

Servicing Modest Fashion Markets: The Case of Two Turkish Clothing Companies

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Abstract

This paper introduces two successful e-commerce companies focusing on offering fashion choices worldwide for women seeking conservative and modest clothing styles. We discuss development options and challenges these companies faced in the course of their journey toward commercial success and market recognition. These insights offer points of consideration for businesses seeking to enter similar markets. In addition, these insights highlight business experiences of halal service provision.

Keywords: *Modest fashion, branding, e-commerce, retailing, Islamic fashion, hijab, Islamic Marketing*

Muslim fashion market

Emphasizing halal in services involves catering to Muslims' need for halal online options (Kadirov, Tjiptono, & Fam, 2020). In the past, mainstream fashion has largely ignored the Muslim market (The Conversation 2017) and, more broadly, more conservative female members of the three Abrahamic faiths – namely, Islam, Christianity, and Judaism (Lewis, 2015). The founder and CEO of Modanisa, one of Turkey's largest modest fashion brands, Kerim Türe states “When we first entered this business, only black, dark blue and stone-colored products were made for conservative women. Women were fed up. We provided large selection for them” (Dalan 2017). More recently the fashion world has discovered a new niche market for modest fashion, not only from affluent Middle Easterners (The Conversation 2017) but also from amongst believers across the three Abrahamic faiths internationally (Lewis, 2015; 2598).

Globally, the number of people practicing Islam has reached approximately 1.9 billion (State of the Global Islamic Economy 2020/21 Report, 2020; 180), and is expected to grow to 2.8 billion by 2050 (Pew Research Center, 2015). The consumer dollar size of the market is only an indicator used by both practitioners and academics. Dinar Standard's *The Global Islamic Economy Report* indicates that apparel and footwear spending by Muslim consumers worldwide reached \$2771 Billion in 2019. The impact of COVID-19 means Muslim consumers expenditure for apparel and footwear will decrease by 2.9%, falling to \$268 Billion, but it is expected to grow at 2.4% for the following 5 years and to reach \$311 Billion in 2024 (State of the Global Islamic Economy 2020/21 Report, 2020; 3). On the other hand, the Pew Research Centre expects the market to reach \$373 billion by 2022 (Pew Research Center, 2017). Iran, Turkey, and Saudi Arabia rank as the top countries by spending (State of the Global Islamic Economy 2020/21 Report, 2020;117).

Table 1: Markets and Exporters of Modest Fashion

	Domestic market (\$ billions) Source: Dinar Standards	Export (\$ billions) Source: Dinar Standards	Muslim clothing markets 2014 (\$ billions) Source: Thomson Reuters
Turkey	28	3	24.84
Saudia Arabia	21	---	14.73
UAE	--	1,5	18.24
Iran	53	--	8.99
Pakistan	20	--	10.52
India	--	2,8	9.78
China	--	11,5	
Bangladesh		1,4	
Indonesia	16		12.69
Nigeria			14.99
Russia			10.92
Egypt			10.73

Sources: Dinar Standards State of the Global Islamic Economy Report 2020/21; Thomson Reuters State of The Global Islamic Economy Report 2015/16

¹ The figures should be approached with great care. For example, all clothing spending probably estimated as all falling within 'modest' purchasing is far from the reality. Furthermore, the State of Global Islamic Economy 2014-2015 report estimates that 39.3 Billion dollar is spent on hijab in Turkey, but the Turkish Statistical Institute figures the whole Turkish clothing market size at 27 Billion dollars (i.e., Benmayor, 2015).

The emergence of Modests Fashion

From the Islamic perspective, modest attire is easy to achieve and identify. Zabeen et al (2017) consider that it can be any sort of modest dress that covers the whole body. Globalization, in terms of worldwide fashion promotion, shared media, and common products, influences many industry sectors, including the fashion industry (Kavakçi, 2014). The fashion industry as an active transmitter of cultural information must continually update itself (McCracken, 1990). When one looks back at historical trends of fashion, many trends repeat themselves, while designers seek something fresh. Designers tend to repackage sub-cultural fashion norms and turn them into trends. Similarly, Muslim women's fashion is a unique trend, yet this potential still needs to be realized to its full extent (Kavakçi, 2014). Several new collections appeared which used Islamic themes and patterns for modest fashion customers. Some of these collections, for example, by Victoria Beckham and Marc Jacobs, targeted Muslim customers. Headscarves became part of fashion design for designers such as Jil Sander, Oscar de la Renta, Givenchy, Thom Browne, Dolce & Gabbana, and Moschino are some of the notable international designers (Kavakçi, 2014). World-renowned fashion brands recognized this opportunity presented by modest fashion being embraced by fashion retailers such as Zara, H&M, Forever 21, Bergdorf Goodman, Macy's, Nordstrom, and Barney's New York as well fashion designers like Armani, Banana Republic, Chanel, DKNY, Dolce & Gabbana, Donna Karan, Giorgio Armani, Givenchy, Gucci, Marc Jacobs, Jil Sander, Moschino, Oscar de la Renta, Prada, Thom Browne, Valentino, Versace, Victoria Beckham (Wilson and Liu, 2011, Kavakçi, 2014; Barlas, 2018, Radwan et al., 2019). The mainstream sports brand Nike has recently introduced the 'Victory Swim' modest wear collection (The Conversation 2017). Speedo launched 'Delight Full Body Suit' and 'Zusaura', a modest swimwear range for men, in London (State of the Global Islamic Economy 2020/21 Report, 2020; 121).

Adoption of modest fashion by these renowned fashion brands and many local brands leads to expansion of modest fashion shows in Milan (Radwan et al., 2019), Miami, and planned for Beverly Hills, Los Angeles, Melbourne, Rwanda, Nairobi and Tanzania, Amsterdam, İstanbul, Indonesia, and Qatar. The University of Central Lancashire, in the UK, hosted a modest fashion show to showcase the work of their graduates (Zabeen, Shams, and Sultana 2017). Dubai-based Safiyya Abdallah's range 'Dulce' was featured in Cosmopolitan magazine (State of the Global Islamic Economy 2020/21 Report, 2020; 120). Muslim model Halima Aden was the first hijab-wearing model to walk international runways and she became the first hijab-wearing model on the cover of Vogue Arabia, Allure, and British Vogue (Independent Türkçe, 2019). These developments in the fashion sphere have increased Internet searches for modest fashion by 90% according to the fashion search platform Lyst's 'Year in Fashion 2019' report (State of the Global Islamic Economy 2020/21 Report, 2020; 120).

Market Ecosystem Developments

The new halal fashion ecosystem expansion appears to be underway because of the increased awareness in the fashion sector where sector-related trade and educational events played a significant role (State of the Global Islamic Economy 2020/21 Report, 2020; 123). Gradually, public acceptance of modest fashion has grown and new businesses have emerged. Despite the problems associated with COVID-19, many stakeholders are aggressively investing in the

industry's development (State of the Global Islamic Economy 2020/21 Report, 2020; 121). With that, stereotypes are also being challenged, as to what Islamic fashion or Islamic dress in general, actually is. There is a widespread perception that black is a fundamental color in Islamic clothing, mainly created by a focus on Gulf, particularly Saudi women's clothing preferences. However, many Muslim cultures do not use, or even like black, which encourages comments such as by Dina Torkia, a Muslim fashion blogger from London: "We're taking over... There are a lot of us Muslim girls who wear the hijab, and we like fashion" (New York Times, 2016).

Modesty in clothing can easily be linked with Islam and arguably has proven to be an effective strategy in creating a global Islamic identity (i.e., The Conversation 2017), at least in the [Western] media. Noor Tagouri, a hijab-wearing television anchor from the US, mentions that some Christians told her, "We like the clothes, but we are not Muslim" (New York Times, 2016). Moreover, some members of the Church of the Latter-Day Saints are known to say, "we don't believe in showing certain parts of your body and so... we teach our children from a very young age to dress modestly" (Lewis, 2015, p. 2602). Most religious groups, especially, the Abrahamic faiths, emphasize modesty. Hence, modest fashion is not a uniquely Islamic trend, but it may conform to the guidelines of different religious denominations (Lewis, 2015).

Although private dress fashions throughout centuries were very rich, the outdoor [non-private] fashion styles and colors for Muslims from the Middle East have been limited to dark colors since it was a symbol of religious commitment (Ali, 2005). Since then, fashion for outdoor wear has evolved to include a multiplicity of new colors and fabrics (Krisjanous, Allayarova, & Kadirov, 2021). In addition to female Muslims experimenting with different non-traditional styles, the fashion industry has increasingly recognized the important role of "hijabistas" (Hassan and Harun, 2016, Zabeen, Shams, and Sultana, 2017). Many Muslim women believe Islamic clothing is the mark of inner excellence and modesty (Huq and Rashid, 2008). For others, fashionable Muslim clothing symbolizes individualism, self-pride, and self-confidence (Genel and Karaosmanoglu, 2006). Despite some tensions between what is expected culturally and what is worn for self-satisfaction, fashion choices are considered to be the reflection of Muslims' social identities (Sobh et al., 2010; Zabeen, Shams, and Sultana, 2017).

Despite challenging and complex circumstances, new modest brand launches took place, and online sales gained greater importance, particularly for fledgling and emerging brands. Brands were also keen to expand new product lines, especially sportswear associated with modest fashion. Competing on price appears to be prevalent as Hassan Mawji from Verona Collection explains: "Price point is one of the biggest challenges for the modest fashion industry. There are giants across the fashion industry with very large production capacities, having their own factories and elastic supply lines. They are able to produce at a cheaper price point, and therefore modest fashion brands, with lower production capacities are competing against industry giants. This is a key hurdle for smaller modest fashion businesses" (State of the Global Islamic Economy 2020/21 Report, 2020; 126). One of the potential ways of dealing with such problems is to collaborate with dedicated modest fashion organizations like the Council of Modest Fashion, Islamic Fashion Design Council, and various other local associations which can substantially help modest fashion companies to grow successfully. Modest fashion associations actively seek out modest fashion businesses with good potential. Governments support these bodies to select businesses that need assistance or help with funding, as well as with incubator and accelerator programs (State of the Global Islamic Economy 2020/21 Report,

2020; 127). For example, the Indonesian government offers trade expos as well as the Modest Fashion Founders Fund incubator program. New York Times reports that the hijab is “No longer an object of derision in Turkey. The headscarf has spurred an Islamic fashion revolution, complete with fashion houses, magazines, bloggers, and Instagram stars. Powerful women in the region, like Mr. Erdogan’s wife, Emine, and Sheikha Mozah, a wife of a former emir of Qatar, have become fashion icons for young conservative women” (New York Times, 2016).

Turkey has been very active, in fact, in producing and supporting the modest fashion industry, As the following quote describes, Turkish fashion houses can now meet worldwide fashion demands: “Every country, every culture has its own fashion. Thanks to our software, we can see which model and which color is preferred. Turkish textile is capable of meeting all these diverse needs” says the founder and CEO of modanisa.com Gökhan Türe (quoted in Ceylan, 2019). As described above, modest fashion is extremely varied and includes designers with very different tastes that are intertwined with those of the countries to which it is addressed, from North Africa to Asia, from the United States to European countries (Radwan et al., 2019).

Modest Fashion in Turkey

Modest fashion designers including Osman Ozdemir, a Turkish in-house designer for Modanisa and several other firms, and Hilal Oğuzkan, the owner-designer of Oğuzkan Apparel, believe that Turkey serves as a natural bridge between European and Asian markets. İstanbul is positioning itself to be a hub in this nascent industry (Ozerkan, 2016; Business Insider, 2016). This position is supported by the specific features in the New York Times which identify İstanbul as the “Islamic fashion capital” (2016). Recently, a designer from Turkey stated “with our design quality and fabric quality, we hope we reach where we need to be in the world and make our name known” (Milliyet 2016). Further, tourists from the Middle East come to shop in İstanbul. “I find many things: casual dresses, trousers, T-shirts, and many pieces,” said Dalia, a young woman from Saudi Arabia. Another person said, “I come without anything and buy from here” (Ozerkan, 2016). The attendees of the major modest fashion event in Turkey, reflect the potential of the market and the pivotal role Turkey, and İstanbul, have positioned themselves to play. Samar Murad, who came to the event from Bahrain, organized a fashion show. He said about his designs: "In general, I am impressed by Sufism in my collection. I am very happy to be here and I think it is the right place to launch. It was a very busy, beautiful, and important period for us. Here we see people from many countries of the world. There are people from Malaysia, Indonesia, and even England. I am the only one from the Arabian Peninsula. I represent myself as a single Bahraini and Arab” (Milliyet 2016).

E-retailers of Turkey: modanisa.com

There are a number of prominent e-retailers in the Turkish market for modest fashion. Below, we look into the profiles of just a few. While there are no case studies of modanisa.com in the literature, there are several pieces of public information concerning the company either on their own website or in the trade press. Gökhan Türe, the founder and CEO of modanisa.com, described the origins of the company as follows: “The idea has matured as we realized how few clothing alternatives are available for conservative, veiled women in our family and

friends. We even saw that women wearing hijab bought two short-sleeved blouses they liked and made one long-sleeved blouse made by the tailor. Because they had few options, they could not follow the fashion they wanted. Therefore, we observed that the 55-year-old mother and 25-year-old daughter wear almost the same clothes. We developed the idea with my friend Lale Tüzün. Then we told my childhood friends Gökhan Kavasoglu and Yener Özaydin, and they decided to be partners with us by investing money. First, we established the company with an investment of 500,000₺ and in the next 6 months we made an additional investment of 500,000₺” (Büyük, 2016). Modanisa.com the online fashion portal for Muslim women was established in 2011. Its name refers to the Koranic chapter al-Nisa, which in Arabic means "women". It has received funding from Goldman Sachs and the European Bank for Reconstruction and Development (Pitel, 2019).

Modanisa has become one of the strongest brands in the modest clothing market, offering more than 30,000 products — from casual tunics to shiny evening wear to shoes and accessories (Özerkan, 2016) – with products made by more than 850 manufacturers (Kardan, 2019) and ships to 140 countries (Yenisafak, 2021). Their export share is 76%² of the total revenue and this proportion continues to grow (Kardan, 2019). According to the latest news from Yenişafak (2021) newspaper, Modanisa.com’s website attracted 240 million visitors in 2020. Modanisa.com has become one of the pioneers of online modest fashion online shopping platforms not only in Turkey but also in the world. Thus, Turkey accounts for about 24% of the sales, 76% of the sales accounted for foreign markets including Australia, Canada, Europe, and the United States (Hashem, 2016; Ceylan, 2019). It seems that modanisa.com wants to expand operations by penetrating both the Muslim world and expanding operations into Europe and North America thus, has invested in both a multilanguage call-center, and having their website available in Turkish, English, French, German, and Arabic. Though the number of items and brands offered is increasing day by day, according to the latest figures that we can access there are more than 70 thousand products, and more than 850 brands available (Ceylan, 2019).

Modanisa has been approved for the Turkish Government’s Turquality project, which provides support for Turkish brands abroad (Kardan, 2019). The Turquality project provides support for Turkish manufacturers’ brand-building attempts in overseas markets and has supported modanisa.com to establish collection centers for returned items in the Middle East, USA, and Europe and establish offices in London and Dubai (Ceylan, 2019). Modanisa is aware that the brand provides invaluable externalities for the Turkish garment industry by acting as a carrier in piggyback exporting, as CEO Kerim Türe expressed, “We are carrying the producers who cannot reach the foreign market alone, to the world markets” (Ceylan, 2019). Furthermore, since modanisa.com defined itself as an e-marketplace, independent designers who have proven their ability can produce their own products and market them through modanisa.com. Although modanisa.com does not have the policy to sell only Turkish-made garments, İstanbul nevertheless hosts most of its designers, and İstanbul also hosts dozens of capable manufacturers. The outcome of which is 90% percent of items sold are manufactured in İstanbul (Dünya, 2015). Two years ago the company had 3,5 million loyal customers who made repeat purchases from the company. Part of this success has been attributed to Turkey’s

² The share of export may vary in the sources for instance Fortune Türkiye (2019) states as to be 80 % in 2018.

longstanding position as a textile producer and İstanbul's reputation as a trendsetting city (Pitel, 2019).

In the three years 2016, 2017, and 2018 modanisa.com was the top brand amongst Turkey's e-exporters. Modanisa.com targeted 200 million dollars worth of exports in 2020 and aims to increase its export size to 1 billion in 2023 (Zenginli, 2019; Kardan, 2019). More than half of Turkey's apparel e-exports are performed by Modanisa (Fortune Türkiye, 2019; Eko Türkiye, 2019)

Fashion and catwalk shows are an indispensable part of mainstream fashion and modest fashion has adopted these. Modanisa hosted the inaugural two-day International Modest Fashion Week in İstanbul in May 2016 which brought designers and models of conservative wear from around the world (Business Insider, 2016; Ozerkan, 2016). The success of the 2016 İstanbul Modest Fashion Week encouraged modanisa.com to turn its face to the west, specifically London, which has a very young and cosmopolitan Muslim population, and organize "London Modest Fashion Week" in April 2017 (Exhibit 1) (Yenişafak, 2017b; Baykal, 2017). In 2018 Jakarta and Dubai modest fashion weeks were sponsored by modanisa.com. The visibility and publicity of these fashion weeks have boosted modanisa.com's global profile (Pitel, 2019). Modanisa.com's dazzling success appeals to investors, and they received their first \$1 million investment from Turkish angel investor Aslanoba Capital. This was quickly followed by 5.5 million dollars from STC Ventures which is the venture capital fund of the Saudi Telecom Group (Haberler, 28.10.2016). Following this, Dubai-based Wamda Capital and Goldman Sachs, one of the world's most important investment banks acquired minority stakes of modanisa.com in 2019 (Fortune Turkey 2019). Three months later The European Bank for Reconstruction and Development invested in Modanisa (Daily Sabah, 2019). These international investments support modanisa.com's aim to become the world's largest online fashion platform in modest fashion (Türkiye Gazetesi 2019). The money pouring in from international investors was used to open logistic centers in Amsterdam and Dubai to deliver items across the whole world within 3 days (Fortune Turkey 2019) and to establish a returned item collection center in London.

Turkey's geographical location is also of advantage for modanisa.com. İstanbul, where modanisa.com is headquartered, is close to both Europe and the Middle East. Nevertheless, long distances are also within range, such as in Indonesia. Also, collaborations with national entities in target markets are underway. For example, Modanisa.com was invited to Indonesia by Bank National Indonesia (BNI) (Dünya, 2015). Modanisa has also received attention from the business world through awards. Modanisa.com's CEO, Kerim Ture, was selected in the "Islamica 500" list which features the most influential persons from finance, science, politics, law, and the media industry in shaping the Islamic economy (Haberler, 2016). Modanisa was awarded the Islamic Economy Award in 2017 and the International Business Excellence Award in the e-commerce and digital experience category in 2018 (Eko Türkiye, 2019). Recently, Modanisa.com was selected as the "Best Muslim Fashion Company" with votes from 90 countries, organized by "The Center for Global Muslim Life" headquartered in the USA. (Yenisafak, 2021). The CEO of Modanisa.com, has stated repeatedly that conservative young women are underrepresented in mainstream fashion: "If that was happening in a country like Turkey, where 99% of its population is Muslim, we wondered how the situation was around the world?" (The Express Tribune 2016; Ozerkan, 2016).

Modanisa serves conservative, or modest dressing, customers – this does not mean only Muslim women, or only Muslim women who wear hijab. Modanisa also focuses on conservative customers who do not wear hijab (Dalan 2017). Since the conservatives have been underserved and their market potential was not realized at the inception of the modanisa venture, supply problems arisen due to confused manufacturers. According to Kerim Türe, manufacturers were unwilling to produce and sell items to modanisa.com for future payment but asked, instead, for cash in advance, believing that the demand for a long-sleeved blouse, for example, may not be realistic in July and that the payment would not be able to be made in the future. When modanisa.com achieved year-round sales in modest dress, the manufacturers' resistance disappeared. So, overcoming the supply challenge required pouring cash into the business, thus the availability of cash limited the initial scope of the business (Seçkin, 2016).

Although Modanisa.com is an e-retailer, their first "Experience Store" opened in İstanbul in 2015. The store concept is "Like in the Store, buy from the web" – the store operates as a display window. Clothes can be seen, touched, and felt in the store, and if customers decide to buy the item, the item is shipped to their addresses. The store serves as a meeting point for fashion lovers. Some selected products can also be purchased directly from the store. Currently, the number of stores is four and all of them are in İstanbul (Modanisa.com). The garden behind the store will be put into service in the month of Ramadan and Modanisa Woman to Woman Chat activities (Mapsmagazin, 2015) will take place there. Modanisa uses social media to promote their products and events and have a presence across the platforms - Instagram, Facebook, Instagram, Snapchat (Table 2) (Hashem, 2016).



Exhibit 1: modanisa.com's London fashion week banner

sefamerve.com

Another online modest fashion outlet is one founded by Oya Okur Erciyes, a conservative Turkish lady who has lived in Canada for 12 years. Mrs. Erciyes had difficulties in finding suitable clothing in Canada, so she used to buy fabric and yarns from İstanbul and take them back with her to Canada after her annual visits to her family. Mrs. Erciyes studied fashion and was capable of designing and sewing her own clothes. She told her brother, Mehmet Metin Okur, who is a businessman, about the problems of hijab-wearing women. Mr. Okur's basic market research revealed a gap in the market and sefamerve.com was launched to take advantage of this unfulfilled market segment (Fırat, 2017). The brand name represents a Turkish transliteration of Safa and Marwa, two small hills in Mecca where hajjis perform sa'ee (Kızılbığ, 2015).

Sefamerve.com's quick success, which even surprised the founder, is attributed to the fact that it has affordable prices. When it opened its doors in March 2012, there were few modest clothes makers and sellers, and their prices were incredibly high. Further, these companies were targeting the affluent ladies of the Middle East. Thus, the landscape of the market was those who are in a strong financial situation can wear products designed for Middle Easterners, and those who are not well-off cannot even access hijab clothes (Fırat, 2017). In the early days of the venture, while offering modest clothes at affordable prices, consumers thought that the quality was very poor, having to compare the prices with the high prices of other available options. Mrs. Erciyes said that "For the first two years, we struggled to destroy this understanding. We did not keep our profit margin too high. We offered people the opportunity to buy five products for the price of one of the products of other sellers" (Fırat, 2017). On the other hand, on the supply side, Mrs. Erciyes had difficulties with hijab-complaint clothes. When she asked for a 105 cm skirt, manufacturers replied they didn't supply this length because only the Arab tourists would buy it. However, now many brands offer 105 cm skirts, which is a norm in the market, due to sefamerve's perseverance (Fırat, 2017).

Turkish journalist Mrs. Baykal had an experience in buying from sefamerve.com and summarizes the key points of her experience in an article she published - she reported, prices are lower by as much as half of comparable offerings, payment can be made at the customer's door to the delivery people, returns are easy as customers may send the product back and get their money back (Baykal, 2017). Sefamerve.com acknowledges that women like to dress in a variety of ways. This is reflected in their membership numbers – which are over 4.5 million. These are loyal customers, who understand that the company founder would not sell anything she would not wear herself – in this way they trust the company and know that it cares about their sensitivities (Fırat T. 2017). The company established a 4,500 square meter warehouse in Yalova, Turkey, which is where all of the orders are shipped from (Kızılbığ, 2015).

Sefamerve.com works with 400 manufacturing companies, with the proportion of exports being around 35% of total sales. The firm has offices in France, Germany, Morocco, Netherlands, and UAE. (Fırat, 2017) and ships products to 56 countries. The demand for hijab evening dresses is high in countries such as Denmark, Spain, Switzerland, America, Jordan, and Bosnia Herzegovina. Turkish fashion style is widely admired (Baykal, 2017). Sefamerve.com is the first and only Turkish company to be included in the Ecommerce Europe from outside the EU (Kızılbığ, 2015).

Sefamerve.com was initially selling only clothing, but today sefamerve web page offers hijab clothing, headscarves, outerwear, shoes, bags, accessories, home and lifestyles, baby and child, sports, and beach. Founder and CEO Mrs. Okur emphasized that Sefamerve.com differentiates itself with its in-house innovations. The seamless bonnet, for example, was developed by the in-house designers of sefamerve.com and sells 500 times as much as their main rivals stitched bonnets (Economist, 2017). Mrs. Okur also claims that sefamerve.com is the first company that introduced tracksuits and swimsuits for conservative women (Milliyet 2017a), with the swimsuit selling over 100 thousand (Kızılbağ, 2015). Inhouse designs are not the only way to introduce clothes, and modified clothes are also offered. For example, the gripper-fit shawl that has been used as a traditional clothing item in a small village of the Black Sea region was introduced to the whole world and is among the best sellers in 21 countries. Hijab swimwear leads the top-selling products in Israel, Italy, Cyprus, Saudi Arabia, Thailand, UAE., the US, and Morocco (Baykal, 2017). Naturally, these e-retailers are not the only ones and there are some others, like Tekbir, Aker, Armine, Kübra Tekin and many others. However, the information about these brands is either very limited or simply not available therefore they are outside the scope of this paper. Tekbir Giyim, for example, has 82 brick and mortar stores, of which 25 of them are in overseas markets (Yeni Şafak 2016).

Table 2: Modanisa.com and sefamerve.com on social media

	modanisa.com	sefamerve.com
Facebook (likes)	3.701.918	5.366.260
Facebook (followers)	3.728.414	5.278.095
Twitter (followers)	13.421	12.895
Instagram (followers)	2.486.606	3.511.871
Pinterest (followers)	14.900	15.900
Youtube (subscriber)	188 000	29.100

Conclusion

The case of these two Turkish retailers tells a story of the radical redefinition of traditional online retailing and traditional Islamic marketing systems (Kadirov 2018; 2019). It is based on the wise use of market intelligence given the current complexities of the markets (Kadirov and Varey, 2005). These two e-retailers dominate the Turkish market, at the same time they have taken the world market for modest fashion by storm. As stated by their founders when these brands come into stage both the supply side and the demand side required solving significant challenges. Not only consumer communities but also supplier companion communities needed to be invigorated (Kadirov and Varey, 2010). It was not that there was an already established gap for modest fashion, but the success depended on how these companies worked along with other retailers, e-retailers, suppliers, and marketing agencies.

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