

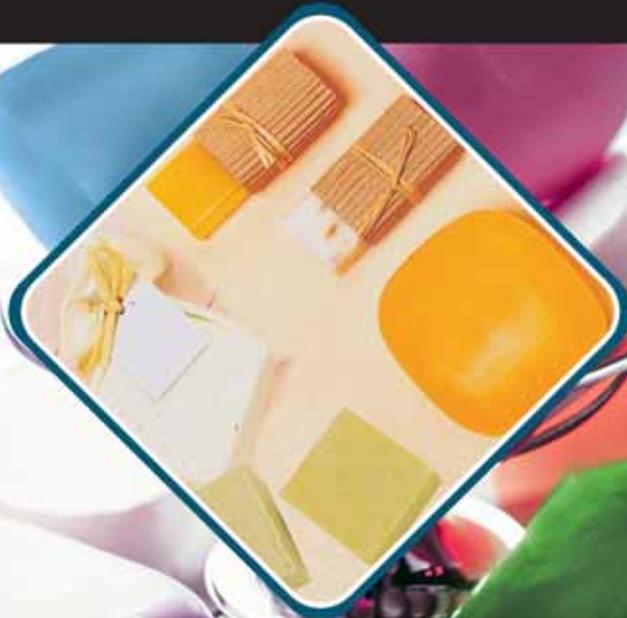


REPUBLIC OF TURKEY
MINISTRY OF ECONOMY

INDUSTRY



CLEANING MATERIALS



TURKEY
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CLEANING MATERIALS INDUSTRY IN TURKEY

Cleaning products are essential for life and are used daily by millions of people. These products loosen and remove soil from a surface, contribute to good personal hygiene, reduce the presence of germs that cause infectious diseases, extend the durability of clothes, tableware, linens, surfaces and furnishings, and make our homes and workplaces more pleasant.

PRODUCTION

Parallel with the increase in living standards, the developments in the cleaning service sector in Turkey and the increase in both domestic and foreign demand, the Turkish cleaning products industry has shown a remarkable performance in terms of quality, production capacity and variety. Since 1990, domestic and foreign investments in the Turkish cleaning products industry have increased considerably. As a consequence, detergent production capacity has reached 1.75 billion tons and soap production capacity has reached 400 thousand tons. These sectors also have great export potential.

The cleaning materials industry employs 12.000 people and the industry involves around 750 companies manufacturing various cleaning materials. The majority of cleaning materials producers is located in Istanbul, which is the largest production and trade center in Turkey. Most of the other manufacturers are located in Izmir, Kocaeli, Gaziantep, Mersin and Adana.

The production of cleaning products in Turkey can be grouped into four general categories:

- Personal Cleaning Products: mainly bar soaps, gels, liquid soaps and heavy-duty hand cleaners.
- Dishwashing Products: detergents for hand and machine dishwashing as well as some special products. They are available as liquids, gels, powders and solids.
- Laundry Detergents: They are available as liquids, powders, gels, sprays, sheets and bars. They are formulated to meet a variety of soil and stain removal, bleaching, fabric softening, conditioning and disinfecting tasks.
- Household Cleaners: They are available as liquids, gels, powders, solids, sheets and pads for use on painted, plastic, metal, porcelain, glass and other surfaces and on washable floor coverings. Household cleaners are formulated to meet a variety of uses: all-purpose cleaners, glass cleaners, toilet bowl cleaners, drain openers, carpet shampoos, upholstery cleaners, etc.

The Turkish cleaning products industry also complies with world standards in terms of quality. The number of firms which have ISO 9000 Quality System Certificates and ISO 14001 Certificates is rapidly increasing. In addition, Turkish cleaning products manufacturers closely follow recent international and national developments in environmental issues and comply with environmental legislation and regulations.

Most of the raw materials required for the cleaning products industry, like fatty acids, oils, LAB, essence, etc. are met by domestic production. However, raw materials which are not produced in Turkey like tallow oil, palm oil and some other chemicals are imported.

Soaps

The Turkish soap sector has a huge production and export capacity. The soap sector in Turkey is highly developed and competitive in the international arena. Since 1990, the rate of production in the soap industry has increased about 10% per year. The number of items produced has increased in parallel with consumer preferences. Today, soap manufacturers produce all types of soaps such as liquid and natural.

Since Turkey has a large variety of herbs and natural products, natural soap production is also widespread and made by small size local companies throughout Turkey. World famous "laurel soaps" are produced in large quantities in Mersin, Antakya and its nearby regions. Turkey is also among the top producers of olives; therefore, olive oil soaps are also manufactured and exported.

"Evyap Sabun", which operates its plant in Istanbul, is one of the leading companies in the Turkish soap industry in terms of capacity, production and exports. Now, it is also one of the leading manufacturers in the world and has the largest soap production capacity in Europe.

The soap sector of Turkey is now an export-oriented sector. Turkish soap producers have created their own brands, which lead to tight consumer dependence in the domestic market, and their targets are now foreign markets.

Detergents and other Household Cleaners

In the detergent sector, 90% of the powder detergent production is realized by 9 large-scale companies and 50% of the detergent market consists of powder detergent. The rest of the production is realized by small enterprises, which are concentrated in Southeastern Anatolia. In liquid detergent production, along with a few big producers, there are many small and medium sized producers.

Most of the major multinational detergent companies have their own manufacturing and marketing facilities in Turkey. Most of the foreign investors in the detergent sector are manufacturing through joint ventures and licensing agreements. Some of them are Procter&Gamble, Henkel, Colgate Palmolive, Unilever, and Benciser. Additionally, there are many domestic manufacturers, which have a large production capacity. Some of them are Hacı Şakir, Evyap, Hayat Kimya, Dalan, Başer Kimya, Hes Kimya, Ev-Tem, Uzay, Büyükmihci Kimya and Saruhanlılar.

EXPORTS

Exports of the Turkish cleaning materials industry show an increasing trend. While it was US\$ 80 million in 1992, the value of cleaning materials exports reached US\$ 768 million in 2011. This remarkably high increase in export value has undoubtedly been achieved due to the recent modernization and technological improvements realized in the sector. Within the total export value, the total share of soaps (HS: 3401) and washing and cleaning preparations (HS: 3402) was US\$ 676 million in 2011.

Turkish cleaning products are exported to 156 countries. Major destinations in 2011 are listed below. As indicated in the table, Iraq (share: 13,5%), Russian Federation (share: 10%) and Israel (share: 7%) are the top three export markets for the sector.

Cleaning Materials Exports (US\$ 1,000)

H.S.NO.	Products	2009	2010	2011	Major export markets in 2011
3401	Soap; organic surface-active preparations for soap use	361.170	373.787	401.520	Iraq, Russian Fed., Germany, Poland, Ukraine, Azerbaijan, Romania, United Kingdom, Egypt, Kazakhstan.
3402	Organic surface-active agents, washing & clean preparations, nes	195.222	214.242	274.340	Azerbaijan, Israel, Iraq, Iran, Georgia, Romania, Russian Fed., Cyprus, Bulgaria, Egypt.
3403	Lubricating preparations, antirust or for treating textiles, leather	29.823	27.825	20.982	Ukraine, Iraq, Iran, Germany, Kyrgyzstan, Azerbaijan, Turkmenistan, Uzbekistan, Israel, Sweden.
3404	Artificial waxes & prepared waxes	1.336	2.632	2.299	Russian Fed., Germany, Iran, Egypt, Azerbaijan, Ukraine, S.Arabia, Syria, Bulgaria, United Kingdom.
3405	Polishes & creams for footwear, furn, floors, glass, metal etc	56.019	55.998	64.780	Russian Fed., Egypt, Ukraine, Iraq, Algeria, Iran, Romania, Kazakhstan, Azerbaijan, Greece.
3406	Candles, tapers & the like	3.257	3.233	3.148	Germany, Switzerland, Israel, USA, Azerbaijan, Libya, TRNC, Senegal, Yemen, Iraq.
3407	Modeling pastes including those for children; dental wax	911	517	806	
	Total	647.738	678.234	767.875	

Source: ITC Trademap

Cleaning Materials Exports by Countries (US\$ 1,000)

Country	2009	2010	2011
Iraq	67.089	72.583	103.770
Russian Federation	73.259	77.010	77.642
Azerbaijan	47.350	49.860	54.201
Israel	33.775	33.394	37.976
Iran	10.511	18.231	33.582
Ukraine	36.461	35.507	28.834
Germany	29.709	23.235	28.623
Romania	24.261	23.012	27.373
Egypt	25.683	32.491	25.156
Georgia	17.398	21.312	24.872
Poland	16.374	14.108	19.079
Bulgaria	17.574	18.320	17.325
Kazakhstan	13.723	17.234	16.531
Turkmenistan	8.418	10.236	13.342
Cyprus	11.216	12.926	12.165
List Total	432.801	459.459	520.471

Source: ITC Trademap

TRADE FAIRS

- Private Label and I Fast Moving Consumer Goods Fair Istanbul
October 11-14, 2012
- International Beauty Eurasia Fair
June 14-16, 2012 Istanbul

USEFUL ADDRESSES

- Cosmetics and Cleaning Products Industry Association
www.ktsd.org.tr/eng/index.html
- Turkish Exporters Assembly
www.tim.org.tr/en/



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