

MÜSAD



MAKARNA ÜRETİCİLERİ VE SANAYİCİLERİ DERNEĞİ
Pasta Producers and Industrialists Association

SECTOR REPORT

JANUARY - FEBRUARY 2020



Pasta Producers and Industrialists' Association

Sector Report

JANUARY - FEBRUARY 2020

PUBLISH DATE

1 APRIL 2020

FEBRUARY 2020

**EXPORT
QUANTITY (KG)** **%23,0**

FEBRUARY 2020

117.089.919

FEBRUARY 2019

95.219.548



**EXPORT VALUE
(USD)** **%34,7**

FEBRUARY 2020

\$59.873.551

FEBRUARY 2019

\$44.464.950



**UNIT PRICE
(USD/TON)** **%9,5**

FEBRUARY 2020

\$511

FEBRUARY 2019

\$467



* Comparisons were made with the same month of the previous year.

JANUARY - FEBRUARY 2020

**EXPORT
QUANTITY (KG)** **%17,9**

2020 TOTAL

228.873.977

2019 TOTAL

194.152.753



**EXPORT VALUE
(USD)** **%28,8**

2020 TOTAL

\$115.065.252

2019 TOTAL

\$89.303.996



**UNIT PRICE
(USD/TON)** **%9,3**

2020 TOTAL

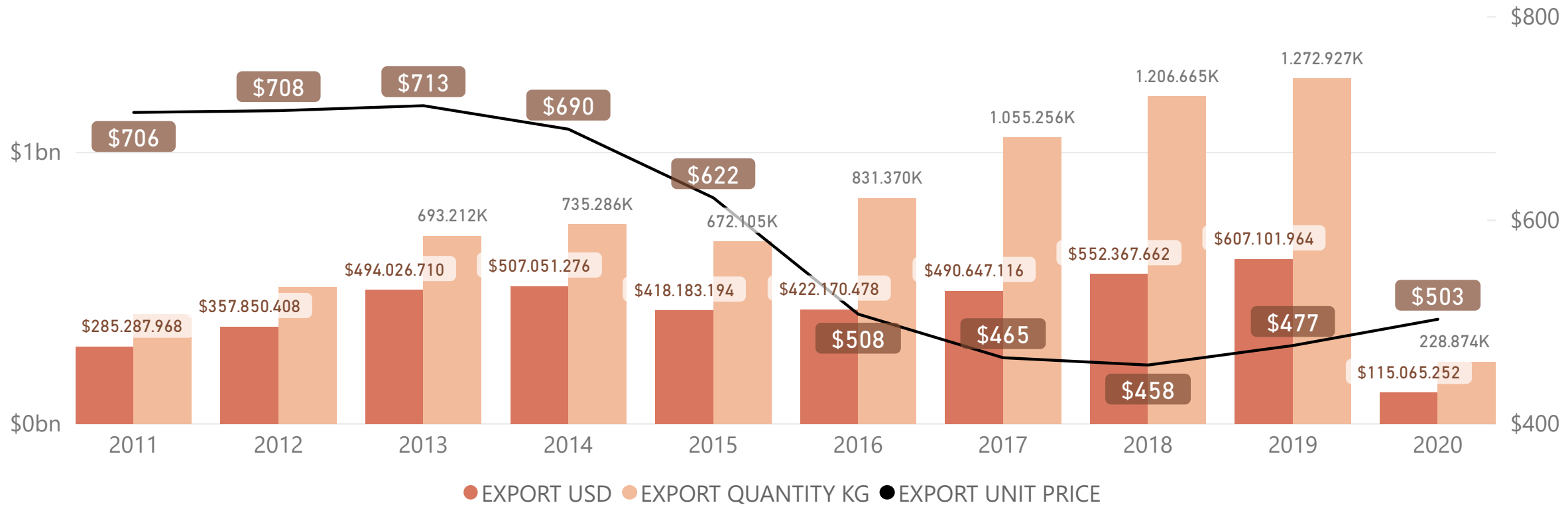
\$503

2019 TOTAL

\$460






* Comparisons were made with the same period of the previous year.






When pasta exports are analyzed by years, the unit export price fell from around \$700/ton to \$450/ton. Since 2011, highest yearly value was \$713/ton in 2013, lowest value was \$458/ton in 2018. It is notable that our unit export value is decreasing while our exports are increasing.

FEBRUARY 2020

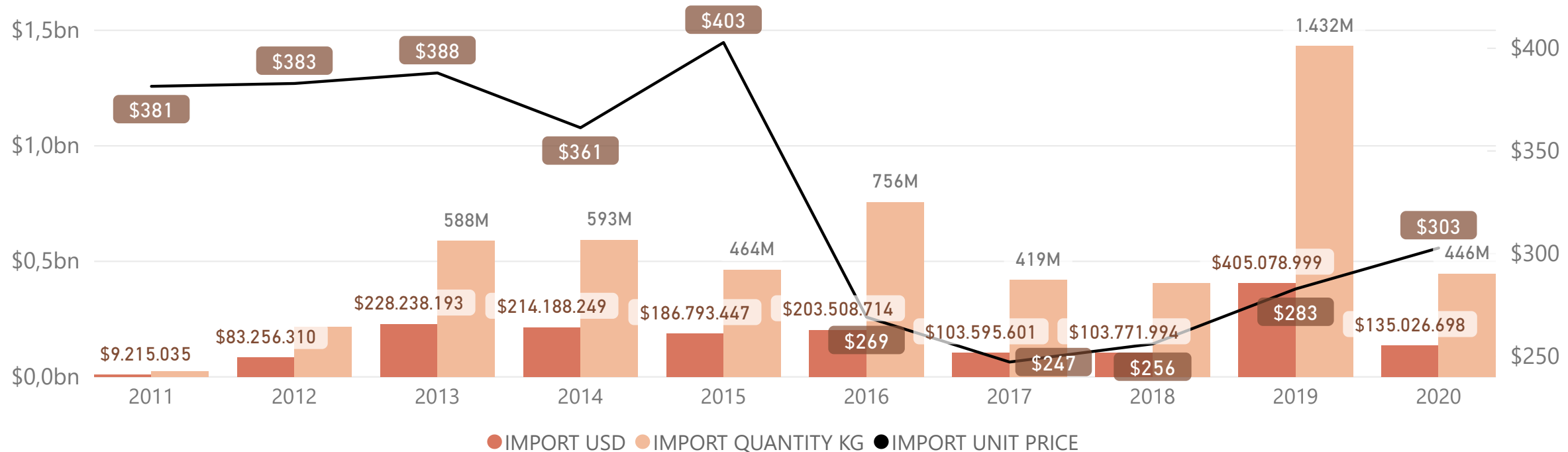
IMPORT QUANTITY (KG)	%145	IMPORT VALUE (USD)	%161	UNIT PRICE (USD/TON)	%6,4
FEBRUARY 2020		FEBRUARY 2020		FEBRUARY 2020	
62.261.647		\$18.954.980		\$304	
FEBRUARY 2019		FEBRUARY 2019		FEBRUARY 2019	
25.400.810		\$7.267.708		\$286	

* Comparisons were made with the same month of the previous year.

JANUARY - FEBRUARY 2020

IMPORT QUANTITY (KG)	%204	IMPORT VALUE (USD)	%233	UNIT PRICE (USD/TON)	%9,7
2020 TOTAL		2020 TOTAL		2020 TOTAL	
445.993.048		\$135.026.698		\$303	
2019 TOTAL		2019 TOTAL		2019 TOTAL	
146.897.699		\$40.554.681		\$276	

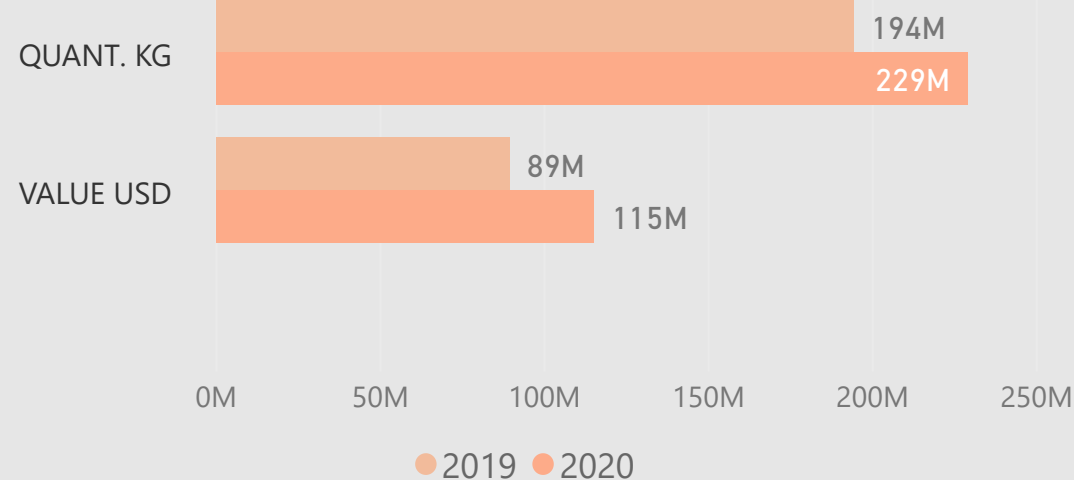
* Comparisons were made with the same period of the previous year.



Durum Wheat Imports by years shows us that, compared to other years, durum wheat imports in 2016 and 2019 comes to the fore. Especially, durum wheat imports in 2019 are the highest among all years, both in terms of value and quantity.

Import Unit Value was around \$400/ton between 2011 – 2015, then it fell sharply to \$250/ton in 2016. After 2018 it began increasing again and reached above \$300 level.

JANUARY - FEBRUARY 2020

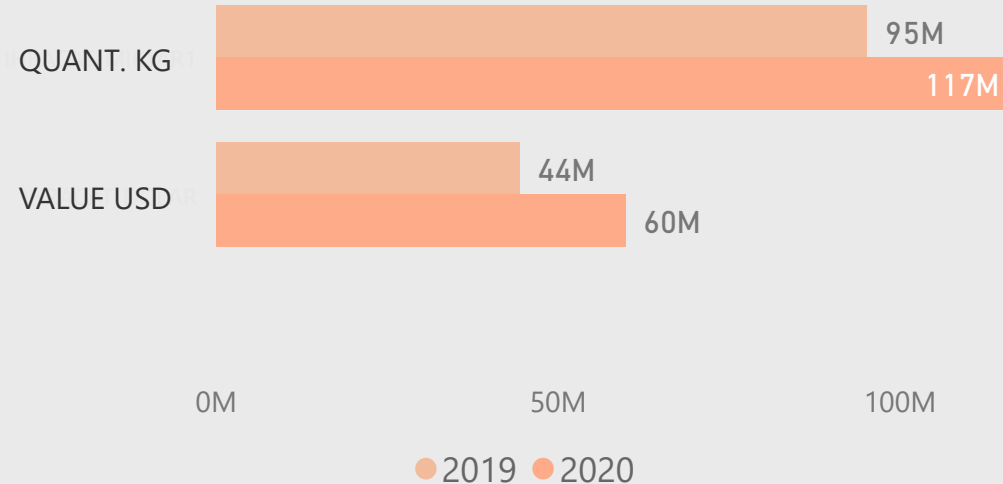


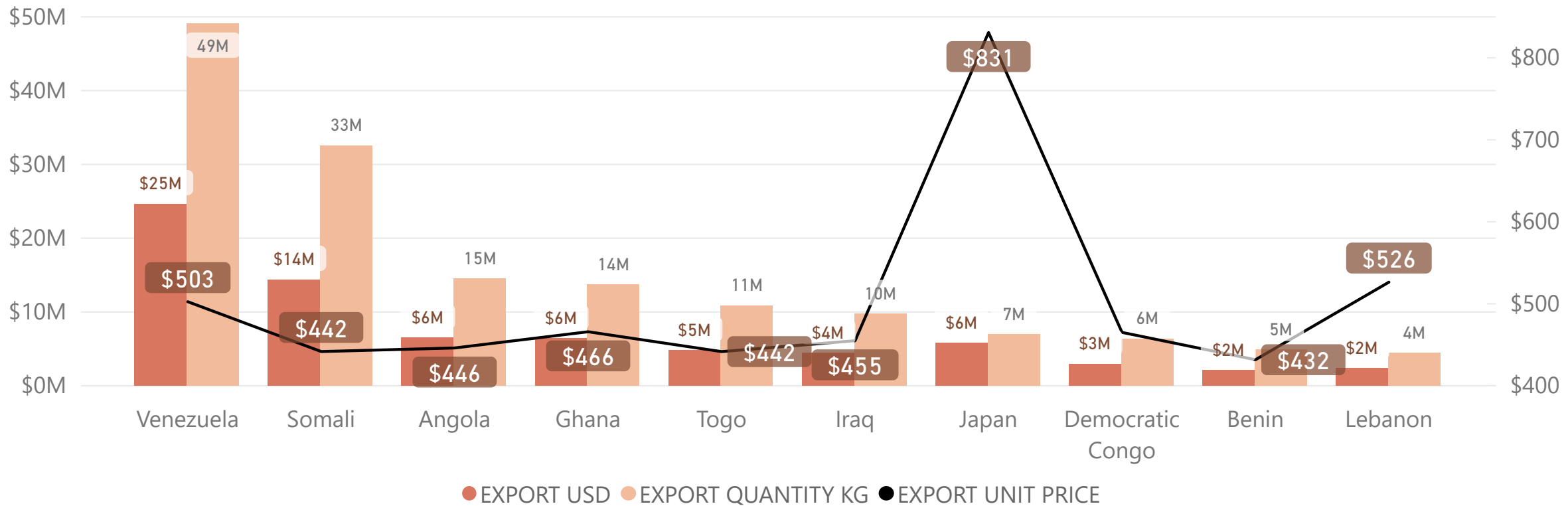
In February 2020, compared to January 2020, Pasta Exports increased 23% and reached 117 thousand tons in quantity; increased 34,7% and reached \$59,8 million in value.

In the first two months of 2020, compared to same period of the previous year, pasta exports increased 17,9% and reached 228,9 thousand tons in quantity; increased by 28,8% and reached \$115 million in value.

Average price per ton was \$467 in February 2019. It increased 9,3% and reached to \$503 in February 2020.

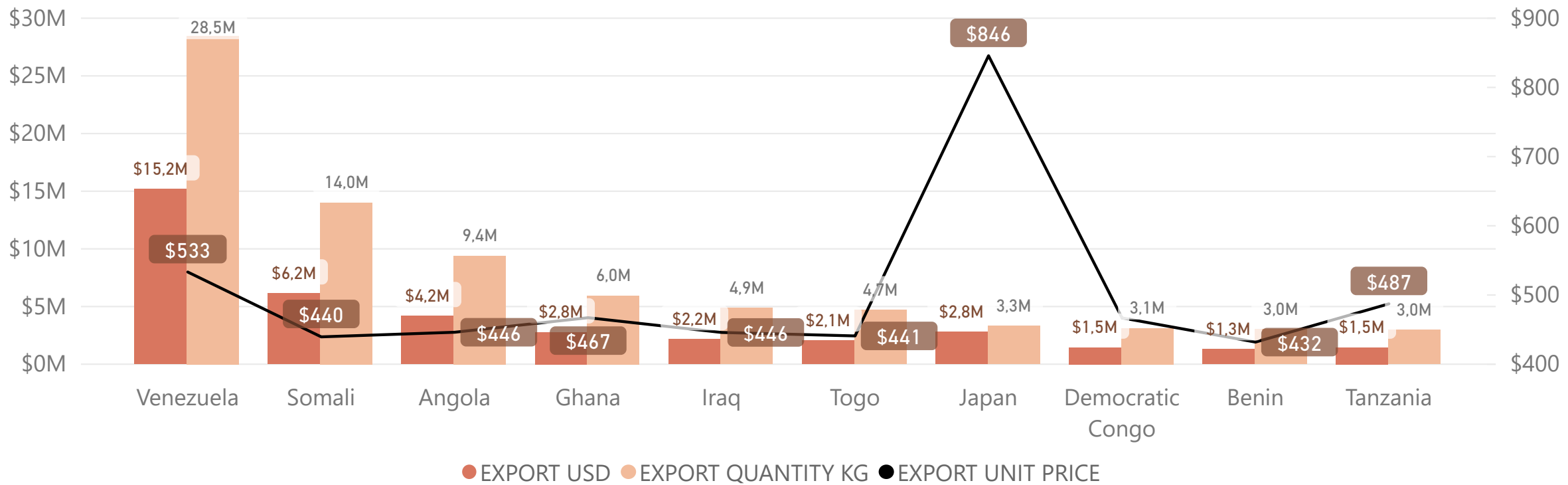
FEBRUARY 2020





In the first two months of 2020, biggest importer was Venezuela with 49 thousand tons, followed by Somalia and Angola. In terms of value, biggest importer is still Venezuela.

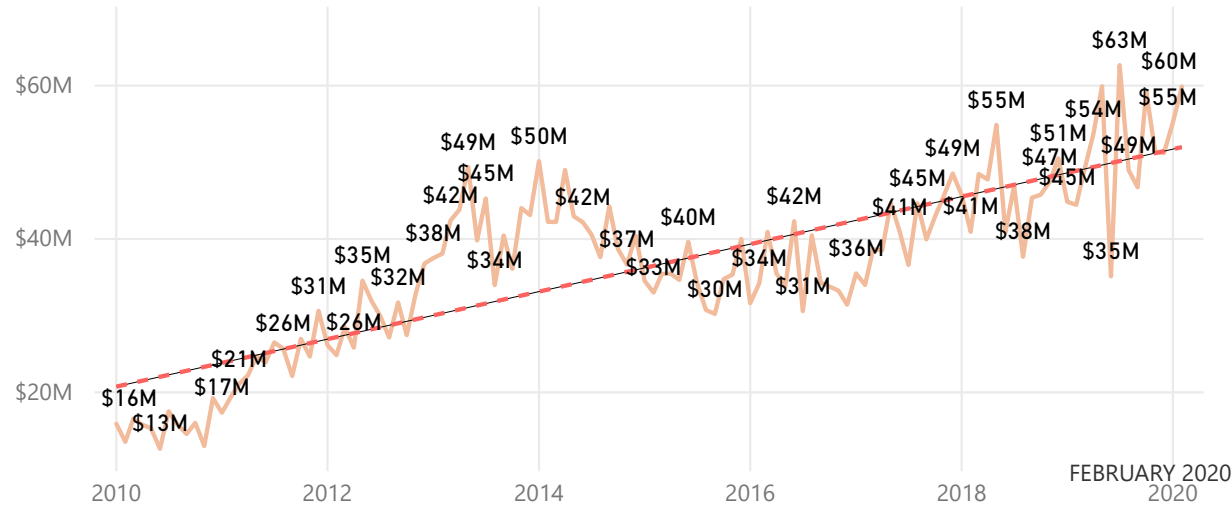
On the basis of unit price amongst top 10 countries we export in 2020, Japan ranked first with \$831/ton.



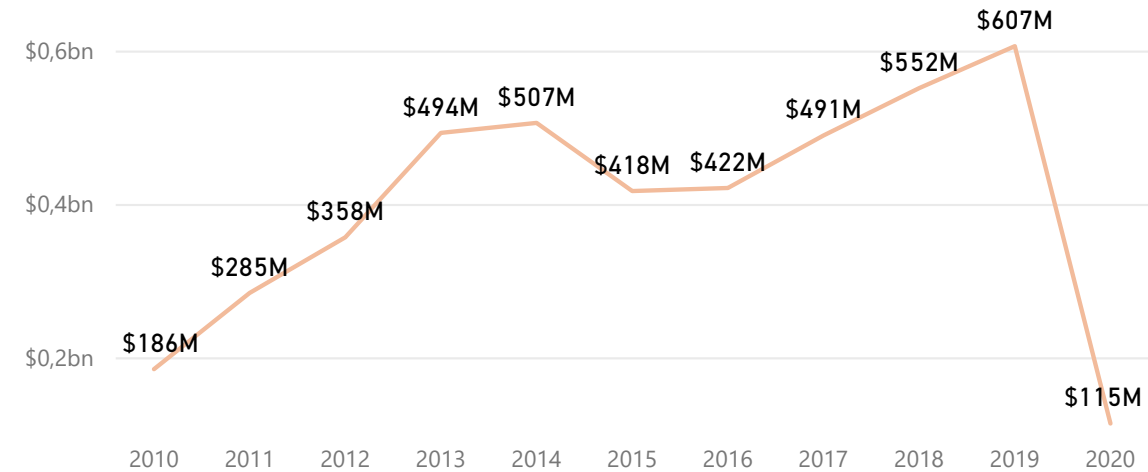
In February 2020, biggest importer was Venezuela with 28,4 thousand tons, followed by Somalia and Angola.

In February 2020, on the basis of unit price among the top 10 countries we export to, Japan ranked 1st with \$846/ton, followed by Venezuela (\$533/ton) and Tanzania (\$487/ton) respectively.

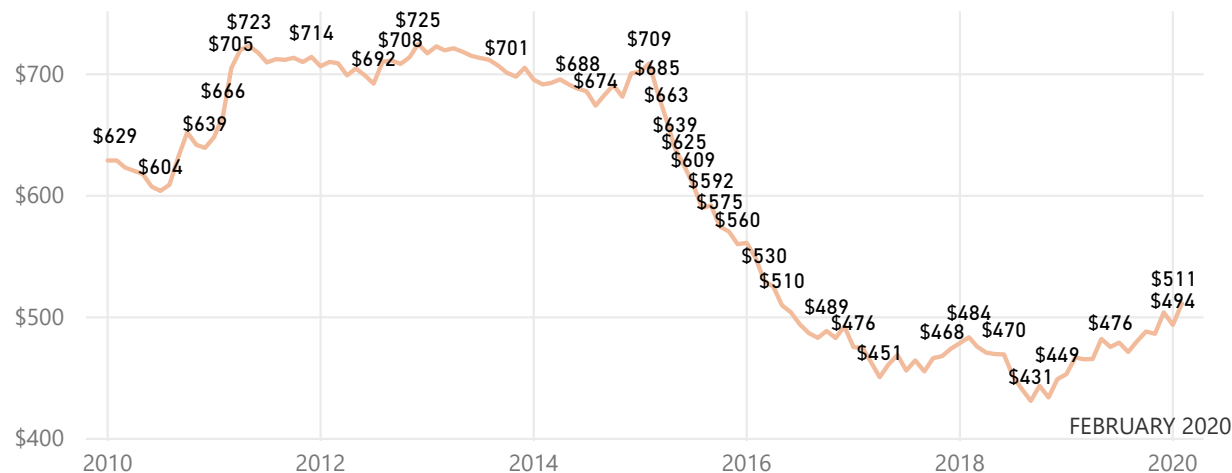
MONTHLY EXPORT VALUE (USD)



YEARLY EXPORT VALUE (USD)

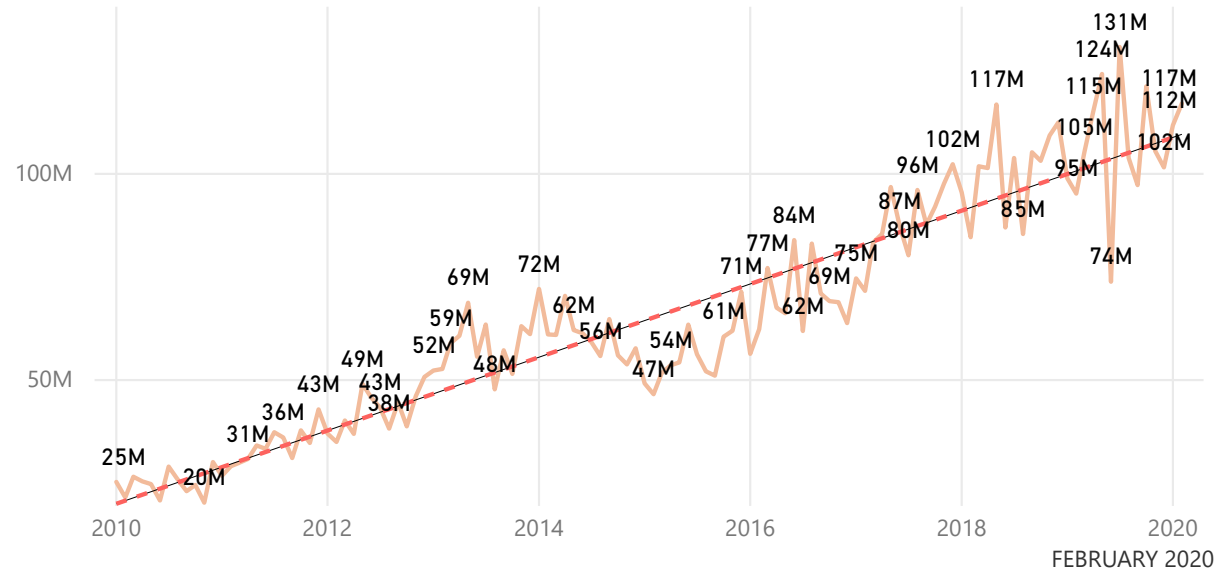


MONTHLY EXPORT UNIT PRICE (USD/TON)

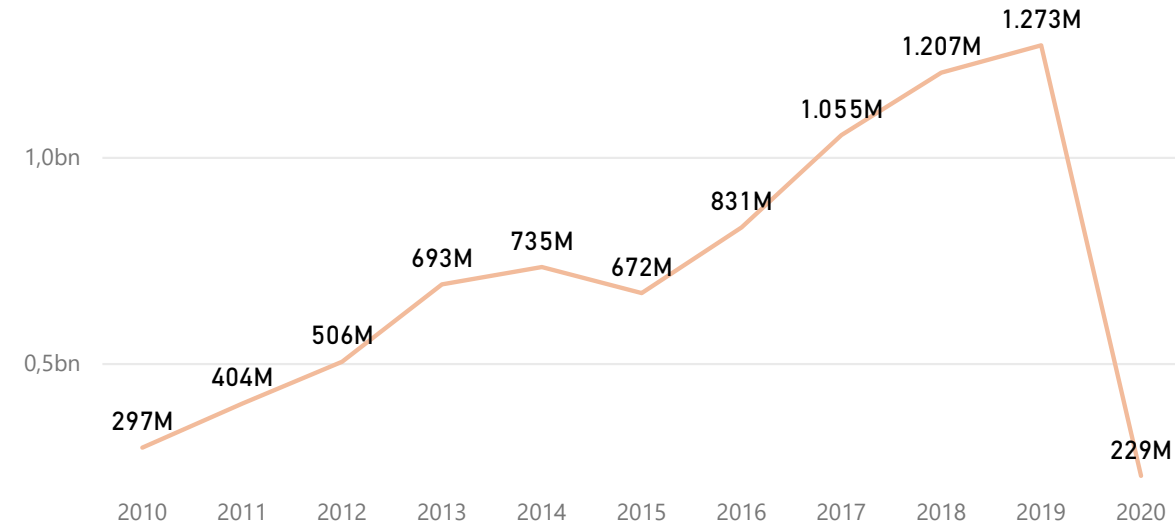


Pasta exports tend to increase in value when evaluated by years. On monthly basis, unit pasta export price was around \$700 between 2011-2015. After 2015, it fell continuously and reached to its lowest level in 2018. After 2018, with increasing wheat costs, it has entered an increasing trend.

MONTHLY EXPORT QUANTITY (KG)



YEARLY EXPORT QUANTITY (KG)



When the monthly export quantities are analyzed by years, it is seen that the export has increased steadily on quantity basis.

2019 - 2020 EXPORT COMPARISON CHART

JANUARY - FEBRUARY 2020

HS CODE 6 - PRODUCT NAME	EXPORT QUANT. (KG)	EXPORT VALUE (USD)	PREV. YEAR EXPORT QUANT. (KG)	PREV. YEAR EXPORT VALUE (USD)	CHANGE % (KG)	CHANGE % (USD)
100119	10.628.610	\$3.646.576	9.002.340	\$3.111.702	%18,1	%17,2
Durum wheat (excl. seed for sowing)	10.628.610	\$3.646.576	9.002.340	\$3.111.702	%18,1	%17,2
190211	945.082	\$1.066.975	428.552	\$391.642	%120,5	%172,4
Uncooked pasta, containing common wheat flour or meal or eggs	694.828	\$886.221	153.856	\$195.416	%351,6	%353,5
Uncooked pasta, not stuffed containing eggs (Excl. phenylketonuria pt.), others	250.254	\$180.754	274.696	\$196.226	-%8,9	-%7,9
190219	217.280.991	\$108.357.938	187.018.444	\$85.279.773	%16,2	%27,1
Low protein pasta for phenylketonuria patients	5.000	\$9.255				
Uncooked pasta, not stuffed or otherwise prepared	114.640.810	\$51.902.709	33.206.613	\$14.066.012	%245,2	%269,0
Uncooked pasta, not stuffed or otherwise prepared, containing vegetables	117.267	\$183.011	48.155	\$69.075	%143,5	%164,9
Uncooked pasta, not stuffed or otherwise prepared, not containing common wheat flour or meal or eggs (Excl. fenilketonüri pt.)	101.340.221	\$55.663.031	152.647.295	\$70.641.429	-%33,6	-%21,2
Uncooked pasta, not stuffed, others	1.177.693	\$599.932	1.116.381	\$503.257	%5,5	%19,2
190220	337.503	\$387.239	66.813	\$97.499	%405,1	%297,2
Cooked pasta, cooked, stuffed with meat or other substances	6.027	\$25.532	4.918	\$18.961	%22,5	%34,7
Cooked pasta, stuffed with meat or other substances, others	209.063	\$275.236	60.608	\$74.940	%244,9	%267,3
Pasta, stuffed with meat, containing > 20% by weight of meat and meat offal of any kind	1.609	\$5.045	1.191	\$3.468	%35,1	%45,5
Pasta, stuffed with meat, containing > 20% by weight of sausages and the like	54	\$540	96	\$130	-%43,8	%315,4
Pasta, stuffed, containing > 20% by weight of fish, etc	120.750	\$80.886				
190230	10.260.189	\$5.214.357	6.606.925	\$3.516.754	%55,3	%48,3
Pasta, dried	1.765.143	\$1.148.726	713.434	\$1.003.069	%147,4	%14,5
Pasta, others	8.495.046	\$4.065.631	5.893.491	\$2.513.685	%44,1	%61,7
190240	50.212	\$38.743	32.019	\$18.328	%56,8	%111,4
Couscous unprepared	39.920	\$24.340	25.770	\$14.515	%54,9	%67,7
Couscous, cooked or otherwise prepared	10.292	\$14.403	6.249	\$3.813	%64,7	%277,7
Total	239.502.587	\$118.711.828	203.155.093	\$92.415.698	%17,9	%28,5

* Comparisons were made with the same period of the previous year.

WORLD PASTA (1902)
EXPORT IN 2018 (USD)

9.894.330

WORLD PASTA (1902)
EXPORT IN 2018 (TON)

6.846.680

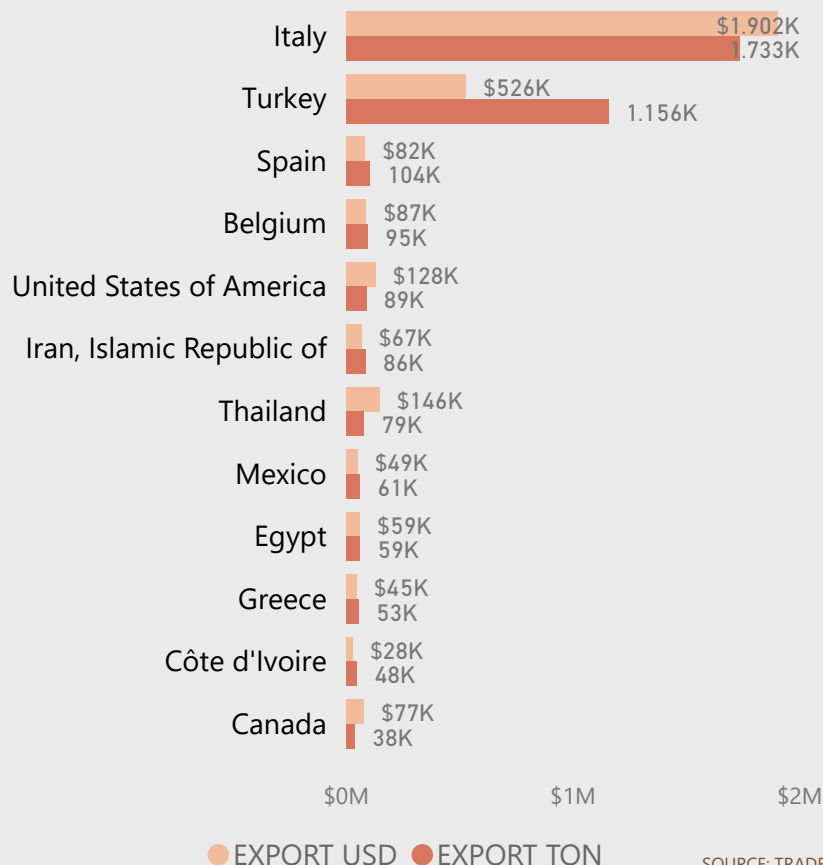
WORLD PASTA (1902.19)
EXPORT IN 2018 (USD)

4.121.601

WORLD PASTA (1902.19)
EXPORT IN 2018 (TON)

4.312.255

WORLD PASTA EXPORTER IN 2018 (1902.19 GTIP)



EXPORT UNIT PRICES OF COUNTRIES OVER 20K TONS EXPORT QUANT. (\$/TON)

COUNTRY	EXPORT TON	EXPORT SHARE	UNIT PRICE (\$/TON)
Italy	1.733.027	%40,3	\$1.098
Turkey	1.156.287	%26,9	\$455
Spain	104.441	%2,4	\$789
Belgium	94.681	%2,2	\$917
Iran, Islamic Republic of	86.048	%2,0	\$773
Mexico	60.668	%1,4	\$802
Egypt	59.304	%1,4	\$1.000
Greece	53.052	%1,2	\$849
Côte d'Ivoire	48.431	%1,1	\$579
Peru	38.104	%0,9	\$756
Saudi Arabia	34.197	%0,8	\$1.795
Czech Republic	29.280	%0,7	\$704
United Arab Emirates	29.102	%0,7	\$905
Latvia	24.721	%0,6	\$619
Russian Federation	24.685	%0,6	\$674
Guatemala	22.979	%0,5	\$905
Argentina	22.774	%0,5	\$553

* Noodle etc. exporters excluded.

SOURCE: TRADEMAP

According to Trademap data, in 2018, Turkey ranked in 2nd place after Italy in 1902.19 GTIP pasta exports, with 26.9% market share. But, among the countries exporting more than 20 thousand tons, ranked last with an export value of \$455/ton.

WORLD PASTA (1902)
IMPORT IN 2018 (USD)

9.583.820

WORLD PASTA (1902)
IMPORT IN 2018 (TON)

6.707.123

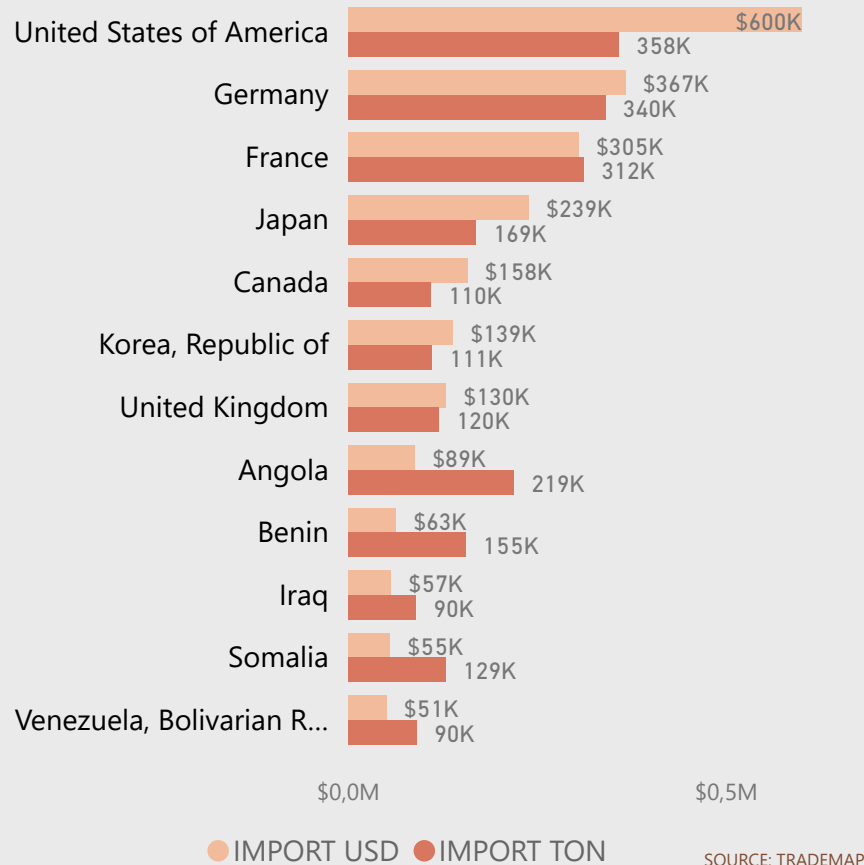
WORLD PASTA (1902.19)
IMPORT IN 2018 (USD)

4.278.458

WORLD PASTA (1902.19)
IMPORT IN 2018 (TON)

4.175.413

WORLD PASTA IMPORTS IN 2018 (1902.19 HS CODE)



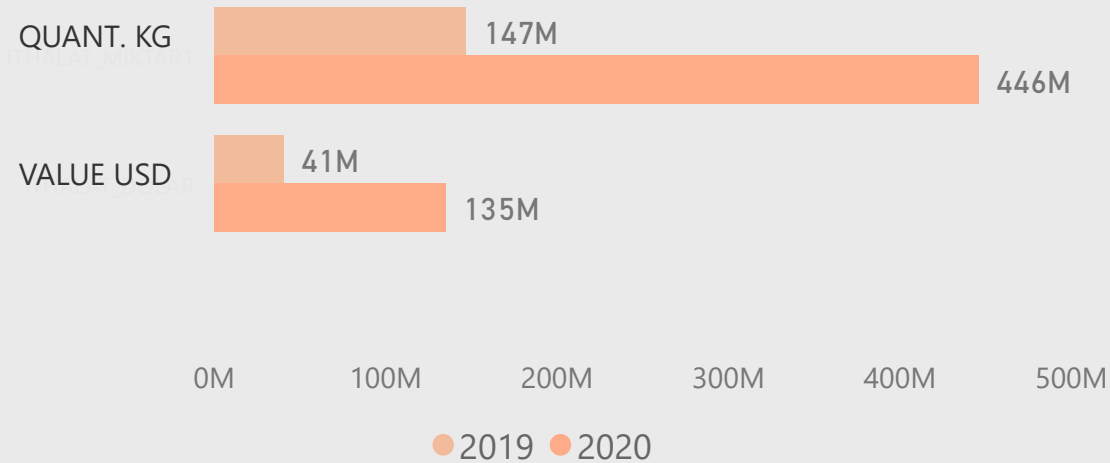
UNIT IMPORT PRICE OF COUNTRIES OVER 55K IMPORT QUANT. (\$/TON)

COUNTRY	IMPORT TON	IMPORT SHARE	UNIT PRICE (\$/TON)
United States of America	358.157	%8,6	\$1.674
Germany	340.339	%8,2	\$1.077
France	312.073	%7,5	\$977
Angola	219.224	%5,3	\$404
Japan	168.883	%4,0	\$1.415
Benin	155.159	%3,7	\$407
Somalia	128.708	%3,1	\$429
United Kingdom	120.198	%2,9	\$1.078
Korea, Republic of	111.070	%2,7	\$1.248
Canada	109.675	%2,6	\$1.438
Venezuela, Bolivarian Republic of	90.441	%2,2	\$559
Iraq	89.521	%2,1	\$632
Togo	87.913	%2,1	\$413
Netherlands	81.585	%2,0	\$1.223
Belgium	66.179	%1,6	\$1.253
Hong Kong, China	56.539	%1,4	\$1.422
Russian Federation	55.229	%1,3	\$1.129

SOURCE: TRADEMAP

According to Trademap data, in 2018, USA ranked first with 8.6% share in 1902.19 GTIP pasta imports. Germany (340 thousand tons) and France (312 tons) followed USA, respectively. Angola, which Turkey exported 160 tons of pasta in 2018, is the fourth largest importer country.

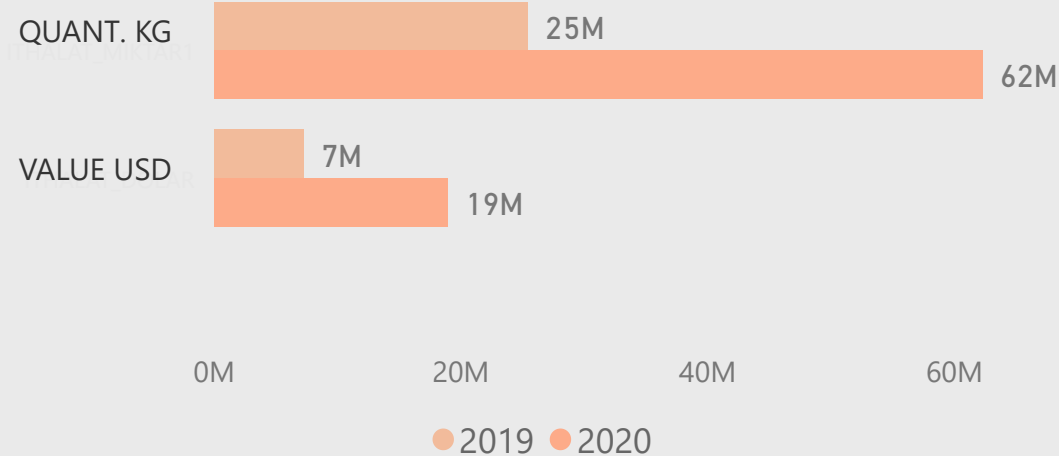
JANUARY - FEBRUARY 2020



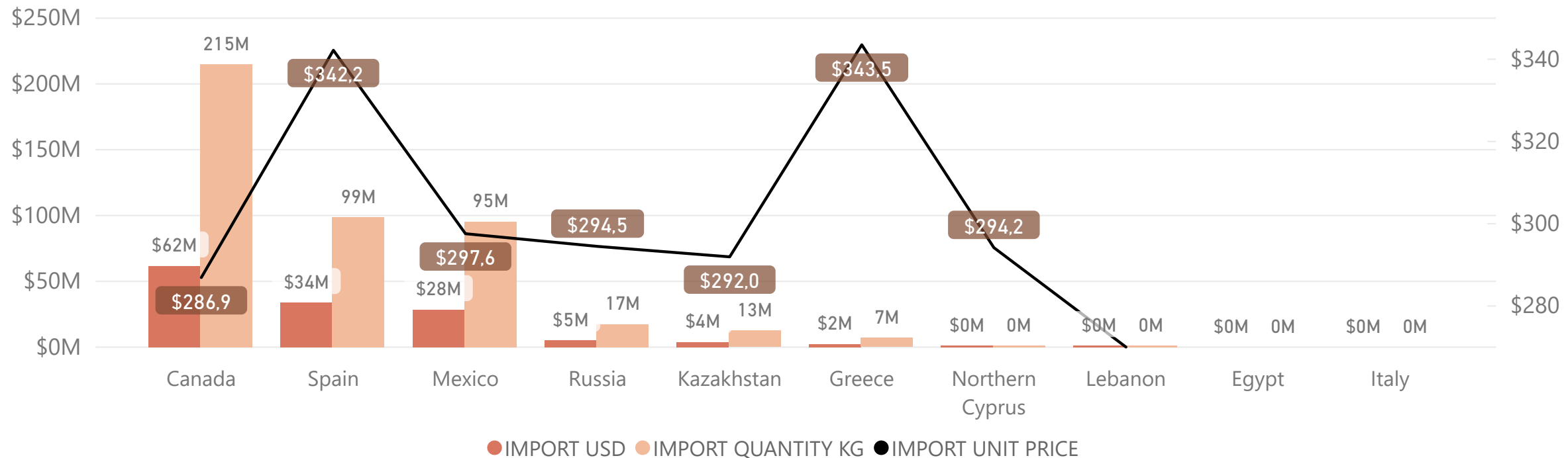
In February 2020, compared to February 2019, durum wheat imports increased 145% and reached to 62.2 thousand tons; in terms of value, increased by 161%, reaching \$18.9 million.

In first two months of 2020, compared to same period of the previous year, amount of durum wheat imports increased 204%, value of durum wheat imports increased 233%.

FEBRUARY 2020

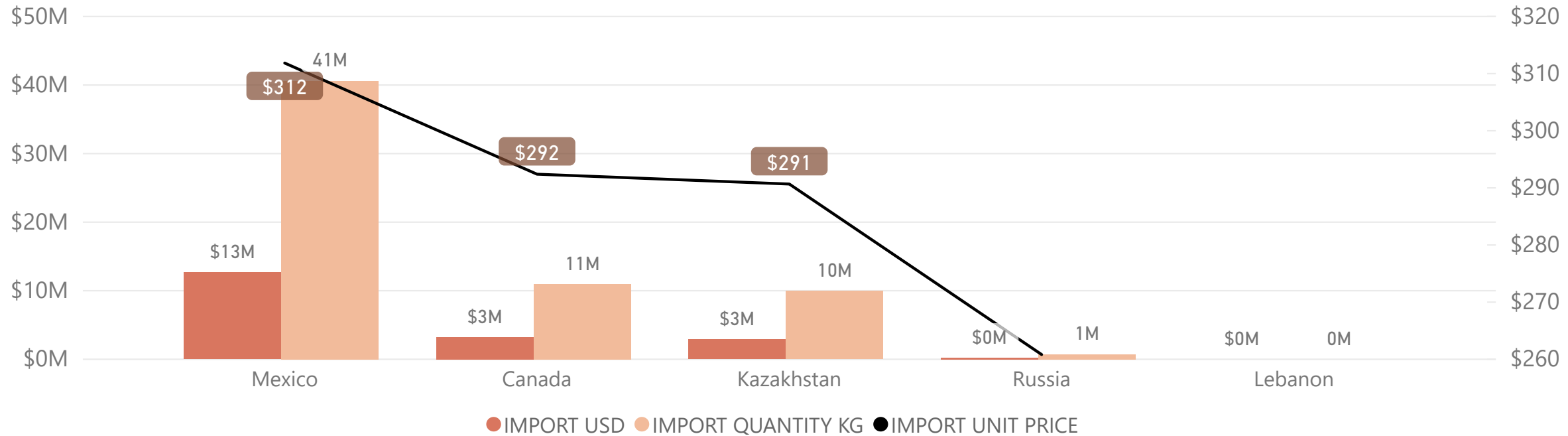


Average unit price per ton was \$286/ton in February 2019. In February 2020, it increased 6.4% and reached \$304/ton.



In the first two months of 2020, biggest importer of durum wheat was Canada with 214.8 thousand tons (\$61.6 million), followed by Spain and Mexico.

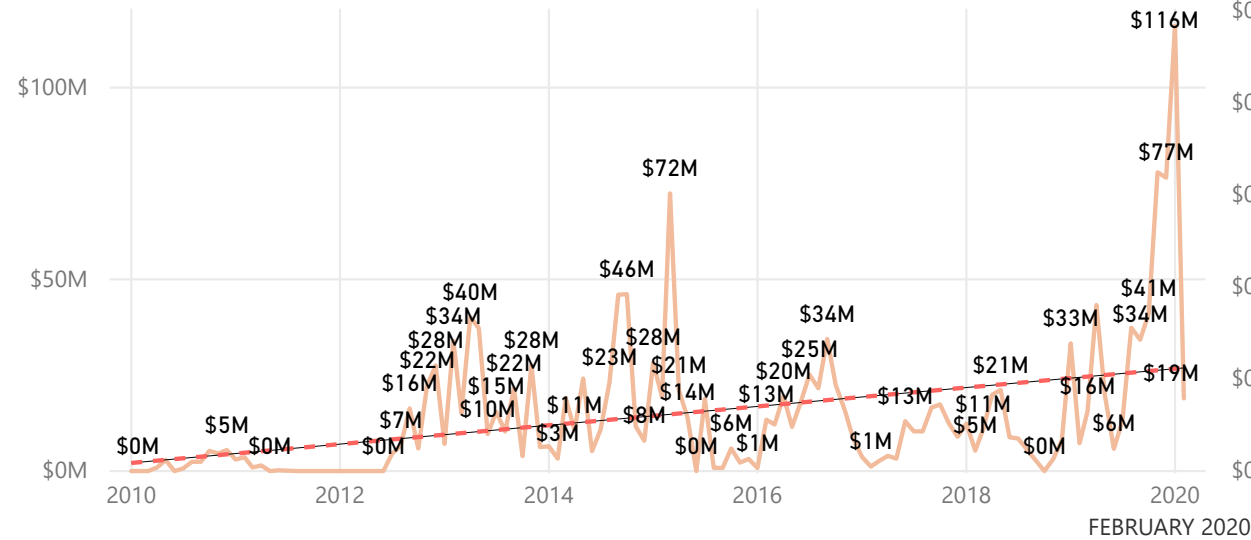
In December, average unit price of durum wheat imported by Canada was \$286.9/ton. This figure is also the lowest price, while the highest unit price belongs to Spain with \$342.2/ton.



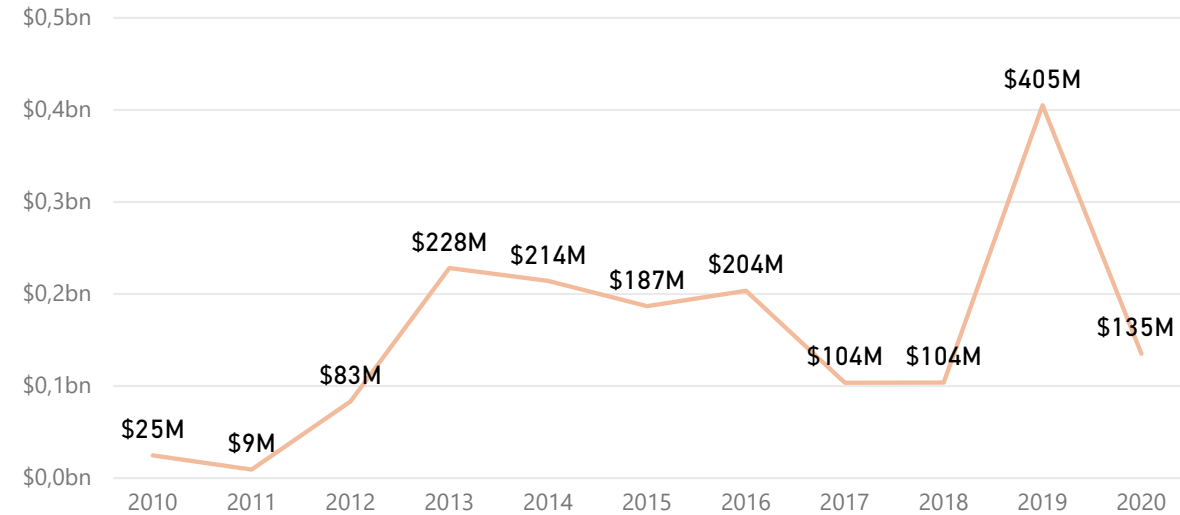
In February 2020, the highest amount of durum wheat is imported by Mexico with 40.6 thousand tons (\$12.7 million), followed by Canada and Kazakhstan.

In February, average unit price of durum wheat imported by Mexico was \$312/ton. This figure is also the highest price, while the lowest unit price belongs to Russia with \$261/ton.

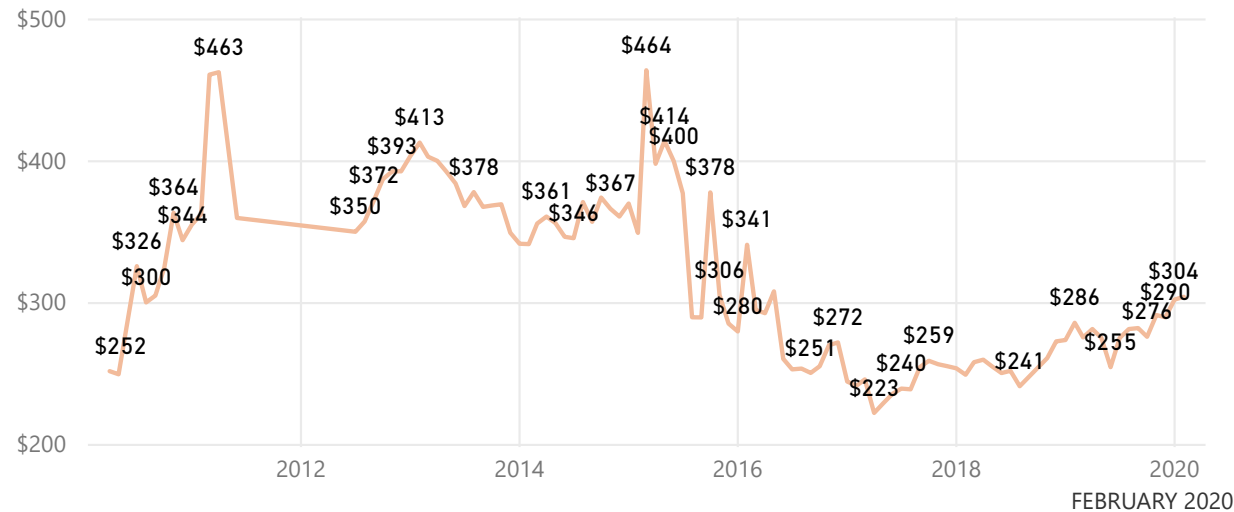
MONTHLY IMPORT VALUE (USD)



YEARLY IMPORT VALUE (USD)



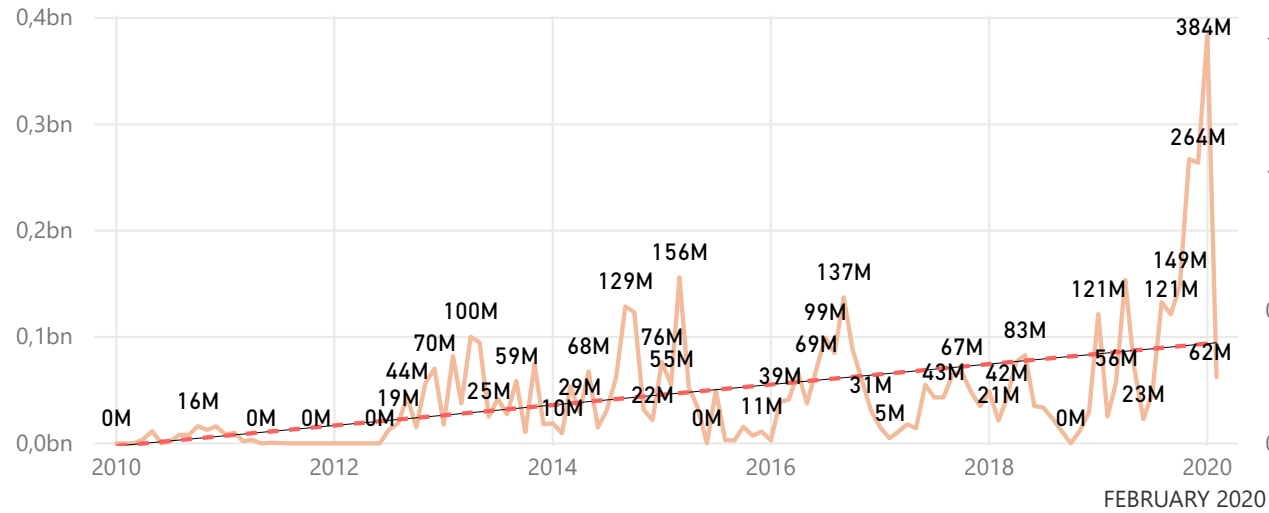
MONTHLY IMPORT UNIT PRICE (USD/TON)



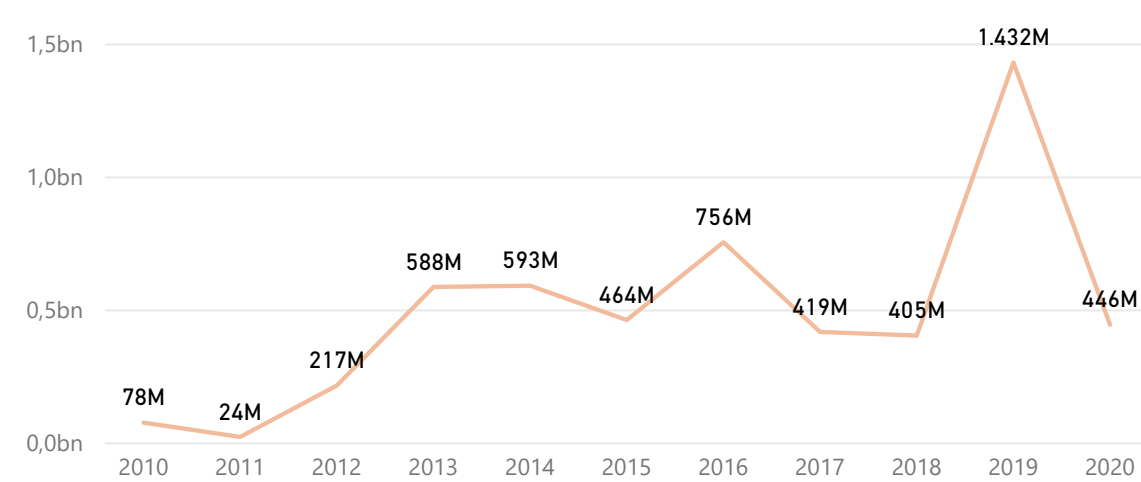
When the monthly import values are analyzed by years, it is seen that imports in January 2020 (\$116 million) is the highest monthly import ever. Also, unit value of import past \$300, reaching the highest value in last 4 years.

The value of imports made in the first two months of 2020 has already been reached of those in 2017 and 2018.

MONTHLY IMPORT QUANTITY (KG)



YEARLY IMPORT QUANTITY (KG)



From data, it is seen that record high imports in 2019 continues in 2020. Imports in January 2020 (384 thousand tons) is the highest amount of all times. Imports in January 2020 is more than the amounts imported both in 2017 and 2018.

HS CODE 6 - PRODUCT NAME	IMPORT QUANT. (KG)	IMPORT VALUE (USD)	PREV. YEAR IMPORT QUANT. (KG)	PREV. YEAR IMPORT VALUE (USD)	CHANGE % (KG)	CHANGE % (USD)
100119	445.993.048	\$135.026.698	146.897.699	\$40.554.681	%203,6	%232,9
Durum wheat (excl. seed for sowing)	445.993.048	\$135.026.698	146.897.699	\$40.554.681	%203,6	%232,9
190219	903.305	\$1.345.376	412.868	\$708.656	%118,8	%89,8
Uncooked pasta, not stuffed or otherwise prepared, not containing common wheat flour or meal or eggs (Excl. fenilketonüri pt.)	823.509	\$1.189.595	359.500	\$603.099	%129,1	%97,2
Uncooked pasta, not stuffed or otherwise prepared	41.312	\$59.058	44.896	\$95.061	-%8,0	-%37,9
Uncooked pasta, not stuffed or otherwise prepared, containing vegetables	3.354	\$18.166	8.472	\$10.496	-%60,4	%73,1
Uncooked pasta, not stuffed, others	35.130	\$78.557	0	\$0		
Low protein pasta for phenylketonuria patients	0	\$0				
190211	61.417	\$93.879	227.220	\$345.601	-%73,0	-%72,8
Uncooked pasta, containing common wheat flour or meal or eggs	27.230	\$52.199	101.656	\$193.746	-%73,2	-%73,1
Uncooked pasta, not stuffed containing eggs (Excl. phenylketonuria pt.), others	34.187	\$41.680	125.564	\$151.855	-%72,8	-%72,6
190230	83.623	\$120.489	86.750	\$212.245	-%3,6	-%43,2
Pasta, dried	57.425	\$101.486	78.062	\$199.431	-%26,4	-%49,1
Pasta, others	26.198	\$19.003	8.688	\$12.814	%201,5	%48,3
190220	137.595	\$216.298	49.365	\$183.655	%178,7	%17,8
Cooked pasta, stuffed with meat or other substances, others	136.064	\$195.360	36.000	\$145.127	%278,0	%34,6
Cooked pasta, cooked, stuffed with meat or other substances	0	\$0	13.365	\$38.528	-%100,0	-%100,0
Pasta, stuffed, containing > 20% by weight of fish, etc	1.531	\$20.938				
100111	1.500	\$2.448	3.400	\$3.972	-%55,9	-%38,4
Durum wheat seed for sowing	1.500	\$2.448	3.400	\$3.972	-%55,9	-%38,4
190240	530	\$2.212	0	\$0		
Couscous unprepared	0	\$0	0	\$0		
Couscous, cooked or otherwise prepared	530	\$2.212	0	\$0		
Total	447.181.018	\$136.807.400	147.677.302	\$42.008.810	%202,8	%225,7

* Comparisons were made with the same period of the previous year.

3.500.000

TON PRODUCTION

291

KG/DECARE (YIELD)

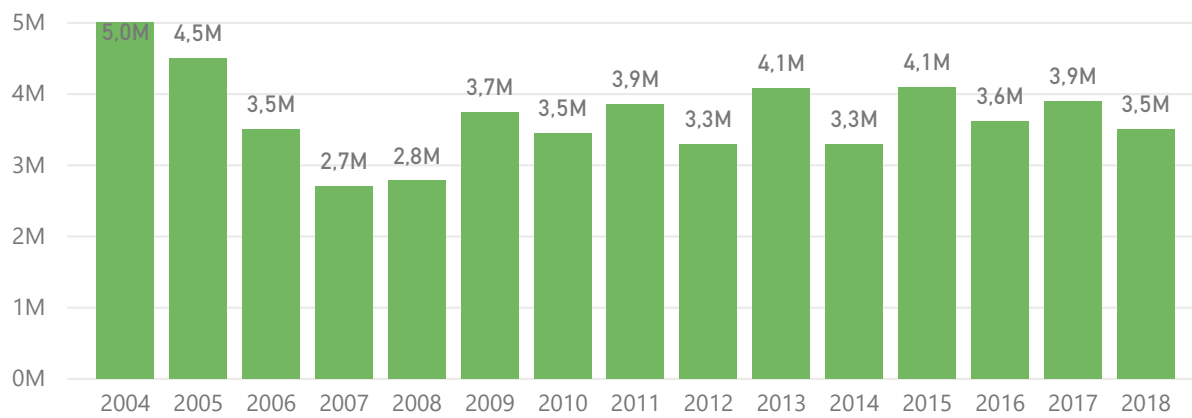
12.021.006

DECARE HARVEST AREA

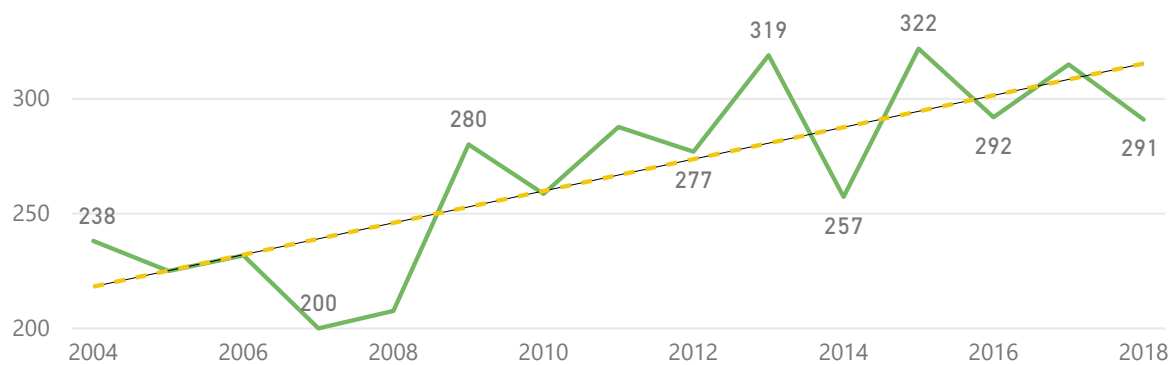
%16,5

RATIO PER TOTAL WHEAT

DURUM WHEAT PRODUCTION PER YEAR



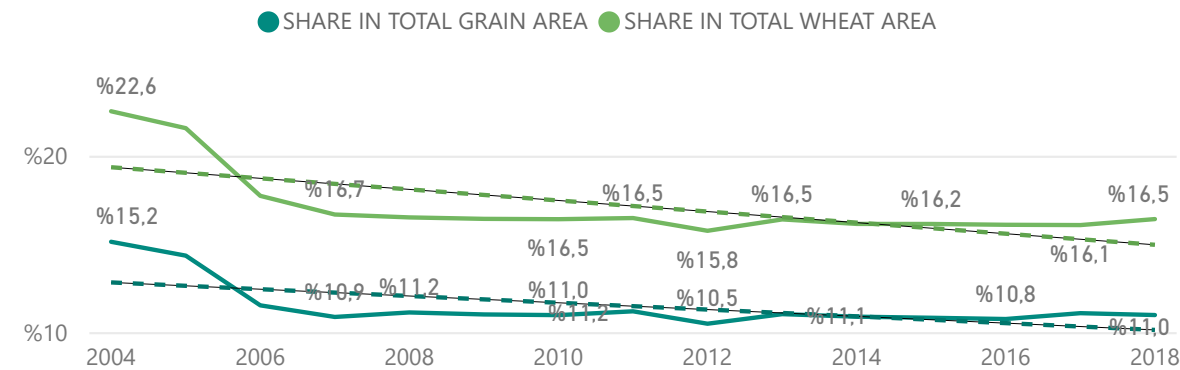
DURUM WHEAT YIELD PER YEAR (KG/DECARE)



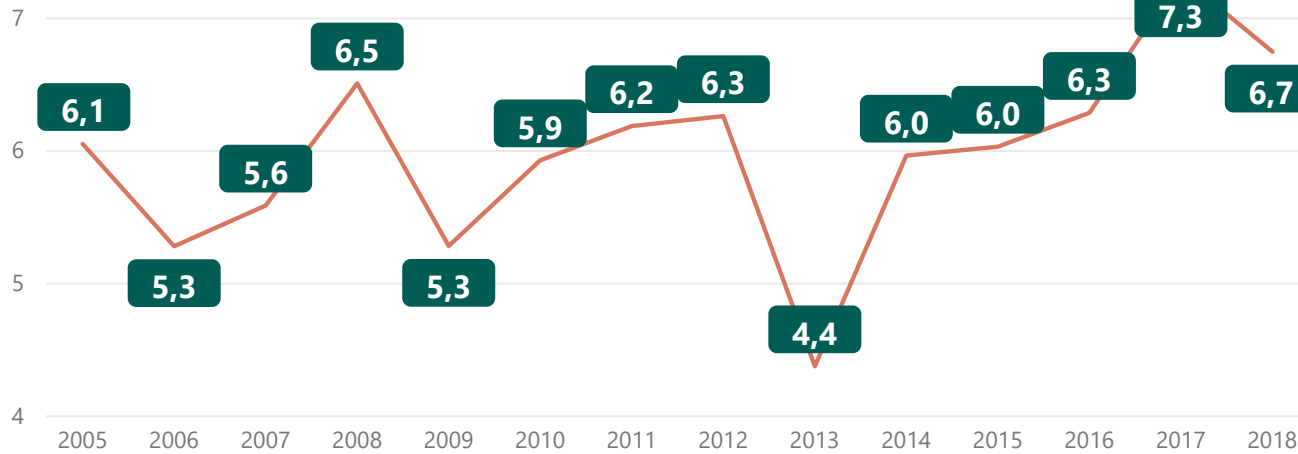
DURUM WHEAT HARVEST AREA PER YER (DECARE)



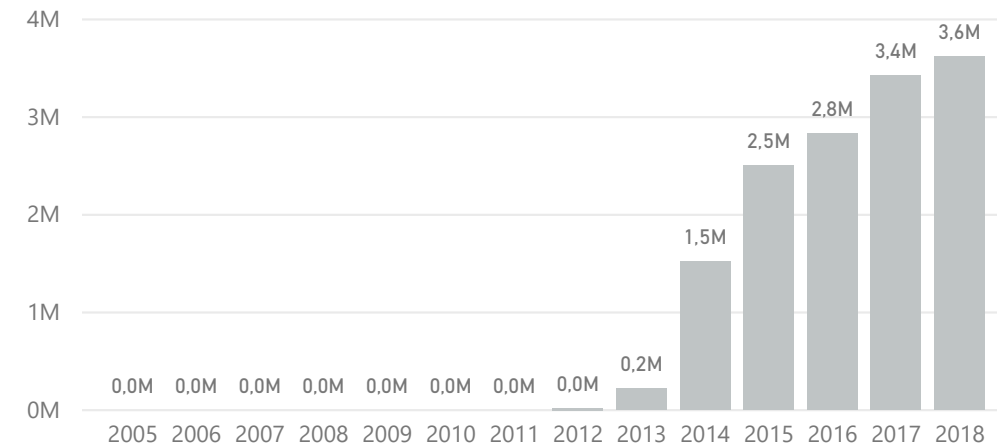
RATIO OF DURUM WHEAT HARVEST AREA



PASTA CONSUMPTION PER CAPITA (Kg/Per)

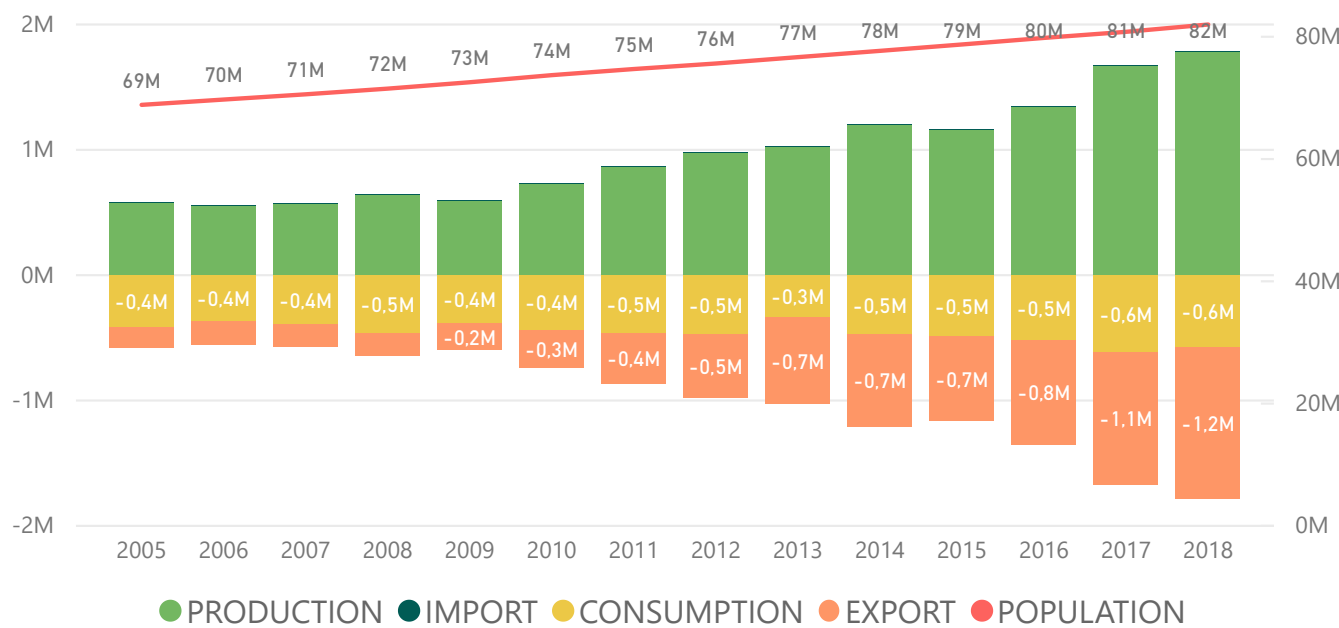


REFUGEE NUMBERS PER YEAR



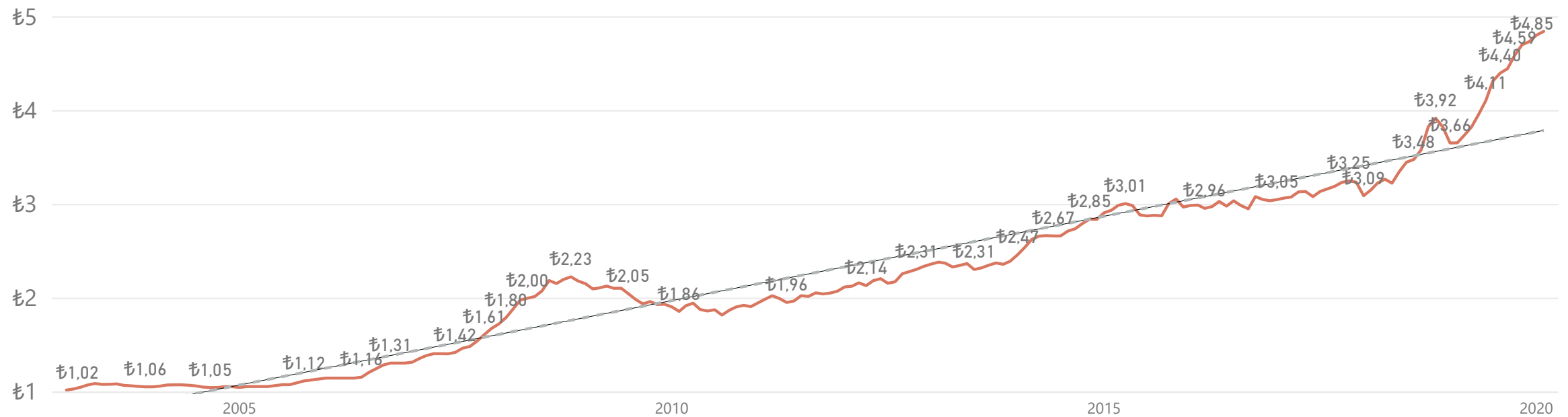
* Calculations were made with population of Turkey and additional refugee numbers.

Source : Ministry of the interior and TÜİK



YEAR	Product. (Ton)	Import (Ton)	Export (Ton)	Consumption (Ton)
2005	580.516	735	164.413	416.838
2006	558.517	1.000	191.196	368.321
2007	571.292	1.193	177.971	394.513
2008	640.985	154	175.614	465.525
2009	595.160	1.784	213.516	383.428
2010	732.411	2.082	297.309	437.184
2011	863.968	2.462	404.064	462.366
2012	976.644	2.709	505.613	473.740
2013	1.026.431	3.390	693.212	336.609
2014	1.202.516	5.329	735.286	472.559
2015	1.158.069	4.143	672.105	490.107
2016	1.347.649	3.384	831.370	519.662
2017	1.667.267	4.289	1.055.256	616.300
2018	1.780.857	3.648	1.206.665	577.840

2020 february pasta market price: ₺4,85 TL/Kg



* Consumer price index pasta price

* Vat included market price

HS12 CODE	CATEGORY	CUSTOM NAME
100111000000	DURUM FOR SEED	Durum wheat seed for sowing
100119000000	DURUM WHEAT	Durum wheat (excl. seed for sowing)
190211000011	PASTA	Uncooked pasta, containing common wheat flour or meal or eggs
190211000019	PASTA	Uncooked pasta, not stuffed containing eggs (Excl. phenylketonuria pt.), others
190219100019	PASTA	Uncooked pasta, not stuffed or otherwise prepared, not containing common wheat flour or meal or eggs (Excl. fenilketonüri pt.)
190219900011	PASTA	Uncooked pasta, not stuffed or otherwise prepared, containing vegetables
190219900012	PASTA	Uncooked pasta, not stuffed or otherwise prepared
190219900013	PASTA	Low protein pasta for phenylketonuria patients
190219900019	PASTA	Uncooked pasta, not stuffed, others
190220100000	PASTA	Pasta, stuffed, containing > 20% by weight of fish, etc
190220301000	PASTA	Pasta, stuffed with meat, containing > 20% by weight of meat and meat offal of any kind
190220309000	PASTA	Pasta, stuffed with meat, containing > 20% by weight of sausages and the like
190220910000	PASTA	Cooked pasta, cooked, stuffed with meat or other substances
190220990000	PASTA	Cooked pasta, stuffed with meat or other substances, others
190230100000	PASTA	Pasta, dried
190230900000	PASTA	Pasta, others
190240100000	PASTA	Couscous unprepared
190240900000	PASTA	Couscous, cooked or otherwise prepared

MÜSAD

MAKARNA ÜRETİCİLERİ VE SANAYİCİLERİ DERNEĞİ
Pasta Producers and Industrialists Association

