August-2023

# The impact of brand-supplier relations on producers in the earthquake zone, Turkey 2023

**Dr. Derya Göçer and Dr. Şerif Onur Bahçecik**
Middle East Technical University

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# Executive Summary

## Our results indicate that textile and garment production in the four provinces was severely affected by the earthquakes.

The February 2023 earthquakes that hit Kahramanmaraş led to one of the biggest disasters in the history of Turkey. The international community responded with immediate disaster relief and humanitarian aid. The 11 provinces hit by the earthquakes also host a significant part of textile production in Turkey. This study analyzes the response of the global apparel brands sourcing from Turkey's earthquake-affected provinces to the disaster, and its impact on garment and textile producers and workers.

In June 2023, we conducted a survey with textile and garment producers in four major provinces of the earthquake-hit region. The survey was conducted through telephone interviews. The research team called more than 1600 phone numbers and received survey responses from 202 producers.

Our results indicate that textile and garment production in the four provinces were severely affected by the earthquakes. Many producers had to close their facilities temporarily. Despite the scale and destruction of the earthquake, global brands did not postpone delivery dates in many cases and suppliers had to work through aftershocks. The global brands did not effectively communicate with the producers and did not demonstrate commitment to assist with wage continuation. According to the survey, 33% of the producers gave unpaid leave to their workers. No financial support to workers has been reported by the producers. Only 48% of the respondents said that they paid full salaries to their workers after the earthquake. The survey results clearly indicate that brands need to rethink and restructure their relations with their supply chains in disaster conditions.

# We called more than 1600 phone numbers and received survey responses from 202 producers

### Unpaid Leave

**33%**

of the producers gave unpaid leave to their workers after the earthquakes

### Paid Full Salary

**48%**

of the producers said they paid full salaries to their workers after the earthquakes

# Background

## The earthquakes led to the relocation of three million people within Turkey and access to shelter is continuing to be a significant problem.

The devastating earthquakes of February 6, 2023, in Kahramanmaraş affected 11 provinces in Turkey and a population of approximately 14 million people. According to recent reports, 50,783 people have been killed, 7,302 of which were refugees.[1] The earthquake led to the relocation of three million people within Turkey and access to shelter is continuing to be a significant problem.[2] Besides the human toll of the earthquake, the affected provinces constitute an important part of Turkey's economy. The total value of the exports from the 11 provinces affected by the earthquakes constitutes 9.05% of Turkey's total exports.[3] Initial estimates showed that the earthquakes led to a 13.7% decrease in textile, and 24.2% decrease in yarn exports by value.[4]

It is, by now, widely accepted that multinational corporations bear responsibility for protecting human rights and ensuring decent labor conditions for the workers in their supply chains. In 2011, the UN Human Rights Council endorsed the UN Guiding Principles (UNGPs) on Business and Human Rights, which set guidelines for how governments and companies can prevent, address, and remedy human rights abuses taking place in their business operations.[5] While the UNGPs are not legally binding, there have been significant policy developments in recent years related to mandatory human rights due diligence.[6] Moments of crisis, like the February earthquakes, as well as the COVID-19 pandemic in the years before, often test the limits of corporations' commitments to uphold human and labor rights standards in their supply chains. Shortly after the disaster, buying offices of global brands and the Turkish Clothing Manufacturers' Association met to discuss the situation.[7] In the meeting, Turkish manufacturers emphasized that a significant part of the production capacity in the region was intact, but that there were problems in labor supply. It was reported that global brands were responding to two to three-week delays with understanding and did not have any intentions to shift their orders elsewhere. Moreover, some major brands provided cash and in-kind donations (blankets, warm clothes, etc.) in response to the earthquake.[8]

While these pledges hinted to an appreciation of the social responsibility of global brands, the extent to which these promises were kept remained an open question. To find answers, we designed a survey on the impact of the earthquake on Turkish textile producers. The survey was prepared in cooperation with Clean Clothes Campaign (CCC).

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3. BTSO Ekonomi. "Deprem Bölgesindeki 11 İlin İhracattaki Payı Yüzde 9,05." Accessed June 14, 2023. https://www.btsoekonomi.com/haber-detay/deprem-bolgesindeki-11-il-in-ihracattaki-payi-yuzde-9-05.
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5. United Nations Human Rights Office of the High Commissioner. "Guiding Principles on Business and Human Rights." 2011. https://www.ohchr.org/sites/default/files/documents/publications/guidingprinciplesbusinesshr_en.pdf
6. Business and Human Rights Resource Centre. "Mandatory Due Diligence." Accessed June 26, 2023. https://www.business-humanrights.org/en/big-issues/mandatory-due-diligence/
7. TGSD. "TGSD - Alım Ofisleri Deprem Sonrası Sektör Güncel Durum Bilgilendirme Toplantısı." TGSD (blog). Accessed June 14, 2023. https://tgsd.org.tr/2023/04/27/tgsd-alim-ofisleri-deprem-sonrasi-sektor-guncel-durum-bilgilendirme-toplantisi/.
8. Henkel, Regina. "Stand with Turkey: How the Fashion Industry Is Helping the Earthquake Victims in Turkey and Syria." FashionUnited, February 10, 2023. https://fashionunited.com/news/business/stand-with-turkey-how-the-fashion-industry-is-helping-the-earthquake-victims-in-turkey-and-syria/2023021052220.

# Methodology

Our survey design was guided by two main questions: First, what was the extent and nature of the damage of the earthquakes to the textile and garment production sector in Turkey's earthquake zone? And second, what was the impact of global brands' purchasing practices on producers in the light of this damage? Four provinces (Adıyaman, Gaziantep, Kahramanmaraş, and Malatya) were selected due to their significant role in Turkey's textile sector. Dr. Derya Göçer[9] and Dr. Şerif Onur Bahçecik[10] directed this survey project, leading a team of five interviewers[11] with research experience. The interviewers entered data on Google Forms, which helped the research team to monitor progress in real time and update sampling lists as necessary. Our team opted for a telephone interview method to mitigate safety risks for our interviewers and due to the lack of access to shelter in the earthquake-affected region. We obtained telephone numbers from several open sources.

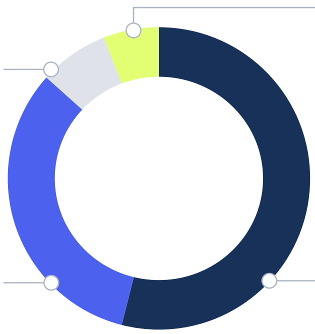
Our first major source of information was the publicly available database of Southeast Anatolian Exporters Union (GAİB), to which companies in the export business are legally required to register. This database provided the names of companies, their addresses, and, in many cases, phone numbers. Where phone numbers were not available, we obtained these by searching company names on the Internet.

Second, publicly available data was obtained from trade expo databases and websites of industrial zones in the sampled provinces. Third, a few companies were contacted through our researchers' personal connections.

Since the survey sought to advance our understanding of the impact of the February earthquakes on the production of textiles and garments, our survey targeted the production sites of these companies rather than their headquarters. Based on this information, we made over 1600 calls during the course of two weeks and obtained 202 full responses to our questionnaire. Three of the 202 companies opted to fill in the survey online, instead of participating in a telephone interview

**We made over 1600 calls during the course of two weeks and obtained 202 full responses to our questionnaire.**

**FIGURE 1: PROVINCE DISTRIBUTION OF THE RESPONDENT PRODUCTION FACILITIES**




9. Dr. Derya Göçer is Assistant Professor at the Middle East Technical University's Graduate School of Social Sciences.

10. Dr. Şerif Onur Bahçecik is Associate Professor at the Middle East Technical University's Department of International Relations.

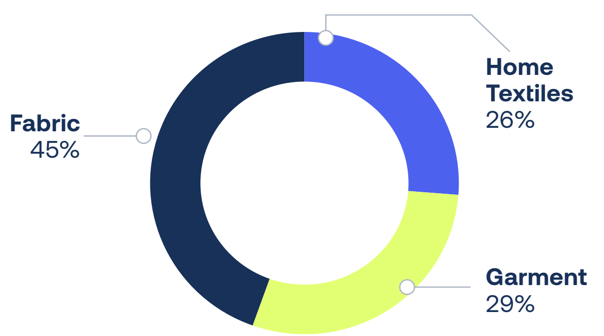
11. The interviewers cannot be named due to security reasons.

The distribution of respondents largely reflects the relative significance of the different provinces in Turkey's textile and garment sector. GAİB data ranks Gaziantep and Kahramanmaraş as 2nd and 4th in textile exports, while Malatya and Adıyaman are ranked 18th and 38th respectively. It is important to note that local companies may export through affiliates in Istanbul and elsewhere and that the numbers above refer squarely to the location of the production sites that are the subject of our survey. Of the 51,000 buildings that need to be urgently demolished in light of the earthquake, 23.4% are located in Gaziantep, 21.4% are in Hatay, 21.1% are in Kahramanmaraş, 12% are in Adıyaman, and 12.9% are in Malatya. Our survey therefore covers provinces that suffered the highest degree of destruction, with the exception of Hatay.

Producers for domestic market brands are primarily supplying well-known Turkish brands that mainly export to Europe, as can be seen in Figure 3. Many of the respondents who identified as producers for the domestic market are actually producing for the shuttle trade; that is, for companies in Turkey that then export their products internationally. So, the label 'domestic market' does not necessarily mean that the finalized product is consumed in Turkey, it just means that 'domestic market' products are further down in the tiers of the supply chain. The regional distribution in Figure 3 is congruent with the data from the Ministry of Trade on the exports and imports in Turkey's textile sector. EU countries lead the regional directionality of Turkey's exports with a total share of 41.1% and Germany and Italy are the leaders in the EU zone.

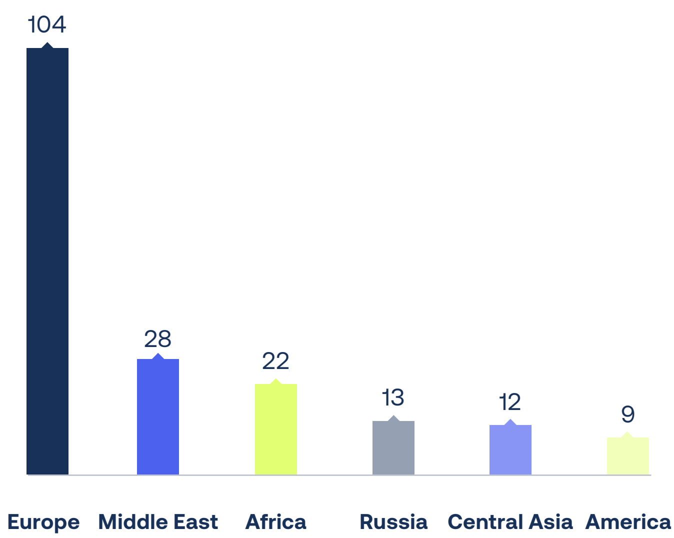
## Sectoral distribution of survey respondents

**FIGURE 2: SECTORAL DISTRIBUTION OF THE RESPONDENTS**




## Market distribution

**FIGURE 3: REGIONAL DISTRIBUTION OF BUYERS**




12. GAİB. "Ocak - Mayıs 2023 Monthly Statistics," n.d. https://www.gaib.org.tr/tr/site/download-file/2838.html?class=StatisticFiles&unitSlug=tekstil.

13. Duvar English. "50,576 buildings need to be demolished urgently in quake-hit provinces, minister says." https://www.duvarenglish.com/50576-buildings-need-to-be-demolished-urgently-in-quake-hit-provinces-minister-says-news-61854, February 16, 2023. https://www.duvarenglish.com/50576-buildings-need-to-be-demolished-urgently-in-quake-hit-provinces-minister-says-news-61854. Official damage assessment categorized buildings into six groups: buildings that need to be demolished urgently, demolished buildings, heavy damage, medium damage, low damage, and no damage. The first category includes buildings that sustained heavy damage, such as collapsed floors, but are still standing. These need to be urgently demolished due to safety hazards. See https://hasartespit.csb.gov.tr.

14. Ministry of Trade, General Directorate of Exports; Textile and Raw Materials Sectoral Report, 2022, https://ticaret.gov.tr/data/5b87000813b8761450e18d7b/Tekstil%20ve%20Hammaddeleri%20Raporu.pdf

# Survey Findings

## A. DAMAGE CAUSED BY THE EARTHQUAKES

Survey results indicate that, although Gaziantep and Kahramanmaraş suffered most of the destruction, the scale and scope of the damage impacted the four provinces unevenly. Among the 83 facilities (41% of total respondents) that were damaged, more than half are located in Kahramanmaraş (46); the rest are located in Gaziantep (18), Malatya (10), and Adıyaman (9). Our survey did not include a specific question asking the respondents to assess the degree of the damage to their facilities. There were, however, two questions regarding post-earthquake safety inspections at the facilities. First, respondents were asked ***"Did representatives from the brand, multistakeholder iniatives or the state visit or inspect your site after the earthquakes?"*** Second, they were asked ***"Did you have a chance to have an expert inspect the damage before opening the factory after the earthquakes?"*** The first question inquires whether authorities or buyers visited the production site on their own accord while the second question asks whether the producers sought inspections before re-opening. In total, 78 (39%) out of the 202 respondents said that no one (officials, auditors, or brands) visited for inspection. Among the 83 production sites which sustained some degree of damage, 37 (45%) of the respondents said that no one (not a single official, auditor, or brand) visited to inspect the facility and 13 (16%) said that they did not have a chance to get the building inspected themselves before re-opening and they did not get an inspection from the government or brands. So, neither the brands nor the relevant state institutions offered any significant support in terms of post-earthquake damage control.

Our survey results indicate that the earthquakes significantly affected producers' ability to carry out operations in the region. Only eight respondents (4%) – two from Kahramanmaraş and six from Gaziantep – indicated that production resumed as usual after the earthquakes. One of these respondents indicated that the production facility of its small operation was damaged.

> In total, 78 (39%) out of the 202 respondents said that no one (officials, auditors, or brands) visited for inspection.

Among the facilities damaged by the earthquakes, 68 (33% of the total sample) indicated that production sites were closed, while 14 (6.9% of total) said that the factory remained open but that there was no one to work.

Among our total sample, 93 (46%) of the respondents indicated that they lost at least four weeks of working days due to the earthquake. To the question ***"Did you have to make late deliveries due to the earthquake?"*** 21% (43) of the respondents indicated that they did not delay deliveries to their buyers while 9% (18) said they had a very slight delay (one week or less). 84 (42%) respondents indicated that they had a delivery delay of more than two weeks.

The earthquake zone experienced serious aftershocks that continued to threaten lives and disrupt production. As shown in Figure 6, of the producers that felt aftershocks, 143 of producers (70.8 %) stated that they stayed open and continued to work through aftershocks. This demonstrates the impact of not changing contract dates or not supporting the supply chain actors so that some relaxation occurs in the production process. Workers having to work through aftershocks is not only physically dangerous but also challenging in terms of their overall wellbeing.

**FIGURE 4: PROPERTY DAMAGE**

*Was your property damaged in the earthquake?*

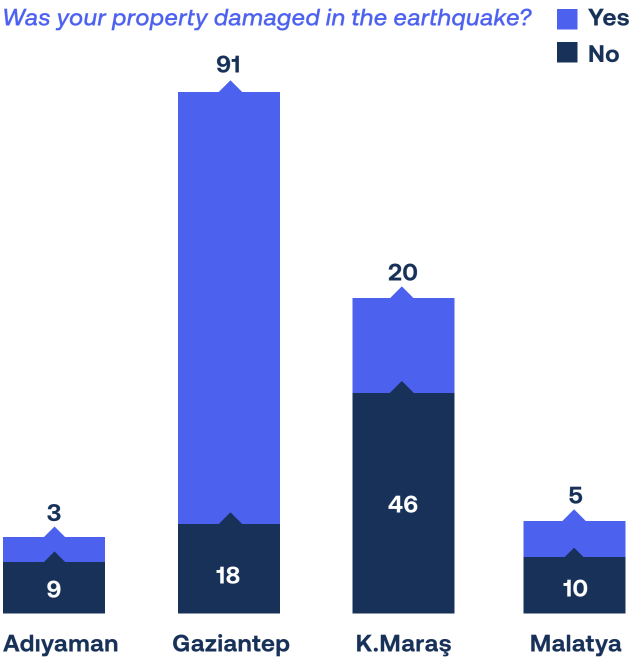



**FIGURE 5: PRODUCTION CAPACITY CHANGE**

*How has your production capacity changed since the earthquake?*

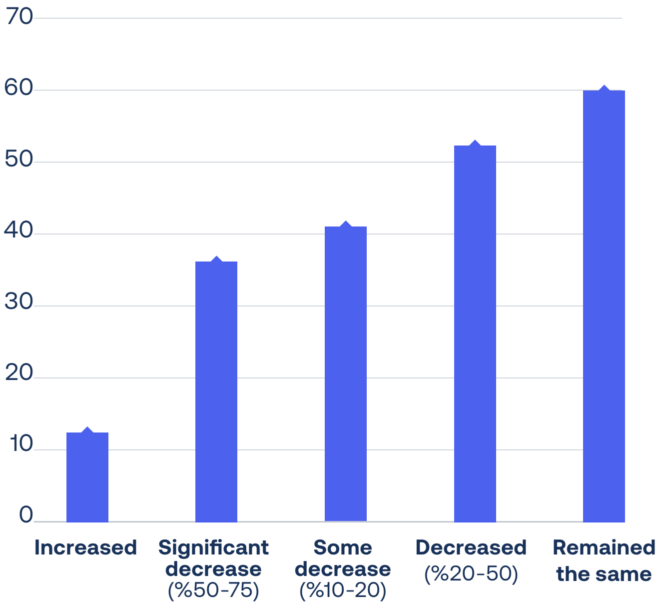



**FIGURE 6: PRODUCTION THROUGH AFTERSHOCKS**

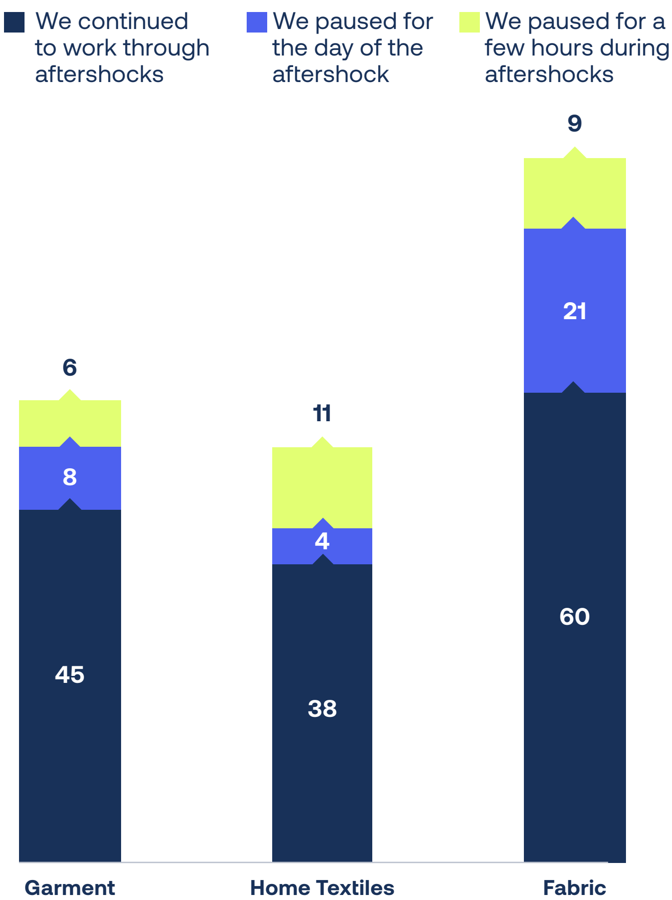
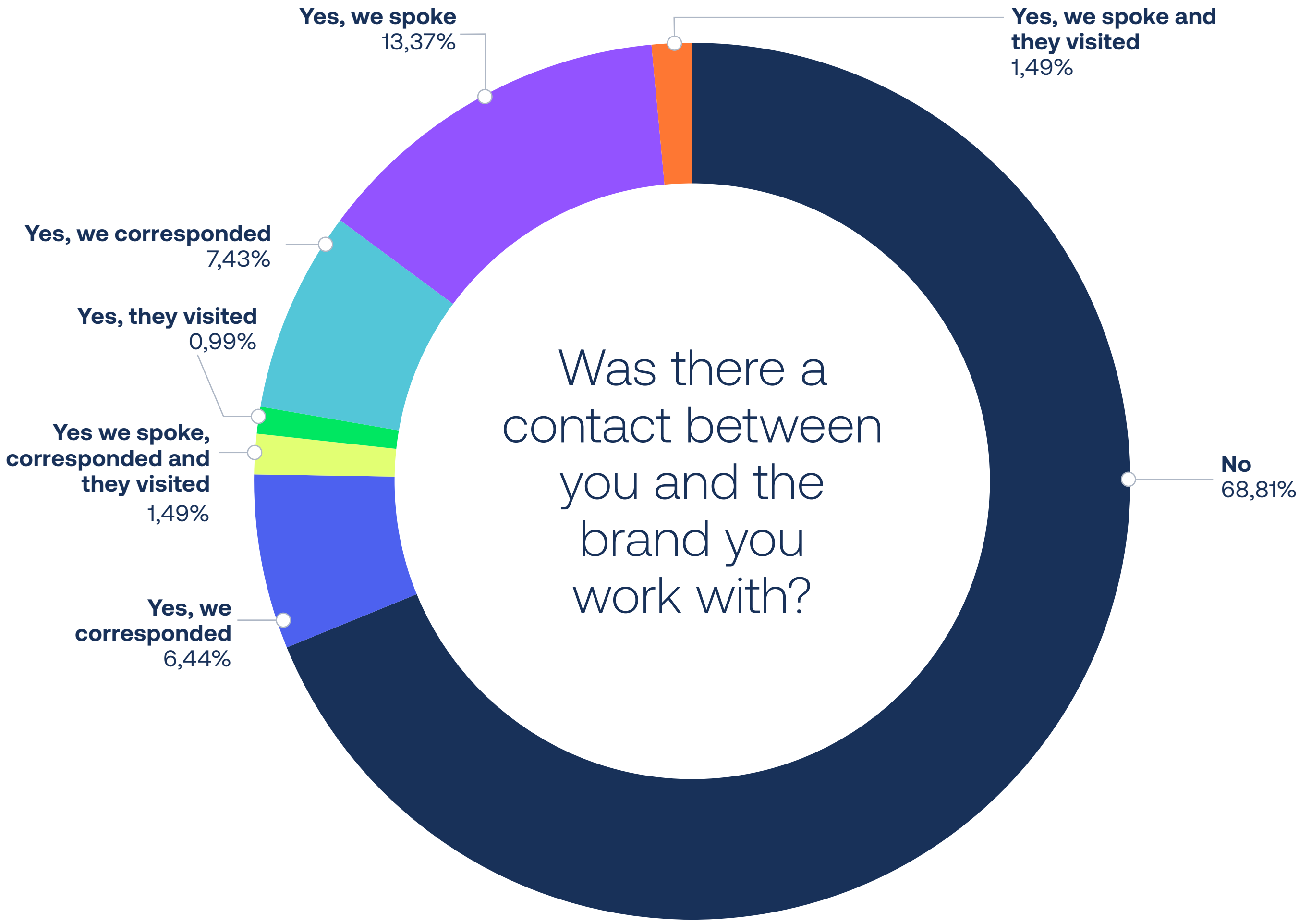


**FIGURE 7: COMMUNICATION FROM BRANDS FOLLOWING THE EARTHQUAKE**




Despite the damage caused by the main earthquakes and the dangerous and disruptive aftershocks, the majority of respondents (69%) did not receive any contact from buyers and brands in the aftermath of the earthquake. Moreover, 35% of the respondents said that buyers did not extend production deadlines after the earthquake. Despite facing dire circumstances, only five among the 202 respondents said that brands offered support to the producers and workers after the earthquake. Thirty-two of the respondents that did not receive support from brands lost at least three weeks of workdays and 15 had at least one employee who was injured or died. *So, the pledges of the global sector in the aftermath of the earthquake do not hold well in the face of the survey results.*

**FIGURE 8: POSTPONEMENT BY BUYERS OF PRODUCTION DEADLINES**

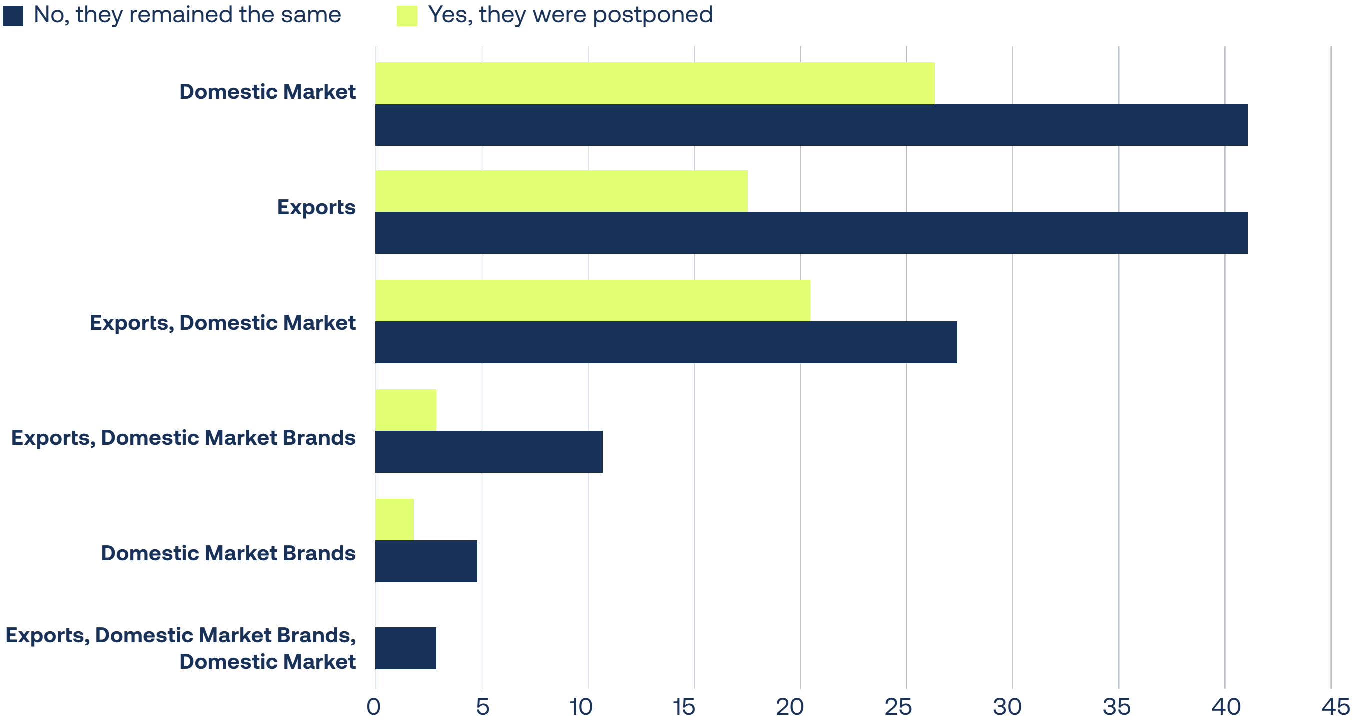
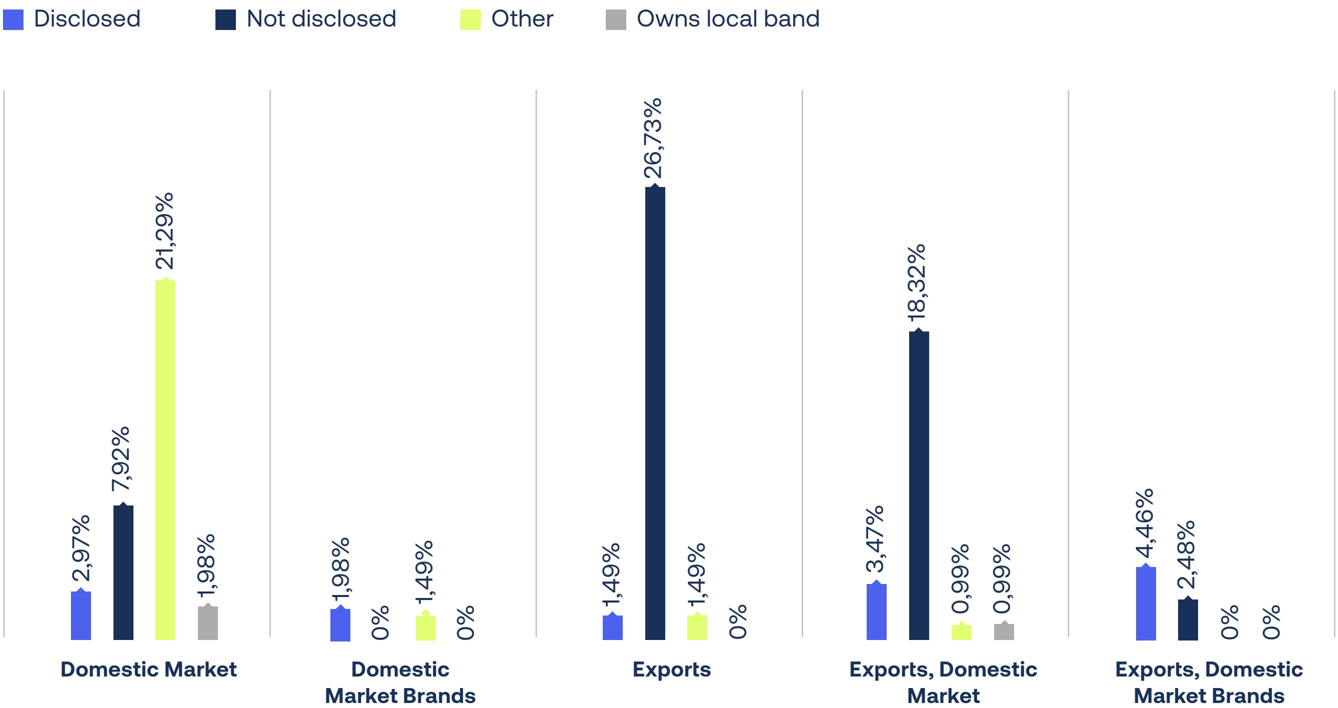



**FIGURE 9: BRAND DISCLOSURE ACCORDING TO MAIN TARGET MARKET**[15]




15. Exports are products produced for direct exportation. Domestic markets are products that are mostly shipped to a seller which then exports the products to foreign markets. Domestic market brands signify those products which are produced for known local brands that is both exported and also consumed domestically. Some producers produce in all these categories.

We can see very clearly in Figure 9 that producers who export refrain from disclosing brand information most frequently, which may be indicative of respondents' fears of potential negative repercussions from brands if critical information regarding the brands' purchasing practices were to come to light.[16] From the way the producers mentioned brand names we can surmise that there might be more brands they work with, but they only mentioned a major one. So, the brand name list below should not be regarded as a conclusive one, due to the high number of producers who chose not to disclose and due to the timidness in the way the remaining producers were disclosed. *This list shows the highly connected nature of the textile and garment sector in the earthquake zone.*

**BRANDS IDENTIFIED BY RESPONDENTS AS BUYERS**

| | | | | | |
|---|---|---|---|---|---|
| Armani | Bershka | Benetton | Beymen | Bestseller | Boohoo |
| Calvin Klein | Defacto | DOS | Gloria Jeans | Good American | H&M |
| IKEA | Inditex | Koton | Kiğılı | Koyteks | LC Wakiki |
| Mavi | MDS | Morben | North Face | S. Oliver | Oysho |
| Pierre Cardin | Sarar | Timberland | Tommy Hilfiger | Urban Outfitters | Vans |
| Varner | Zara | | | | |

According to the survey (***"Have your customers' order volumes changed after the earthquake?"***), 97 (48%) of the respondents say that buyers reduced their orders after the earthquakes. The sectors seem to be roughly proportionally affected by this reduction in orders. 42 (43.3%) of the reductions were in the fabric sector, 34 (35%) in garments and 21 (21%) in home textiles. *Reducing orders instead of delaying dates, causes loss of revenue at a time when extra revenues are direly needed.*

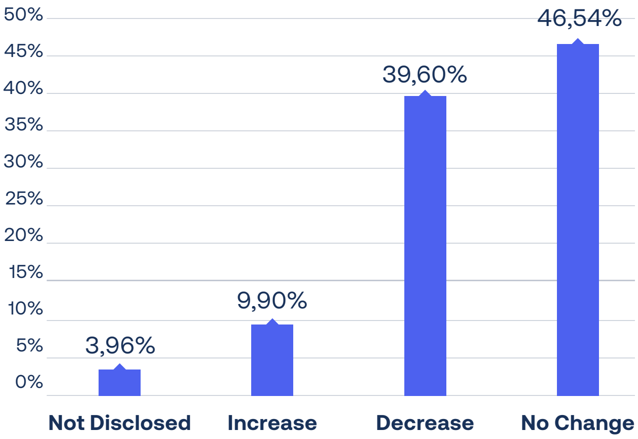
97 (48%) of the respondents say that buyers reduced their orders after the earthquake. 43.3% of the reductions were in the fabric sector.

16. Brand disclosure is a discussed topic in the NGO work on textile and garment production: https://www.workersrights.org/wp-content/uploads/2020/01/garment_industry_brochure_dec_2019.pdf.

# B. IMPACTS ON WORKFORCE

Our survey also sought to advance our understanding of how the earthquakes impacted the textile and garment production workforce. Many workers who survived the earthquakes had a significant loss of family, shelter, and overall wellbeing. The following chart shows changes in employment levels at the producers:

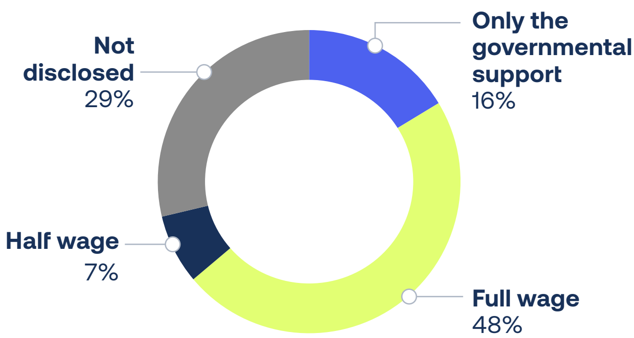
**FIGURE 10: WORKER COUNT CHANGE AFTER EARTHQUAKE**




The survey responses show that a significant number of producers experienced a decrease in their workforce size. From the phone conversation notes, we gather that even those who reported no change in total workforce actually did lose some workers and needed to hire new ones. Workers who were forced to leave the facilities due to the devastating conditions of the earthquakes were reported as 'resigning', meaning they had to forgo what otherwise would have been legally-mandated severance packages. This issue of 'resignations' is problematic since the government banned the dismissal of any workers in the earthquake zone, which applies to all sectors.[17] Hence, the reported 'resignation' numbers may include workers who were actually laid off for all intents and purposes, but which producers will refuse to admit. Even cases of "regular" worker resignations must not be interpreted as routine, since the circumstances surrounding departure from employment are related to extremely challenging conditions caused by the earthquake, such as loss of shelter and the need to move to a safe location and/ or loss of family members. Therefore, whereas workers may not be able to legally claim full terminal compensation in cases of resignation, any employer that wishes to behave responsibly and do right by their employees in the aftermath of the earthquake devastation should pay proper compensation even in the case of resignation. Moreover, 58 producers reported their workers to be on unpaid leave.

The survey did not ask producers whether production quotas for their employees increased after the earthquake. It is likely that at some facilities, due to the workforce reduction, production quotas did increase for the workers who remained, at least temporarily in the initial weeks after the earthquakes (while workers were still finishing earlier orders and before the reduction in new orders). This might be one of the factors why a high number of producers did not pause production even during aftershocks.

**FIGURE 11: INCOME RECEIVED BY WORKERS WHO REMAINED EMPLOYED DURING A TEMPORARY SHUTDOWN**




17. https://www.haberturk.com/deprem-bolgesinde-isten-cikarma-yasaklandi-3567633-ekonomi, accessed 9.07.2023.

# Conclusion: SUMMARY *of* FINDINGS

## The findings of this survey clearly show that:

| | |
|---|---|
| 1 | There has been a significant disruption to the production process of fabric, garment, and home textiles in these four provinces. |
| 2 | The disruption has been first and foremost in the form of temporary closures of the facilities. |
| 3 | Despite the disruption there was a quantitatively meaningful number of producers who could not get a postponement on the deadlines of the orders from the brands, as can be seen in **Figure 8**. |
| 4 | No substantial financial or in-kind brand support to producers was reported by respondents to the survey. Although there were some donations to the victims of the earthquake, no substantial brand response is recorded regarding the garment and textile workers that work in their supply chains. |
| 5 | This lack of support and relative inflexibility regarding production deadlines should be grasped in the context of the significant decrease in production capacity (as can be seen in **Figure 5** ) combined with the decreased workforce at a significant number of factories, still three months after the earthquake. |
| 6 | Only 96 facilities out of the 202 facilities surveyed report paying full wages in the immediate aftermath of the earthquakes when production was disrupted. The lack of severance packages reported together with the absence of any support trickling down to workers indicates that the brands sourcing from producers in this region have failed to uphold their vague declarations of support for people in the earthquake zone in the aftermath of a major earthquake. |
| 7 | More communication with the producers, more flexibility with production deadlines, and more attention to the working conditions are three factors that come to the fore in terms of suggestions to improve brands' responses. |

17. https://www.haberturk.com/deprem-bolgesinde-isten-cikarma-yasaklandi-3567633-ekonomi, accessed 9.07.2023.

**Overall, this survey's results indicate that, absent sufficient communication and assurances from brands, producers may have felt pressure to meet delivery deadlines despite the very difficult circumstances they and their workers were facing.**

That production resumed in many cases in the absence of safety inspections and during aftershocks signals that producers felt the need to prioritize delivery deadlines over workers' safety.[18] Many producers' responses regarding lead times and their inability to provide workers with their legally-owed severance or paid leave further supports our view that brands have left producers to fend for themselves in the aftermath of this humanitarian crisis.
**Our findings thus highlight the deep power asymmetries at the core of buyer-supplier relationships.**

**Our findings also support the conclusions of previous NGO work on the earthquake zone.**

Working through aftershocks, not being paid when a natural disaster damaged their homes and families, and working extra hours trying to meet deadlines when deadlines should be postponed was the general picture of an NGO statement.[19] Our survey of employers reveals findings that support this conclusion.

18. One respondent to the survey indicated that they worked with licensed subcontractors to meet buyers' production demands.

19. https://www.payyourworkers.org/pyw-statement-on-turkey , accessed on 21.06.2023

# Appendix: Survey Questions

## A. PLACE OF PRODUCTION AND IMPACT OF EARTHQUAKE

1. Do you produce in more than one province?

- Yes → 1a. If yes, how many?
- No   1b. Where?

  - Adıyaman
  - Gaziantep
  - Kahramanmaraş
  - Malatya

2. What type of product do you produce?

- Fabric for home textiles
- Fabric for garments
- Home textiles (ex. bedsheets, towels, carpets, curtains, etc.)
- Garments
- Footwear
- Other, explain......

3. Was your production site damaged in the earthquake?

- Yes
- No

4. Did representatives from the brand, multistakeholder initiatives or the state visit or inspect your site after the earthquake?

- No one inspected
- Yes, state inspected
- Yes, brand inspected
- Yes, multistakeholders inspected

5. Did you communicate with the brands after the earthquake?

- No
- Yes, we had written communication
- Yes, we had a phone call
- Yes, we had a visit

6. If you communicated with the brands, what were the main topics of your communication?

7. Did you have a chance to have an expert inspect the damage before opening the factory after the earthquake?

- No
- Yes
- We applied and are still waiting for the inspection. (Add this if the answer is no)

8. Were you or any of your employees injured in this earthquake?

- No
- Yes → 8a. If yes, how many people?

  8b. Were you or any of your employees killed in this earthquake?

  - Yes → If yes, how many people?
  - No

## B. POST-EARTHQUAKE PRODUCTION AND RELATIONS WITH BRANDS

9. What did you experience at the production site during the aftershocks?

- We did not feel anything.
- We felt some of them and left the site temporarily
- We felt some of them but we had to continue production, could not stop.

10. Who are the main buyers for your main product?

- Domestic brands
- Domestic buyers
- Export

11. Which brands are you working with for your exports? (Hints: US, EU region, Asia; Brands, Country name)

12. How many people did you employ before the earthquake?

13. How many people do you employ now?

14. How was your production process disrupted after the earthquake?

- Factory was closed down
- Factory was open but production did not start because workers could not come
- There was no closure, we continued production.

14. How many weeks of workdays did you lose due to the earthquake?

16. Could you continue production during the aftershocks?

- Yes, we had to.
- We took an hour break.
- We called it a day.

17. Can you evaluate your production capacity after the earthquake?

- Remained the same
- Increased
- Slightly decreased (10-20%)
- Decreased (20-50%)
- Significantly decreased (50-75%)

18. Have your customers' order volumes changed after the earthquake?

- Increased
- Decreased
- Remained the same

19. Have your customers changed the deadlines?

- Yes, they moved it forward.
- No, it remained the same.

20. As far as you know, did the brands working with you redirect the order they were planning to place with you to other regions and countries after the earthquake?

- Yes
- No
- I don't know

21. Did you have to make late deliveries due to the earthquake?

- No.
- Very slightly delayed (one week or less)
- Slightly delayed (about 2 weeks)
- Very late (more than 2 weeks)

22. Have you experienced any sanctions due to late delivery? (Interviewer should explain the sanction: Reducing the number of orders due to delay; no further orders, fines, cancellation of contract)

23. If yes and working with different brands: Can you list the different sanctions imposed by different brands?

- Losing the contract
- Getting less of the product
- Fine
- Other:

24. If you had to lay off workers due to the earthquake, were you able to pay their compensation?

- Yes, I paid.
- Yes, I paid partially.
- No, I could not pay.
- No, I did not lay off anyone.

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25. If you experienced a temporary shutdown, did workers get leave without pay?

- Yes
- No
- I did not experience a temporary shut down.

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26. If the workers did not get leave without pay, what amount were they paid?

- We paid half salary
- We paid full salary
- We paid the state support payment only

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27. Did the brands support you in any way?

- No
- Yes, (please explain)

VOA, Wikimedia Commons

**Report Design:** Ceren Bettemir