



REPUBLIC OF TURKEY
MINISTRY OF ECONOMY



INDUSTRY



COSMETICS AND PERSONAL CARE PRODUCTS



TURKEY
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COSMETICS AND PERSONAL CARE PRODUCTS INDUSTRY

Parallel with the increase in living standards, the wish to keep a young and attractive appearance, the increasing number of working women and the young population of the country has led to the development of the cosmetics sector in Turkey. The Turkish cosmetic products industry has shown very good performance in terms of quality, production capacity and variety. The increase in both domestic and world demand is the major driving force for the rapid development of the sector. Today, Turkish cosmetics and personal care products companies offer high-quality, diverse products.

According to the Ministry of Health, the cosmetics and personal care products industry employs 14.000 people, and 1372 companies manufacturing various cosmetics and personal care products are operating in the sector. The majority of these companies are located in Istanbul, which is the largest production and trade center in Turkey.

In conjunction with recent economic growth in Turkey, the consumption and production of cosmetics and personal care products are growing rapidly. The number of cosmetics and personal care product range is increasing every year. The production value of the Turkish cosmetics and personal care products industry reached approximately 1.5 billion Euros. Hair care has the largest share of the cosmetics and personal care products market in Turkey. Shampoos represent around 59% of hair care products. Men's grooming products, depilatories, bath and shower products especially bar soaps, lip and eye make-up, personal deodorants and antiperspirants, perfumes, cologne and other toiletries, baby care products and dentifrices are the main products.

The Turkish cosmetics market has recently witnessed the appearance of new and more competitive products such as soaps, natural soaps, natural shampoos, natural hair care, natural skin care, natural body care and other natural cosmetics. Since Turkey has a large variety of herbs and natural products, natural soap production is also widespread and done by small size local companies throughout Turkey. World-famous "laurel soaps" and "olive oil soaps" are produced in large quantities in Turkey. The Turkish soap sector is now an export-oriented sector. Turkish soap producers have created their own brands, which have led to strong consumer dependence in the domestic market, and they directed their attention to foreign markets.

Most of the major multinational cosmetics and personal care products companies have manufacturing and marketing facilities in Turkey. Most of the foreign investors in the cosmetics and personal care products sector are manufacturing through joint ventures and licensing agreements. Some of them are Procter & Gamble, Henkel, Colgate Palmolive, and Unilever. Additionally, there are many strong domestic manufacturers which have large production capacities. Some of them are Evyap, Eczacıbaşı, Canan Kozmetik, Kopaş Kozmetik, Kurtsan İlaçları, Hunca Kozmetik, Aromel Kozmetik, Hobi Kozmetik, Koşan Kozmetik, Dündar Kozmetik and Rosense Kozmetik.

The Turkish cosmetics and personal care products industry has also reached world standards in terms of quality. Most of the companies have ISO 9000 Quality System Certificates and ISO 14001 Certificates. In addition, Turkish cosmetics and personal care products manufacturers closely follow recent international and national developments in environmental issues and comply with environmental legislation and regulations. The cosmetic and personal care products regulations adjusted to EU Cosmetics Directive (76/768/EEC) has been in force in the Turkish market since 2005.

EXPORTS

Exports of the Turkish cosmetics and personal care products industry have an upward trend. While it was US\$ 61 million in 2000, the value of cosmetics and personal care products exports reached US \$ 509 million in 2011. If soap exports were included in this figure, the total export value of the sector would rise to US\$ 910 million in 2011. This remarkably high increase in the export value has undoubtedly been achieved due to the recent modernisation and technological improvements carried out in the sector.

Exports of the cosmetics and personal care products sector in Turkey are composed of five major subsectors:

- Bath and shower products (preshave lotions, aftershave lotions, shaving cream, shaving soap and other shaving preparations products, bath soaps, deodorants, antiperspirants, bath salt, bath oils and other bath preparations, shower preparations, depilatories, room deodorizers, diapers, sanitary napkins and other toilet and cosmetic preparations products) comprise 43% of the cosmetic exports.

- Beauty or make-up and skin care products (skin care creams, moisturising, skin care powders, skin cleansing, body lotions, eye make-up, lip make-up, manicure and pedicure preparations, sun protection, sun tan products and other skin care preparations) comprise 25% of the cosmetic exports.

- Hair products (shampoos, hair conditioners, hair rinses, hair straighteners, permanent waves, hair sprays, hair lotions, hair dyes, hair bleaches and other hair preparations) comprise 23% of the cosmetic exports.

- Perfume and toiletries (perfumes, colognes, toiletries and other products) comprise 7% of the cosmetic exports.

- Oral and dental hygiene products (dentifrices: aerosol, liquid, pastes and powders, mouthwashes and breath fresheners, dental floss and other oral hygiene products) comprise 2% of the cosmetic exports.

Cosmetics and Personal Care Products Exports by Types, (Value: US \$ Million)

| HS No. | Products | 2009 | 2010 | 2011 | Major export markets of 2011 |
|--------|---|------------|------------|------------|--|
| 3303 | Perfume and toilet waters | 26 | 36 | 38 | Azerbaijan, Iran, Iraq, UAE, Romania, Russian Federation |
| 3304 | Beauty or make-up and skin care products | 85 | 96 | 125 | Iran, Russian Federation, Iraq, Germany, Poland, Ukraine |
| 3305 | Hair products | 101 | 106 | 118 | Iraq, Iran, Israel, Azerbaijan, Germany, Cyprus |
| 3306 | Oral and dental hygiene | 10 | 9 | 9 | Iraq, Algeria, Cyprus, Ukraine, Azerbaijan, Afghanistan |
| 3307 | Bath, shower products and men's grooming products | 156 | 204 | 219 | Iraq, Russian Federation, Iran, Romania, UAE |
| | Total | 378 | 451 | 509 | |

Source: www.trademap.org

The major export product of the Turkish cosmetics and personal care products industry were personal deodorants and antiperspirants with an export value of US\$ 82 million in 2011. The second major export product was shampoos with an export value of US\$ 75 million. Manicure or pedicure preparations (US\$ 44 million), perfumes and toilet waters (US\$ 38 million) hair paint and others preparations (US\$ 38 million), shaving preparations (US\$ 38 millions), eye make-up preparations (US\$ 20 million), lip make-up preparations (US\$ 15 million) were the other export items of the cosmetics and personal care products industry.

Turkish cosmetics and personal care products are exported to a wide range of countries and Turkey is now exporting cosmetics and personal care products to 159 countries throughout the world. Major destinations in 2011 were Iraq, Iran, the Russian Federation, Azerbaijan, Germany, Romania, the UAE, Ukraine, and Israel. In 2011, Iraq had a 16% share in Turkey's cosmetics and personal care products exports and Iran had 11%.

Cosmetics and Personal Care Products Industry Exports by Countries
(Value: US \$ 1000)

| Countries | 2009 | 2010 | 2011 |
|----------------------------|----------------|----------------|----------------|
| Iraq | 67.569 | 73.139 | 82.069 |
| Iran (Islamic Republic of) | 22.528 | 31.710 | 56.339 |
| Russian Federation | 27.186 | 34.725 | 35.528 |
| Azerbaijan | 13.243 | 14.783 | 16.837 |
| Germany | 7.371 | 10.983 | 16.671 |
| Romania | 11.612 | 15.364 | 16.260 |
| United Arab Emirates | 10.075 | 15.475 | 15.164 |
| Ukraine | 16.638 | 16.718 | 14.396 |
| Israel | 6.414 | 10.146 | 13.746 |
| Libya | 22.973 | 19.023 | 11.961 |
| Algeria | 7.634 | 10.146 | 11.672 |
| Cyprus | 9.642 | 11.168 | 11.596 |
| Saudi Arabia | 6.995 | 8.281 | 10.150 |
| Bulgaria | 10.401 | 9.015 | 9.811 |
| Jordan | 5.792 | 9.428 | 8.915 |
| Serbia | 5.970 | 7.463 | 8.551 |
| United Kingdom | 3.639 | 5.601 | 8.527 |
| Egypt | 4.055 | 6.631 | 8.264 |
| Netherlands | 6.607 | 5.754 | 8.090 |
| Poland | 5.523 | 6.341 | 7.607 |
| Free Zones | 5.826 | 7.535 | 6.965 |
| Turkmenistan | 4.634 | 6.435 | 6.205 |
| United States of America | 6.449 | 6.281 | 5.672 |
| Morocco | 3.191 | 4.913 | 5.401 |
| Italy | 6.891 | 6.530 | 5.285 |
| Kazakhstan | 3.943 | 5.066 | 4.877 |
| Uzbekistan | 2.572 | 3.417 | 4.582 |
| Georgia | 4.105 | 3.225 | 4.391 |
| France | 1.542 | 4.331 | 4.016 |
| Syrian Arab Republic | 5.077 | 5.079 | 3.950 |
| Other Countries | 316.097 | 374.706 | 423.498 |
| Total | 377.669 | 450.997 | 508.938 |

Source: www.trademap.gov.tr

TRADE FAIRS

The products of the industry are exhibited in international and national fairs organized in Turkey. Major fairs in the Turkish cosmetics and personal care products industry in 2012 are as follows:

- BURSA BRIDE GROOM 2012 6TH Wedding Fair- Cosmetics, Beauty, Aesthetics, and Personal Care in Bursa, 23-26 February 2012
- BEAUTY FORUM - Cosmetics, Beauty, Aesthetics, Personal Care in Istanbul in 22-25 March 2012.
- İZMİR 1ST PREPARATION BEFORE MARRIAGE FAIR - Cosmetics, Beauty, Aesthetics, Personal Care in Izmir 22-25 March 2012
- CARE & CURE - Medical Aesthetics, Facial and Franchising Fair, Cosmetics, Beauty, Aesthetics, Personal Care in Istanbul in 08-10 April 2011.
- PHARMACEUTICALS 2012 6. PHARMACEUTICALS EXHIBITION- Cosmetics, Beauty, Aesthetics, Personal Care - Medicine, Medical Equipment, Laboratory Equipment, and Dentistry in Istanbul 06- 08 April 2012
- BEAUTY EURASIA - International Exhibition For Beauty & Cosmetics Products, Cosmetics, Beauty, Aesthetics, Personal Care in Istanbul in 14-18 June 2012
- ANFAŞ HETEX - 4. HEALTH TOURISM EXHIBITION- Cosmetics, Beauty, Aesthetics, Personal Care and Tourism in Antalya 01- 03 November 2012

USEFUL LINKS

- Turkish Chemical Manufacturers Association
www.tksd.org.tr
- The Association Of Cosmetics And Cleaning Products Industrialists
www.ktsd.org.tr
- Istanbul Mineral And Metals Exporters' Association
www.immib.org.tr



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