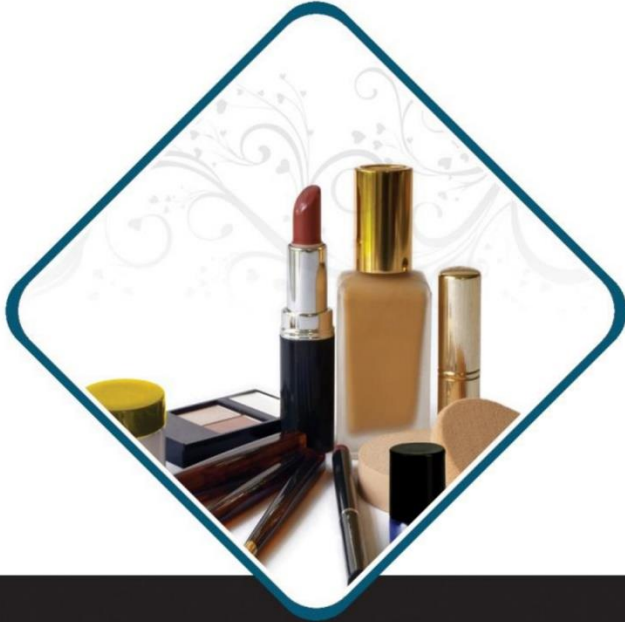




REPUBLIC OF TURKEY
MINISTRY OF TRADE

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 Türkiye. 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 approximately 3.250 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 biggest trade center in Türkiye and in which the largest production is made.

In conjunction with recent economic growth in Türkiye, 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. 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 Türkiye has a large variety of herbs and natural products, natural soap production is also widespread and done by small size local companies throughout Türkiye. World-famous "laurel soaps" and "olive oil soaps" are produced in large quantities in Türkiye. 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 Türkiye. Most of the foreign investors in the cosmetics and personal care products sector are manufacturing through joint ventures and licensing agreements. Additionally, there are many strong domestic manufacturers which have large production capacities.

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 European Cosmetics Directive 1223/2009.

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\$ 1,34 billion in 2022. This remarkably high increase in the export value has undoubtedly been achieved due to the recent modernization and technological improvements carried out in the sector.

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

Bath and shower products (pre-shave 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).

Beauty or make-up and skin care products (skin care creams, moisturizing, 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).

Hair products (shampoos, hair conditioners, hair rinses, hair straighteners, permanent waves, hair sprays, hair lotions, hair dyes, hair bleaches and other hair preparations).

Table 1: Cosmetics and Personal Care Products Exports by Types, (1.000 \$)

HS No.	Products Name	Value (1.000 \$)			Change (%) (2021-22)	Share (%) 2022
		2020 (\$)	2021 (\$)	2022 (\$)		
3301	Essential oils, whether or not terpeneless, incl. concretes and absolutes; resinoids; extracted ...	37.894	37.917	44.419	17,1%	3,3%
3302	Mixtures of odoriferous substances and mixtures, incl. alcoholic solutions, based on one or ...	169.120	196.146	249.402	27,2%	18,5%
3303	Perfumes and toilet waters (excluding aftershave lotions, personal deodorants and hair lotions)	117.199	125.145	137.219	9,6%	10,2%
3304	Beauty or make-up preparations and preparations for the care of the skin, incl. sunscreen or ...	214.315	232.799	264.149	13,5%	19,6%
3305	Preparations for use on the hair	188.476	234.720	300.943	28,2%	22,4%
3306	Preparations for oral or dental hygiene, incl. denture fixative pastes and powders; yarn used ...	12.116	12.219	16.534	35,3%	1,2%
3307	Shaving preparations, incl. pre-shave and aftershave products, personal deodorants, bath and ...	214.149	272.867	332.156	21,7%	24,7%
TOTAL		953.269	1.111.813	1.344.822	21%	100%

Source: Turkish Statistical Institute

Perfume and toiletries (perfumes, colognes, toiletries and other products).

Oral and dental hygiene products (dentifrices: aerosol, liquid, pastes and powders, mouthwashes and breath fresheners, dental floss and other oral hygiene products).

Turkish exports have shown a steady increase in recent years. While the total value of the cosmetics and personal care products' exports was US\$ 953 million in 2020, it rose to US\$ 1.1 billion in 2021 and it recorded a further 21% increase in 2022 and reached a record value of US \$ 1,34 billion (Table 1).

Table 2: Cosmetics and Personal Care Products Exports by Countries (1.000 \$)

	Countries	Value (1.000 \$)			Change (%)	Share (%)
		2020	2021	2022	(2021-22)	2022
1	Iraq	103.126	116.445	108.192	-7,1%	8,0%
2	USA	82.270	94.569	96.921	2,5%	7,2%
3	Russia	40.690	48.484	92.567	90,9%	6,9%
4	United Arab Emirates	36.376	50.673	79.139	56,2%	5,9%
5	Iran, Islamic Republic of	49.614	59.191	75.562	27,7%	5,6%
6	Holland	53.623	54.687	67.910	24,2%	5,0%
7	France	25.070	32.931	45.974	39,6%	3,4%
8	Germany	38.895	36.313	44.497	22,5%	3,3%
9	Azerbaijan	29.651	30.365	43.446	43,1%	3,2%
10	Israel	20.265	25.367	35.681	40,7%	2,7%
11	Libya	17.870	33.048	32.246	-2,4%	2,4%
12	United Kingdom	25.905	28.761	32.239	12,1%	2,4%
13	Uzbekistan	14.071	12.363	29.967	142,4%	2,2%
14	Romania	21.528	26.273	27.603	5,1%	2,1%
15	Georgia	13.617	14.150	21.600	52,7%	1,6%
Sub Total		572.571	663.620	833.544	25,6%	62%
Total Cosmetics Exports		953.269	1.111.813	1.344.822	21%	100%

Source: Turkish Statistical Institute

TRADE FAIRS

- [Fairs in Turkey](#)

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
- EUR-Lex (<https://eur-lex.europa.eu>)



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