



Passport

Colour Cosmetics in Turkey

Euromonitor International

April 2021

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purposes only.
Some content and data have been
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COLOUR COSMETICS IN TURKEY - CATEGORY ANALYSIS

KEY DATA FINDINGS

- Double-digit decline in colour cosmetics in 2020 as a result of lockdowns, home seclusion and social distancing due to COVID-19

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2020 IMPACT

Lockdowns, home seclusion and social distancing significantly impact sales in 2020

Colour cosmetics experienced a significant drop in value growth in 2020 as the need for

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Retailers adapt to COVID-19

Leading retailers such as Gratis and Watson sought to maintain demand with aggressive o

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L'Oréal maintains its lead with its wide brand portfolio and strong social media presence

L'Oréal Türkiye Kozmetik continued to hold the highest value share within colour cosmetics in

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RECOVERY AND OPPORTUNITIES

Recovery expected with development of new formats and “free from” offers

Colour cosmetics is expected to recover from the losses experienced in 2020 as a result of

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Increased demand for sustainable and vegan products

Sephora added five products to its clean collection, including foundation, lip oil, lip mousse,

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Social media and influencers encourages consumers to adopt complicated regimes, incorporating multiple colour cosmetics

Turkish consumers increasingly see make-up as a hobby, not just an everyday routine. Social

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CATEGORY DATA

Table 1 Sales of Colour Cosmetics by Category: Value 2015-2020

TRY million	2015	2016	2017	2018	2019	2020
Eye Make-Up - Eye Liner/Pencil -- Premium Eye Liner/ Pencil -- Mass Eye Liner/Pencil - Eye Shadow -- Premium Eye Shadow -- Mass Eye Shadow - Mascara -- Premium Mascara -- Mass Mascara - Other Lash and Brow Make-Up -- Premium Other Lash and Brow Make-Up -- Mass Other Lash and Brow Make-Up Facial Make-Up - BB/CC Creams -- Premium BB/CC Creams -- Mass BB/CC Creams - Blusher/Bronzer/ Highlighter -- Premium Blusher/ Bronzer/Highlighter -- Mass Blusher/Bronzer/ Highlighter - Foundation/Concealer -- Premium Foundation/ Concealer -- Mass Foundation/ Concealer - Powder -- Premium Powder -- Mass Powder - Other Facial Make-Up -- Premium Other Facial Make-Up -- Mass Other Facial Make-Up Lip Products - Lip Gloss -- Premium Lip Gloss -- Mass Lip Gloss - Lip Liner/Pencil -- Premium Lip Liner/ Pencil -- Mass Lip Liner/Pencil - Lipstick -- Premium Lipstick -- Mass Lipstick - Other Lip Products -- Premium Other Lip	Data removed from sample					

Products
 -- Mass Other Lip Products
 Nail Products
 - Nail Polish
 -- Premium Nail Polish
 -- Mass Nail Polish
 - Nail Treatments/
 Strengtheners
 -- Premium Nail
 Treatments/Strengtheners
 -- Mass Nail Treatments/
 Strengtheners
 - Polish Remover
 -- Premium Polish Remover
 -- Mass Polish Remover
 - Other Nail Products
 -- Premium Other Nail
 Products
 -- Mass Other Nail
 Products
 Colour Cosmetics Sets/
 Kits
 - Premium Colour
 Cosmetics Sets/Kits
 - Mass Colour Cosmetics
 Sets/Kits
 Colour Cosmetics

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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Colour Cosmetics by Category: % Value Growth 2015-2020

% current value growth

2019/20 2015-20 CAGR 2015/20 Total

Eye Make-Up
 - Eye Liner/Pencil
 -- Premium Eye Liner/Pencil
 -- Mass Eye Liner/Pencil
 - Eye Shadow
 -- Premium Eye Shadow
 -- Mass Eye Shadow
 - Mascara
 -- Premium Mascara
 -- Mass Mascara
 - Other Lash and Brow Make-Up
 -- Premium Other Lash and Brow Make-Up
 -- Mass Other Lash and Brow Make-Up
 Facial Make-Up
 - BB/CC Creams
 -- Premium BB/CC Creams
 -- Mass BB/CC Creams
 - Blusher/Bronzer/Highlighter
 -- Premium Blusher/Bronzer/Highlighter
 -- Mass Blusher/Bronzer/Highlighter
 - Foundation/Concealer
 -- Premium Foundation/Concealer
 -- Mass Foundation/Concealer

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- Powder
 - Premium Powder
 - Mass Powder
- Other Facial Make-Up
 - Premium Other Facial Make-Up
 - Mass Other Facial Make-Up
- Lip Products
 - Lip Gloss
 - Premium Lip Gloss
 - Mass Lip Gloss
 - Lip Liner/Pencil
 - Premium Lip Liner/Pencil
 - Mass Lip Liner/Pencil
 - Lipstick
 - Premium Lipstick
 - Mass Lipstick
 - Other Lip Products
 - Premium Other Lip Products
 - Mass Other Lip Products
- Nail Products
 - Nail Polish
 - Premium Nail Polish
 - Mass Nail Polish
 - Nail Treatments/Strengtheners
 - Premium Nail Treatments/Strengtheners
 - Mass Nail Treatments/Strengtheners
 - Polish Remover
 - Premium Polish Remover
 - Mass Polish Remover
 - Other Nail Products
 - Premium Other Nail Products
 - Mass Other Nail Products
- Colour Cosmetics Sets/Kits
 - Premium Colour Cosmetics Sets/Kits
 - Mass Colour Cosmetics Sets/Kits
- Colour Cosmetics

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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 NBO Company Shares of Colour Cosmetics: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
L'Oréal Türkiye Kozmetik San ve Tic AS	Data removed from sample				
Kosan Kozmetik Sanayi AS					
Farmasi Enternasyonal Tic AS					
Erkul Dagitim Pazarlama Tic AS					
Coty Kozmetick TIC AS					
Avon Kozmetik Urunleri San ve Tic AS					
Estée Lauder Cos Inc					
Eczacibasi Girisim Pazarlama					
Oriflame Kozmetik AS					
Pinkar Kimya Sanayi AS					

Dcb kozmetik paz. ve
 tic. AS
 Naturel Kozmetik
 Ticaret AS
 Innova Kozmetik Kimya
 San ve Tic AS
 Dogus Grubu
 Sephora Kozmetik AS
 Alticor Inc
 Kopas Kozmetik
 Pazarlama San AS
 Shiseido Co Ltd
 Alfar Kozmetik Sanayi AS
 Body Shop Plc, The
 LVMH Moët Hennessy
 Louis Vuitton SA
 Chanel SA
 Nivea Beiersdorf Turkey
 Kozmetik San Ve Tic AS
 LVMH Moët Hennessy
 Louis Vuitton Turkiye
 Procter & Gamble
 Tuketim Mallari Sanayi
 Ltd Skt
 Other Private Label
 Others
 Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 LBN Brand Shares of Colour Cosmetics: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 LBN Brand Shares of Eye Make-up: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
-----------------------------------	---------------	------	------	------	------

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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 LBN Brand Shares of Facial Make-up: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
-----------------------------------	---------------	------	------	------	------

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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 LBN Brand Shares of Lip Products: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
-----------------------------------	---------------	------	------	------	------

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Table 8 LBN Brand Shares of Nail Products: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
-----------------------------------	---------------	------	------	------	------

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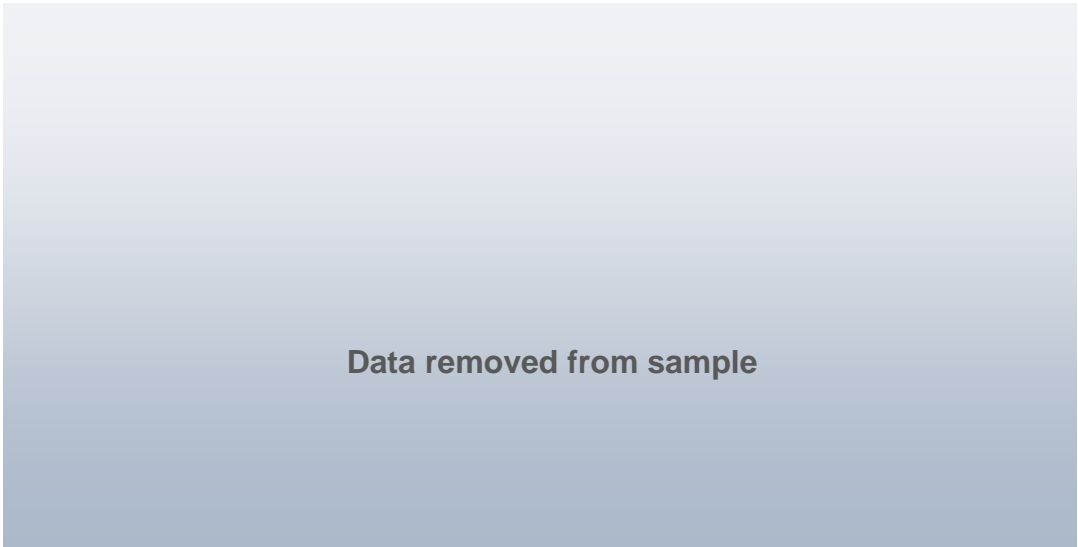
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 LBN Brand Shares of Premium Colour Cosmetics: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 Forecast Sales of Colour Cosmetics by Category: Value 2020-2025

TRY million

2020 2021 2022 2023 2024 2025

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Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 11 Forecast Sales of Colour Cosmetics by Category: % Value Growth 2020-2025

% constant value growth

2020/2021

2020-25 CAGR

2020/25 Total

Eye Make-Up

- Eye Liner/Pencil

-- Premium Eye Liner/Pencil

-- Mass Eye Liner/Pencil

- Eye Shadow

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- Premium Eye Shadow
- Mass Eye Shadow
- Mascara
- Premium Mascara
- Mass Mascara
- Other Lash and Brow Make-Up
- Premium Other Lash and Brow Make-Up
- Mass Other Lash and Brow Make-Up
- Facial Make-Up
- BB/CC Creams
- Premium BB/CC Creams
- Mass BB/CC Creams
- Blusher/Bronzer/Highlighter
- Premium Blusher/Bronzer/Highlighter
- Mass Blusher/Bronzer/Highlighter
- Foundation/Concealer
- Premium Foundation/Concealer
- Mass Foundation/Concealer
- Powder
- Premium Powder
- Mass Powder
- Other Facial Make-Up
- Premium Other Facial Make-Up
- Mass Other Facial Make-Up
- Lip Products
- Lip Gloss
- Premium Lip Gloss
- Mass Lip Gloss
- Lip Liner/Pencil
- Premium Lip Liner/Pencil
- Mass Lip Liner/Pencil
- Lipstick
- Premium Lipstick
- Mass Lipstick
- Other Lip Products
- Premium Other Lip Products
- Mass Other Lip Products
- Nail Products
- Nail Polish
- Premium Nail Polish
- Mass Nail Polish
- Nail Treatments/Strengtheners
- Premium Nail Treatments/Strengtheners
- Mass Nail Treatments/Strengtheners
- Polish Remover
- Premium Polish Remover
- Mass Polish Remover
- Other Nail Products
- Premium Other Nail Products
- Mass Other Nail Products
- Colour Cosmetics Sets/Kits
- Premium Colour Cosmetics Sets/Kits
- Mass Colour Cosmetics Sets/Kits
- Colour Cosmetics

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Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

BEAUTY AND PERSONAL CARE IN TURKEY - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

COVID-19 impact on beauty and personal care

COVID-19 has dampened economic prospects in Turkey for 2020. There was a direct hit to

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COVID-19 country impact

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Company response

Multinationals L'Oréal, Unilever, Procter & Gamble, Nivea Beiersdorf continued to lead

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Retailing shift

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What next for beauty and personal care?

Sales of some categories such as colour cosmetics are expected to continue to suffer during

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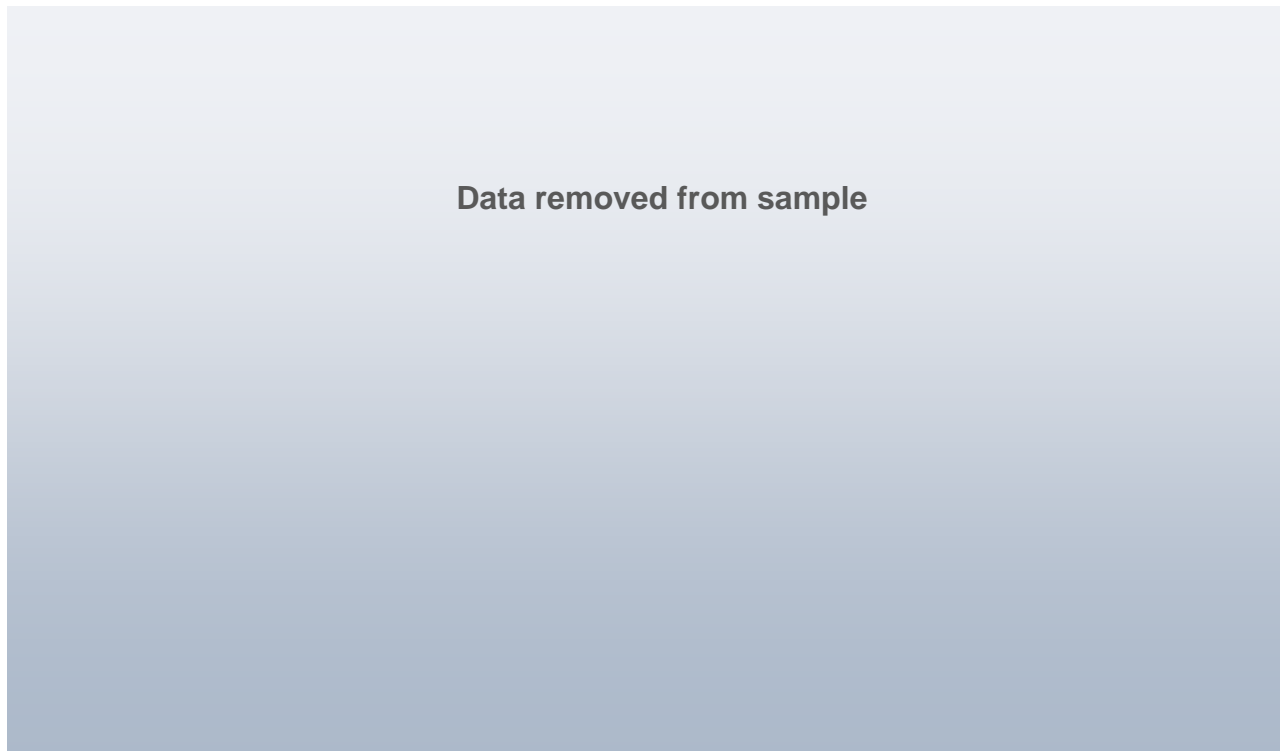
Chart 1 Beauty and Personal Care Value Sales Growth Scenarios: 2018-2025

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Source: Euromonitor International

Note: C19 Pessimistic 1 represents a modelled scenario with an estimated probability of 25-35% over a 1-year horizon, factoring in macro drivers including GDP, stock prices, business and consumer confidence rates alongside infection rates, supply chain and labour supply disruption rates

Chart 2 Beauty and Personal Care Impact of Soft Drivers on Value Sales: 2017-2025



Source: Euromonitor International

Note: The above chart shows the growth decomposition split by macro drivers such as GDP per capita and population alongside soft drivers listed as having a positive (+) or negative (-) impact on the total growth rate

MARKET DATA

Table 12 Sales of Beauty and Personal Care by Category: Value 2015-2020

TRY million

	2015	2016	2017	2018	2019	2020
Baby and Child-specific Products	Data removed from sample					
Bath and Shower						
Colour Cosmetics						
Deodorants						
Depilatories						
Fragrances						
Hair Care						
Men's Grooming						
Oral Care						
Oral Care Excl Power						
Toothbrushes						

Skin Care
 Sun Care
 Premium Beauty and
 Personal Care
 Prestige Beauty and
 Personal Care
 Mass Beauty and
 Personal Care
 Dermocosmetics Beauty
 and Personal Care
 Beauty and Personal Care

Data removed from sample

- Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
- Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, sets/kits, skin care and sun care.
- Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances, colour cosmetics sets/kits, skin care sets/kits, fragrances sets/kits and baby and child-specific sun care categories.

Table 13 Sales of Beauty and Personal Care by Category: % Value Growth 2015-2020

% current value growth

2019/20 2015-20 CAGR 2015/20 Total

Baby and Child-specific Products
 Bath and Shower
 Colour Cosmetics
 Deodorants
 Depilatories
 Fragrances
 Hair Care
 Men's Grooming
 Oral Care
 Oral Care Excl Power Toothbrushes
 Skin Care
 Sun Care
 Premium Beauty and Personal Care
 Prestige Beauty and Personal Care
 Mass Beauty and Personal Care
 Dermocosmetics Beauty and Personal Care
 Beauty and Personal Care

Data removed from sample

- Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
- Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, sets/kits, skin care and sun care.
- Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances, colour cosmetics sets/kits, skin care sets/kits, fragrances sets/kits and baby and child-specific sun care categories.

Table 14 GBO Company Shares of Beauty and Personal Care: % Value 2016-2020

% retail value rsp
 Company

2016 2017 2018 2019 2020

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 NBO Company Shares of Beauty and Personal Care: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 16 LBN Brand Shares of Beauty and Personal Care: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 Penetration of Private Label in Beauty and Personal Care by Category: % Value 2015-2020

% retail value rsp	2015	2016	2017	2018	2019	2020
Beauty and Personal Care	Data removed from sample					
Baby and Child-specific Products						
Bath and Shower						
Colour Cosmetics						
Deodorants						
Fragrances						
Hair Care						
Men's Grooming						
Oral Care						
Skin Care						
Mass Beauty and Personal Care						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 18 Distribution of Beauty and Personal Care by Format: % Value 2015-2020

% retail value rsp	2015	2016	2017	2018	2019	2020
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
- Non-Grocery Specialists						
-- Apparel and Footwear Specialist Retailers						
-- Electronics and Appliance Specialist Retailers						
-- Health and Beauty Specialist Retailers						
--- Beauty Specialist Retailers						
--- Chemists/Pharmacies						
--- Drugstores/parapharmacies						
--- Other Health and Beauty Specialist retailers						
-- Home and Garden Specialist Retailers						

- Homewares and Home Furnishing Stores
- Other Non-Grocery Specialists
- Outdoor Markets
- Other BPC Non-Grocery Specialists
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Vending
- Non-retail channels
- Hair Salons
- Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 **Distribution of Beauty and Personal Care by Format and Category: % Value 2020**

% retail value rsp

BC

BS

CC

DO

DP

FR

- Store-Based Retailing
- Grocery Retailers
- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Non-Grocery Specialists
- Apparel and Footwear Specialist Retailers
- Electronics and Appliance Specialist Retailers
- Health and Beauty Specialist Retailers
- Beauty Specialist Retailers
- Chemists/Pharmacies
- Drugstores/parapharmacies
- Other Health and Beauty Specialist retailers
- Home and Garden Specialist Retailers
- Homewares and Home

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Furnishing Stores
 -- Other Non-Grocery Specialists
 --- Outdoor Markets
 --- Other BPC Non-Grocery Specialists
 - Mixed Retailers
 -- Department Stores
 -- Mass Merchandisers
 -- Variety Stores
 -- Warehouse Clubs
 Non-Store Retailing
 - Direct Selling
 - Homeshopping
 - E-Commerce
 - Vending
 Non-retail channels
 - Hair Salons
 Total

Store-Based Retailing
 - Grocery Retailers
 -- Modern Grocery Retailers
 --- Convenience Stores
 --- Discounters
 --- Forecourt Retailers
 --- Supermarkets
 -- Traditional Grocery Retailers
 - Non-Grocery Specialists
 -- Apparel and Footwear Specialist Retailers
 -- Electronics and Appliance Specialist Retailers
 -- Health and Beauty Specialist Retailers
 --- Beauty Specialist Retailers
 --- Chemists/Pharmacies
 --- Drugstores/parapharmacies
 --- Other Health and Beauty Specialist retailers
 -- Home and Garden Specialist Retailers
 --- Homewares and Home Furnishing Stores
 -- Other Non-Grocery Specialists
 --- Outdoor Markets
 --- Other BPC Non-Grocery Specialists
 - Mixed Retailers
 -- Department Stores
 -- Mass Merchandisers

Data removed from sample

-- Variety Stores
 -- Warehouse Clubs
 Non-Store Retailing
 - Direct Selling
 - Homeshopping
 - E-Commerce
 - Vending
 Non-retail channels
 - Hair Salons
 Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Key: BC = baby and child-specific products; BS = bath and shower; CC = colour cosmetics; DO = deodorants; DP = depilatories; FR = fragrances; HC = hair care; MG = men's grooming; OC = oral care; SK = skin care; SU = sun care

Table 20 Forecast Sales of Beauty and Personal Care by Category: Value 2020-2025

TRY million

2020 2021 2022 2023 2024 2025

Baby and Child-specific Products
 Bath and Shower
 Colour Cosmetics
 Deodorants
 Depilatories
 Fragrances
 Hair Care
 Men's Grooming
 Oral Care
 Oral Care Excl Power
 Toothbrushes
 Skin Care
 Sun Care
 Premium Beauty and Personal Care
 Prestige Beauty and Personal Care
 Mass Beauty and Personal Care
 Dermocosmetics Beauty and Personal Care
 Beauty and Personal Care

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, sets/kits, skin care and sun care.

Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances, colour cosmetics sets/kits, skin care sets/kits, fragrances sets/kits and baby and child-specific sun care categories.

Table 21 Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2020-2025

% constant value growth

	2020/2021	2020-25 CAGR	2020/25 Total
Baby and Child-specific Products	Data removed from sample		
Bath and Shower			
Colour Cosmetics			
Deodorants			
Depilatories			
Fragrances			
Hair Care			
Men's Grooming			
Oral Care			
Oral Care Excl Power Toothbrushes			
Skin Care			
Sun Care			
Premium Beauty and Personal Care			
Prestige Beauty and Personal Care			
Mass Beauty and Personal Care			
Dermocosmetics Beauty and Personal Care			
Beauty and Personal Care			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, sets/kits, skin care and sun care.

Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances, colour cosmetics sets/kits, skin care sets/kits, fragrances sets/kits and baby and child-specific sun care categories.

GLOBAL MACROECONOMIC ENVIRONMENT

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GLOBAL INDUSTRY ENVIRONMENT

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DISCLAIMER

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SOURCES

Sources used during the research included the following:

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