



REPUBLIC OF TURKEY  
MINISTRY OF TRADE



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.

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## 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.

## CLEANING AGENTS SECTOR OF TURKEY

### EXPORTS

Turkey cleaning materials exports increased by 3.2% in 2019 compared to the previous year and amounted to us \$ 829.6 million (Table 1).

**Table 1: Cleaning Materials Exports (1.000 \$)**

HS No.	Products Name	Value (1.000 \$)			Change (%)	Share (%)
		2017 (\$)	2018 (\$)	2019 (\$)	(2018-19)	2019
3401	Soap; organic surface-active preparations for soap use	357.695	349.972	347.347	-0,75%	41,87%
3402	Organic surface-active agents, washing & clean preparations, nes	350.777	376.402	400.183	6,32%	48,24%
3403	Lubricating preparations, antirust or for treating textiles, leather	19.622	22.929	25.352	10,57%	3,06%
3404	Artificial waxes & prepared waxes	5.462	7.360	6.901	-6,24%	0,83%
3405	Polishes & creams for footwear, furn, floors, glass, metal etc.	39.375	39.687	41.726	5,14%	5,03%
3406	Candles, tapers & the like	1.009	797	1.025	28,61%	0,12%
3407	Modeling pastes including those for children; dental wax	5.878	6.699	7.061	5,40%	0,85%
<b>Genel Toplam</b>		<b>779.818</b>	<b>803.846</b>	<b>829.595</b>	<b>3,20%</b>	<b>100,00%</b>

Source: Trade Map

The main markets in the sector are Iraq, Israel, Azerbaijan, Russia, Georgia and the United Kingdom. The share of our top 15 export markets in the said sector in total sector exports is around 62% in 2019 (Table 2).

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

	Countries	Value (1.000 \$)			Change (%)	Share (%)
		2017	2018	2019	(2018-19)	2019
1	Iraq	113.715	119.597	136.229	13,91%	16,42%
2	Israel	44.037	45.035	46.227	2,65%	5,57%
3	Azerbaijan	43.646	44.182	43.848	-0,76%	5,29%
4	Russian Federation	37.840	37.358	40.490	8,38%	4,88%
5	Georgia	31.637	32.532	32.088	-1,36%	3,87%
6	United Kingdom	28.357	29.114	30.491	4,73%	3,68%
7	Iran, Islamic Republic of	36.032	28.622	28.980	1,25%	3,49%
8	Romania	29.709	28.432	28.562	0,46%	3,44%
9	Germany	33.371	24.970	22.787	-8,74%	2,75%
10	Egypt	12.522	16.210	21.415	32,11%	2,58%
11	Saudi Arabia	14.025	14.899	16.669	11,88%	2,01%
12	Libya, State of	11.695	20.086	16.503	-17,84%	1,99%
13	Bulgaria	20.430	16.832	16.397	-2,58%	1,98%
14	United Arab Emirates	15.793	15.086	15.920	5,53%	1,92%
15	Netherlands	17.063	17.130	15.855	-7,44%	1,91%
<b>List Total</b>		<b>489.872</b>	<b>490.085</b>	<b>512.461</b>	<b>4,57%</b>	<b>61,77%</b>
<b>General Total</b>		<b>779.818</b>	<b>803.846</b>	<b>829.595</b>	<b>3,20%</b>	<b>100,00%</b>

Source: Trade Map

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## **TRADE FAIRS**

- [www.fairguide.org.tr/](http://www.fairguide.org.tr/)

## **USEFUL ADDRESSES**

- Cosmetics and Cleaning Products Industry Association  
[www.ktsd.org.tr/eng/index.html](http://www.ktsd.org.tr/eng/index.html)
- Turkish Exporters Assembly  
[www.tim.org.tr/en/](http://www.tim.org.tr/en/)





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Prepared by

Directorate General of Exports

[www.trade.gov.tr](http://www.trade.gov.tr)

[ihticari@ticaret.gov.tr](mailto:ihticari@ticaret.gov.tr)

Call Center

+90 850 808 04 04