



Beauty and Personal Care in Turkey

April 2024

Table of Contents

Beauty and Personal Care in Turkey

EXECUTIVE SUMMARY

Beauty and personal care in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for beauty and personal care?

MARKET DATA

Table 1 - Sales of Beauty and Personal Care by Category: Value 2018-2023

Table 2 - Sales of Beauty and Personal Care by Category: % Value Growth 2018-2023

Table 3 - GBO Company Shares of Beauty and Personal Care: % Value 2019-2023

Table 4 - NBO Company Shares of Beauty and Personal Care: % Value 2019-2023

Table 5 - LBN Brand Shares of Beauty and Personal Care: % Value 2020-2023

Table 6 - Penetration of Private Label in Beauty and Personal Care by Category: % Value 2018-2023

Table 7 - Distribution of Beauty and Personal Care by Format: % Value 2018-2023

Table 8 - Distribution of Beauty and Personal Care by Format and Category: % Value 2023

Table 9 - Forecast Sales of Beauty and Personal Care by Category: Value 2023-2028

Table 10 - Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby and Child-Specific Products in Turkey

KEY DATA FINDINGS

2023 DEVELOPMENTS

Innovation drives growth

Post-pandemic shift in demand

Natural ingredients gain traction

PROSPECTS AND OPPORTUNITIES

Private label continues to gain traction

"Free from" products remain in high demand

The internet retailing boom continues

CATEGORY DATA

Table 11 - Sales of Baby and Child-specific Products by Category: Value 2018-2023

Table 12 - Sales of Baby and Child-specific Products by Category: % Value Growth 2018-2023

Table 13 - Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2018-2023

Table 14 - NBO Company Shares of Baby and Child-specific Products: % Value 2019-2023

Table 15 - LBN Brand Shares of Baby and Child-specific Products: % Value 2020-2023

Table 16 - LBN Brand Shares of Baby and Child-specific Skin Care: % Value 2020-2023

Table 17 - LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2020-2023

Table 18 - LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2020-2023

Table 19 - Forecast Sales of Baby and Child-specific Products by Category: Value 2023-2028

Table 20 - Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2023-2028

Table 21 - Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2023-2028

Bath and Shower in Turkey

KEY DATA FINDINGS

2023 DEVELOPMENTS

Private label gains ground

Hand sanitisers: A post-pandemic normalisation

Shrinkflation: A price-driven strategy

PROSPECTS AND OPPORTUNITIES

Blurring the lines: Skin care meets body care

Sustainability: A growth engine

Focus on intimate hygiene

CATEGORY DATA

Table 22 - Sales of Bath and Shower by Category: Value 2018-2023

Table 23 - Sales of Bath and Shower by Category: % Value Growth 2018-2023

Table 24 - Sales of Bath and Shower by Premium vs Mass: % Value 2018-2023

Table 25 - NBO Company Shares of Bath and Shower: % Value 2019-2023

Table 26 - LBN Brand Shares of Bath and Shower: % Value 2020-2023

Table 27 - LBN Brand Shares of Premium Bath and Shower: % Value 2020-2023

Table 28 - Forecast Sales of Bath and Shower by Category: Value 2023-2028

Table 29 - Forecast Sales of Bath and Shower by Category: % Value Growth 2023-2028

Table 30 - Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2023-2028

[Colour Cosmetics in Turkey](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Inflation pushes exponential retail value growth

Shifting trends: Eyes, lips, and the embrace of natural beauty

New launches reflect evolving preferences: Health-focused innovation

PROSPECTS AND OPPORTUNITIES

Multitasking make-up and skin care to take centre stage

Digital transformation: Redefining the beauty experience

Sustainability and ethical consumerism on the rise

CATEGORY DATA

Table 31 - Sales of Colour Cosmetics by Category: Value 2018-2023

Table 32 - Sales of Colour Cosmetics by Category: % Value Growth 2018-2023

Table 33 - NBO Company Shares of Colour Cosmetics: % Value 2019-2023

Table 34 - LBN Brand Shares of Colour Cosmetics: % Value 2020-2023

Table 35 - LBN Brand Shares of Eye Make-up: % Value 2020-2023

Table 36 - LBN Brand Shares of Facial Make-up: % Value 2020-2023

Table 37 - LBN Brand Shares of Lip Products: % Value 2020-2023

Table 38 - LBN Brand Shares of Nail Products: % Value 2020-2023

Table 39 - LBN Brand Shares of Premium Colour Cosmetics: % Value 2020-2023

Table 40 - Forecast Sales of Colour Cosmetics by Category: Value 2023-2028

Table 41 - Forecast Sales of Colour Cosmetics by Category: % Value Growth 2023-2028

[Deodorants in Turkey](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Heatwaves, innovation, and sustainability

Demand for “clean” deodorants increases in line with heightened health consciousness

Evolving retail landscape: Private label and e-commerce gain ground

PROSPECTS AND OPPORTUNITIES

Urbanisation and fitness drive demand

Clean label and natural ingredients take priority

Sustainability meets convenience with solid deodorants and small packs

CATEGORY DATA

Table 42 - Sales of Deodorants by Category: Value 2018-2023

Table 43 - Sales of Deodorants by Category: % Value Growth 2018-2023

Table 44 - Sales of Deodorants by Premium vs Mass: % Value 2018-2023

Table 45 - NBO Company Shares of Deodorants: % Value 2019-2023

Table 46 - LBN Brand Shares of Deodorants: % Value 2020-2023

Table 47 - LBN Brand Shares of Premium Deodorants: % Value 2020-2023

Table 48 - Forecast Sales of Deodorants by Category: Value 2023-2028

Table 49 - Forecast Sales of Deodorants by Category: % Value Growth 2023-2028

Table 50 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2023-2028

Depilatories in Turkey

KEY DATA FINDINGS

2023 DEVELOPMENTS

Competition heats up: Salons vs. at-home solutions

Natural ingredients gain traction

Private label gains ground as affordability reigns supreme

PROSPECTS AND OPPORTUNITIES

Warmer weather, more demand

E-commerce takes centre stage

Untapped potential: Men's depilatories

CATEGORY DATA

Table 51 - Sales of Depilatories by Category: Value 2018-2023

Table 52 - Sales of Depilatories by Category: % Value Growth 2018-2023

Table 53 - Sales of Women's Razors and Blades by Type: % Value Breakdown 2019-2023

Table 54 - NBO Company Shares of Depilatories: % Value 2019-2023

Table 55 - LBN Brand Shares of Depilatories: % Value 2020-2023

Table 56 - Forecast Sales of Depilatories by Category: Value 2023-2028

Table 57 - Forecast Sales of Depilatories by Category: % Value Growth 2023-2028

Fragrances in Turkey

KEY DATA FINDINGS

2023 DEVELOPMENTS

The rise of the fragrance wardrobe

E-commerce blossoms, but trust reigns supreme

The rise of apparel specialist fragrance shares

PROSPECTS AND OPPORTUNITIES

Beyond basic: Self-expression through scents

Luxury redefined: Smaller sizes, sustainable solutions

Beyond the bottle: A world of olfactory experiences

CATEGORY DATA

Table 58 - Sales of Fragrances by Category: Value 2018-2023

Table 59 - Sales of Fragrances by Category: % Value Growth 2018-2023

Table 60 - NBO Company Shares of Fragrances: % Value 2019-2023

Table 61 - LBN Brand Shares of Fragrances: % Value 2020-2023

Table 62 - LBN Brand Shares of Premium Men's Fragrances: % Value 2020-2023

Table 63 - LBN Brand Shares of Premium Women's Fragrances: % Value 2020-2023

Table 64 - Forecast Sales of Fragrances by Category: Value 2023-2028

Table 65 - Forecast Sales of Fragrances by Category: % Value Growth 2023-2028

Hair Care in Turkey

KEY DATA FINDINGS

2023 DEVELOPMENTS

Price pressures and the rise of private label

Fragmentation on the rise: Small players find a niche

Innovation drives growth: New products and reformulations

PROSPECTS AND OPPORTUNITIES

The rise of natural and organic hair care

The solid shampoo revolution

"Skinification" of hair care

CATEGORY DATA

Table 66 - Sales of Hair Care by Category: Value 2018-2023

Table 67 - Sales of Hair Care by Category: % Value Growth 2018-2023

Table 68 - Sales of Hair Care by Premium vs Mass: % Value 2018-2023

Table 69 - NBO Company Shares of Hair Care: % Value 2019-2023

Table 70 - NBO Company Shares of Salon Professional Hair Care: % Value 2019-2023

Table 71 - LBN Brand Shares of Hair Care: % Value 2020-2023

Table 72 - LBN Brand Shares of Colourants: % Value 2020-2023

Table 73 - LBN Brand Shares of Salon Professional Hair Care: % Value 2020-2023

Table 74 - LBN Brand Shares of Styling Agents: % Value 2020-2023

Table 75 - LBN Brand Shares of Premium Hair Care: % Value 2020-2023

Table 76 - Forecast Sales of Hair Care by Category: Value 2023-2028

Table 77 - Forecast Sales of Hair Care by Category: % Value Growth 2023-2028

Table 78 - Forecast Sales of Hair Care by Premium vs Mass: % Value 2023-2028

Men's Grooming in Turkey

KEY DATA FINDINGS

2023 DEVELOPMENTS

Breaking down barriers: Men embrace grooming routines

Efficiency is key: Multi-purpose products take centre stage

Private label gains traction in a cost-conscious environment

PROSPECTS AND OPPORTUNITIES

Discount dominance: The rise of value-driven options

Untapped potential: Men's depilatories

Social savvy: The power of influencers

CATEGORY DATA

Table 79 - Sales of Men's Grooming by Category: Value 2018-2023

Table 80 - Sales of Men's Grooming by Category: % Value Growth 2018-2023

Table 81 - Sales of Men's Razors and Blades by Type: % Value Breakdown 2020-2023

Table 82 - Sales of Men's Skin Care by Type: % Value Breakdown 2020-2023

Table 83 - NBO Company Shares of Men's Grooming: % Value 2019-2023

Table 84 - LBN Brand Shares of Men's Grooming: % Value 2020-2023

Table 85 - LBN Brand Shares of Men's Razors and Blades: % Value 2020-2023

Table 86 - Forecast Sales of Men's Grooming by Category: Value 2023-2028

Table 87 - Forecast Sales of Men's Grooming by Category: % Value Growth 2023-2028

Oral Care in Turkey

KEY DATA FINDINGS

2023 DEVELOPMENTS

Essentials drive growth: A room for improvement

Sensitive solutions and gum health take centre stage

Colgate whitens up its game

PROSPECTS AND OPPORTUNITIES

Rising awareness fuels growth

Developing e-commerce demand

Sustainability and natural ingredients

CATEGORY DATA

Table 88 - Sales of Oral Care by Category: Value 2018-2023

Table 89 - Sales of Oral Care by Category: % Value Growth 2018-2023

Table 90 - Sales of Toothbrushes by Category: Value 2018-2023

Table 91 - Sales of Toothbrushes by Category: % Value Growth 2018-2023

Table 92 - Sales of Toothpaste by Type: % Value Breakdown 2019-2023

Table 93 - NBO Company Shares of Oral Care: % Value 2019-2023

Table 94 - LBN Brand Shares of Oral Care: % Value 2020-2023

Table 95 - LBN Brand Shares of Mouthwashes/Dental Rinses: % Value 2020-2023

Table 96 - LBN Brand Shares of Toothpaste: % Value 2020-2023

Table 97 - Forecast Sales of Oral Care by Category: Value 2023-2028

Table 98 - Forecast Sales of Oral Care by Category: % Value Growth 2023-2028

Table 99 - Forecast Sales of Toothbrushes by Category: Value 2023-2028

Table 100 - Forecast Sales of Toothbrushes by Category: % Value Growth 2023-2028

Skin Care in Turkey

KEY DATA FINDINGS

2023 DEVELOPMENTS

The rise of skin cycling and multi-step routines

Prioritising sun protection with active ingredients

Dermocosmetics and indie brands gain momentum

PROSPECTS AND OPPORTUNITIES

Rise of targeted skin care with ingredient awareness

Probiotics gain traction in skin care

At-home electronic facial devices gain popularity

CATEGORY DATA

- Table 101 - Sales of Skin Care by Category: Value 2018-2023
- Table 102 - Sales of Skin Care by Category: % Value Growth 2018-2023
- Table 103 - NBO Company Shares of Skin Care: % Value 2019-2023
- Table 104 - LBN Brand Shares of Skin Care: % Value 2020-2023
- Table 105 - LBN Brand Shares of Basic Moisturisers: % Value 2020-2023
- Table 106 - LBN Brand Shares of Anti-agers: % Value 2020-2023
- Table 107 - LBN Brand Shares of Firming Body Care: % Value 2020-2023
- Table 108 - LBN Brand Shares of General Purpose Body Care: % Value 2020-2023
- Table 109 - LBN Brand Shares of Premium Skin Care: % Value 2020-2023
- Table 110 - Forecast Sales of Skin Care by Category: Value 2023-2028
- Table 111 - Forecast Sales of Skin Care by Category: % Value Growth 2023-2028

Sun Care in Turkey

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Rise of multifunctional sun care products
- Growing preference for dermocosmetics and natural ingredients
- High SPF, anti-ageing, and hyperpigmentation solutions

PROSPECTS AND OPPORTUNITIES

- Growing awareness of everyday need for sun protection to stimulate healthy sales growth
- Additional benefits to steer newer demand trends
- Private label growth and everyday sun protection awareness

CATEGORY DATA

- Table 112 - Sales of Sun Care by Category: Value 2018-2023
- Table 113 - Sales of Sun Care by Category: % Value Growth 2018-2023
- Table 114 - NBO Company Shares of Sun Care: % Value 2019-2023
- Table 115 - LBN Brand Shares of Sun Care: % Value 2020-2023
- Table 116 - LBN Brand Shares of Premium Adult Sun Care: % Value 2020-2023
- Table 117 - Forecast Sales of Sun Care by Category: Value 2023-2028
- Table 118 - Forecast Sales of Sun Care by Category: % Value Growth 2023-2028

Premium Beauty and Personal Care in Turkey

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Fragrances lead the premium charge
- Premium sun care soars with innovation
- Online repeat purchases gain traction

PROSPECTS AND OPPORTUNITIES

- The rise of premium dermocosmetics
- Customisation and personalisation: The next frontier
- Fashion houses embrace beauty

CATEGORY DATA

- Table 119 - Sales of Premium Beauty and Personal Care by Category: Value 2018-2023
- Table 120 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2018-2023
- Table 121 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2019-2023

Table 122 - LBN Brand Shares of Premium Beauty and Personal Care: % Value 2020-2023

Table 123 - Forecast Sales of Premium Beauty and Personal Care by Category: Value 2023-2028

Table 124 - Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2023-2028

Mass Beauty and Personal Care in Turkey

KEY DATA FINDINGS

2023 DEVELOPMENTS

Value reigns supreme: Savvy shopping drives growth

Sun care soars under summer skies whilst deodorants take centre stage in hot Weather

Shrinkflation: A balancing act

PROSPECTS AND OPPORTUNITIES

The rise of private label brands

Navigating inflationary pressures

The clean beauty movement gains momentum

CATEGORY DATA

Table 125 - Sales of Mass Beauty and Personal Care by Category: Value 2018-2023

Table 126 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2018-2023

Table 127 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2019-2023

Table 128 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2020-2023

Table 129 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2023-2028

Table 130 - Forecast Sales of Mass Beauty and Personal Care by Category: % Value Growth 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/beauty-and-personal-care-in-turkey/report.