

COSMETICS AND PERSONAL CARE PRODUCTS INDUSTRY IN TURKEY

Parallel with the increase in living standards, the wish to keep a youthful 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 14000 people and 1372 companies manufacturing various cosmetics and personal care products are operating in the sector. The majority 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 represented 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 has led to tight consumer dependence in the domestic market and 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.

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.

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 \$ 451 million in 2010. If soap exports were included in this figure, the total export value of the sector would rise to US \$ 825 million in 2010. This remarkable high increase in 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 is 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 45% 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 25% of the cosmetic exports.

Beauty or makeup and skin care products (skin care creams, moisturising, skin care powders, skin cleansing, body lotions, eye makeup, lip makeup, manicure and pedicure preparations, sun protection, sun tan products and other skin care preparations) comprise 21% of the cosmetic exports.

Perfume and toiletries (perfumes, colognes, toiletries and other products) comprise 8% 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.

Exports of Cosmetics and Personal Care Products in Turkey by year

Years	Value (\$)
2000	61.440.010
2001	68.895.222
2002	80.797.982
2003	130.195.039
2004	181.320.286
2005	229.567.142
2006	277.727.598
2007	325.929.554
2008	406.857.000
2009	377.782.511
2010	450.994.872

Information source: Undersecretariat of Foreign Trade

Exports of Cosmetics and Personal Care Products in Turkey, (Value: \$ million)

Products	2008	2009	2010	The main export markets, and shares
Perfume and Toilet waters	29	26	36	Azerbaijan, Iraq, Libya, UAE, Iran
Beauty or make-up and skin care products	100	85	96	Iran, Russian Federation, Iraq, Ukraine, UAE
Hair products	89	101	106	Iraq, Libya, TRNC, Italy, Azerbaijan
Oral and dental hygiene	25	10	9.5	Iraq, Ukraine, TRNC, Algeria, Afghanistan
Bath, shower products and men's grooming products	164	156	204	Iraq, Russian Federation, Iran, Romania, Libya
Total	407	378	451	

The major export product of the Turkish cosmetics and personal care products industry were personal deodorants and antiperspirants with an export value of US \$ 83 million in 2010. The second major export products was shampoos with an export value of US \$ 68 million. Manicure or pedicure preparations (US \$ 32 million), hair paint and others preparations (US \$ 29 million), shaving preparations (US \$ 27 millions), perfumes (US \$ 20 million), eye makeup preparations (US \$ 16 million), skin care products (US \$ 14 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 products to 150 countries throughout the world. Major destinations in 2010 were Iraq, the Russian Federation, Iran, Libya, Ukraine, the UAE, Romania, Azerbaijan, TRNC, Germany and Algeria. In 2010, Iraq had a 16% share in Turkey's cosmetics and personal care products exports and the the Russian Federation had 8%.

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

Countries	2008	2009	2010
Iraq	57.523	67.570	73.138
Russian Federation	46.050	27.186	34.725
Libya	21.923	22.527	31.724
Iran	17.842	22.971	19.023
Ukraine	24.437	16.637	16.717
UAE	11.682	10.075	15.474
Bulgaria	16.791	10.401	9.014
Algeria	11.352	7.634	10.146
Total	406.857	377.672	450.994

Imports of Cosmetics and Personal Care Products in Turkey by year

Years	Value (\$)
2000	159.491.893
2001	138.053.234
2002	164.748.464
2003	212.507.757
2004	276.660.255
2005	322.336.331
2006	385.285.807
2007	462.534.873
2008	489.909.234
2009	491.362.071
2010	589.524.018
Information source: Undersecretariat of Foreign Trade	

Major Imported Cosmetics

(Value: \$)

Products (2010)	
Shampoos	115.724.591
Creams, oils	80.745.790
Toothpastes / powders	62.259.263

Toilet waters	50.531.029
Hair dyes	44.880.116
Eye make-up preparations	30.993.180
Other hair preparations	30.152.229
Body deodorant and antiperspirant deodorants	27.859.251
Beauty / make-up preparations and preparations for skin care	27.289.938
Perfume	25.366.012
Room fragrances	14.576.699
Lipsticks	13.111.654
Other perfumery, cosmetics / toilet preparations, depilatory	10.816.725
Perfumed bath salts and other bath preparations	6.382.674
Powders	5.974.160
Mouth / dental hygiene preparations	5.784.387
Body lotions	5.509.444
Blusher	4.624.932
Contact lens / artificial eye solutions	3.971.823
Shaving cream	3.922.373
Make-up preparations	3.734.185
Hair spray	3.073.223
Manicure, pedicure preparations	2.842.563
Pre-shave, shave during, after-shave preparations	2.599.070
Colognes	1.750.215
Dental floss	1.502.472
Soap / bath preparations	1.281.432

Lotions (for shaving)	1.157.607
Perfume / cosmetics impregnated, coated	610.060
Preparations for permanent waving or straightening (hair)	250.810
Other odoriferous preparations which operate by burning	239.449
Information source: Undersecretariat of Foreign Trade	

Import rate

33% of hair preparations, 30% of beauty and makeup products, 13% of perfumes and toilet water, 12% of shaving preparations, 12% of oral and dental care products

There are many foreign investors in the cosmetic industry in Turkey. Some of them are Procter Gamble, Henkel, Colgate Palmolive and Unilever.

Cosmetics and Personal Care Products Imports

(Value: 1000 \$)

Countries	2008	2009	2010
France	136.116	141.410	170.036
Germany	100.368	107.020	116.814
Poland	59.226	71.781	76.495
England	23.949	24.537	37.266
Italy	31.692	25.042	34.752
USA	36.091	26.481	30.787
Spain	19.429	15.234	19.300
China	6.441	8.908	10.665
Total	489.909	491.960	589.524

PRINCIPAL FAIRS IN TURKEY IN 2012

14-16 Jun
BEAUTY EURASIA
Istanbul

22-25 March
Health and Beauty
Istanbul