

MARKET RESEACH AND OVERVIEW IN TO TURKISH HYGIENIC PRODUCTS

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ABSTRACT

In this research all the hygiene products in the Turkish market have been investigated. All exports and imports with countries of origins with quantity have been studied. Market capacity is also researched and the results are discussed.

INTRODUCTION

Non-woven are the most widely used materials in single use textiles globally. Out of that single use hygienic products take the lead in the markets of the world. Hygienic products include babies diapers, ladies sanitary towels and adult incontinence pads for the elderly and consists of over 35 billion US dollar market.

Table.1 World Hygienic Product Markets And Estimated Developments

Non-woven Containing Single -use Hygienic Product End-uses	World Market Volume	Estimated Increase In World Market
Diapers	19 Billion \$	%9
Adult Incontinence	4.5 Billion \$	% 8-30
Ladies Sanitary Products	12 Billion \$	America & Western Europe %2, Asia & Eastern Europe %10-15

In the 1980's Turkey was importing hygienic products However towards the end of the 1980's Turkey started to produce her own hygienic products and has developed into a sector with around a 300 million \$ market share.

In this work the Turkish hygienic market has been researched. It should be noted that research has been carried out on two main products baby's diapers and ladies hygienic pads (sanitary products). All the names of the firms in the market, development of capacity, imports and exports, estimated internal and external demands; internal market volume figures are discussed. Daily used panty liners and Incontinence pads are not taken in to account in this work due to the lack of information about these products.

TURKISH HYGIENIC PRODUCT MARKET

There are 16 companies involved in the production of hygienic products in Turkey. The names, dates production commenced, place of production and product names are given in Tables 2 below. It can be seen in Table 2 that production started in late 1980's in Turkey.

Table 2 Companies Producing Babies Diapers and Hygienic Ladies Pads in Turkey

	FIRMS	Date of Start of Bussiness	Place of	Product (*)	Name of Products
1	PROCTER GAMBLE Tüketim Malları San. A.Ş.	1990	Kocaeli	BD LSP dHP	Prima, Pampers Orkid Orkid-Yaprak, Alldays
2	ASTEL Kağıtçılık San ve Tic. A.Ş.	1990	Istanbul	BD LSP AI	Canbebe, Bello Canleydi Canped, VVİndelhosen
3	TOPRAK ilaç ve Kim. Mad. San. Tic. A.Ş.	1996	Sakarya	BD LSP	Libero, Nova
4	HAYAT Kimya San. ve Tic. A.Ş.	1998	Istanbul	BD LSP	Molfix, Bebem Molned
5	ROZI Kağıt. Tem. Ur. San. ve Tic. A.Ş.	1997	Istanbul	BD LSP	Rozi, Lilibebe Rozi, Yes
6	ELHADEFLER Kağıtçılık San. ve Tic. A.Ş.	1989	Istanbul	BD LSP dHP AI	Lila, lilafiks
7	PAKSEL Kimya San. ve Tic. A.Ş.	1992	Tekirdağ	BD	Bebiko, Diana
8	OZBEY Hijyenik Ürünler San. ve Tic. A.Ş.	2001	Karaman	BD	Elbebek, Albodo
9	YUZAL intern. Tic. ve San. A.Ş.	2001	Istanbul	BD LSP	Pomiks, Babyline Pomiksped
10	OVİSAN Sıhhi Bez San. ve Tic. A.Ş.	1989	Istanbul	BD	Pedo
11	FANY SOFT Kağıt San. Ltd. Şti.	1993	Adana	BD	Fany, Bebeteks
12	IDA Kim. ve Sıh. M d. Paz. San. ve Tic.	1998	Yalova	BD	Bambola, Gülenbebe
13	PAKTEN Sağlık Ürü. ve Tic. A.Ş.	2000	Gaziantep	BD	Joyfui, Önlem
14	İŞSEVEROĞLU iplik Tic. San. A.Ş.	2000	Adana	BD	Samo, Deyzı
15	AAK Gıda San. Dış Tic. A.Ş.	2001	Kırklareli	BD	Markasız
16	HES Kimya San. ve Tic. A.Ş.	2002	Kayseri	LSP	Polped, Notped

(*) **BD:** Babies Diapers **LSP:** Ladies Sanitary products **dHP:** Daily Ladies Sanitary (Panty Liners) **AI:** Adult Incontinence

In Table 3 existing capacity and estimated additions are given in terms of numbers of production.

Table 3 Sectors of Babies Diaper and Ladies Sanitary Products Capacity Development (000.units)

YEAR		EXISTING CAPACITY	ADDED CAPACITY	TOTAL CAPACITY
2002	BD	2.772.630	170.100	2.942.730
	LSP	1.168.020	181.440	1.349.460
2003	BD	2.942.730	170.100	3.112.830
	LSP	1.349.460	748.440	2.097.900
2004	BD	3.112.830	107.000	3.219.830
	LSP	2.097.900	60.300	2.158.200

Table 4 below list the companies in order of production volume. As it can be seen Procter and Gamble are the largest producer in Turkey. All the rest of the companies are of Turkish origin.

Table 4 Companies Listed by Order of Production

YEAR	BD PRODUCERS IN ORDER OF VOLUME	LSP PRODUCERS IN ORDER OF VOLUME
2001	Procter Gamble A.Ş	Procter Gamble A.Ş
	Astel A.Ş	Astel A.Ş
	Ovisan A.Ş	Toprak A.Ş
	Rozi A.Ş	Rozi A.Ş
	Hayat A.Ş	Hayat A.Ş
2002	Procter Gamble A.Ş	Procter Gamble A.Ş
	Astel A.Ş	Toprak A.Ş
	Ovisan .Ş	Ovisan A.Ş
	Hayat A.Ş	Hayat A.Ş
	Rozi A.Ş	Rozi A.Ş

In year 2000, Procter and Gamble produced the most BD followed by Astel, Ovisan, Rozi and Hayat. In HP however after P&G(Proctor and Gamble), Astel takes second place followed by Toprak, Rozi and Hayat.

In year 2002 when the BD production is evaluated, there was a reduction in P&G production, where as Astel stayed the same and Ovisan, Hayat and Rozi increased their production. In HP, in 2002 again there was a reduction in P&G production rate and increase production of Astel, Rozi and Hayat.

Daily used Panty Liners (dHP) are believed to constitute 14-15 % of the total HP in Turkey. Due to the increase in competition in the internal market companies have started to look to the exportation of their products. In recent years exportation of Hygienic Products in Turkey have increased.

Turkish Hygienic Product exports are mainly concentrated in three areas;

USR

Balkan Countries

South Africa and Israel

The above countries constitute the largest part of Turkish hygienic products exports However apart from exports to those countries exports to African countries and the Central Asian Turkish Republics are also slowly increasing.

Table 5 Outlines the Turkish HP Exports Volume (kg) and Value (\$)

YEARS	BD		LSP	
	Volume(kg)	Value(\$)	Volume(kg)	Value(\$)
1994	319.012	786.434	28.328	133.565
1995	734.553	1.795.932	690.487	2.499.672
1996	1.334.455	3.838.470	365.800	1.078.675
1997	4.353.289	11.133.270	1.509.023	4.498.565
1998	3.028.021	7.569.380	2.133.598	8.533.617
1999	5.503.118	13.217.063	1.505.737	6.439.944
2000	4.673.643	11.626.595	1.926.170	11.317.285
2001	15.391.095	34.805.120	2.193.234	13.233.995
2002 *	22.219.309 !	44.873.903	3.470.536	14.664.169

(*) Include January-October

Table 6 Turkish Export Distributions of Babies Diapers and Ladies Sanitary Products in Volume (Kg) by Countries

COUNTRIES	2001		2002 *	
	BD	LSP	BD	LSP
1 Azerbaijan	352.159	98.468	328.993	72.631
2 Bulgaria	448.707	20.270	1.510.588	20.248
4 South African Republic	3.261.889	94.362	3.670.039	1.584.937
5 Georgia	750.047	152.896	590.721	123.915
6 Israel	3.518.592	185.051	4.596.279	327.062
7 Italy	-	-	1.341.238	-
8 Kazakhstan	807.737	212.642	56	4.996
9 Lebanon	60.884	481	232.841	-
10 Hungary	664.715	84.905	47.106	125.483
11 Macedonia	1.180.891	734	1.683.725	71.144
12 Poland	345.436	150.412	-	30.925
13 Romania	2.115.023	106.476	4.848.126	5.447
14 Russia	232.950	224.780	13.854	167.500
15 Ukraine	40.254	97.023	53.159	113.747
16 Jordan	267.085	-	276.845	-
17 Yugoslavia	535.894	255	536.082	1.043
18 Free Zones	171.934	370.357	530.826	504.859
19 Unknown	266.696	48.496	313.267	37.411
19 COUNTRIES TOTAL	15.020.893	1.847.608	20.573.745	3.191.348
OVERALL TOTAL	15.391.095	2.193.234	22.219.309	3.470.536

(*) Include January-October

When the increasing trend of exports is evaluated it can clearly be seen that the biggest buyers of Turkish babies diapers are Israel, South Africa, Romania and Macedonia however in ladies

sanitary products the biggest buyers are South Africa, Israel and Russia. Table 6 outlines the Turkish Hygienic Product exports by countries.

Table 7 Turkish Babies Diapers and Ladies Sanitary Export (\$)

YEAR	BD		LSP	
	Volume	Value	Volume	Value
1994	45.851	163.297	95.283	336.077
1995	1.349.596	4.891.090	263.440	1.845.787
1996	3.002.583	8.136.324	722.860	4.135.202
1997	2.096.886	5.249.514	1.434.230	7.553.259
1998	1.295.958	3.370.729	823.017	4.904.056
1999	2.209.012	5.394.006	1.073.561	5.858.607
2000	4.678.848	10.992.530	1.132.352	5.758.931
2001	2.575.765	5.386.182	1.167.942	6.150.286
2002 *	984.654	2.088.628	1.519.964	7.551.982

(*)Include January-October.

When imports of babies diapers products of Turkey are investigated up and down trends over the years can be observed. The highest import was at year 2000 with 4679 tonnes and the lowest import was at year 2002 at levels of 985 tonnes. However increasing trends were observed in ladies sanitary products by year after year.

Table 8 shows the Turkish hygienic product exports by country.

Table 8 Babies Diapers and Ladies Sanitary Product Imports By Countries In Volume

COUNTRIES	2001		2002*	
	BD	LSP	BD	LSP
1 Germany	285.002	-	135.655	294.276
2 USA	-	-	270	-
3 Belgum	357.401	40.424	302.000	14.386
4 Bulgaria	-	-	87	5.781
5 Czech Rebuplic	-	68.973	-	-
6 China	-	-	-	5.930
7 Indonezia	-	-	-	54.842
8 France	-	-	67.317	-
9 Holland	-	525	-	-
10 England	3.064	-	354	-
11 Espania	-	1.750	-	20.572
12 Israel	1.359.874	-	456.685	47.450
13 sweden	-	-	-	-
14 swiss	-	12.422	18.000	3.414
15 Italy	55.867	185.724	3.940	242.452
16 Hungary	-	858.124	-	830.861
17 Polanda	514.553	-	-	-
18 Romania	4	-	-	-
19 Taiwan	-	-	346	-
OVERALL TOTAL	2.575.765	1.167.942	984.654	1.519.964

(*)Include January-October.

Hygienic Ladies Sanitary Products imports are given in Table 9 in terms of product name and name of the producers.

Table 9 Imported LSP and Producers

	COMPANY NAME	PRODUCT	PRODUCT NAME
1	JOHNSON and JOHNSON	LSP, Tampon dHP	Carefree, Stayfree, O. B. Carefree
2	OVISAN	LSP dHP	Kotex Kotex
3	LRC PRODUCT	Tampon	Tampax
4	PROCTER GAMBLE	Tampon	Tampax

Table 10 Turkish Babies Diapers and Ladies Sanitary Export and Import by Volume (units)

YEAR	BD		LSP	
	EXPORT	IMPORT	EXPORT	IMPORT
1994	6.897.557	991.373	3.848.913	12.946.060
1995	15.882.227	29.180.454	93.816.168	35.793.478
1996	28.853.081	64.920.714	49.701.087	98.214.674
1997	94.125.168	45.338.076	205.030.299	194.868.207
1998	65.470.724	28.020.714	289.891.033	111.822.962
1999	118.986.335	47.762.422	204.583.832	145.864.266
2000	101.051.741	101.164.281	261.707.880	153.852.174
2001	332.780.432	55.692.216	297.993.750	158.687.772
2002 (*)	480.417.492	21.289.816	471.540.217	206.516.848

(*)Include January-October.

In the foreign trade, values are kept in volume (kg) by the Department of Outside Foreign Trade in Turkey. To be able to compare the Turkish babies diapers and sanitary products imports and exports the volumes need to be converted into single units. Assuming all the exports and imports of hygienic products are only babies diapers and ladies sanitary products and approximate weight of one diaper is 46.25g and sanitary product is 7.36g. Table 10 compares the Turkish exports and imports between 1994 and 2002.

To increase the exports new markets especially those with higher birth rates should be approached. Table 11 outlines the birth and death rates of the Middle Eastern countries.

Country	Population (millions)	Birth rate per 1000 population	Infant Mortality per 1000 births	Net live births	Theoretical Diaper Requirements
Saudi Arabia	22,023,506	3747	52.90	781,560	3,321,630
Syria	16,305,659	31.1	34.86	489,606	2,080,825
Jordan	4,998,564	26.24	21.1	128,382	545,623
Yemen	17,479,206	43.44	70.28	705,946	5-45,623
Israel	5,842,454	1932	790	111,974	475,889
Egypt	68,359,979	25.38	62.32	1,626,652	6,914,121
Turkey	65,666,677	18.65	48.90	1,164,835	4,950,549

CONCLUSIONS

Turkey was a hygienic product importer till the late 1980's. Since the late 1980's the Turkish hygienic product sector has grown rapidly and has started to produce for the internal market. After fulfilling the internal market in the second half of the 1990's Turkish hygienic product exports started to increase steadily. Turkey also imports hygienic products but an imports do not show the same trends as exports.

There are 16 companies producing hygienic products in Turkey excluding the small non-brand producers.

The main markets for Turkish hygiene products are Israel, South Africa and Balkan countries. Main imports are from Israel, Benelux countries and Germany.

However Turkish hygienic products exports are increasing to Middle Eastern countries and Central Asian Turkic countries.

Turkey produces more than the internal demand and as a result exportation develops. However Turkey should use its full capacity in hygienic products. That requires new markets. Capacity usage ratio of hygienic products in Turkey is believed to be 50%. Turkey therefore does not use its full capacity in hygienic products and is only using half. This is of course due to the market consumption and lack of enough export markets. Turkish hygienic product producers should look at the new markets to increase the exports to countries such as Middle East, North Africa, Central Asian countries and China. Birthrates shown in Table 11 prove this.

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