



REPUBLIC OF TURKEY
MINISTRY OF ECONOMY

INDUSTRY



CLEANING MATERIALS



TURKEY

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CLEANING MATERIALS INDUSTRY IN TÜRKİYE

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 Türkiye 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 Türkiye. Most of the other manufacturers are located in Izmir, Kocaeli, Gaziantep, Mersin and Adana.

The production of cleaning products in Türkiye 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 Türkiye 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 Türkiye 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 Türkiye has a large variety of herbs and natural products, natural soap production is also widespread and made by small size local companies throughout Türkiye. World famous "laurel soaps" are produced in large quantities in Mersin, Antakya and its nearby regions. Türkiye 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 Türkiye 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 Türkiye. 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.

CLEANING AGENTS SECTOR OF TÜRKİYE

EXPORTS

Türkiye cleaning materials exports decreased by 9,7% in 2021 compared to the previous year and amounted to us \$ 1.015 billion (Table 1).

Table 1: Cleaning Materials Exports (1.000 \$)

HS No.	Products Name	Value (1.000 \$)			Change (%)	Share (%)
		2019 (\$)	2020 (\$)	2021 (\$)	(2020-21)	2021
3401	Soap; organic surface-active preparations for soap use	367.260	525.830	422.088	-19,73%	41,56%
3402	Organic surface-active agents, washing & clean preparations, nes	410.964	507.737	479.640	-5,53%	47,22%
3403	Lubricating preparations, antirust or for treating textiles, leather	22.669	25.014	29.431	17,66%	2,90%
3404	Artificial waxes & prepared waxes	8.024	7.194	10.041	39,57%	0,99%
3405	Polishes & creams for footwear, furn, floors, glass, metal etc.	53.999	48.201	57.023	18,30%	5,61%
3406	Candles, tapers & the like	1.044	1.345	3.613	168,64%	0,36%
3407	Modeling pastes including those for children; dental wax	7.050	9.530	13.872	45,55%	1,37%
Genel Toplam		871.011	1.124.853	1.015.708	-9,70%	100,00%

Source: Turkish Statistical Institute

The main markets in the sector are Iraq, Azerbaijan, Israel, Russia and USA. The share of our top 15 export markets in the said sector in total sector exports is around 63% in 2021(Table 2).

Table 2: Cleaning Materials Exports by Countries (1.000 \$)

	Countries	Value (1.000 \$)			Change (%)	Share (%)
		2019	2020	2021	(2020-21)	2021
1	Iraq	148.493	142.774	138.628	-2,9%	13,6%
2	Azerbaijan	44.621	59.212	55.220	-6,7%	5,4%
3	Israel	46.228	53.412	52.908	-0,9%	5,2%
4	Russia	40.530	43.625	46.941	7,6%	4,6%
5	USA	17.677	100.672	45.781	-54,5%	4,5%
6	United Kingdom	31.042	62.277	38.244	-38,6%	3,8%
7	Romania	28.616	43.521	36.654	-15,8%	3,6%
8	Gemany	26.285	42.488	35.272	-17,0%	3,5%
9	Iran, Islamic Republic of	30.985	28.902	34.751	20,2%	3,4%
10	Holland	16.619	35.472	33.561	-5,4%	3,3%
11	Georgia	32.630	28.840	27.115	-6,0%	2,7%
12	Libya	16.627	25.311	25.523	0,8%	2,5%
13	Bulgaria	16.924	21.763	22.782	4,7%	2,2%
14	Morocco	14.845	19.259	21.921	13,8%	2,2%
15	Egypt	21.999	18.377	21.707	18,1%	2,1%
Türkiye's Total Export		871.011	1.124.853	1.015.708	-9,70%	100,00%

Source: Turkish Statistical Institute

TRADE FAIRS

- www.fairguide.org.tr/

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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