



MAKARNA ÜRETİCİLERİ VE SANAYİCİLERİ DERNEĞİ
Pasta Producers and Industrialists Association

SECTOR REPORT

JANUARY - MAY 2020



Pasta Producers and Industrialists' Association




Sector Report

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PUBLISH DATE




1 July 2020

MAY 2020

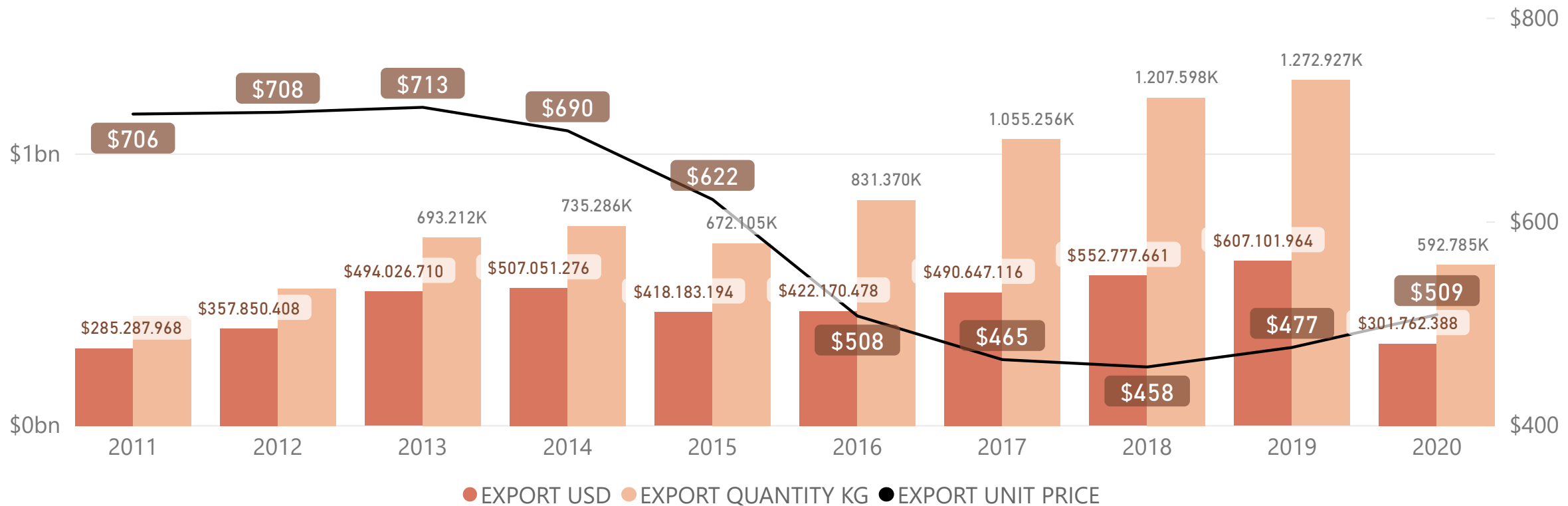
EXPORT QUANTITY (KG)	-%0,5	EXPORT VALUE (USD)	%9,1	UNIT PRICE (USD/TON)	%9,7
MAY 2020		MAY 2020		MAY 2020	
123.625.389		\$65.380.426		\$529	
MAY 2019		MAY 2019		MAY 2019	
124.227.794		\$59.905.783		\$482	

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

JANUARY - MAY 2020

EXPORT QUANTITY (KG)	%10,0	EXPORT VALUE (USD)	%19,8	UNIT PRICE (USD/TON)	%8,9
2020 TOTAL		2020 TOTAL		2020 TOTAL	
592.785.179		\$301.762.388		\$509	
2019 TOTAL		2019 TOTAL		2019 TOTAL	
538.823.135		\$251.850.944		\$467	




* 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.




Since 2019, with increasing durum wheat costs, unit export price rose and reached to \$509/ton by May 2020. But, compared to surge in durum wheat prices, increase in unit export price is still insufficient.

MAY 2020

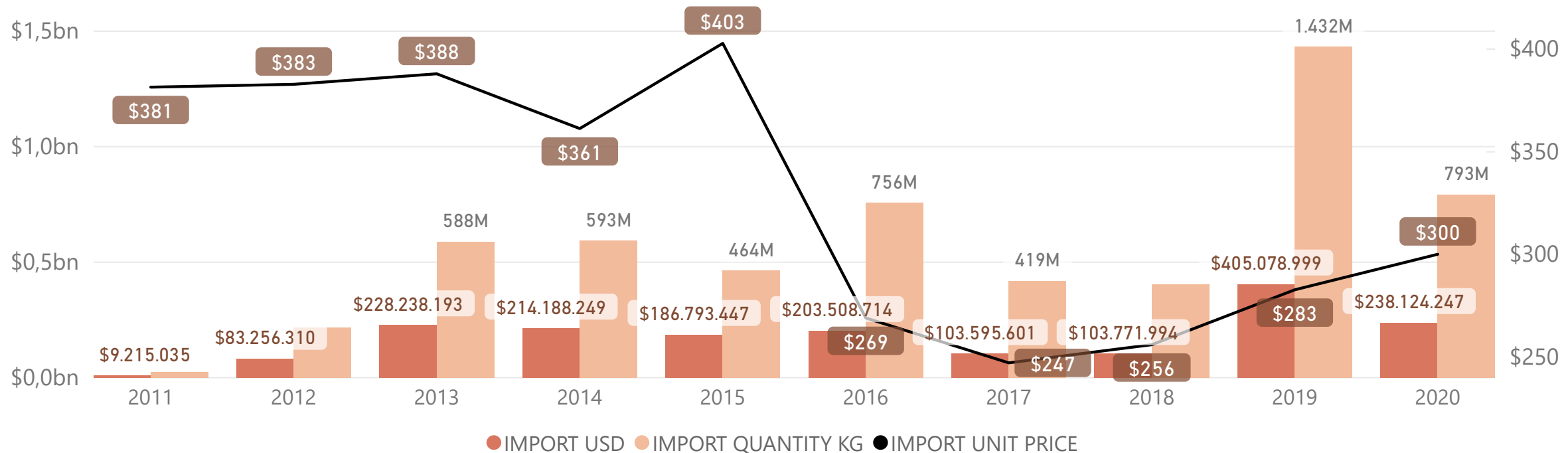
IMPORT QUANTITY (KG)	%1	IMPORT VALUE (USD)	%10	UNIT PRICE (USD/TON)	%9,7
MAY 2020		MAY 2020		MAY 2020	
71.776.700		\$21.693.069		\$302	
MAY 2019		MAY 2019		MAY 2019	
71.350.121		\$19.658.310		\$276	

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

JANUARY - MAY 2020

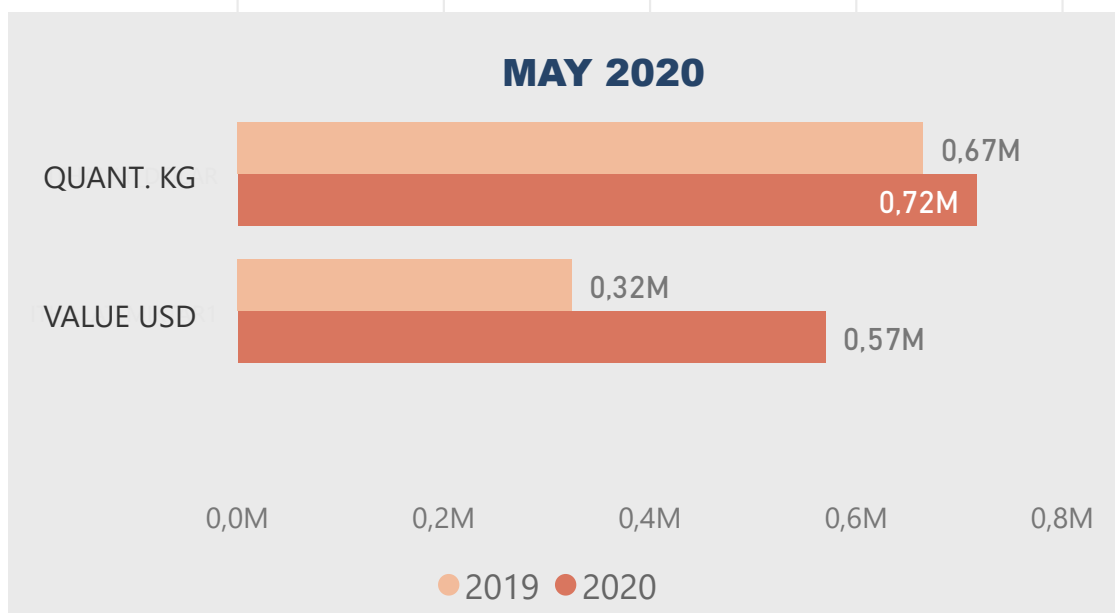
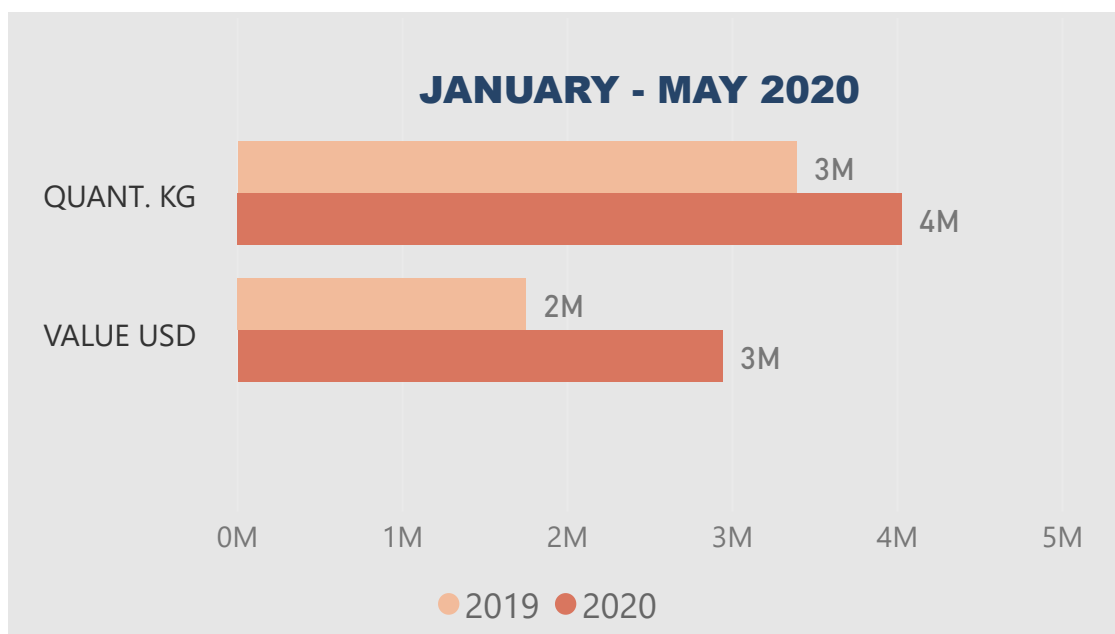
IMPORT QUANTITY (KG)	%85	IMPORT VALUE (USD)	%100	UNIT PRICE (USD/TON)	%8,0
2020 TOTAL		2020 TOTAL		2020 TOTAL	
793.447.413		\$238.124.247		\$300	
2019 TOTAL		2019 TOTAL		2019 TOTAL	
428.412.385		\$119.087.311		\$278	

* 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. Also, compared to 2016, durum wheat imports in 2019 are two times higher in terms of quantity and value.

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 in 2020.

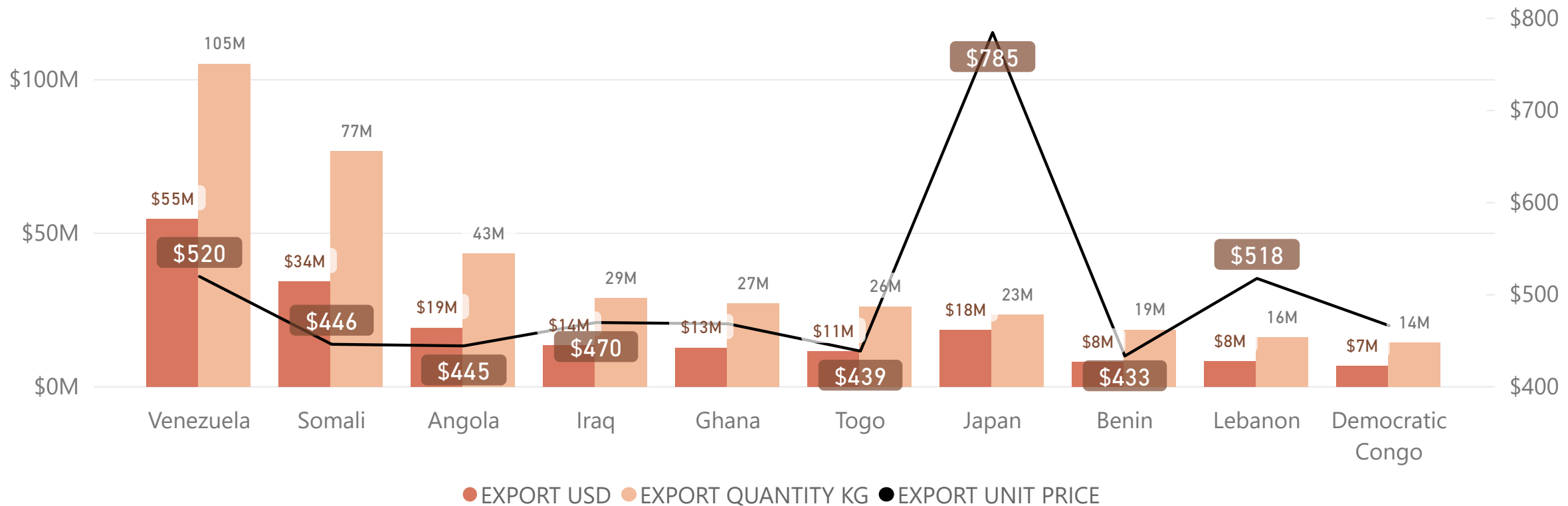


In May 2020, compared to May 2019, Pasta Exports decreased 0.5% and reached 123.6 thousand tons in quantity; increased 9.1% and reached \$65.4 million in value.

In the first five months of 2020, compared to same period of the previous year, pasta exports increased 10% and reached 592.8 thousand tons in quantity; increased by 19.8% and reached \$301.8 million in value.

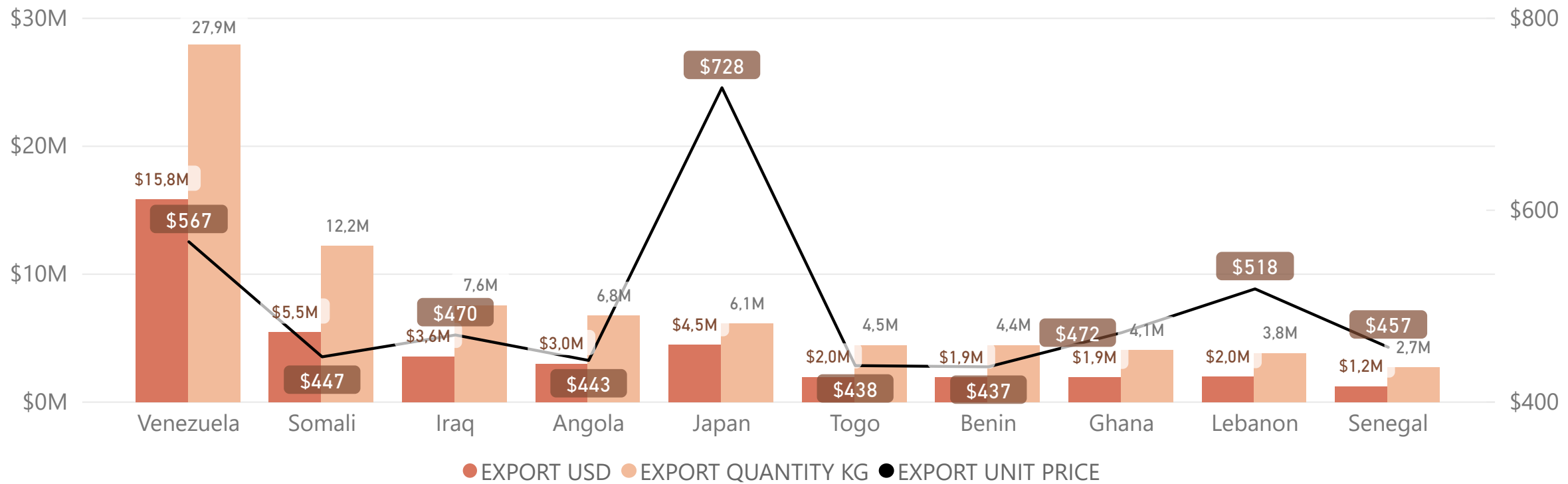
Average price per ton was \$482 in May 2019. It increased 9.7% and reached to \$529 in May 2020.

Compared to same period of the previous year, in January – May 2020 period, average price per ton increased 8,9% and reached \$509/ton.



In the first five months of 2020, biggest importer was Venezuela with 105.2 thousand tons, followed by Somalia and Angola. In terms of value, biggest importer is still Venezuela. Japan, which took the 7th place on quantity of imports, is on the 4th place in terms of value.

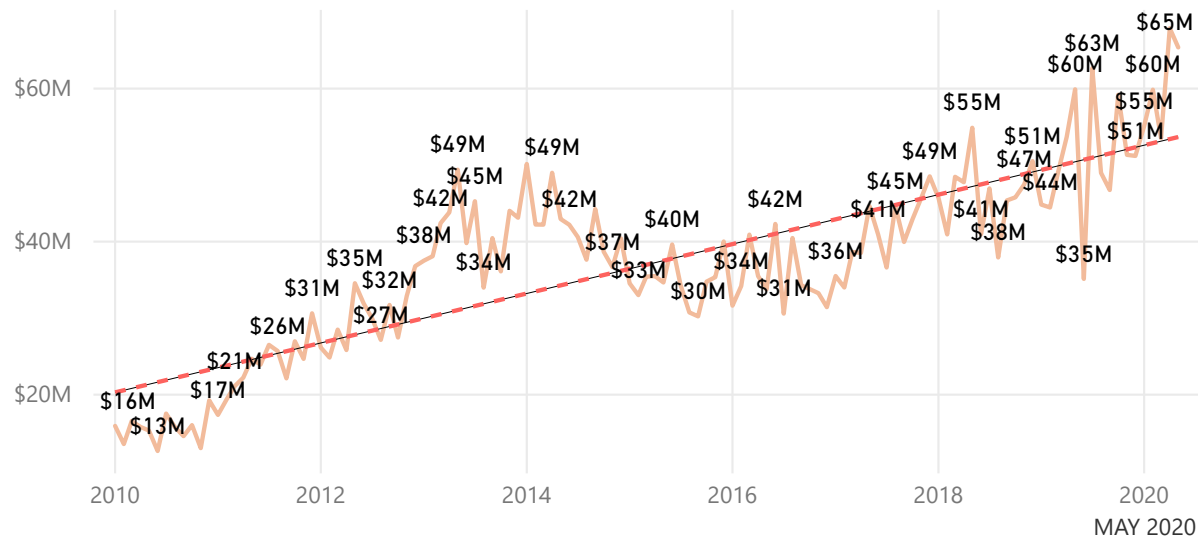
On the basis of unit price amongst top 10 countries we export to in 2020, Japan ranked first with \$785/ton. Benin was on the last place with \$433/ton unit price.



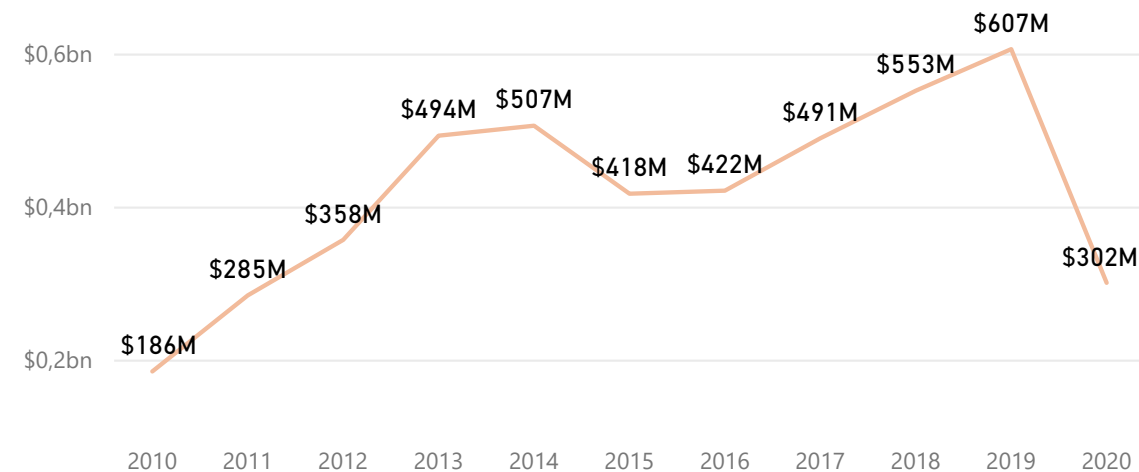
In May 2020, biggest importer was Venezuela with 27.9 thousand tons, followed by Somalia and Iraq.

In May 2020, among the top 10 countries we export to on the basis of unit price, Japan ranked 1st with \$728/ton, followed by Venezuela (\$567/ton) and Lebanon (\$518/ton) respectively. Like the first five months of the year, Benin had the lowest price with \$437/ton.

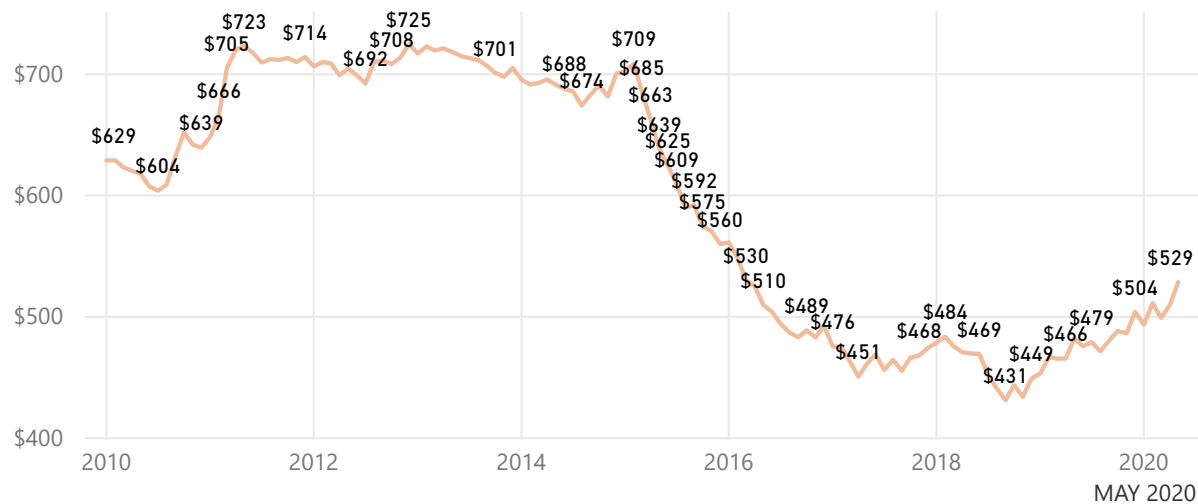
MONTHLY EXPORT VALUE (USD)



YEARLY EXPORT VALUE (USD)



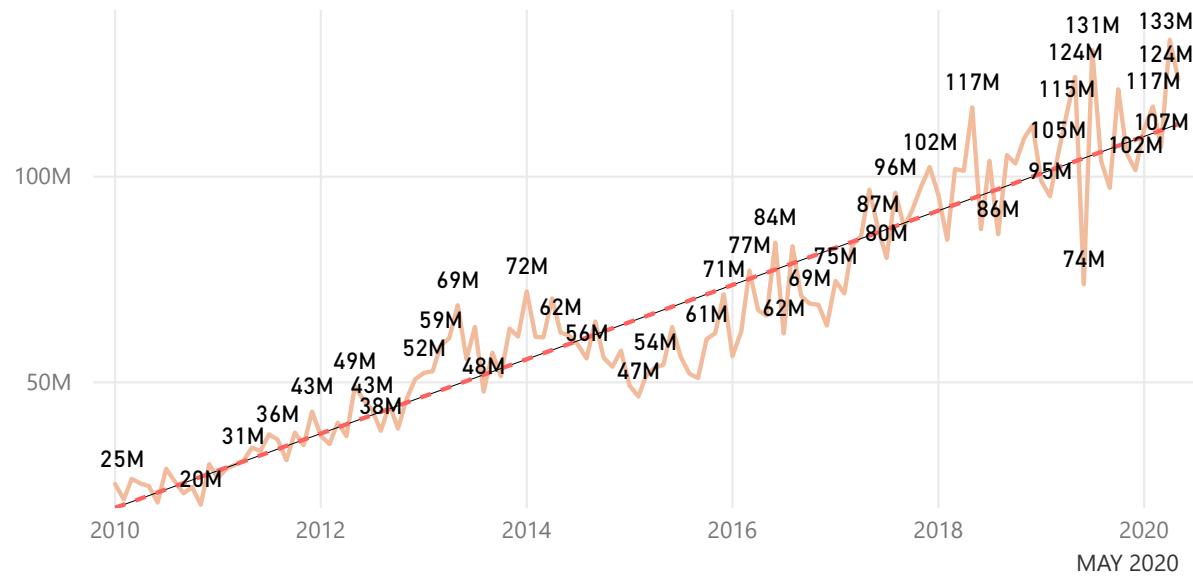
MONTHLY EXPORT UNIT PRICE (USD/TON)



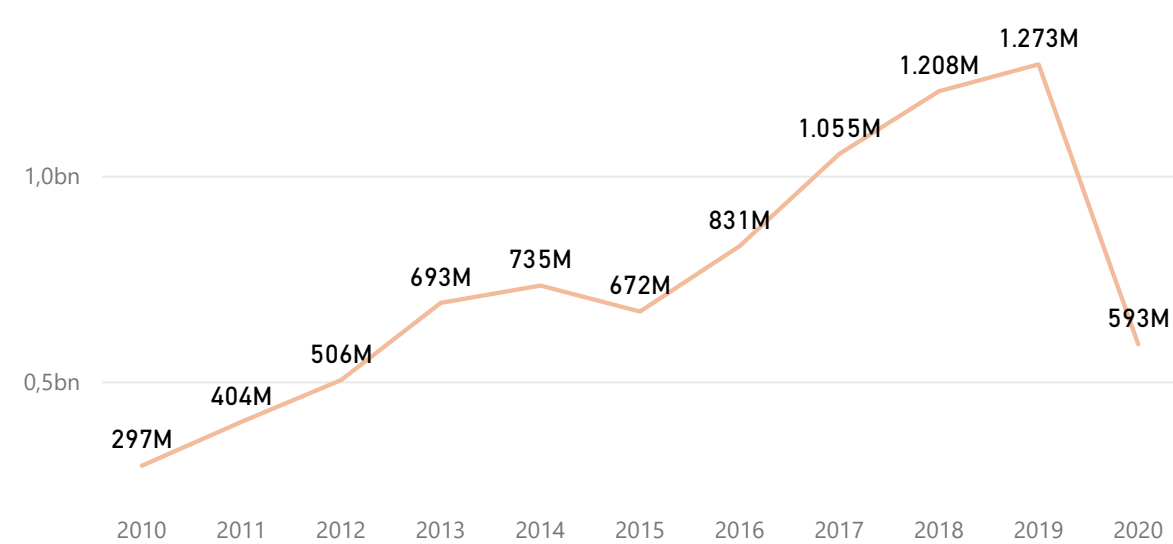
When pasta exports are analyzed by years, after achieving the highest monthly export value in April 2020 (\$68 million), \$65 million worth of exports were made in May.

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)



April 2020, the month which the highest exports was made in terms of value, is also the month which highest exports was made in terms of quantity. Quantity of exports in May is the 3rd highest monthly value ever. Highest monthly exports in terms of value and quantity achieved in April 2020, during global COVID-19 pandemic.

2019 - 2020 EXPORT COMPARISON CHART

JANUARY - MAY 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	35.565.650	\$12.020.329	9.974.620	\$3.483.112	%256,6	%245,1
Durum wheat (excl. seed for sowing)	35.565.650	\$12.020.329	9.974.620	\$3.483.112	%256,6	%245,1
190211	2.620.846	\$2.527.776	1.002.212	\$795.947	%161,5	%217,6
Uncooked pasta, containing common wheat flour or meal or eggs	1.359.806	\$1.772.220	308.643	\$358.129	%340,6	%394,9
Uncooked pasta, not stuffed containing eggs (Excl. phenylketonuria pt.), others	1.261.040	\$755.556	693.569	\$437.818	%81,8	%72,6
190219	560.349.730	\$283.325.834	513.433.731	\$239.809.256	%9,1	%18,1
Low protein pasta for phenylketonuria patients	5.000	\$9.255				
Uncooked pasta, not stuffed or otherwise prepared	276.279.354	\$125.838.710	63.587.106	\$27.789.532	%334,5	%352,8
Uncooked pasta, not stuffed or otherwise prepared, containing vegetables	231.152	\$368.775	98.512	\$172.172	%134,6	%114,2
Uncooked pasta, not stuffed or otherwise prepared, not containing common wheat flour or meal or eggs (Excl. fenilketonüri pt.)	281.067.673	\$155.717.726	447.886.876	\$210.868.848	-%37,2	-%26,2
Uncooked pasta, not stuffed, others	2.766.551	\$1.391.368	1.861.237	\$978.704	%48,6	%42,2
190220	528.235	\$624.494	155.473	\$204.407	%239,8	%205,5
Cooked pasta, cooked, stuffed with meat or other substances	6.505	\$26.606	6.688	\$24.799	-%2,7	%7,3
Cooked pasta, stuffed with meat or other substances, others	370.995	\$476.600	141.723	\$163.387	%161,8	%191,7
Pasta, stuffed with meat, containing > 20% by weight of meat and meat offal of any kind	4.131	\$13.450	5.610	\$11.790	-%26,4	%14,1
Pasta, stuffed with meat, containing > 20% by weight of sausages and the like	994	\$1.817	1.404	\$3.031	-%29,2	-%40,1
Pasta, stuffed, containing > 20% by weight of fish, etc	145.610	\$106.021	48	\$1.400	%303254,2	%7472,9
190230	28.996.975	\$15.104.398	24.120.407	\$10.976.870	%20,2	%37,6
Pasta, dried	3.776.920	\$2.767.235	1.693.607	\$2.039.201	%123,0	%35,7
Pasta, others	25.220.055	\$12.337.163	22.426.800	\$8.937.669	%12,5	%38,0
190240	289.393	\$179.886	111.312	\$64.464	%160,0	%179,0
Couscous unprepared	259.588	\$149.725	70.090	\$41.420	%270,4	%261,5
Couscous, cooked or otherwise prepared	29.805	\$30.161	41.222	\$23.044	-%27,7	%30,9
Total	628.350.829	\$313.782.717	548.797.755	\$255.334.056	%14,5	%22,9

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

WORLD PASTA (1902)
EXPORT IN 2019 (USD)

9.741.092

WORLD PASTA (1902)
EXPORT IN 2019 (TON)

6.846.680

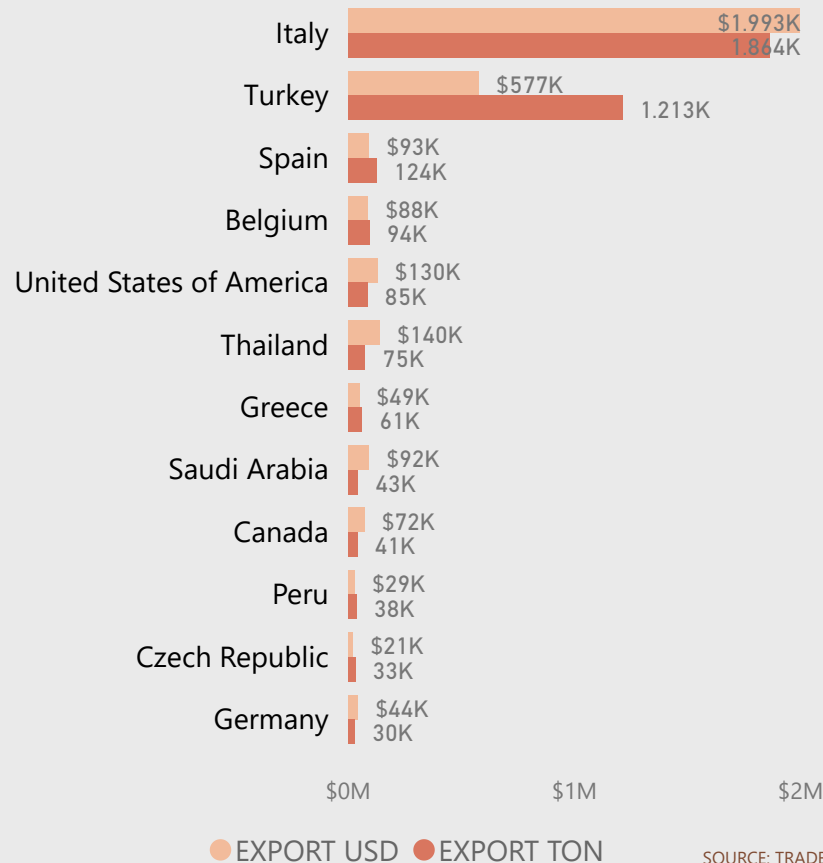
WORLD PASTA (1902.19)
EXPORT IN 2019 (USD)

4.121.601

WORLD PASTA (1902.19)
EXPORT IN 2019 (TON)

4.312.255

WORLD PASTA EXPORTER IN 2019 (1902.19 GTİP)



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

COUNTRY	EXPORT TON	EXPORT SHARE	UNIT PRICE (\$/TON)
Italy	1.863.639	%43,2	\$1.070
Turkey	1.212.773	%28,1	\$475
Spain	124.262	%2,9	\$744
Belgium	93.767	%2,2	\$936
Greece	61.168	%1,4	\$795
Saudi Arabia	43.199	%1,0	\$2.127
Peru	37.505	%0,9	\$771
Czech Republic	32.560	%0,8	\$650
Latvia	28.904	%0,7	\$617
Russian Federation	27.030	%0,6	\$750
Indonesia	27.022	%0,6	\$1.259
Guatemala	24.426	%0,6	\$900
Egypt	23.591	%0,5	\$496
Argentina	23.353	%0,5	\$584
Poland	20.644	%0,5	\$1.050

* Noodle etc. exporters excluded.

SOURCE: TRADEMAP

According to Trademap data, in 2019, Turkey ranked in 2nd place after Italy in 1902.19 GTIP pasta exports, with 28,1% (2018-%26,9) market share. But, among the countries exporting more than 20 thousand tons, ranked last with an export value of \$475/ton.

WORLD PASTA (1902)
IMPORT IN 2019 (USD)

9.741.092

WORLD PASTA (1902)
IMPORT IN 2019 (TON)

6.887.407

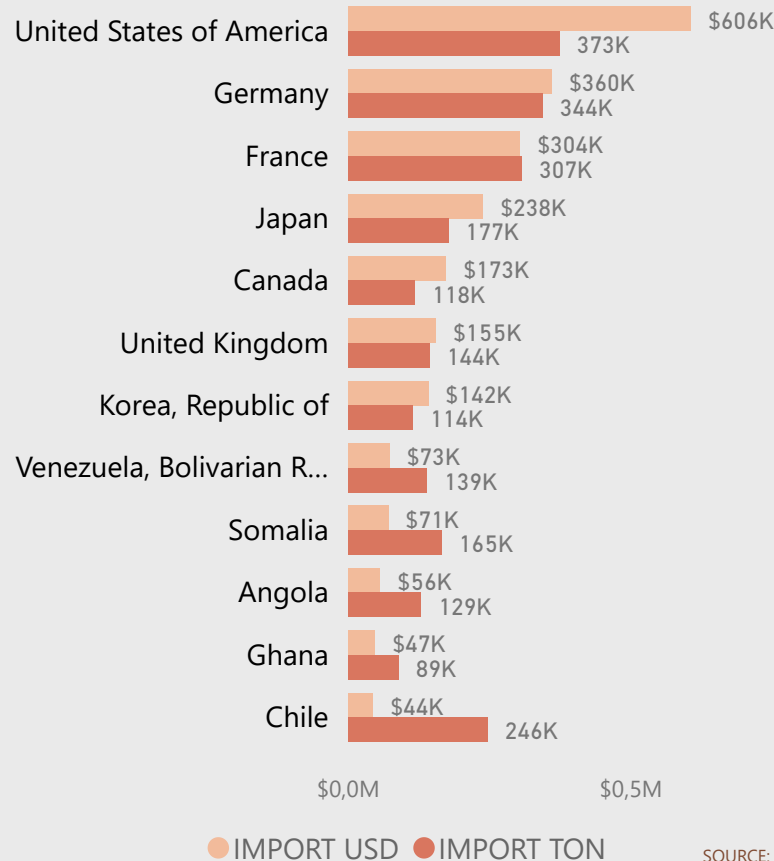
WORLD PASTA (1902.19)
IMPORT IN 2019 (USD)

4.268.211

WORLD PASTA (1902.19)
IMPORT IN 2019 (TON)

4.276.378

WORLD PASTA IMPORTS IN 2019 (1902.19 HS CODE)



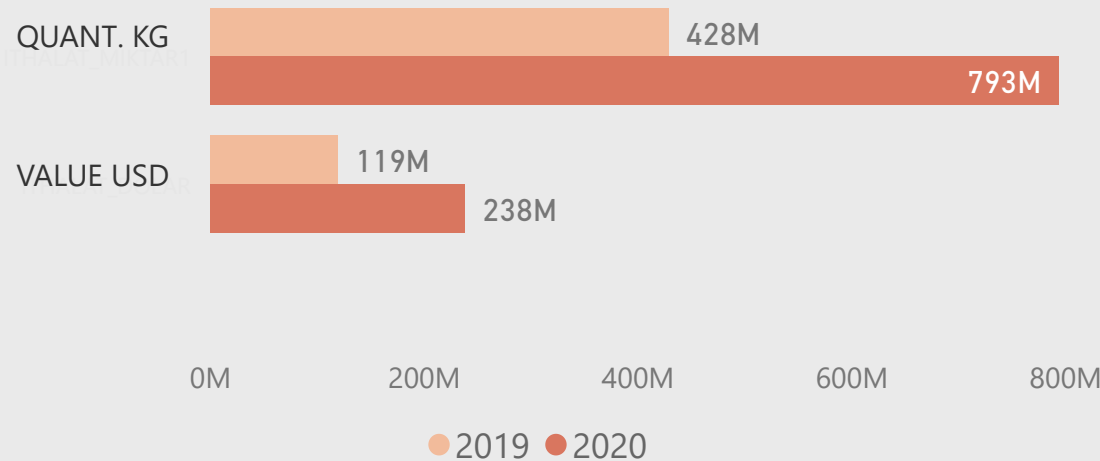
UNIT IMPORT PRICE OF COUNTRIES OVER 55K IMPORT QUANT. (\$/TON)

COUNTRY	IMPORT TON	IMPORT SHARE	UNIT PRICE (\$/TON)
United States of America	373.442	%8,7	\$1.622
Germany	343.571	%8,0	\$1.048
France	307.021	%7,2	\$990
Chile	246.039	%5,8	\$180
Japan	176.939	%4,1	\$1.348
Somalia	164.685	%3,9	\$430
United Kingdom	143.824	%3,4	\$1.077
Venezuela, Bolivarian Republic of	138.906	%3,2	\$527
Angola	128.702	%3,0	\$438
Canada	117.695	%2,8	\$1.469
Korea, Republic of	114.169	%2,7	\$1.240
Ghana	89.111	%2,1	\$533
Netherlands	87.531	%2,0	\$1.187
Togo	76.945	%1,8	\$429
Belgium	70.640	%1,7	\$1.176
Saudi Arabia	58.166	%1,4	\$1.084
Russian Federation	55.031	%1,3	\$1.114

SOURCE: TRADEMAP

According to Trademap data, in 2019, USA ranked first with 8.7% share in 1902.19 GTIP pasta imports. Germany (343K tons) and France (307K tons) followed USA, respectively. Somalia, which Turkey exported 163 tons of pasta in 2019, is the sixth largest importer country.

JANUARY - MAY 2020

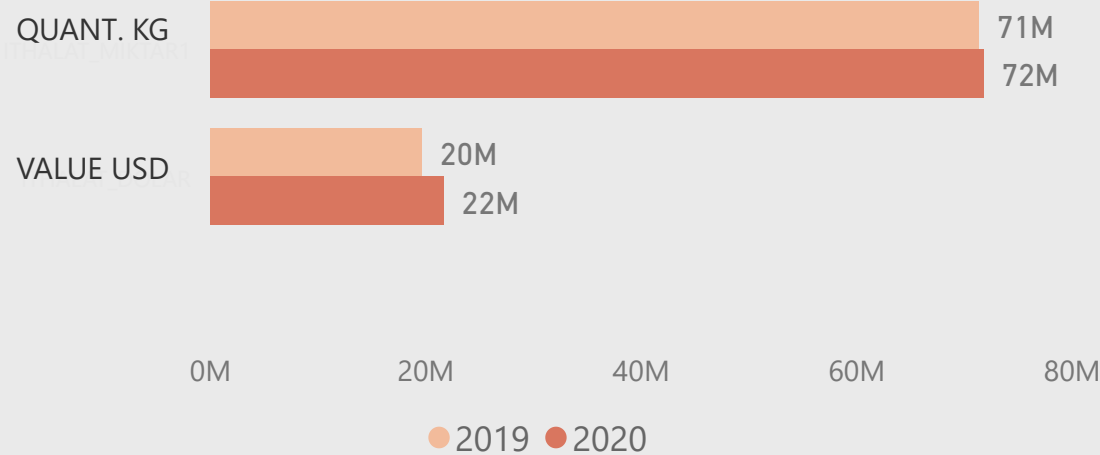


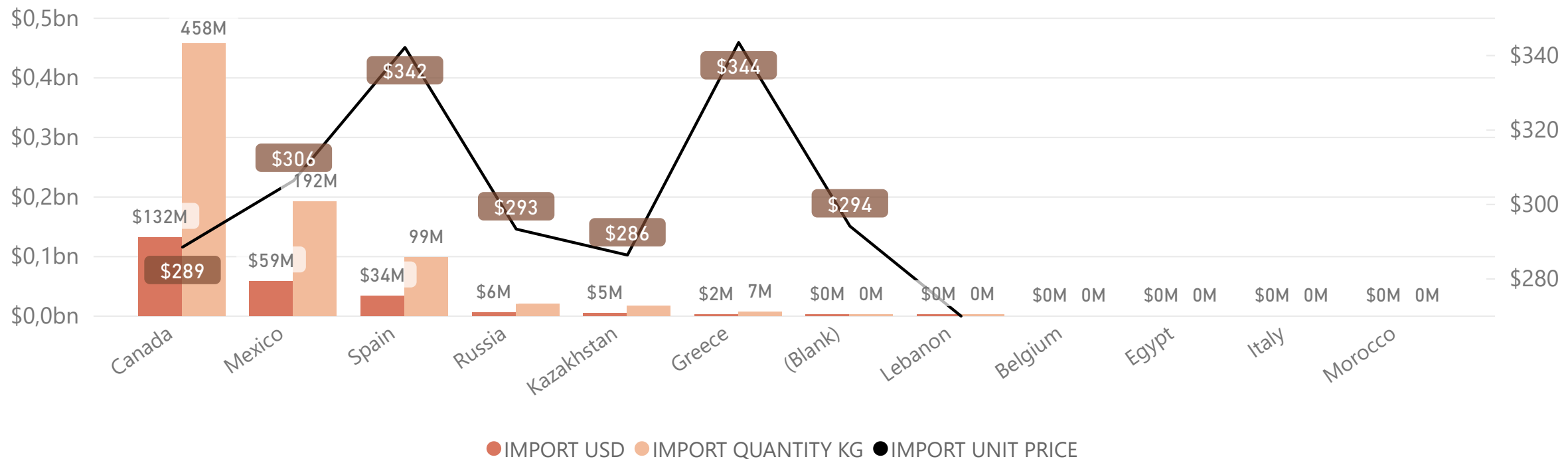
In May 2020, compared to May 2019, durum wheat imports increased 0.6% and reached to 71.8 thousand tons; in terms of value, increased by 10.4%, reaching \$21.7 million.

In the first five months of 2020, compared to same period of the previous year, amount of durum wheat imports increased 85%, value of durum wheat imports increased 100%.

Average unit price per ton was \$276/ton in May 2019. In May 2020, it increased 9.7% and reached \$302/ton.

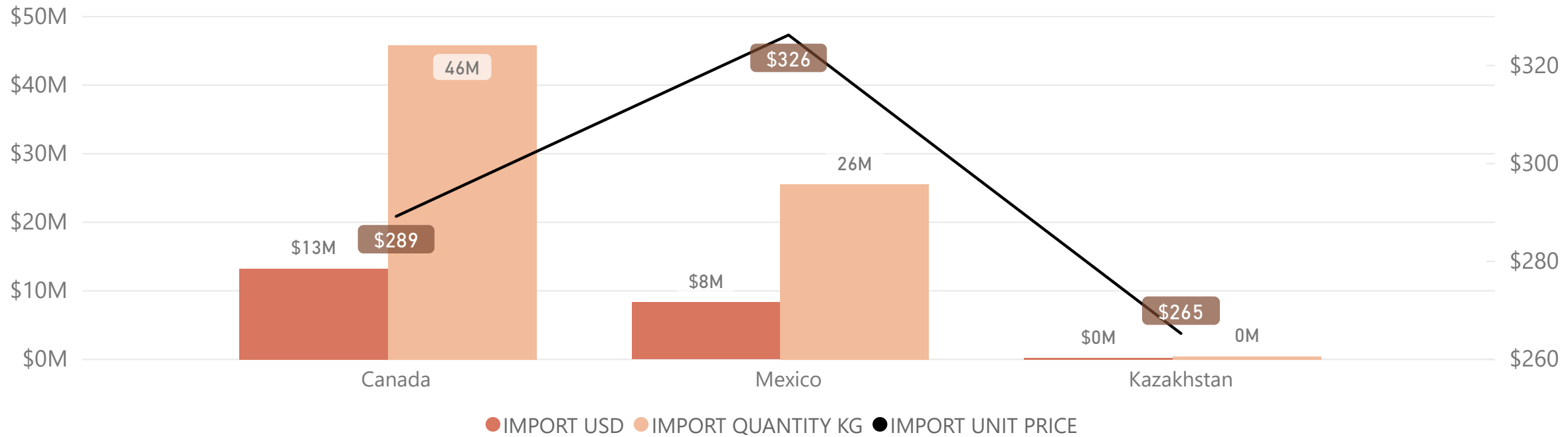
MAY 2020





In the first five months of 2020, biggest importer of durum wheat was Canada with 457.9 thousand tons (\$132.1 million), followed by Mexico and Spain.

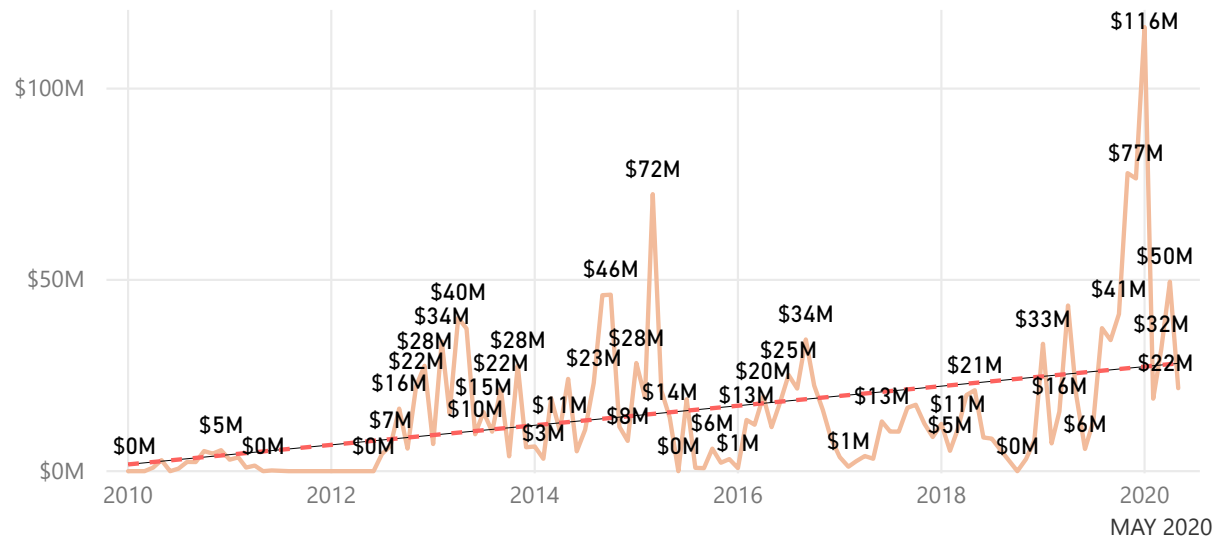
In the first five months of 2020, average unit price of durum wheat imported by Canada was \$289/ton. Lowest price belonged to Kazakhstan with \$286/ton, while the highest unit price belongs to Greece with \$344/ton.



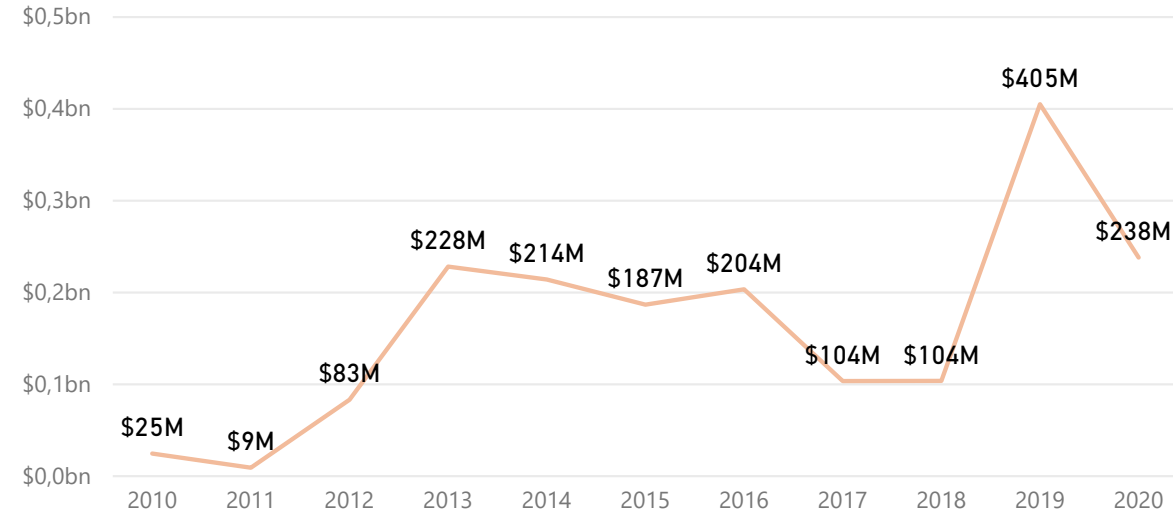
In May 2020, the highest amount of durum wheat is imported by Canada with 45.8 thousand tons (\$13.2 million), followed by Mexico and Kazakhstan.

In May, average unit price of durum wheat imported by Canada was \$289/ton. Highest unit price belongs to Mexico with \$326/ton.

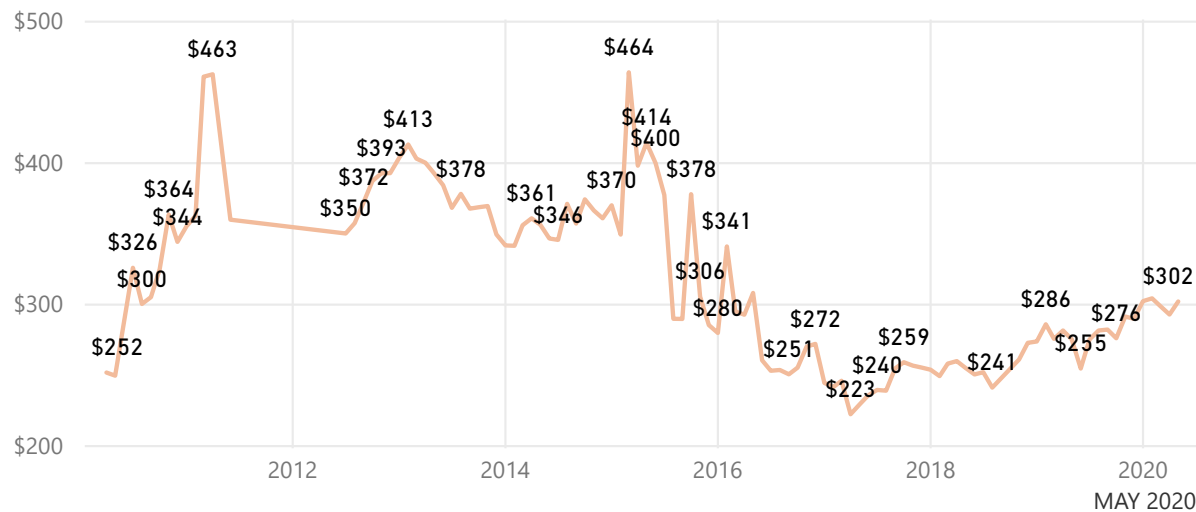
MONTHLY IMPORT VALUE (USD)



YEARLY IMPORT VALUE (USD)



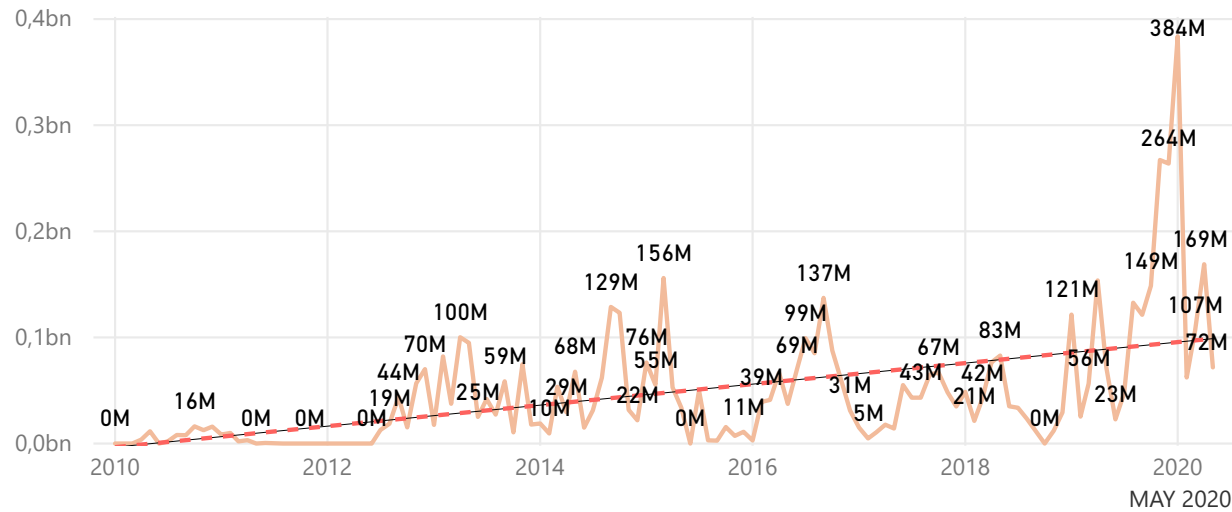
MONTHLY IMPORT UNIT PRICE (USD/TON)



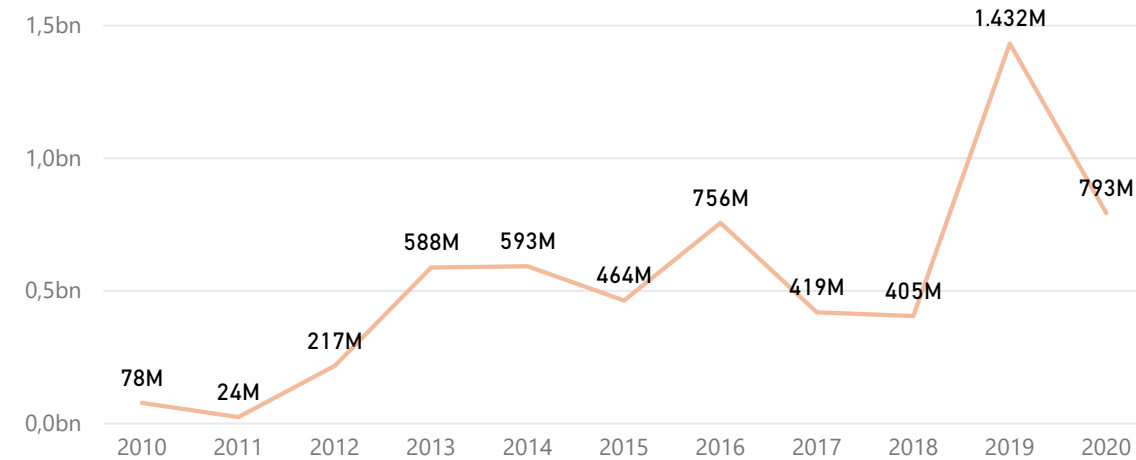
When the monthly import values are analyzed by years, it is seen that imports in January 2020 (\$116 million) is the highest monthly import ever.

Also, unit value of import past \$300 level in May 2020, reaching the highest value in last 4 years. The value of imports made in the first five months of 2020 has already past the total of 2017 and 2018.

MONTHLY IMPORT QUANTITY (KG)



YEARLY IMPORT QUANTITY (KG)



From data, it is seen that record high Durum Wheat imports in 2019 continues in 2020.

Imports in January 2020 (384 thousand tons) is the highest amount of export at all times. Imports in the first five months of 2020 is more than the amounts imported both in 2017 and 2018.

2019 - 2020 IMPORT COMPARISON CHART

JANUARY - MAY 2020

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	793.447.413	\$238.124.247	428.412.385	\$119.087.311	%85,2	%100,0
Durum wheat (excl. seed for sowing)	793.447.413	\$238.124.247	428.412.385	\$119.087.311	%85,2	%100,0
190219	2.372.213	\$3.041.286	948.366	\$1.582.610	%150,1	%92,2
Uncooked pasta, not stuffed or otherwise prepared, not containing common wheat flour or meal or eggs (Excl. fenilketonüri pt.)	1.950.029	\$2.454.945	812.130	\$1.338.886	%140,1	%83,4
Uncooked pasta, not stuffed or otherwise prepared	283.197	\$327.593	58.995	\$123.735	%380,0	%164,8
Uncooked pasta, not stuffed, others	135.633	\$240.582	63.945	\$103.180	%112,1	%133,2
Uncooked pasta, not stuffed or otherwise prepared, containing vegetables	3.354	\$18.166	13.296	\$16.809	-%74,8	%8,1
Low protein pasta for phenylketonuria patients	0	\$0				
190230	190.483	\$286.174	232.294	\$706.747	-%18,0	-%59,5
Pasta, dried	121.643	\$188.497	197.881	\$682.099	-%38,5	-%72,4
Pasta, others	68.840	\$97.677	34.413	\$24.648	%100,0	%296,3
190211	142.477	\$253.309	426.934	\$632.407	-%66,6	-%59,9
Uncooked pasta, containing common wheat flour or meal or eggs	102.062	\$203.986	176.592	\$334.178	-%42,2	-%39,0
Uncooked pasta, not stuffed containing eggs (Excl. phenylketonuria pt.), others	40.415	\$49.323	250.342	\$298.229	-%83,9	-%83,5
190220	233.661	\$441.561	140.022	\$465.218	%66,9	-%5,1
Cooked pasta, stuffed with meat or other substances, others	232.130	\$420.623	79.452	\$296.828	%192,2	%41,7
Cooked pasta, cooked, stuffed with meat or other substances	0	\$0	60.570	\$168.390	-%100,0	-%100,0
Pasta, stuffed, containing > 20% by weight of fish, etc	1.531	\$20.938	0	\$0		
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	48	\$228	%1004,2	%870,2
Couscous, cooked or otherwise prepared	530	\$2.212	48	\$228	%1004,2	%870,2
Couscous unprepared	0	\$0	0	\$0		
Total	796.388.277	\$242.151.237	430.163.449	\$122.478.493	%85,1	%97,7

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

3.150.000

TON PRODUCTION

288

KG/DECARE (YIELD)

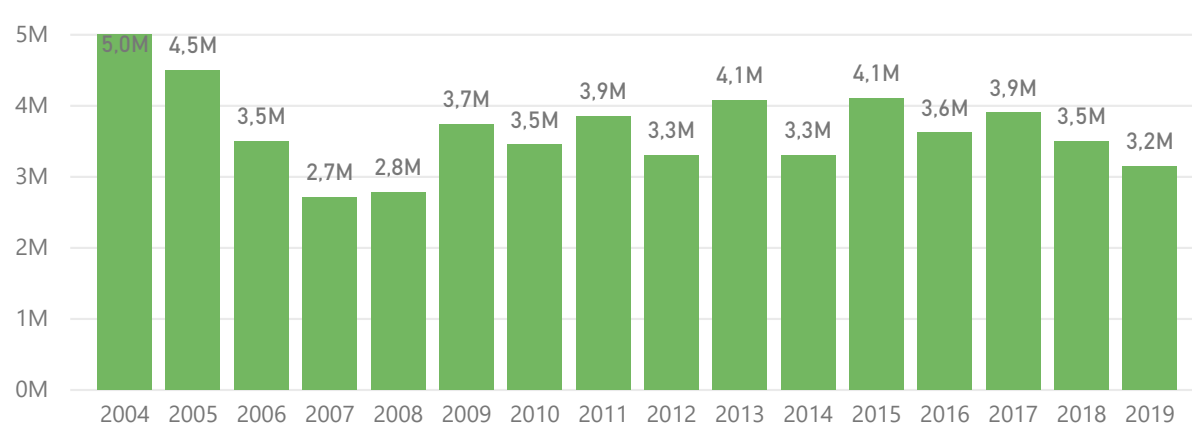
10.955.635

DECARE HARVEST AREA

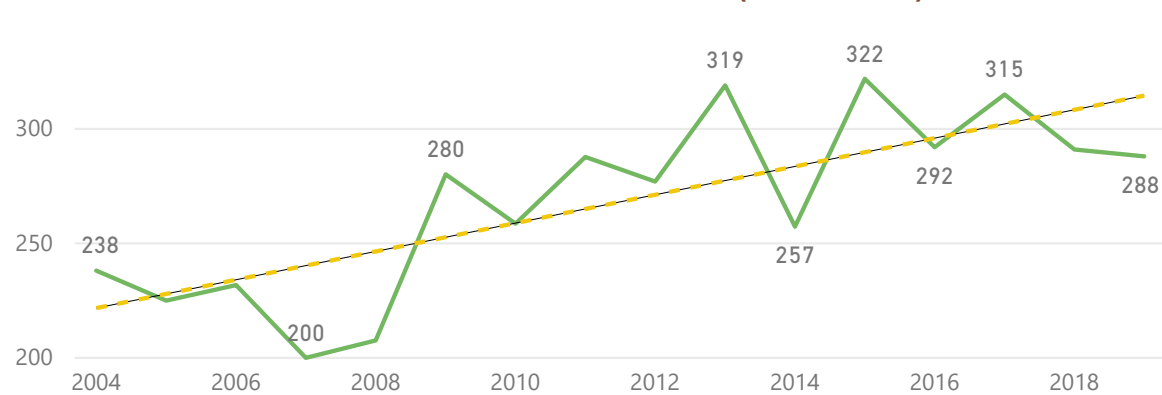
%16,0

RATIO PER TOTAL WHEAT

DURUM WHEAT PRODUCTION PER YEAR



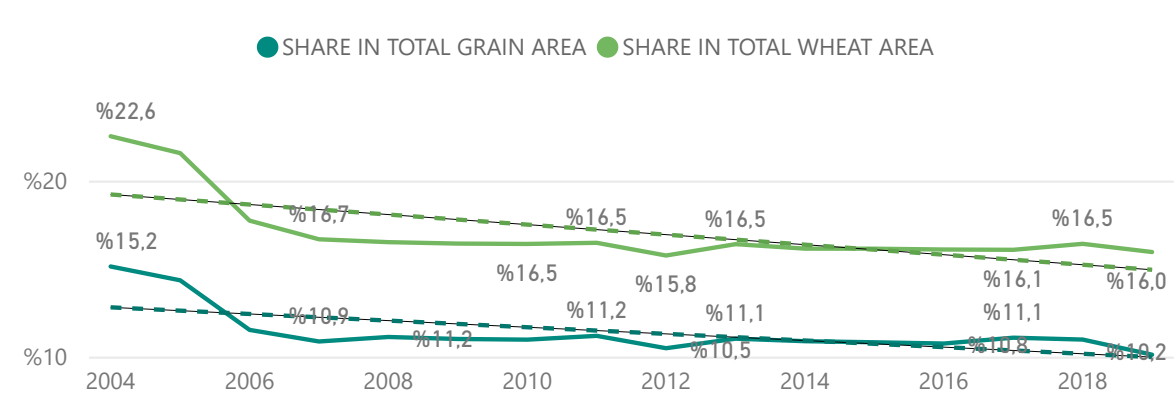
DURUM WHEAT YIELD PER YEAR (KG/DECARE)



DURUM WHEAT HARVEST AREA PER YER (DECARE)



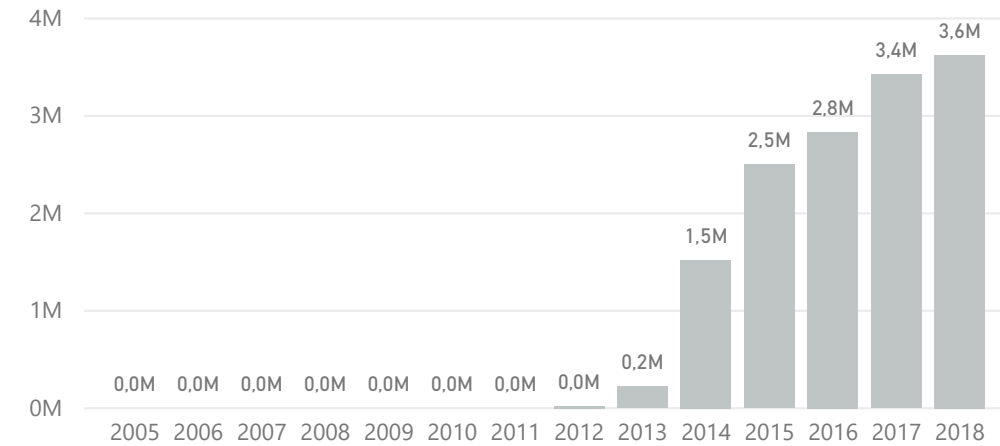
RATIO OF DURUM WHEAT HARVEST AREA



PASTA CONSUMPTION PER CAPITA (Kg/Per)

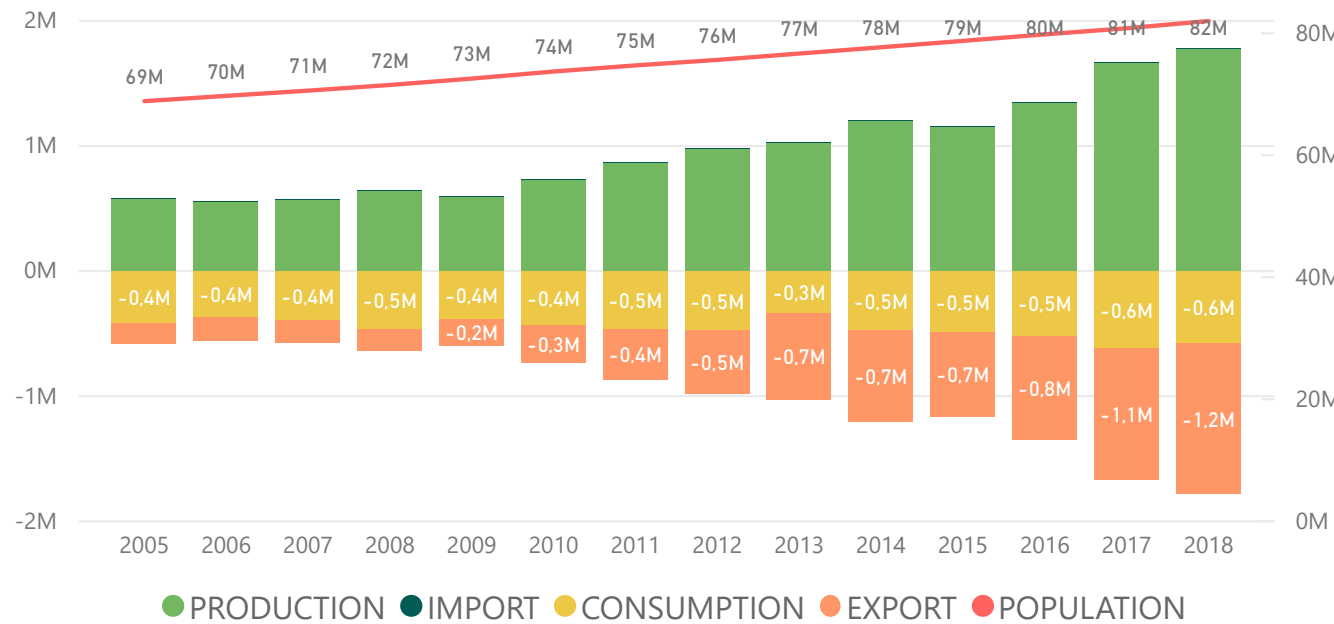


REFUGEE NUMBERS PER YEAR



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

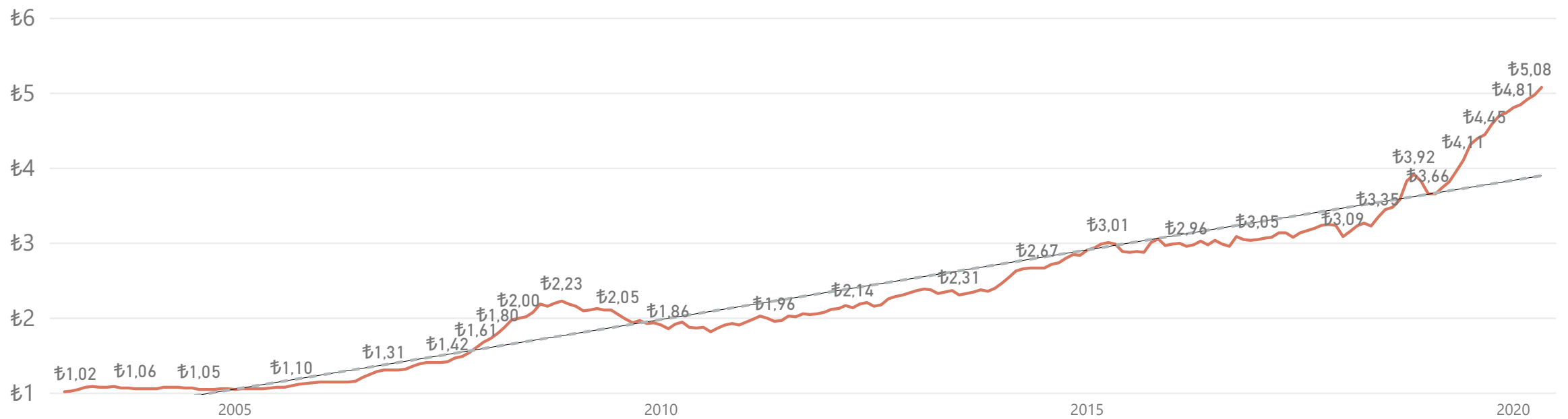
Source : Ministry of the interior and TÜİK



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

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₺5,08 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
190219100000	PASTA	Uncooked pasta, not stuffed or otherwise prepared, not containing common wheat flour or meal or eggs
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

