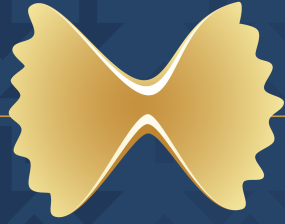


# MÜSAD



MAKARNA ÜRETİCİLERİ VE SANAYİCİLERİ DERNEĞİ  
Pasta Producers and Industrialists Association

## SECTOR REPORT

JANUARY - JUNE 2020



# Pasta Producers and Industrialists' Association

## Sector Report

JANUARY - JUNE 2020

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PUBLISH DATE

1 August 2020

Hello,

MÜSAD's January – June 2020 Sector Report includes pasta sector's foreign trade data of a period that mostly affected by negative conditions of coronavirus pandemic.

Since the first case have been reported in our country, after March's second half COVID-19 precautions has been applied. During January – June 2020 period, pasta exports increased 15.7% and reached 709.3 thousand tons in quantity; increased by 25.8% and reached \$361.6 million in value. In first half of the year, compared to same period of the previous year, average price per ton increased 8.7% and reached \$510/ton.

Also, amount durum wheat imports in first half of 2020, compared to same period of the previous year increased 113%, value of durum wheat imports increased 131%. Unit price of imported durum wheat has increased by 8.4% and reached \$300/ton in 2020. It was \$276/ton last year.

These figures show that, we were able to increase our unit export price only as much as the price surge in raw materials.

Although an added value increase could not be provided, these figures shows that our sector continued production and exports devotedly, despite restrictions and measures due to COVID-19 pandemic.

While these are happening in foreign trade wheat harvest in our country is almost done. A high crop was forecasted and as industrialists we were optimistic about this. But before we were delighted, with the expectation that prices are going to increase, people started buying wheat using cheap loans. Besides, Sugar Institution has entered the market, which we couldn't make sense. In July, prices of wheat varieties for bread and pasta increased from 800 Turkish liras to 2,050 Turkish liras just in 15 days.

If this price surge of wheat is not prevented, eventually it will affect bread and pasta prices and cause an increase inevitably.

Turkish Grain Board, should step in quickly and declare buying price, and opportunism with cheap loans must be prevented. Otherwise, applications intended to support wheels of economy to turn will result in exact opposite way.

Hoping to reach days that pandemic will end, healthful...

Nihat Uysallı  
Chairman of the Executive Board

## JUNE 2020

**EXPORT  
QUANTITY (KG)** **%57,7**

JUNE 2020

**116.523.556**

JUNE 2019

73.879.280



**EXPORT VALUE  
(USD)** **%70,2**

JUNE 2020

**\$59.884.768**

JUNE 2019

\$35.182.831



**UNIT PRICE  
(USD/TON)** **%7,9**

JUNE 2020

**\$514**

JUNE 2019

\$476



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

## JANUARY - JUNE 2020

**EXPORT  
QUANTITY (KG)** **%15,7**

2020 TOTAL

**709.256.391**

2019 TOTAL

613.044.817



**EXPORT VALUE  
(USD)** **%25,8**

2020 TOTAL

**\$361.621.602**

2019 TOTAL

\$287.446.513



**UNIT PRICE  
(USD/TON)** **%8,7**

2020 TOTAL

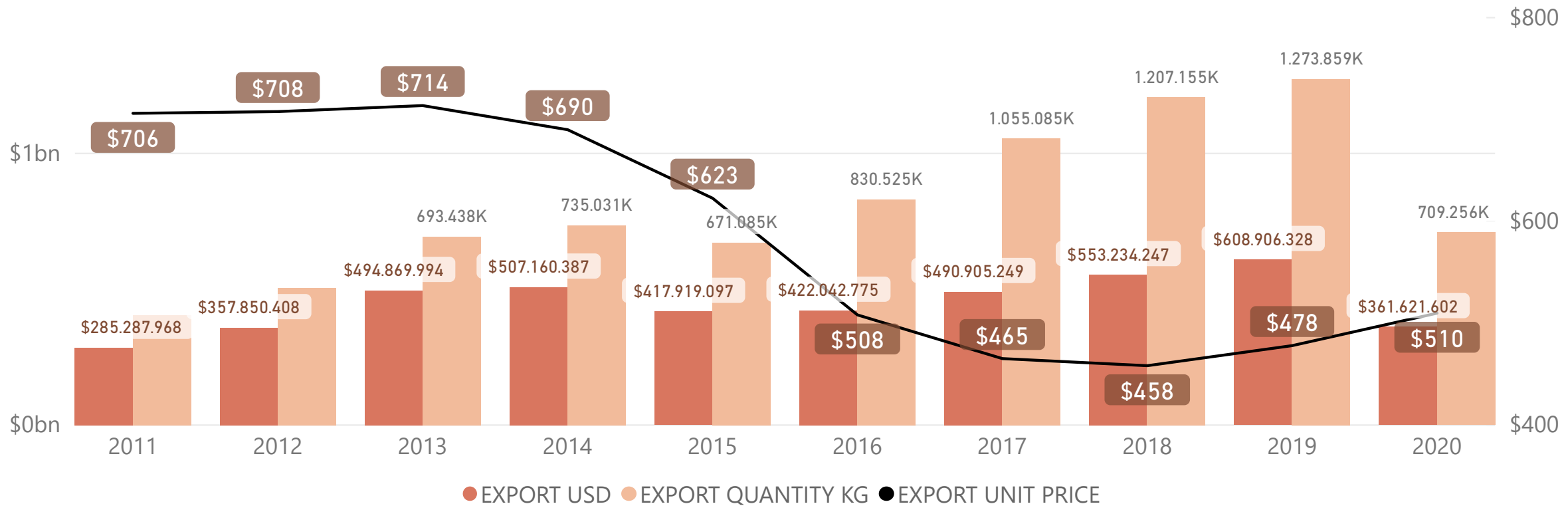
**\$510**

2019 TOTAL

\$469



\* 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 \$458/ton. Since 2011, highest yearly value was \$714/ton in 2013, lowest value was \$458/ton in 2018.

Since 2019, with increasing durum wheat costs, unit export price rose and reached to \$510/ton by June 2020. But, compared to surge in durum wheat prices, increase in unit export price is still insufficient.

## JUNE 2020

**IMPORT  
QUANTITY (KG)**

**%317**

JUNE 2020

**86.111.351**

JUNE 2019

20.663.340



**IMPORT VALUE  
(USD)**

**%373**

JUNE 2020

**\$25.336.064**

JUNE 2019

\$5.351.374



**UNIT PRICE  
(USD/TON)**

**%13,6**

JUNE 2020

**\$294**

JUNE 2019

\$259



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

## JANUARY - JUNE 2020

**IMPORT  
QUANTITY (KG)**

**%113**

2020 TOTAL

**879.558.764**

2019 TOTAL

413.129.213



**IMPORT VALUE  
(USD)**

**%131**

2020 TOTAL

**\$263.460.311**

2019 TOTAL

\$114.132.311



**UNIT PRICE  
(USD/TON)**

**%8,4**

2020 TOTAL

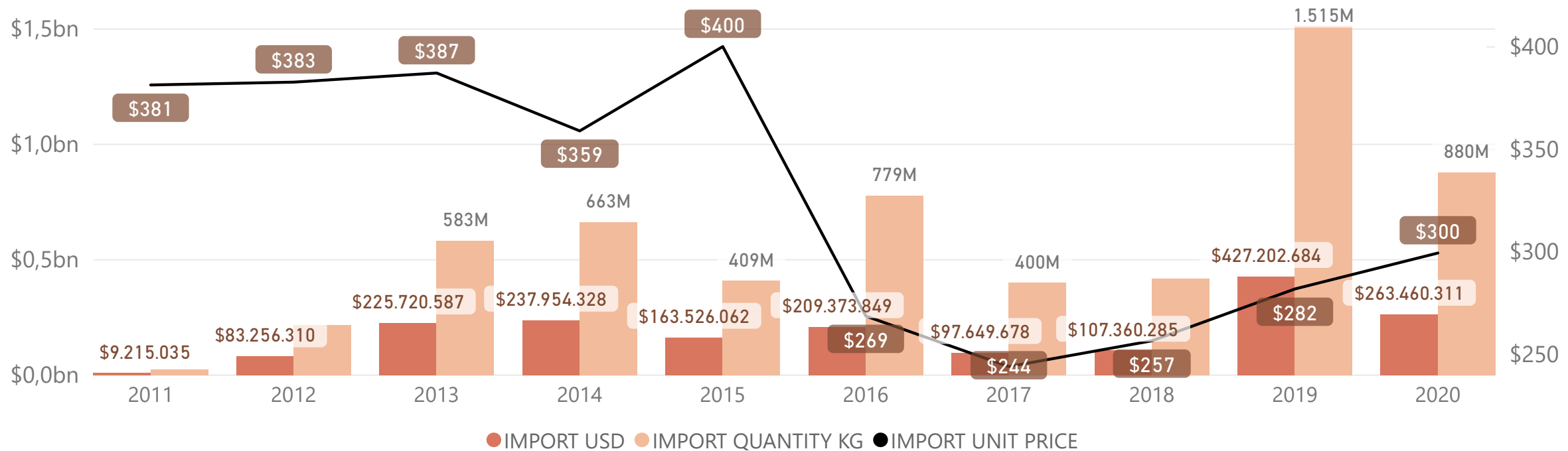
**\$300**

2019 TOTAL

\$276

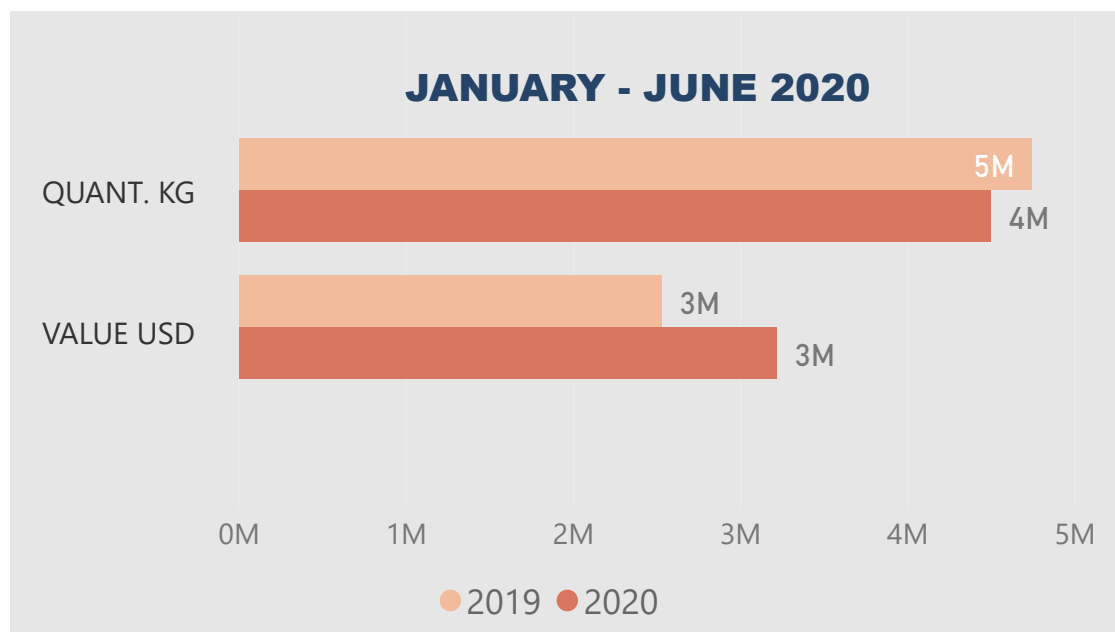


\* Comparisons were made with the same period of the previous year.



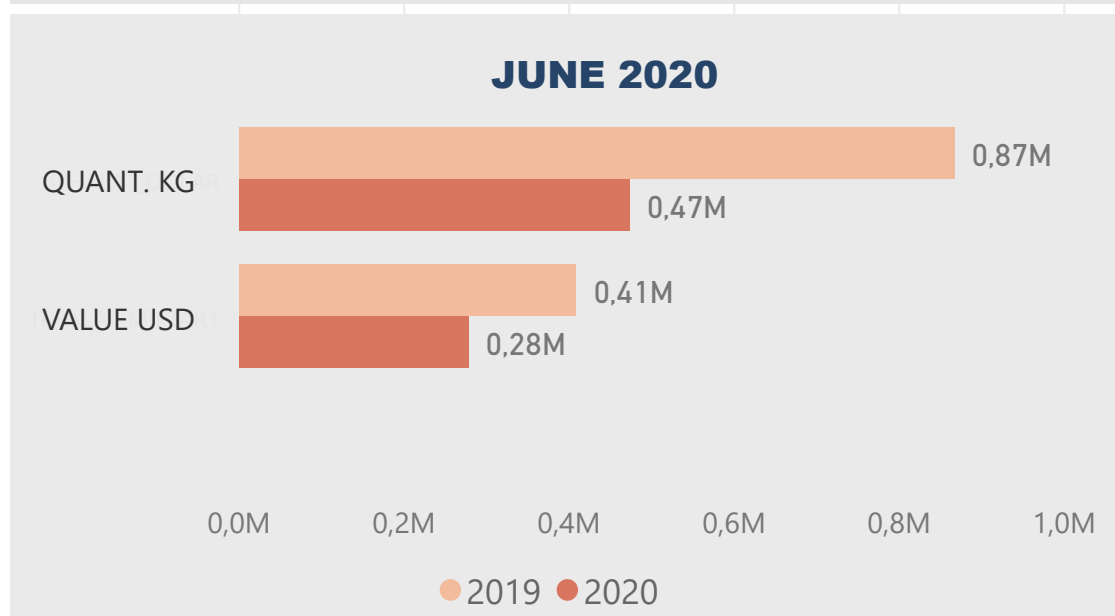
Durum Wheat Imports by years shows us that, compared to other years, durum wheat imports in 2016 and 2019 comes to the fore. Also, compared to 2016, durum wheat imports in 2019 are two times higher in terms of quantity and value.

Import Unit Value was around \$390/ton between 2011 – 2015, then it fell sharply to \$244/ton in 2017. After 2018 it began increasing again and reached above \$300 level in 2020.



In June 2020, compared to June 2019, Pasta Exports increased 57.7% and reached 116.5 thousand tons in quantity; increased 70.2% and reached \$59.9 million in value.

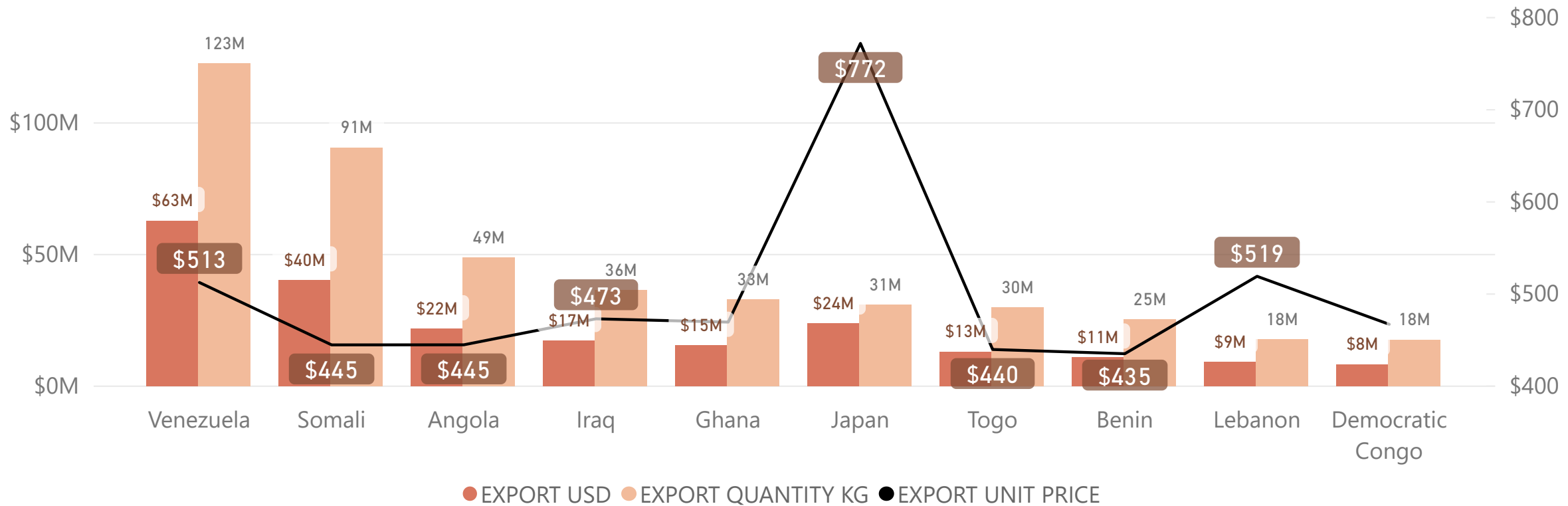
In the first half of 2020, compared to same period of the previous year, pasta exports increased 15.7% and reached 709.3 thousand tons in quantity; increased by 25.8% and reached \$361.6 million in value.



Average price per ton was \$476 in June 2019. It increased 7.9% and reached to \$514 in June 2020.

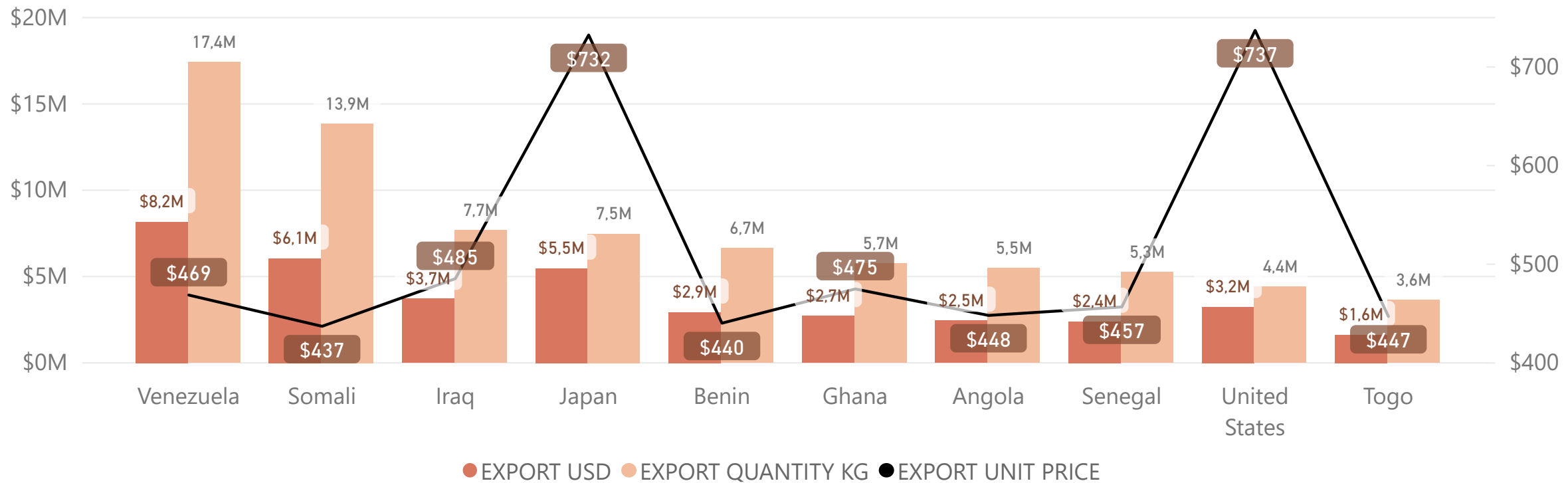
Compared to same period of the previous year, in the first half on 2020, average price per ton increased 8,7% and reached \$510/ton.





In the six months of 2020, biggest importer was Venezuela with 122.6 thousand tons, followed by Somalia and Angola. In terms of value, biggest importer is still Venezuela. Japan, which took the 6th place on quantity of imports, is on the 3th place in terms of value.

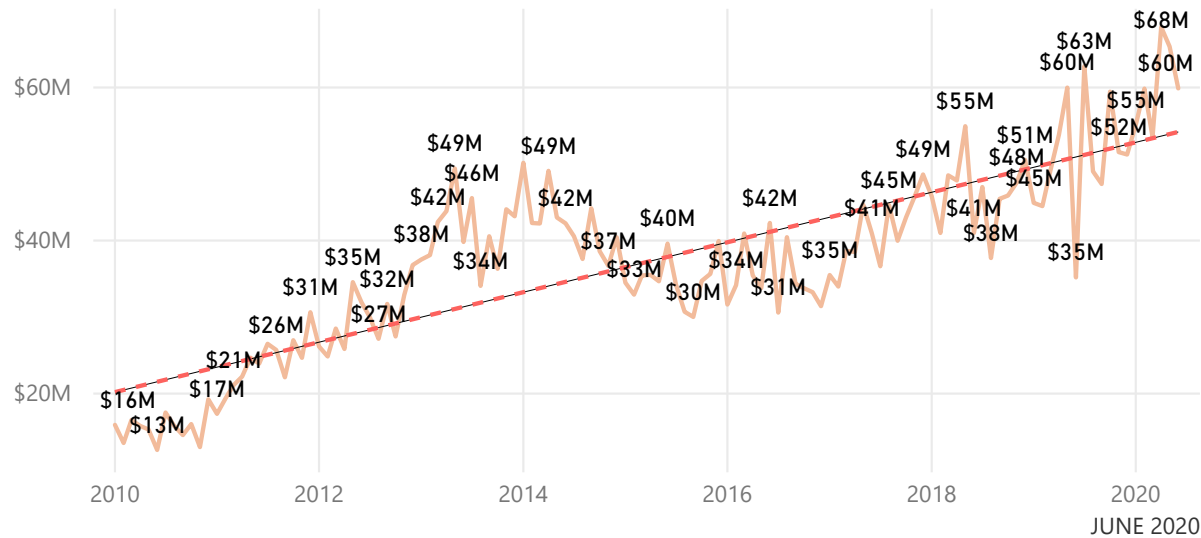
On the basis of unit price amongst top 10 countries we export to in 2020, Japan ranked first with \$772/ton. Benin was on the last place on the basis of unit price.



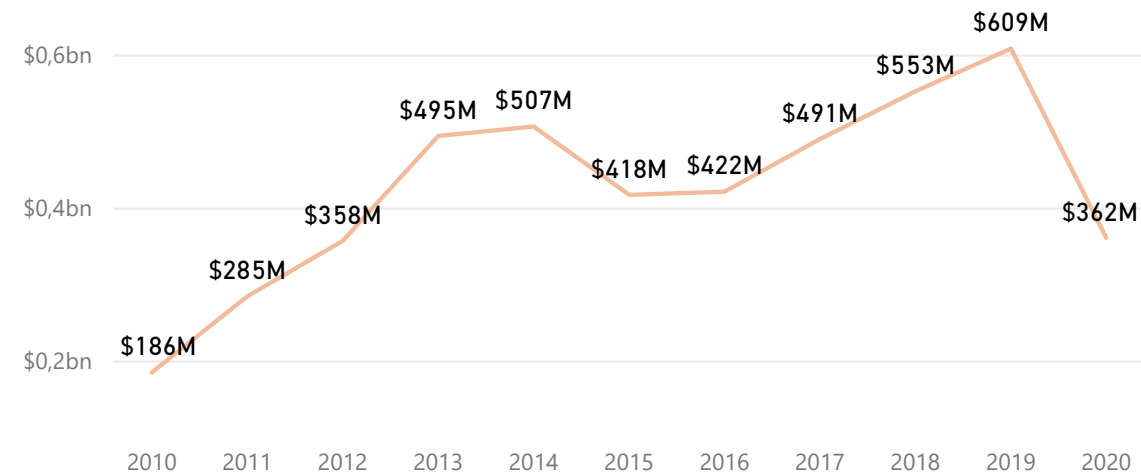
In June 2020, biggest importer in terms of quantity was Venezuela with 17.4 thousand tons, followed by Somalia and Iraq.

In June 2020, among the top 10 countries we export to on the basis of unit price, USA ranked 1st with \$737/ton, followed by Japan (\$732/ton) and Iraq (\$485/ton) respectively. Somalia had the lowest price with \$437/ton.

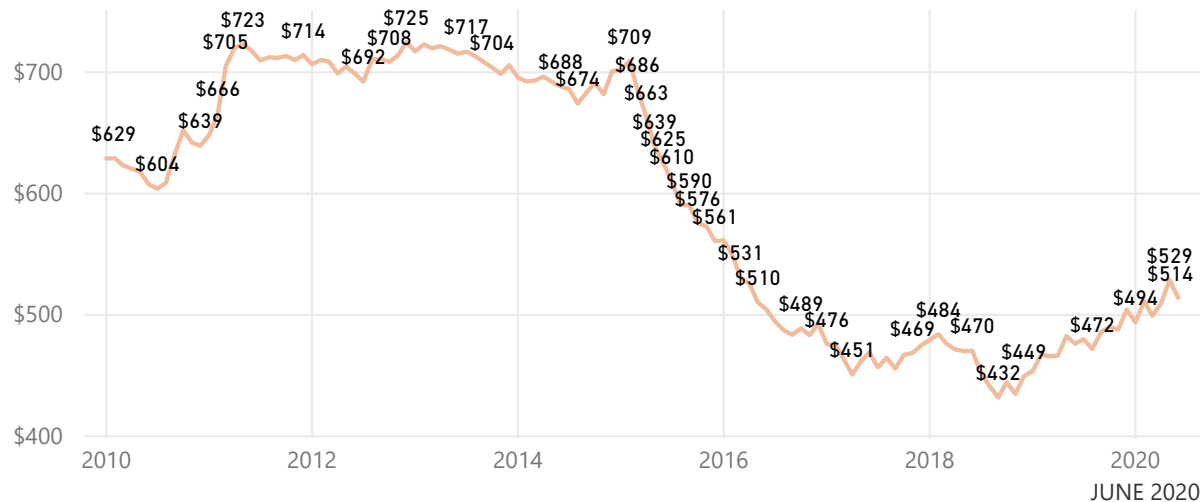
## MONTHLY EXPORT VALUE (USD)



## YEARLY EXPORT VALUE (USD)



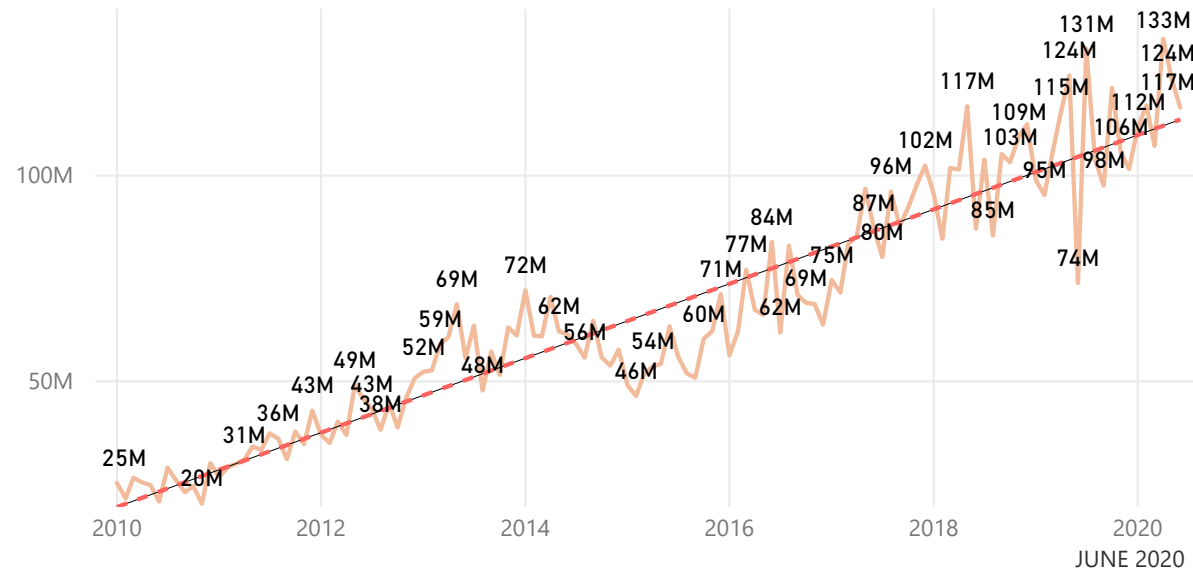
## MONTHLY EXPORT UNIT PRICE (USD/TON)



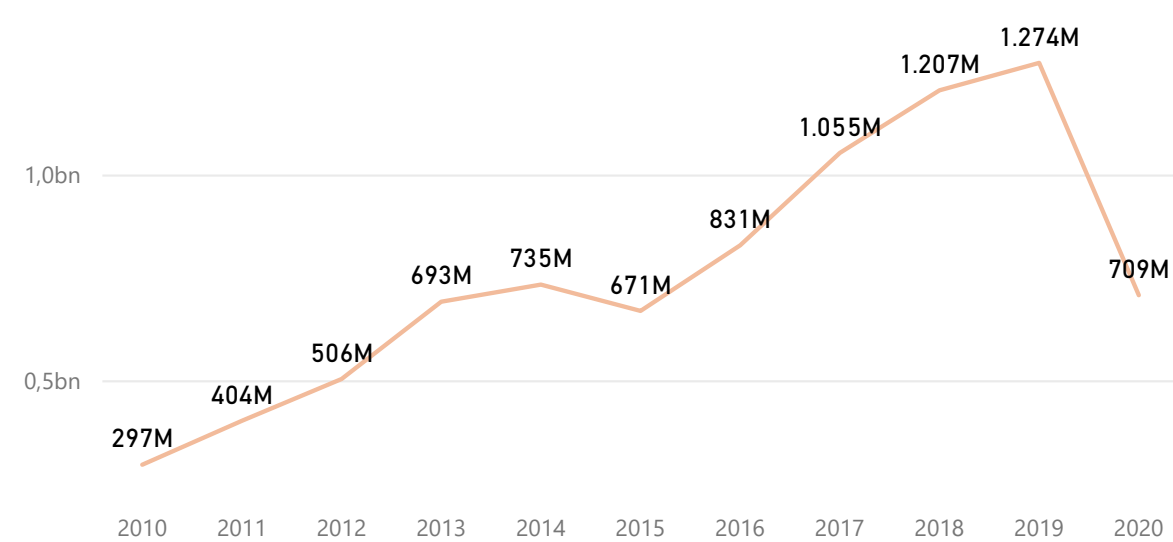
When pasta exports are analyzed by years, after achieving the highest monthly export value in April 2020 (\$68 million), \$59.9 million worth of exports were made in June.

When pasta exports are analyzed on the basis of unit price, highest value of the recent years has been observed in May 2020, with \$529/ton. This value fell to \$514/ton in June 2020.

## 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. After this record, quantity of exports fell in May and June. But compared to same months of previous year, quantity of exports has increased in May and June 2020. This point and increasing trend in paste exports.

# 2019 - 2020 EXPORT COMPARISON CHART

JANUARY - JUNE 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)
<b>100119</b>	<b>35.565.650</b>	<b>\$12.020.329</b>	<b>10.472.830</b>	<b>\$3.644.112</b>	<b>%239,6</b>	<b>%229,9</b>
Durum wheat (excl. seed for sowing)	35.565.650	\$12.020.329	10.472.830	\$3.644.112	%239,6	%229,9
<b>190211</b>	<b>3.157.115</b>	<b>\$3.089.450</b>	<b>1.138.265</b>	<b>\$973.338</b>	<b>%177,4</b>	<b>%217,4</b>
Uncooked pasta, containing common wheat flour or meal or eggs	1.699.898	\$2.204.880	377.829	\$443.061	%349,9	%397,6
Uncooked pasta, not stuffed containing eggs (Excl. phenylketonuria pt.), others	1.457.217	\$884.570	760.436	\$530.277	%91,6	%66,8
<b>190219</b>	<b>669.934.337</b>	<b>\$338.921.413</b>	<b>584.464.918</b>	<b>\$273.591.136</b>	<b>%14,6</b>	<b>%23,9</b>
Low protein pasta for phenylketonuria patients	5.000	\$9.255				
Uncooked pasta, not stuffed or otherwise prepared	309.609.183	\$141.294.466	80.138.154	\$34.979.149	%286,3	%303,9
Uncooked pasta, not stuffed or otherwise prepared, containing vegetables	255.709	\$404.211	106.056	\$261.116	%141,1	%54,8
Uncooked pasta, not stuffed or otherwise prepared, not containing common wheat flour or meal or eggs (Excl. fenilketonüri pt.)	356.870.951	\$195.614.340	502.059.239	\$237.212.691	-%28,9	-%17,5
Uncooked pasta, not stuffed, others	3.193.494	\$1.599.141	2.161.469	\$1.138.180	%47,7	%40,5
<b>190220</b>	<b>595.508</b>	<b>\$727.231</b>	<b>160.025</b>	<b>\$228.573</b>	<b>%272,1</b>	<b>%218,2</b>
Cooked pasta, cooked, stuffed with meat or other substances	14.938	\$48.427	6.688	\$24.799	%123,4	%95,3
Cooked pasta, stuffed with meat or other substances, others	424.469	\$546.757	145.429	\$184.923	%191,9	%195,7
Pasta, stuffed with meat, containing > 20% by weight of meat and meat offal of any kind	9.449	\$24.101	6.376	\$14.190	%48,2	%69,8
Pasta, stuffed with meat, containing > 20% by weight of sausages and the like	1.042	\$1.925	1.484	\$3.261	-%29,8	-%41,0
Pasta, stuffed, containing > 20% by weight of fish, etc	145.610	\$106.021	48	\$1.400	%303254,2	%7472,9
<b>190230</b>	<b>35.266.692</b>	<b>\$18.696.065</b>	<b>27.089.207</b>	<b>\$12.535.212</b>	<b>%30,2</b>	<b>%49,1</b>
Pasta, dried	4.364.073	\$3.555.510	2.033.492	\$2.546.219	%114,6	%39,6
Pasta, others	30.902.619	\$15.140.555	25.055.715	\$9.988.993	%23,3	%51,6
<b>190240</b>	<b>302.739</b>	<b>\$187.443</b>	<b>192.402</b>	<b>\$118.254</b>	<b>%57,3</b>	<b>%58,5</b>
Couscous unprepared	265.758	\$153.127	141.134	\$82.637	%88,3	%85,3
Couscous, cooked or otherwise prepared	36.981	\$34.316	51.268	\$35.617	-%27,9	-%3,7
<b>Total</b>	<b>744.822.041</b>	<b>\$373.641.931</b>	<b>623.517.647</b>	<b>\$291.090.625</b>	<b>%19,5</b>	<b>%28,4</b>

\* 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

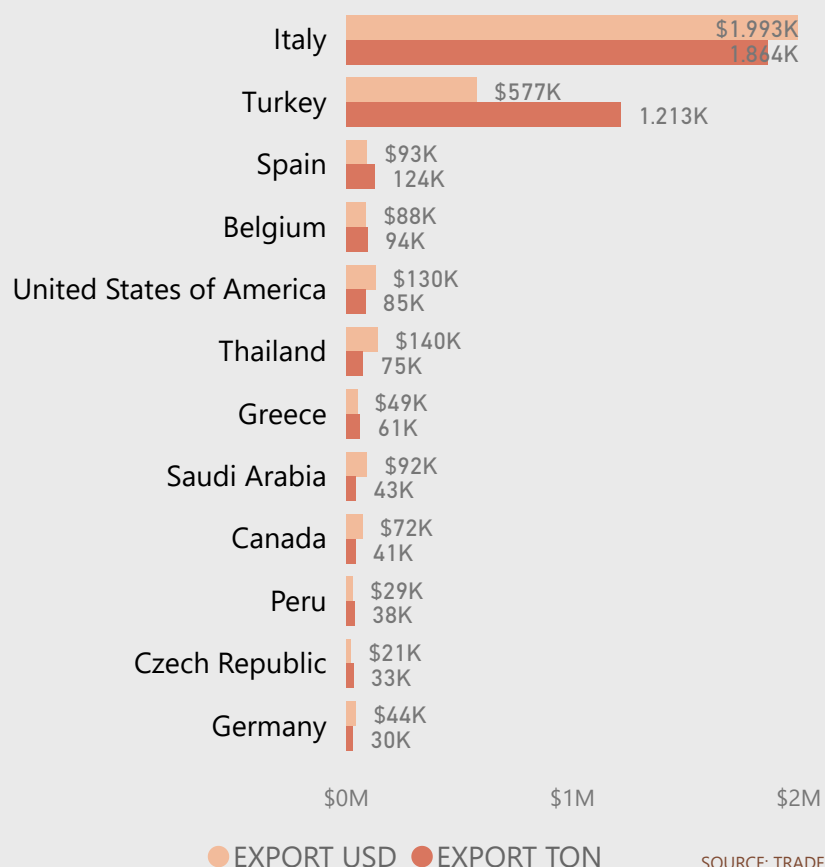
WORLD PASTA (1902.19)  
EXPORT IN 2019 (USD)

4.121.601

WORLD PASTA (1902.19)  
EXPORT IN 2019 (TON)

4.312.255

## WORLD PASTA EXPORTER IN 2019 (1902.19 GTIP)



## 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

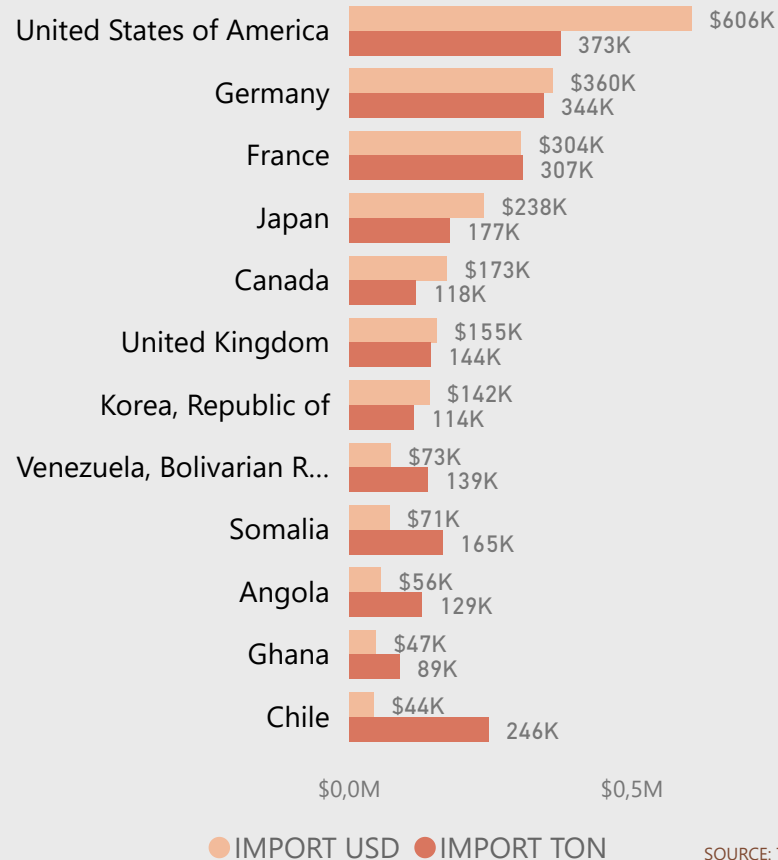
WORLD PASTA (1902.19)  
IMPORT IN 2019 (USD)

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)

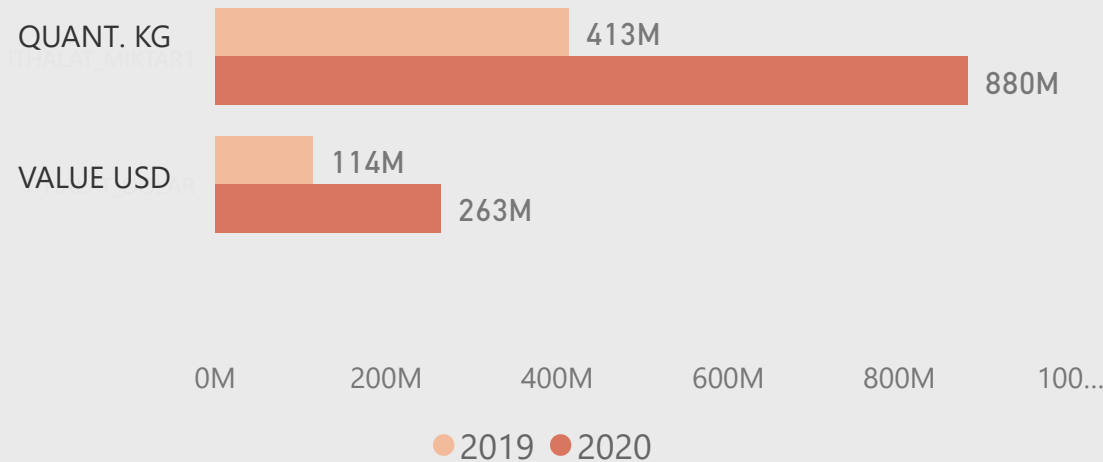
COUNTRY	IMPORT TON	IMPORT SHARE	UNIT PRICE (\$/TON)
United States of America	373.442	%8,7	\$1.622
Germany	343.571	%8,0	\$1.048
France	307.021	%7,2	\$990
Chile	246.039	%5,8	\$180
Japan	176.939	%4,1	\$1.348
Somalia	164.685	%3,9	\$430
United Kingdom	143.824	%3,4	\$1.077
Venezuela, Bolivarian Republic of	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 - JUNE 2020**

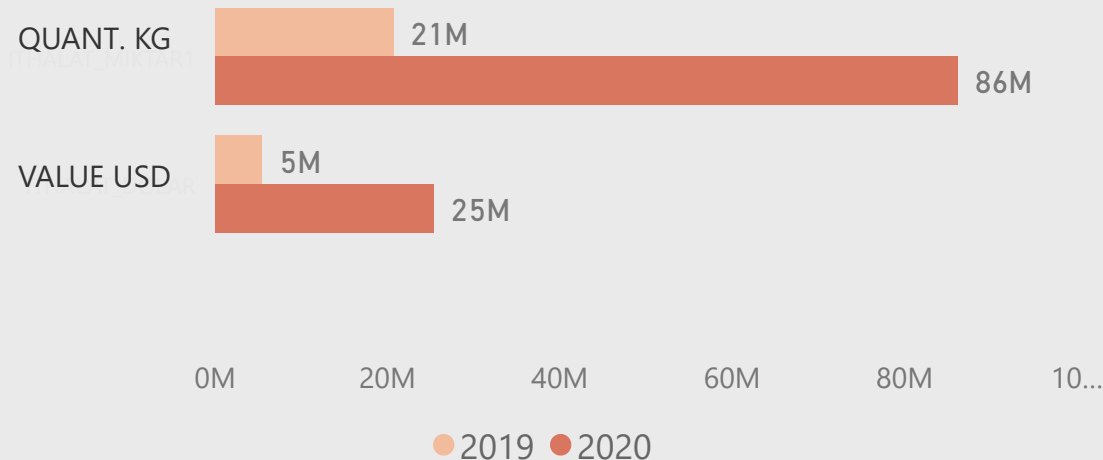


In June 2020, compared to June 2019, durum wheat imports increased 316.7% and reached to 86.1 thousand tons; in terms of value, increased by 373.4%, reaching \$25.3 million.

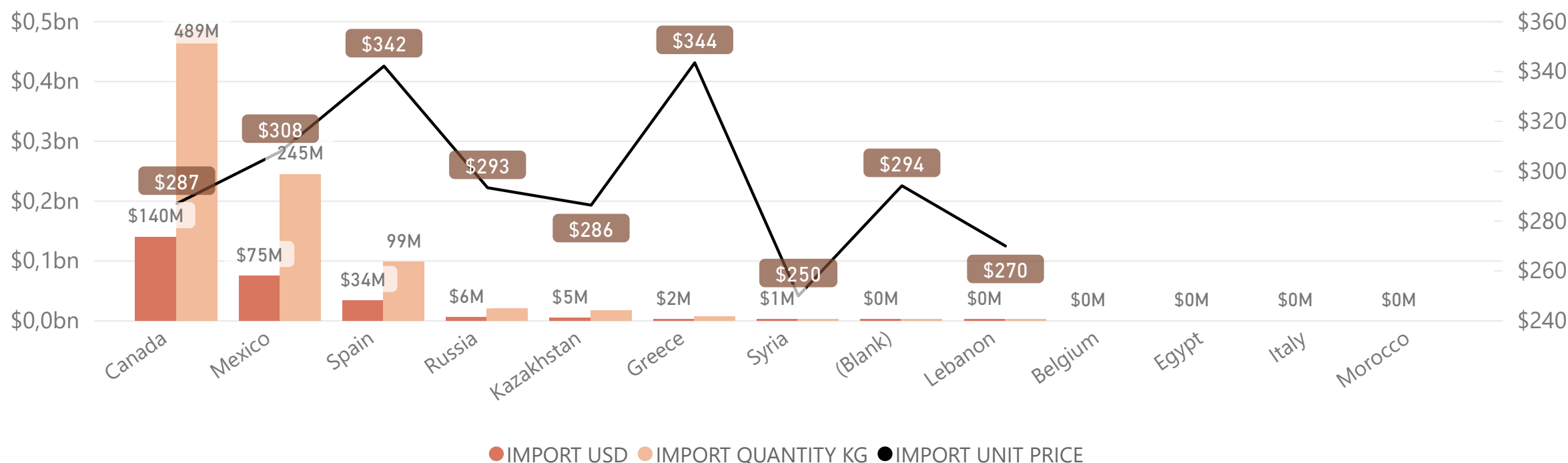
In the first half of 2020, compared to same period of the previous year, amount of durum wheat imports increased 113%, value of durum wheat imports increased 131%.

Average unit price per ton was \$259/ton in June 2019. In June 2020, it increased 13.6% and reached \$294/ton. In the first half of 2020, average unit price was \$300/tons.

**JUNE 2020**

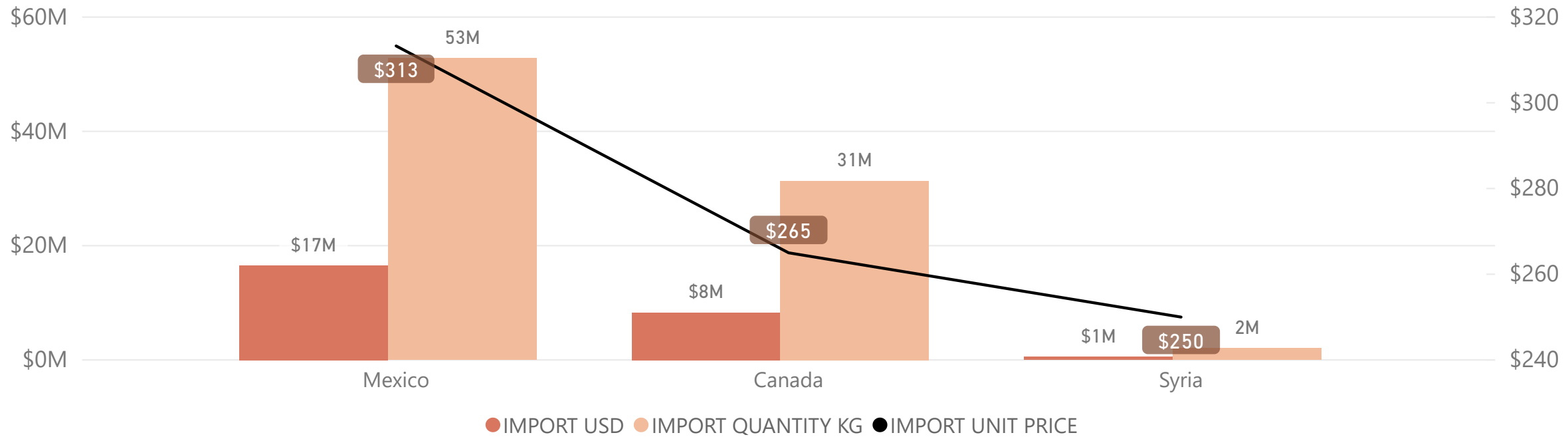






In the first six months of 2020, biggest importer of durum wheat was Canada with 489.2 thousand tons (\$140.4 million), followed by Mexico and Spain.

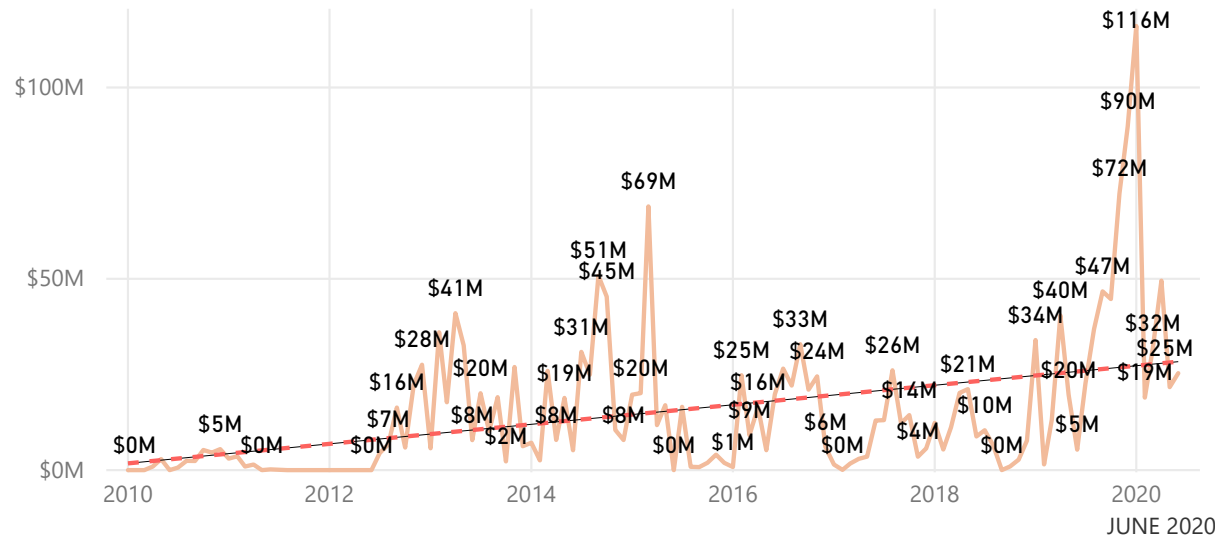
In the first six months of 2020, average unit price of durum wheat imported by Canada was \$287/ton. Lowest price amongst top exporter countries belonged to Syria with \$250/ton, while the highest unit price belongs to Greece with \$344/ton.



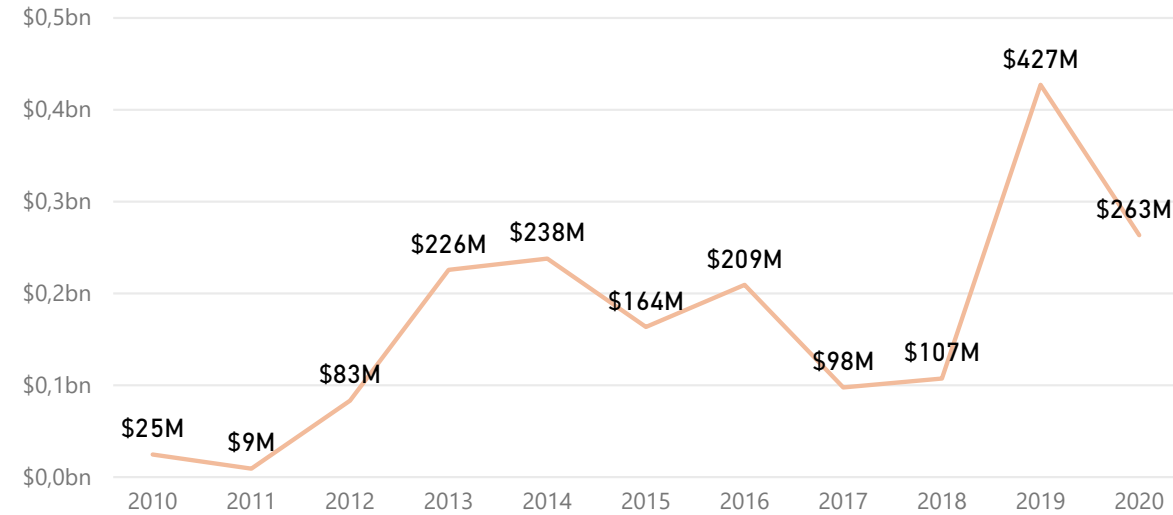
In June 2020, the highest amount of durum wheat is imported by Mexico with 52.8 thousand tons (\$16.5 million), followed by Canada and Syria.

In June, average unit price of durum wheat imported by Mexico was \$313/ton.

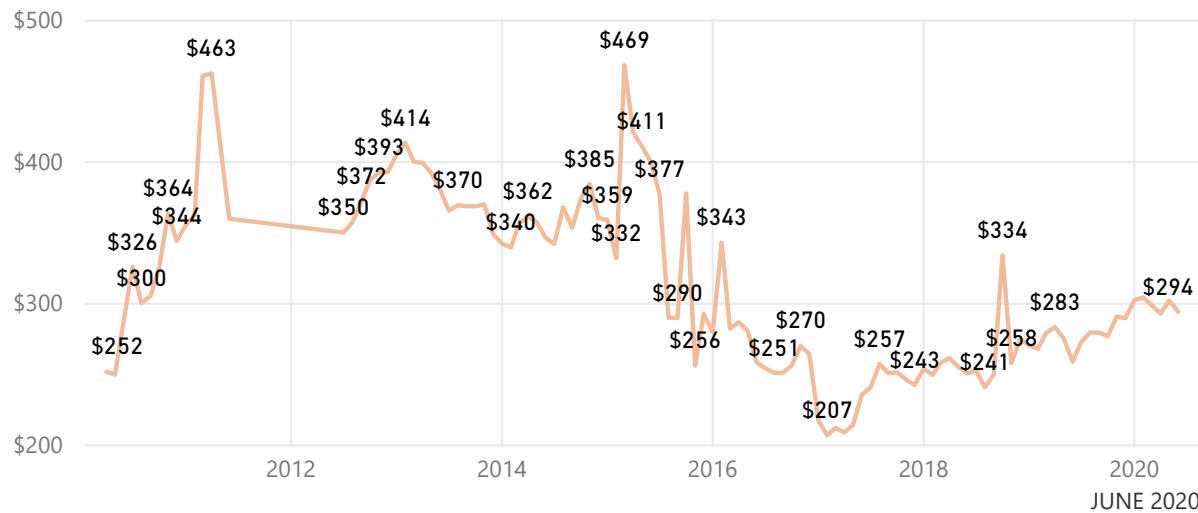
## MONTHLY IMPORT VALUE (USD)



## YEARLY IMPORT VALUE (USD)



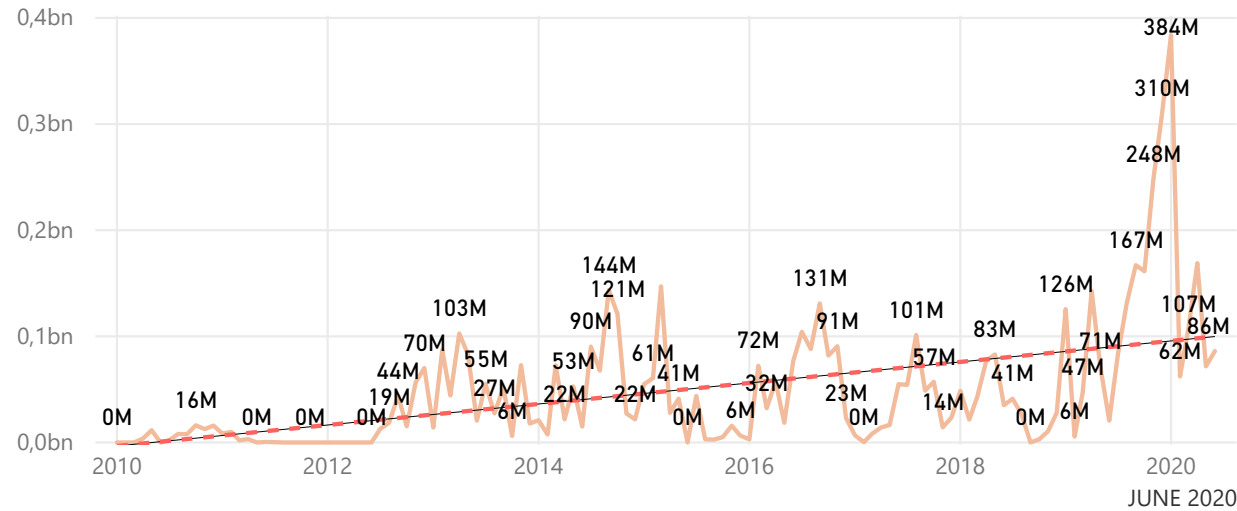
## MONTHLY IMPORT UNIT PRICE (USD/TON)



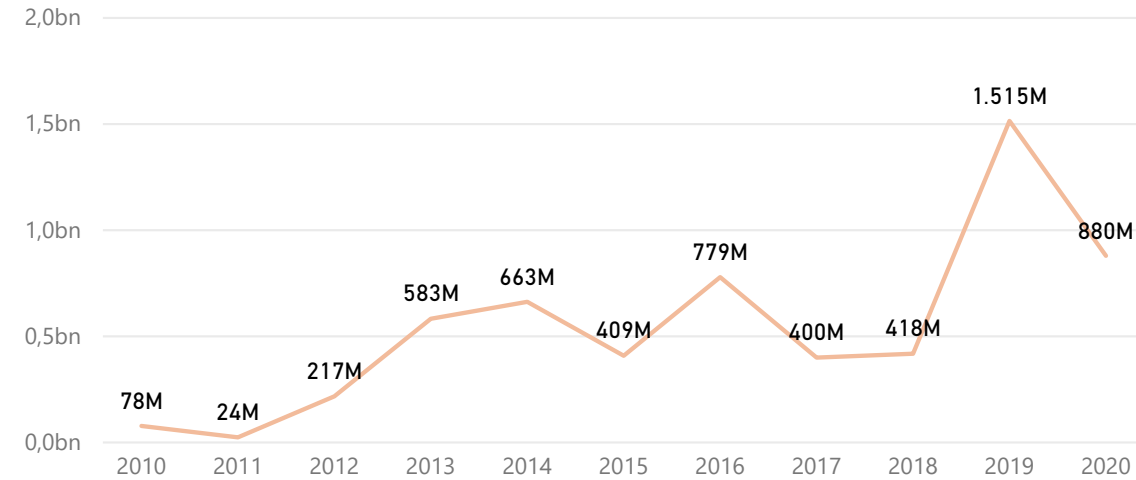
When the monthly import values are analyzed by years, it is seen that imports in January 2020 (\$116 million) is the highest monthly import ever.

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 half of 2020 has already past the 12 months total of all years, except 2019.

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 six months of 2020 is more than the amounts of 12 months total of all years, except 2019.

# 2019 - 2020 IMPORT COMPARISON CHART

JANUARY - JUNE 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)
<b>100119</b>	<b>879.558.764</b>	<b>\$263.460.311</b>	<b>413.129.213</b>	<b>\$114.132.311</b>	<b>%112,9</b>	<b>%130,8</b>
Durum wheat (excl. seed for sowing)	879.558.764	\$263.460.311	413.129.213	\$114.132.311	%112,9	%130,8
<b>190219</b>	<b>2.558.985</b>	<b>\$3.363.762</b>	<b>1.426.085</b>	<b>\$2.328.036</b>	<b>%79,4</b>	<b>%44,5</b>
Uncooked pasta, not stuffed or otherwise prepared, not containing common wheat flour or meal or eggs (Excl. fenilketonüri pt.)	2.072.002	\$2.677.214	1.233.527	\$1.904.289	%68,0	%40,6
Uncooked pasta, not stuffed, others	197.737	\$336.765	101.192	\$168.912	%95,4	%99,4
Uncooked pasta, not stuffed or otherwise prepared	285.892	\$331.617	68.970	\$146.137	%314,5	%126,9
Uncooked pasta, not stuffed or otherwise prepared, containing vegetables	3.354	\$18.166	22.396	\$108.698	-%85,0	-%83,3
Low protein pasta for phenylketonuria patients	0	\$0				
<b>190230</b>	<b>224.847</b>	<b>\$350.269</b>	<b>283.913</b>	<b>\$897.829</b>	<b>-%20,8</b>	<b>-%61,0</b>
Pasta, dried	155.292	\$251.274	240.762	\$816.969	-%35,5	-%69,2
Pasta, others	69.555	\$98.995	43.151	\$80.860	%61,2	%22,4
<b>190211</b>	<b>146.939</b>	<b>\$258.720</b>	<b>582.638</b>	<b>\$872.333</b>	<b>-%74,8</b>	<b>-%70,3</b>
Uncooked pasta, not stuffed containing eggs (Excl. phenylketonuria pt.), others	44.877	\$54.734	398.278	\$512.629	-%88,7	-%89,3
Uncooked pasta, containing common wheat flour or meal or eggs	102.062	\$203.986	184.360	\$359.704	-%44,6	-%43,3
<b>190220</b>	<b>285.708</b>	<b>\$522.441</b>	<b>172.808</b>	<b>\$601.282</b>	<b>%65,3</b>	<b>-%13,1</b>
Cooked pasta, stuffed with meat or other substances, others	284.177	\$501.503	82.953	\$325.958	%242,6	%53,9
Cooked pasta, cooked, stuffed with meat or other substances	0	\$0	89.855	\$275.324	-%100,0	-%100,0
Pasta, stuffed, containing > 20% by weight of fish, etc	1.531	\$20.938	0	\$0		
<b>190240</b>	<b>530</b>	<b>\$2.212</b>	<b>63.508</b>	<b>\$43.270</b>	<b>-%99,2</b>	<b>-%94,9</b>
Couscous unprepared	0	\$0	60.000	\$36.050	-%100,0	-%100,0
Couscous, cooked or otherwise prepared	530	\$2.212	3.508	\$7.220	-%84,9	-%69,4
<b>100111</b>	<b>1.500</b>	<b>\$2.448</b>				
Durum wheat seed for sowing	1.500	\$2.448				
<b>Total</b>	<b>882.777.273</b>	<b>\$267.960.163</b>	<b>415.658.165</b>	<b>\$118.875.061</b>	<b>%112,4</b>	<b>%125,4</b>

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

3.150.000

TON PRODUCTION

288

KG/DECARE (YIELD)

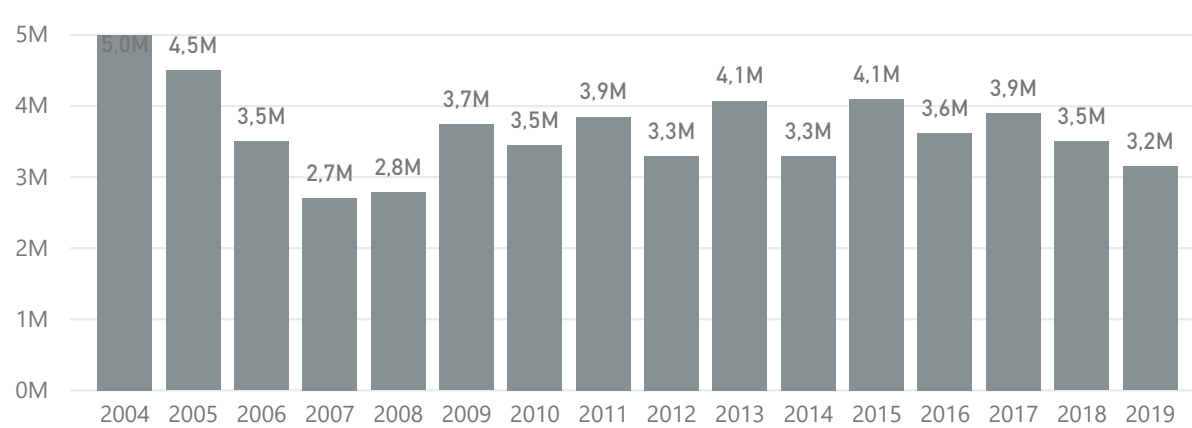
10.955.635

DECARE HARVEST AREA

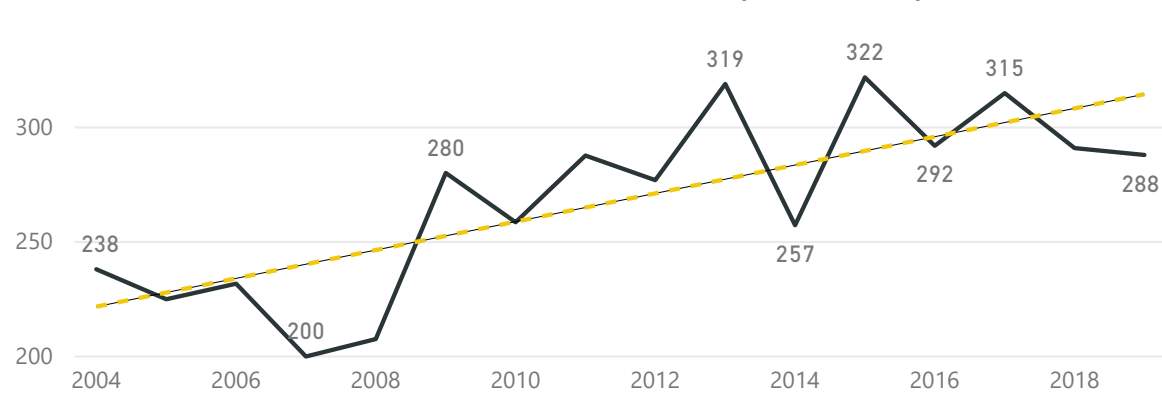
%16,0

RATIO PER TOTAL WHEAT

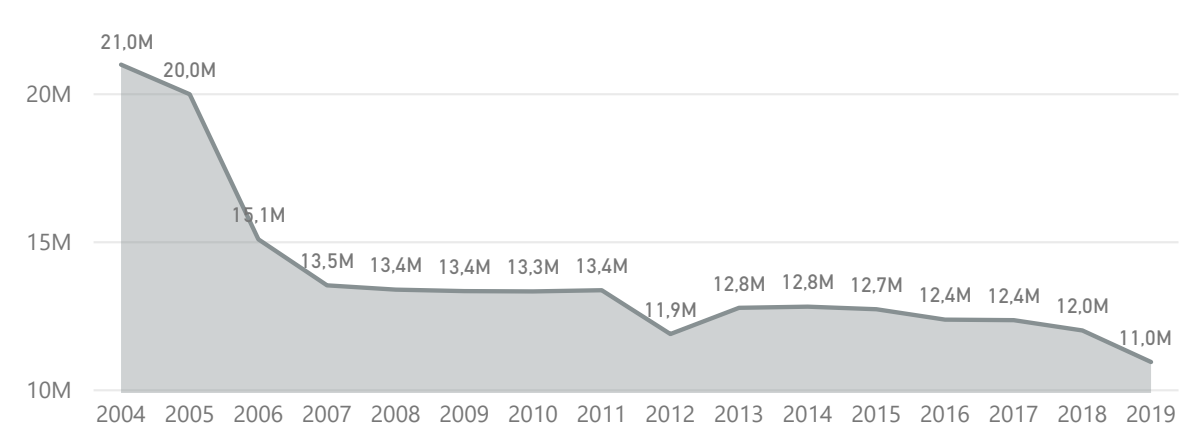
DURUM WHEAT PRODUCTION PER YEAR



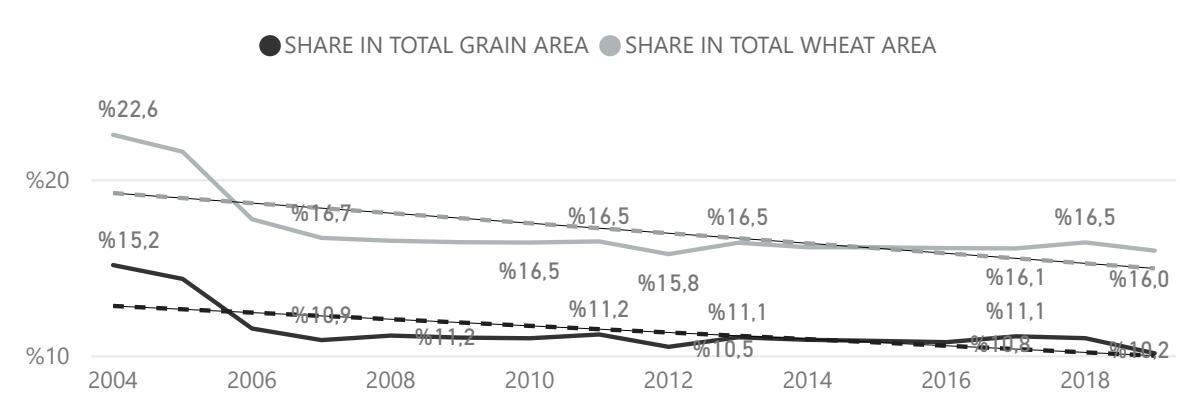
DURUM WHEAT YIELD PER YEAR (KG/DECARE)



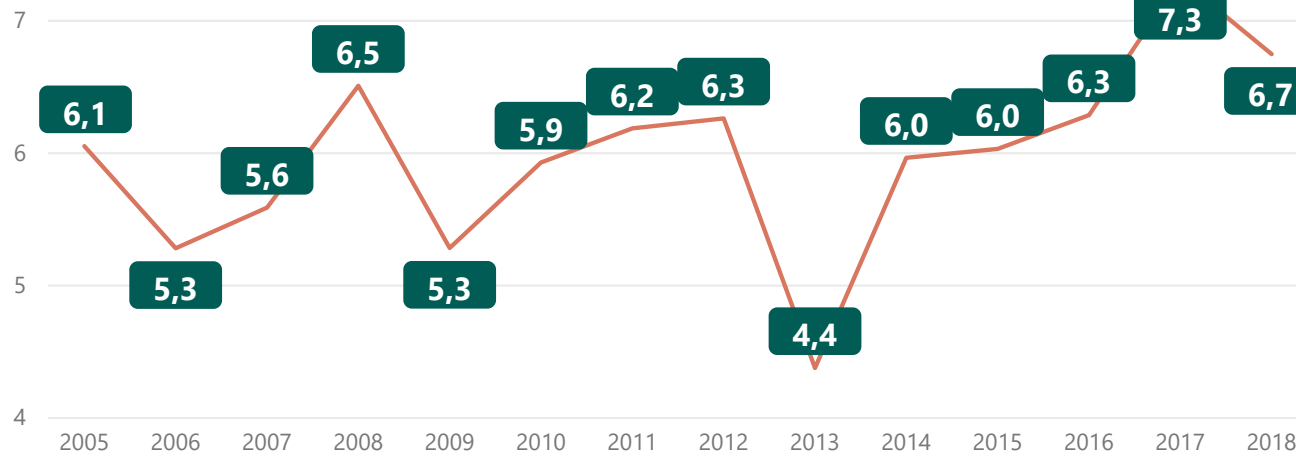
DURUM WHEAT HARVEST AREA PER YER (DECARE)



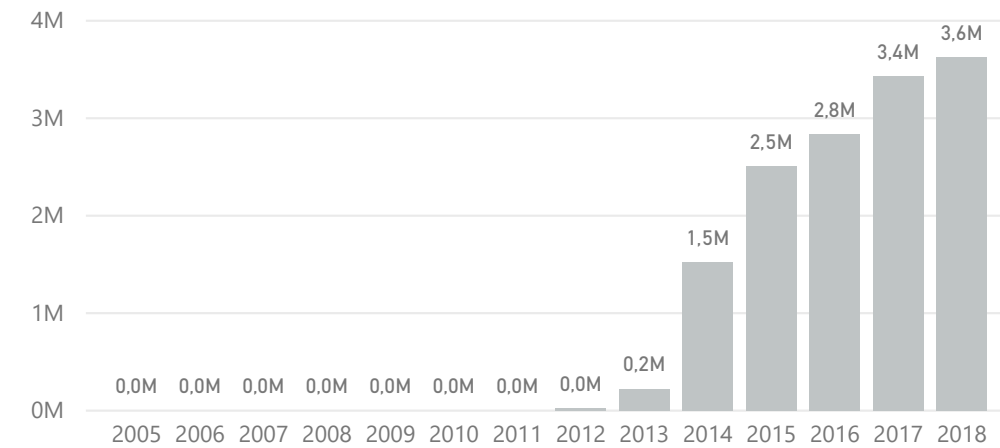
RATIO OF DURUM WHEAT HARVEST AREA



## PASTA CONSUMPTION PER CAPITA (Kg/Per)

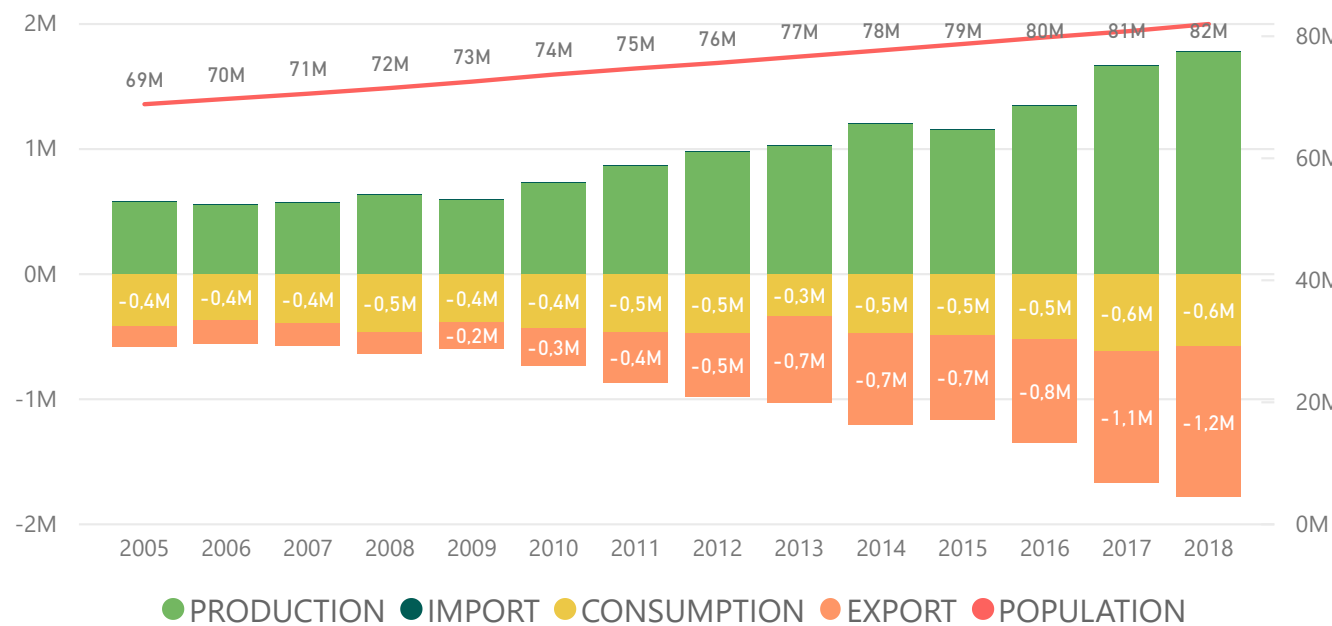


## REFUGEE NUMBERS PER YEAR



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

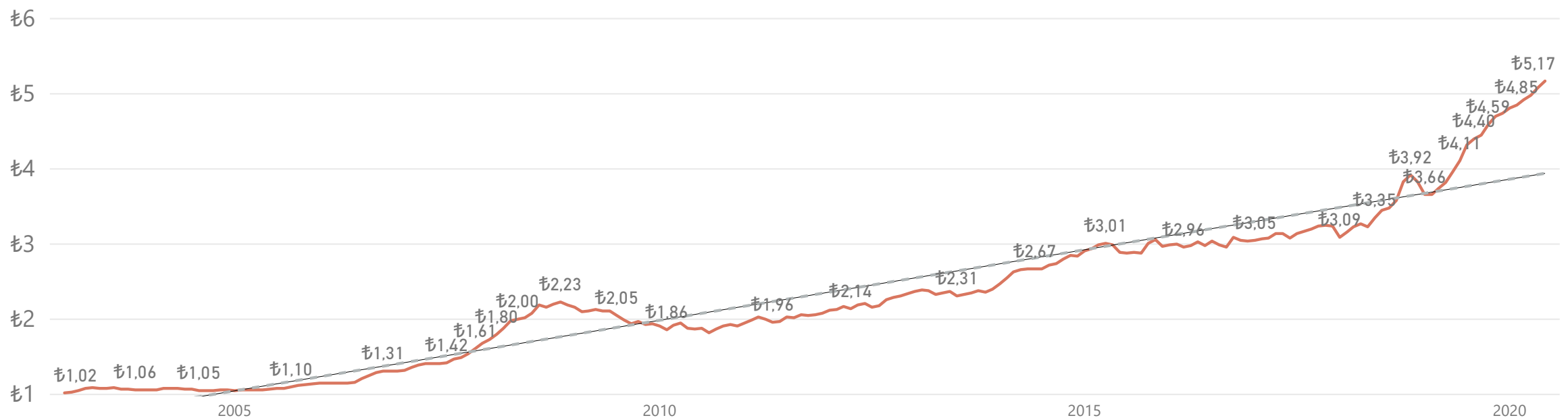
Source : Ministry of the interior and TÜİK



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

2020 june pasta market price:

₺5,17 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

