİKASI Mamülleri (İstanbul)

Mamûn Cinst	Eni	Vâdeli Fiyat
<b>Terilenli Mallar:</b>		
Terilen alpaka	140	44.00
Nopeli alpaka	140	45.00
Terilen filafil	140	45.00
Panama	140	33.00
Terilen		
Pötikare alpaka	140	43.00
Terilen sable	140	
Terilen Pepita	140	38.00
Terilen kareli alpaka	140	—
Terilen milre	140	30.00
Terilen muline	140	28.00

DIŞ PIYASALAR

## İngiltere'de satışlar birden hareketlendi

### G.A.T.T'nin yeni kararına itiraz olmayacağı anlaşılıyor

**M**ANCHESTER, (Özel muhabirimizden uçak postası ile bildiriyor) — Geçen hafta için de hemen hemen bütün talepler karşılanmıştır. İç piyasada da işler oldukça canlı bir durum arz etmiştir. Bu arada haftanın en önemli gelişmele-

rinden beri de Britanyanın dış memleketlerden ithal edeceği tekstil maddeleri kontrol and laşmaları konusunda yapılmış tir. G.A.T.T. üyelerinin, İngilterenin tekstil konusunda aldığı bu yeni kararlara da itiraz etmeyeceği tahmin edilmektedir.

Piyasada bez üzerine olan işler bilhassa endüstri mallarında dikkati çekmiştir. Pamuklu dokuma malları üzerine de bazı işler olmuştur.

## Belçika'da tekstil sağlam

**B**RÜKSEL, (Özel muhabirimizden) — Tekstil piyasaları da sağlam bir durum arz etmektedir. Geçen yıl aynı yıl mukayese edildiği takdirde bu yıl işlerin memnuniyet verici bir şekilde geliştiği görülmektedir. Bazı fabrikatörler sonbahara kadar olan anlaşmalarını ta-

98-100	345	Lüks emprime	88-90	430
238-240	1400	Saten emprime	88-90	530
88-90	355	E/90 Mersin kaput bezi	90	91
88-90	430	Düz opel	38/90	425
88-90	430	Düz flanel		405

70219	Pardösü gabardin
67220	Trençkot poplin
66289	Yıldız gabardin
72187	Lüks kaşmir
72187	Kaşmir
39229	Pantolonluk
49259	Kostümlük
66205	Süper terdin
72252	Reps baskıl

Fiatlarımız teslim günü fiatdır.  
(\* işaretli kaliteler % 4 peşin

## Mensucat Santr Mamûlleri

Kalite adı	Eni	Yeni Fiat	Satış Ra. Ce. Dö. Toplan	Perakende
<b>BASMALAR</b>				
Arslanlı basma	68-70	258		
İstanbul basma	65-67	248		
Telaforata	68-70	275		
<b>PAZENLER :</b>				
Pehlivanlı pazen	68-70	375		
<b>DÜVETİNLER:</b>				
Nâzıma Emp.	68-70	595		
Film Düvetin	68-70	500		
Film Düvetin (B)		470		
Beyoğlu Kadife Emp.	78/80	725		
<b>HASSELER:</b>				
Madapolam				
Hasse (renkli)	178-180	1035		
" (kasar)		985		
" II		850		
<b>ÇARŞAFLAR:</b>				
Lâle hazır çarşaf	takım	4800		
Lâle hazır çar. renk		4975		
Lâle hazır çar. renk	180x240	2650		
Lâle hazır çar. renk	180x240	2700		
Lâle hazır çar. renk	140x240	1725		
Lâle hazır çar. renk	140x240	1785		
Lâle hazır yastık k1.	50x70	525		
Lâle hazır Yastık k1.	50x70	600		
<b>GÖMLEKLİKLER:</b>				
Ekst. ekose düve.	88-90	430		
Ekose pazen	78-80	390		
Süper reps gömlek.	88-90	435		
Metin gömlekkik	78-80	345		
<b>DÖŞEMELİKLER:</b>				
Saten perdelik	128-130	960		

## Bossa Fab. Mamulleri (Adana)

Malın Cinsi	Eni	Kuruş
Velvetin Emprime	68/70	625
Kelebekli divitin	68/70	465
Kelebekli kadife	68/70	580
Pazen çamaşrılık	78/80	385
Pazen pijamalık	78/80	390
Bossa Nova poplin emprime	88/90	495
Saten emprime	78/80	580
Lüks pop. emprime	88/90	560
Petekman	138/410	1075
Moleskin	138-140	1200
Bossa Mers. etamin	158/160	1250
Krep döşemelik	128/130	900
Atlas döşemelik	88/90	625
Döşemelik	88/90	405
Otoman	88/90	395
Ekstra poplin	136/140	1125
Kaşın emprime	68/70	500

## AK FIATLARI

Eni	Yeni Fiat	Satış Ra. Ce. Dö. Toplan	Perakende
68-70	258		
65-67	248		
68-70	275		
68-70	375		
68-70	595		
68-70	500		
78/80	725		
178-180	1035		
(kasar)	985		
II	850		
takım	4800		
	4975		
180x240	2650		
180x240	2700		
140x240	1725		
140x240	1785		
50x70	525		
50x70	600		
88-90	430		
78-80	390		
88-90	435		
78-80	345		
128-130	960		

## FIATLARI

SATIŞ FIATI	
Toplan	Perakende
130,—	150,—
113,—	130,—
96,—	110,—
78,—	90,—
69,50	80,—
65,—	75,—
65,—	75,—
61,—	70,—
38,50	43,93
38,—	43,53
36,50	41,75
36,50	41,47
35,—	40,18
34,50	39,50
33,50	38,50
30,—	34,32
27,—	30,80
23,50	26,68
20,—	22,50
7,—	770,—
26,—	30,—
200,—	225,—

## Mamulleri

Toplan	Perakende
Satış fi.	Satış fi.
191	205
247	260
297	320
615	660
538	580
564	605
369	395
359	385
359	385
487	525

Seçme desen  
Seçme renk  
Seçme desen  
Siyah beyaz  
Siyah beyaz  
Seçme renk  
I. A. kalite

Konya	0/10	40235 Serj	140	640
Çalı koparan	1225	47240 Briyante	(*) 140	840
		44222 Krep	(*) 140	775
<b>BEZİR BOYALI MALLAR</b>				
Altınlı moleskin	138/140	1150		
Moleskin		1075		
Saten Seyhan-kızı	128/130	700		
Saten lüks	138/140	685		
Öğrenci sateni	88/90	340		
AA. 18. Fasone	138/140	650		
Merinos	88/90	325		
Otoman		325		
Montgomeri	138/140	860		
Gabardin		810		
Keten D.		650		
İşçi elbiseliği	143/145	615		
<b>HASSNER</b>				
Madapolam hasse	178/180	975		
Madapolam has. II		840		
Makinalı hasse	138/140	465		
Makinalı hasse II		445		
<b>KONFEKSİYON</b>				
Lâle hazır çarşaf	Takım	4600		
Lâle hazır çar.	180/240	2550		
Lâle hazır çar.		2600		
Lâle hazır çar.	140/200	1650		
Lâle hazır çar.		1700		
Lâle ha. yas. kılıfı	50/70	500		
Lâle ha. yas. kılıfı		575		

50229 Pike	135	810
72187 Kaşmir	130	795
72187 Lüks kaşmi	130	870
50299 Çalı		
koparan	(*) 145	900
66251 Drill	140	950
64204 Pardösü poplin	140	1020
70219 Pardösü gabar.	140	1110
67220 Trençkot poplin	140	1200
70209 Trençkot gabar.	140	1200
66289 Yıldız gabardin	140	1250
46243 Fantazi baskıl	130	900

SÜMERBANK'ın Brandahlık- tan diktirilmiş Kamyon örtülükleri			
Eb'adı (Mt)	Fabrika (TL)	Toplan (TL)	Perakende
5x 8	605,48	622,—	
8x10	1.139,10	1.226,—	

## Antalya Fabrikası Mamûlleri

C İ N S İ		SATIŞ FIATI		
Eni	Fabrika	Toplan	Perakende	
Düz poplin	90	574	591	650
Çizgili poplin	90	574	591	650
İpl. boy pij.	90	657	677	745
Kadın ropluğu	90	839	864	950
Mendil	Ad.	177	182	200
Mendil	Ad.	177	182	200
Kadın mendili	Ad.	88	91	100
Ekose	90	525	541	595
L. Popl. sonferize	90	860	886	975
Fantazi ekose	89	539	555	610
Sanferizeli düz ve çizgili gömlek	Ad.	2000	2060	2275
Ekose gömlek (Spor uzun kol.)	Ad.	1756	1854	1990
Ekose gömlek (Spor kısa kol.)	Ad.	1316	1391	1490
Ekose Çocuk Göml. (Spor kısa kol.)	Ad.	1030	1061	1185
Ekose	—	704	725	800

## Çukurova Fab. Mamulleri (Tarsus)

Malın Cinsi	Eni	Fiat
T. 224 patiska	peşin	260
P. 30/108 patiska	peşin	310
T. 22 düz poplin	peşin	330
T. 22 poplin pijama	peşin	405
T. 45 düz poplin	peşin	380
T. 45 poplin emprime	peşin	455
P. 30 parlak s. saten	peşin	405
Saten emprime	vadeli	530
0.19 otoman	peşin	305
S. 8 düz kadife	vadeli	530
T. 3 perdelik	peşin	1655
Köylü divitin	vadeli	415

S. 219 kadife emprime peşin 555  
P. A/20 pazen pijamalık vâdeli 340  
U.x ekose gömlekkik 405 vâ.  
T. 10 lüks döşemelik 460 vâd.

P. 30/252 en-240 Patiska 1400 peşin	
36 Metrelik Top Fiatları	
C/90 Tavşanlı Sil.	127,50
C/100 Tavşanlı Sil.	135,—
D/75 Atlı Sil.	58,—
D/90 Atlı Sil.	69,50
D/100 Atlı Sil.	75,—
E/80 Değirmenli Sil.	72,50
E/90 Değirmenli Sil.	78,—
E/100 Değirmenli Sil.	85,—
H/90 Köprülü	64,—
H/100 Köprülü	66,50

HASTALIK  
Hâlen bölge  
mavi küf ve  
görülmedik  
da, şimdilik o  
deki günler  
kesinin mevcu  
dilmektir.  
yağışlar dolay  
sullerinde ve  
ballık mendis

## Mirm

- 1 — Bakk
- 2 — Et-da
- 3 — Yaş
- 4 — Balık
- 5 — Yaka
- 6 — Temi
- 7 — Sıfır
- 8 — Tıbbi

## Pamuk söylü Men

1 — D  
kacak, ten  
5-6-7-8 m  
2 — Şa  
rülebilir.  
3 — EK  
nü saat  
4 — Ta  
mektupları  
meyi yap  
ihale edile

Ist. Lv.  
Aşağıda  
de, İzmir  
görülebilir  
Teklif  
zımdır. Po  
Cinsi  
Odun  
Duvetin  
GİMLER:  
Reps Gömleki  
Gömlekkik  
lin poplin (B)  
am (ropin)  
pop. (B)  
mirlikleri  
Teklif  
zımdır. P  
MELİKLER:  
perdelik  
Cinsi  
r perdelik  
Odun  
eri (B)  
ık tapisseri  
TOLONLUK

UFA lezzet bakımından birinci geldi!

Piyasada mevcut margarinerden nü-  
münceler, marka ve vasıfları hiçbir şekil-  
de açıklanmadan, muhtelif bölgelerdeki  
binlerce kişiye tattırılıp... ve bu anket  
neticesinde her üç kişiden ikisinin ge-  
rek tadı, gerek kokusu bakımından  
tereddütsüz UFA margarini tercih  
ettikleri tesbit edildi.  
Böylece, memleketimizin en komple-  
nebatî yağ fabrikasında imal edilen  
UFA'nın lezzet bakımından üstünlüğü  
bir-kere daha ispat edilmiş oldu.  
İştahla, seve seve... doya doya yenilen  
yemekler ancak UFA ile pişirilen  
yemeklerdir.

100 Gr. UFA, 2000 litre A şifalı ve  
100 litre D vitaminli iktosa olan.



"ÜSTÜN LEZZETLİ MARGARİN"

(Ticret - 1714)

16/AGUSTOS/1965

## TÜRKİYE PAMUKLU MENSUCAT

Fuarın iş mevsimini getirme

Piyasalarda canlılık

## DIŞ PİYASALAR

**Britanyanın döviz kaynağındaki azalma alıcıları ihtiyatlı kıldı**

**Mensucat çeşitlerinde kalite bakımından bir değişiklik olmadı**

**MANCHESTER (Özel muhabirimiz uçak postası ile bildiriyor) —** Geçen hafta içinde Manchester pamuk ipliği ve mensucat piyasasında vâdeli mübayaaları canlandırarak kayda değer bir hareket görülmemiştir.

**İşler Aksadı**

Havanın mevsimsiz olarak yağışlı gitmesi, fabrikalardaki tatiller ve en mühim olarak Britanyanın döviz naklarının azalmış bu yüzden piyasadaki

alıcıların biraz daha ihtiyatlı hareket etmesine âmil olmaktadır. Mamafî devamlı olarak gelen kısa vâdeli siparişler fabrikalardaki fazla imalatın sürümünü sağlamaktadır. Son bir kaç haftadan beri devam eden mensucat satışlarında kalite baki-

mından bir değişiklik görülmemiştir.

**KUMAŞ SATIŞLARI**

Standart kumaş satışları normal olarak cereyan etmekte, orta kalite iplik satışları da devamlı olarak yapılmakta ise de iyi kalite ipliklere de alâka gösterildiği kaydedilmiştir.

## 3. Antalya Fabrikası Mümülleri

C İ N S İ	SATIŞ FIATI			
	Eni	Fabrika	Toptan	Perakende
Düz poplin	90	574	591	650
Çizgili poplin	90	574	591	650

**Pamuk Mensucat Fab. Ma. (İzmir)**

% 3  
İskontolu

## revaçta

**NEW YORK. (AP.) —** Geçen hafta içinde New York mensucat piyasası hareketli geçmiş ve 1966 senesi ikinci üç aylık devrede teslim edilmek kaydıyla emprime kumaşlar üzerine tatminkâr satışlar kaydedilmiştir. Fabrikaların büyük bir kısmı 1966 senesinde teslim edilecek siparişleri için faaliyet göstermekte olduklarından 1965 teslimatları için yapılan muameleler pek cüzi olmaktadır.

Yünlü kumaş siparişleri normal olarak devam etmektedir. Avustralya yün borsasında bazı yünlü kumaş fiyatları gayri muntazam seyretmektedir. Suni kumaş piyasası umumiyetle durgun olup hafta fiyatlarda cüzi gerileme kaydedilmiştir.

**Belçika'da mensucat satışları hızlanmadı**

**BRÜKSEL. (Özel) —** Belçika mensucat piyasasında beklenen ilerleme henüz kaydedilmemiştir. Piyasanın mensucata ait bütün branşları hareketsiz olup taleplerin pek azaldığı bildirilmektedir. Bir çok fabrikalar faaliyet göstermekte ise de sadece stoklarının artışı ve satış olmaması dolayısıyla iplik fiyatlarına tesir ettiği söylenmektedir.

**Kula Mensucat Fab. mamulleri (İzmir)**

Mahul Cinsi	Eni	Vâdeli Fiyat
Renkli Hasse	80	225
Keten Taklidi	90	325
Tülbent	80	170 peşin
Mermer	100	210
Hasse 45	90	

## YAZLIK BASKILI PAMUKLULAR

Mahul Cinsi	Eni	Vâdeli Fiyat
Basma Gömleklik	80	
Basma Pijamalık	80	260
Lenjeri çamaşılık	80	250
Mer. Ekose gömlek	90	325
Poplin emprime (Doşemelik)	90	90
Baskılı Doşemelik Rant	90	350
Ekose gömleklik	80	285

Perdelik renkli poplin Kadın Ropluk poplin PANTOLONLUKLU Fantazi Elbiselik Ege tipi Toplin Altın Toplin TERİLENLİ MALI Terilen Alpaka Terilen Filafil Kareli Terilen Alpaka Terilen Pepita Terilen Pötikare Terilen Balıksırtı Terilen Panama Terilen Muline Terilen Serj Terilen Flament

## SÜMERB

DEFTERDAR Eb'ad	
20x30	R. M
30x45	
50x75	
70x105	
100x150	
150x225	
200x300	
300x450	
400x600	
600x900	

## BATT

Defterdar Fabrika	
3438 MA/02	
3438 MA/01	
4439 HC/02	
3339 MP/01	
3349 YL/02	
5416 MK (Tec)	
4439 YM/01	
3349 YA/01	
3447 MD/01	
4437 YF/02	
4439 YG/03	
3348 YA/01	
4438 MK/04	
4448 MG/02	
4437 MS/01	
4439 YG/04	
4139 YF/01	
4338 YG/03	
4139 YG/0 2	
4439 YG/05	
1163 TA (Tec)	
3439 MA (Tec)	Lüks

## Aydın

6000/G	Ka
6100/E	
6200	
6500	
6600	Fan
6610	
6650	
6700	
6750	
6800	P

## EYİNDE ŞİMDİLİK EHLİKE YOK

Yalnız zeytin mahsulünde şimdiki ciddi bir tehlikenin mevcut olduğu bildirilmektedir. Yalnız geçen ayına doğru yağışlardan dolayı bölgede sıcaklar başladığı sırada zeytin mahsulünde de enli bir durumun ortaya çıkacağı belirtilmektedir.

## Hastanesi Baş

Numarası	Muham. Bedeli
1	Lira Krş.
33	28419.25
2	16625.00
38	8374.30
1	1000.00
5	9805.00
5	2620.00
2	12390.00
60	14999.59

malî yılı ihtiyacından olan ve bir ay içinde ihaleye çıkarılmıştır.

malî yılı ihtiyacından olan ve bir ay içinde ihaleye çıkarılmıştır.

## Demirkapı 1 No. lu Sat.

Demirkapı 1 No. lu Sat. ile satın alınacaktır. Şartname başkanı ve Sirkeci - Demir

## Demirkapı 1 No. lu Sat. Al.

Demirkapı 1 No. lu Sat. Al. ile satın alınacaktır. Şartname başkanı ve Sirkeci - Demir

Demirkapı 1 No. lu Sat. Al. ile satın alınacaktır. Şartname başkanı ve Sirkeci - Demir

Pamuk  
söyliye

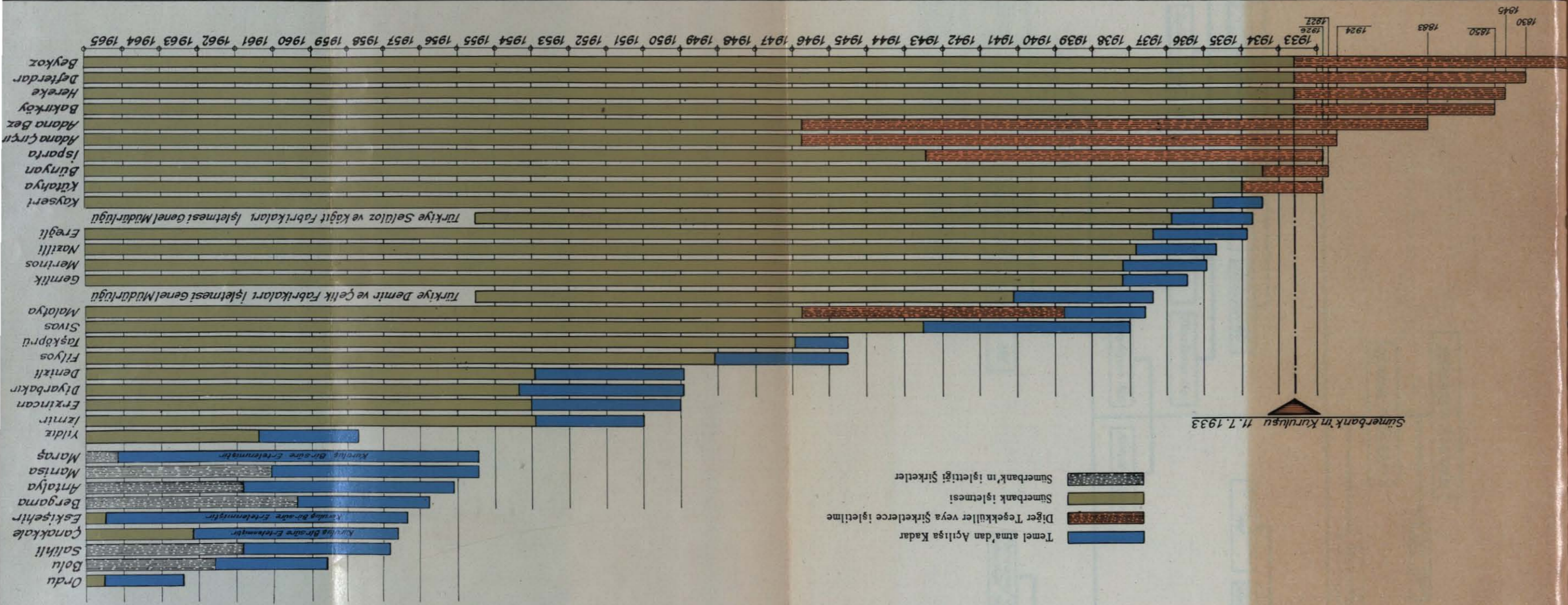
Mens

Mensucat Sanayi Fabrikası mam

(İstanbul)

Kalite adı	
BASMALAR	
Arsian basma	6
İstanbul basma	6
Telaorta	6
PAZENLER	
Penuvanlı Pazen	6
Ekse pazen	7
Pijamalık pazen	
Lenjeri pazen	
Fantazi pazen	
Seda Flanel	
DUVETİNLER:	
Film-düvetin	6
Lüks Düvetin	6
Kadite düvetin	
Ekstra ekose düv.	8
Yeni Düvetin	6
EMPRİNELER:	
Super Keps Gömleklik	8
Meun Gömleklik	
Mensalin poplin (B)	
Mensalin (Poplin)	
Super pop. (B)	
Riviera (Keten empr.)	
Super (Poplin empr.)	
DOŞEMELİKLER:	
Radar perdelik	
Reps doşemelik	
Cezayir perdelik	
Doşemelik	
Tapisseri	12
Tapisseri (B)	12
Perdelik tapisseri	12
PANTOLONLUKLU	
Granit	13

SÜMERBANK'IN İŞLETİĞİ FABRİKALARIN KURULUŞ VE SÜMERBANK'A GEÇİŞLERİ



Temel amaçla dan Açılışa Kadar  
Diğer Teşekküller veya Şirketlerce İşletime  
Sümerbank işletmesi  
Sümerbank'ın işlettiği Şirketler

Lüks Kreton B	80	330
Çizgili gömleklik	80	330
Arma poplin		
H/70 1e1a		
H/70 Kasarlı Hasse	70	170
H/90 Kasarlı Hasse	90	200
H/100 Kasarlı Hasse		
2/319 Kateli Hasse		
342 Suvarılı hasse	90	310
500 Eibiselik Kasarlı	70	260
502	90	325

371	70	320
524	70	310
400	70	370
542	70	402
369	90	383

Pajamalik pazen	80	350
Yeşkenli pazen		
Şehirli Pazen	80	355
Ekose pazen	80	350
5002 Krep Boyalı	90	
Divitin	80	
	70	370

Çukurova Fab. Mamulleri (Tarsus)

T. 224 patiska	peşin	260
P. 30/10s patiska	peşin	310
T. 22 düz poplin	peşin	330
T. 22 poplin pijama	peşin	405
T. 45 düz poplin	peşin	380
T. 45 poplin emprime	peşin	455
P. 30 parlak s. saten	peşin	405
Saten emprime	vadeli	530
0.19 otoman	peşin	305
S. 8 düz kadife	vadeli	530
T. 3 perdelik	peşin	1655
Köylü divitin	vadeli	415
S. 219 kadife emprime	peşin	555
P. A/20 pazen		
pijamalık	vadeli	340
U.x ekose gömleklik 405 vâ.		
T. 10 lüks dop-melik		460 vâd.

P. 30/252 en 240 Patiska	1400	peş.
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36 Metrelik Top Fiatları	
C/90 Tavşanlı Sil.	127.50
C/100 Tavşanlı Sil.	135.—
D/75 Atlı Sil.	58.—
D/90 Atlı Sil.	69.50
D/100 Atlı Sil.	75.—
E/80 Değirmenli Sil.	72.50
E/90 Değirmenli Sil.	78.—
E/100 Değirmenli Sil.	85.—
H/90 Köprülü	64.—
H/100 Köprülü	66.50

Fantazi ekose Sanferizeli düz ve çizgili gömlek Ekose gömlek (Spor uzun kol.) Ekose gömlek (Spor kısa kol.) Ekose Çocuk Gömle (Spor kısa kol) Ekose

BATTAL

Defterdar Fabrikası	
3438 MA/02 Battal	
3438 MA/01 Battal	
4439 HC/02	
3339 MP/01	
3349 YL/02	
5416 MK (Tec.11)	
4439 YM/01	
3349 YA/01	
3447 MD/01	
4437 YF/02	
4439 YG/03	
3348 YA/01	
4338 MK/04	
4448 MG/02	
4437 MS/01	
4439 YG/04	
4139 YF/01	
4338 YG/03	
4139 YG/0 2	
4439 YG/05	
1163 TA (Tec.9) k	
3439 MA (Tec. 12	
Lüks battal	

4. Aydın

6000/G	Kaputbez
6100/E	Hasse
6200	Poplin
6600	Fantazi file
6610	
6650	File
6700	Poplin
6750	
6800	Pijamalik

Meniscat Fab. mamulleri (İzmir)

S. 219 kadife emprime	peşin	555
P. A/20 pazen		
pijamalık	vadeli	340
U.x ekose gömleklik 405 vâ.		
T. 10 lüks dop-melik		460 vâd.

SÜMERBANK DEFTERDAR FABRİKASI

20x30 R. Milli	
30x45	
50x75	
70x105	
100x150	
150x225	
200x300	
300x450	
400x600	
600x900	

lekeleri 15 mil metre ham bez bulunmakta- Müessesesi şimdye ar bu miktarın 10 yon metresini fi-i ihraç etmiş bulun ktadır. İhracat için i partiler hazırlanmaktadır.

BATTAL SEKTÖRÜ ATIŞLARI

Diger taraftan hu i sektör tarafın da yabancı mem etlere yeni satışlar olduğı bildirilmek- ir. Malüm olduğı re bir müddet ev- bir firma tarafın a Amerikaya 1.5 yon metre ham bez kedilmişti. önümüzdeki gün- le gene aynı mem ete ihracat yapıla- n ifade edilmekte-

taltepe Fabrikası mamulleri (İstanbul)

EN FIAT	KIŞLIK BASKILI PAMUKLULAR
88/90	Ekose pazen 80 355
88/90	Pijamalik pazen 80 350
78/80	Çamaşirlik pazen 80 350
68/70	Düz kazmir pazen 80 315
68/70	Pantolonluk 90 365
78/80	Fantazi Pazen 70 330
78/80	Viskon Emp. 90 550
78/80	Süet divitin 70 490

ENLİ PAMUKLULAR

Vadeli	Ekose gömleklik	80
	Ekose pazen	80 370
	Fantazi pazen	80 360
	Fantazi pazen	70 330
	Pijamalik pazen	80 350
	Çamaşirlik pazen	80 350

NOT: Peşin fiatlardır.

SATILIK

Hatay caddesi Bahçelievler Camii bitişiğı imar duru- mu 9 kat Apartman yap- mağa elverişli geniş bahçe- li ev. Müracaat: Karşıdaki Bak- kal Bilal Kula, (Ticaret - 2776)

Yönetim Kurulu

Yönetim Kurulu  
Büro Md.

Genel Müdür

Müşavirler

Genel Md. Muavini  
"Teknik"

Genel Md. Muavini  
"İdari"

Yünlü San. Md.

Pamuklu San. Md.

Kimya San. Md.

Makine ve Enerji Md.

Plan ve Organizasyon Md.

Teftiş Kontrol Md.

Bankacılık ve Kredi İş. Md.

Satış Md.

Muhasebe Md.

İştirakler Md.

Tekstil Pr. Md.

Kimya Pr. Md.

Satınalma Md.

İnşaat Md.

Tesis Md.

Planlama Hey.

Resmî sat.  
ihracat

Araştırma Md.

Hukuk Müşaviri

Genel Sekreter

Savunma Sekreteri

Personeel Md.

Sosyal İşler Md.

Eğitim Md.

Neşriyat Md.

Daire Md.

Personeel Seferberliği Md.

Ana Görevler Md.

Sivil Savunma Md.

İstatistik Md.

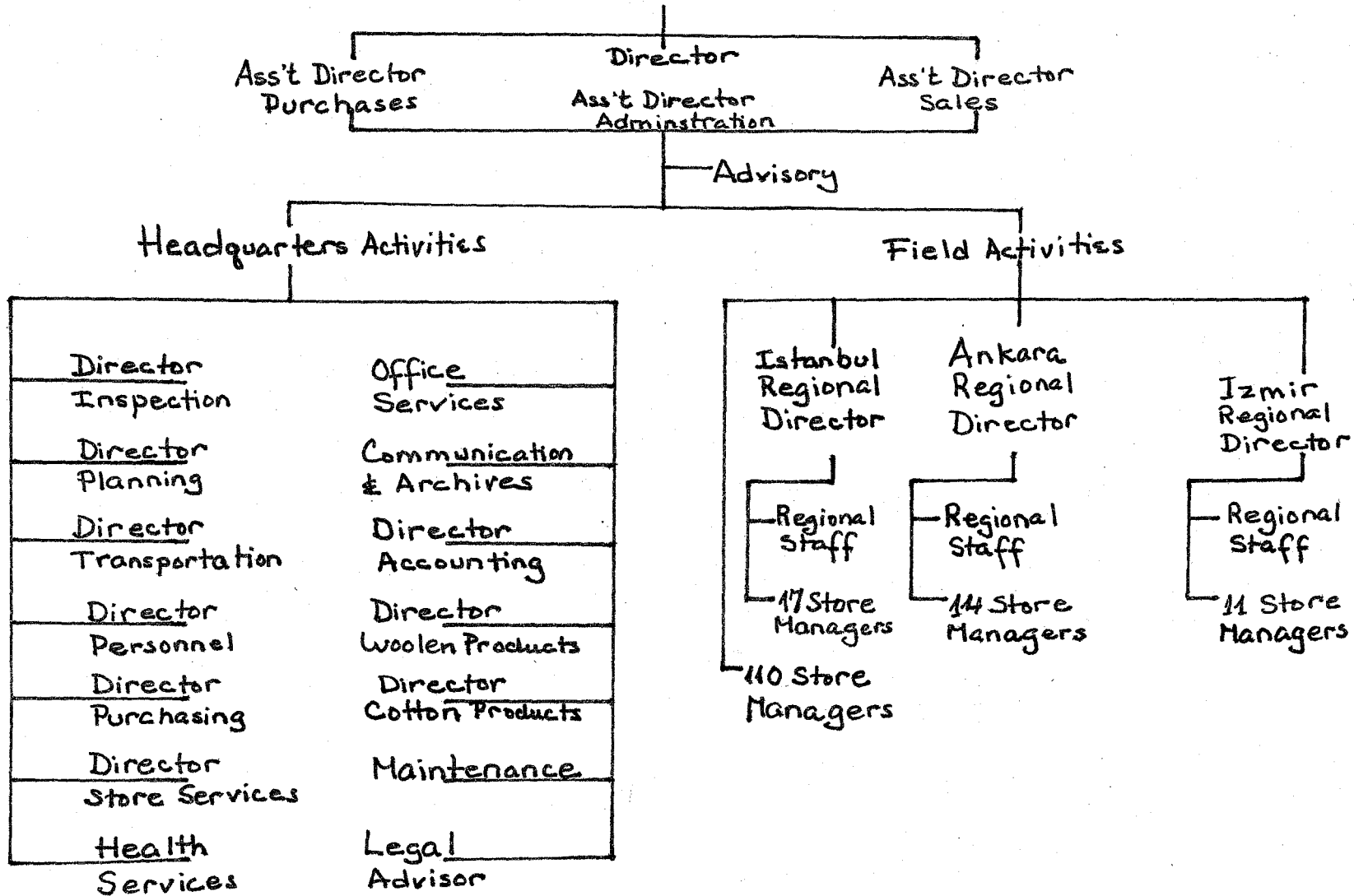
Tercüme Şf.

Gıda İşleri Şefi

Haberleşme Şefi

Sümerbank Genel Müdürlüğü  
Organizasyon Şeması  
Yürürlük Tarihi: 10. 2. 1966

# ALIMSATIM'S ORGANIZATION CHART



APPENDIX: VI

# RECOMMENDED ORGANIZATION CHART FOR ALIMSATIM

Director

→ Advisors

Ass't Director  
Purchasing

Ass't Director  
Administration

Ass't Director  
Sales

→ Buying

→ Customs

→ Records

→ Storage

→ Transportation

→ Planning  
&  
Research

→ Personnel  
Service

→ Accounting  
&  
Statistics

→ Legal

→ Inspection

→ Office  
Services

→ Regional  
Directors  
↓  
Store Managers

→ Store Services

→ Woolen  
Products

→ Cotton  
Products

→ Wholesale

→ Export

Madde 22-

Unvanı : Satış Müdürü

TEMEL GÖREVİ:

Teşekkülün genel gaye ve politikasına uygun olarak, iç piyasa satışları, ihracat ve resmi satışlar konularında takip edilecek politikayı tesbit eder; Plân ve programlar yapar; Onaylanan politika, plân ve programı uygular.

İhracatla ilgili bütün faaliyetleri etkili bir şekilde yönetir, teşekkül mamûllerini dış piyasalarda tanıtmak ve sürümünü sağlamak için bütün tedbirleri alır.

Resmî satışlarla ilgili faaliyetleri satış organı müesseseler adına yönetir.

İhracat ve resmî satışlarla ilgili etüdüler meyanında, ilgili müdürlüklerle de işbirliği yaparak Sümerbank'ın iştiğal konularına giren Sanayi kolları için ekonomik etüd ve araştırmalar yapar.

KURULUŞ İÇİNDEKİ YERİ :

Direktif alacağı makam : Yürürlükteki Org. Şemasında gösterilmiştir.

Direktif vereceği personel : Müdür Yardımcıları  
Pamuklu Satış Şefi  
Yünlü Satış Şefi  
Diğer Mamûller Satış Şefi  
Sergiler Şefi  
Resmî Satışlar Şefi  
İhracat Şefi  
İstatistik Şefi  
Büro Baş Memuru

İŞ MÜNASEBETLERİ :

Reklâm ve Propaganda kurulunun aslı üyesidir.

Teşekkül mamûllerinin dış piyasalara sürüm ve satışı konularında Milletlerarası Ticaret Odaları Birliği ve benzeri teşekküller ve firmalarla, resmî daire ve teşekküllere yapılan satışların Teşekkülün iyi hizmet gayelerine uygunluğu bakımından, Resmî Daireler ve diğer

Devlet Teşekkülleri temsilcileri ile, fiyat politikasının teşekkül gayelerine uygunluğunu sağlamak için ilgili müessese fabrika ve şube müdürleri ile, iş programlarının hazırlanması safhasında ilgili ünitelerle, müşteri şikâyet ve dileklerinin halli konularında ilgili şubelerle, satıcı müessese ve imalât üniteleri, Satış Şubesi bütçesinin tanzimi ve uygulanması konularında Genel Muhasebe Müdürü ile, personel temini ve eğitimi konularında personel ve eğitim müdürleri ile sıkı bir işbirliği kârar.

#### GÖREV VE SORUMLULUKLARI :

1. Bu yönetmeliğin 3.ü maddesinde açıklanmış bulunan "Amir Mevkiinde Bulunanların Genel Görev ve Sorumlulukları" hususlarını uygulamak.
2. Teşekkülün genel gaye ve politikası çerçevesinde kendi bölümünün politika, plân, program ve kadrolarını teklif etmek, onaylanan politika, plân, program ve kadroyu uygulamak.
3. Kontrolü altındaki faaliyet alanlarının iş verimini arttıracak şekilde birbirleri ile ve diğer ilgili faaliyet alanları ile olan ilişkilerini koordine ve kontrol etmek.
4. Resmî satışlar ve ihracat bakımından yapmış olduğu piyasa etüdülerine dayanarak imalâtın miktar ve kalitesine ve stok durumuna yön vermek üzere bu konuda ilgili üniteler nezdinde teşebbüste bulunmak.
5. İhracat ve resmî satışlarda müşteriler itibarı ile satış kayıtları tutmak sureti ile, müşteri siparişlerini takip etmek, zamanında ve şartlara uygun olarak yerine getirilmesi için gerekli tedbirleri almak.
6. Mamûller itibarı ile satış faaliyetlerini takip etmek ve gelecek devrelerdeki imalât faaliyetlerine ışık tutacak istatistikî bilgileri hazır bulundurmak.
7. İhracat ve resmî daireler müşterilerinden fabrikaların kapasitelerine uygun siparişler temin etmek, müşterilerle teşekkül arasındaki satış ilişkilerini düzenlemek, siparişlerin zamanında yerine getirilmesi için gerekli tedbirleri almak.

8. Mamûlleri tanıtmak ve reklâm ve propagandasını yapmak maksadıyla yurt içi ve yurt dışı fuar ve sergilere katılmak.
9. İç ve dış piyasa fiyat hareketlerini satış organı müesseselerle de iş birliği yapmak suretiyle izlemek, etüd ve analiz ettirmek, Teşekkülün mamûl fiyatları ile mukayesesini yapmak ve alınacak sonuçlara göre teklif ve tavsiyelerde bulunmak.
10. Rakip firmaların kalite standartlarını, fiyat politikalarını, sürüm ve satış stratejilerini tesbit etmek ve teşekkül bakımından alınacak tedbirleri teklif etmek.
11. Kredili satış imkânlarını etüd etmek ve bu hususun uygulanması için teklif ve tavsiyelerde bulunmak.
12. Hareket görmiyen mamûl stoklarının elden çıkarılması için gerekli etüd ve araştırmaları yapmak ve resmî daire ve teşekküllerle dış piyasalar nezdinde gerekli teşebbüslerde bulunmak.
13. Kendi şubesine ait faaliyetlerin verimli bir şekilde yürütülmesini sağlayacak plân, program ve kadro tekliflerini hazırlamak, Genel Müdürlüğe sunmak ve tasdikini müteakip uygulamak.

