



MAKARNA ÜRETİCİLERİ VE SANAYİCİLERİ DERNEĞİ
Pasta Producers and Industrialists Association

SECTOR REPORT

JANUARY - JULY 2020



Pasta Producers and Industrialists' Association

Sector Report

JANUARY - JULY 2020

PUBLISH DATE

1 September 2020

JULY 2020

**EXPORT
QUANTITY (KG)**

%0,3

JULY 2020

131.152.997

JULY 2019

130.798.078



**EXPORT VALUE
(USD)**

%13,0

JULY 2020

\$70.966.644

JULY 2019

\$62.775.865



**UNIT PRICE
(USD/TON)**

%12,7

JULY 2020

\$541

JULY 2019

\$480



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

JANUARY - JULY 2020

**EXPORT
QUANTITY (KG)**

%13,0

2020 TOTAL

840.409.388

2019 TOTAL

743.842.895



**EXPORT VALUE
(USD)**

%23,5

2020 TOTAL

\$432.588.246

2019 TOTAL

\$350.222.378



**UNIT PRICE
(USD/TON)**

%9,3

2020 TOTAL

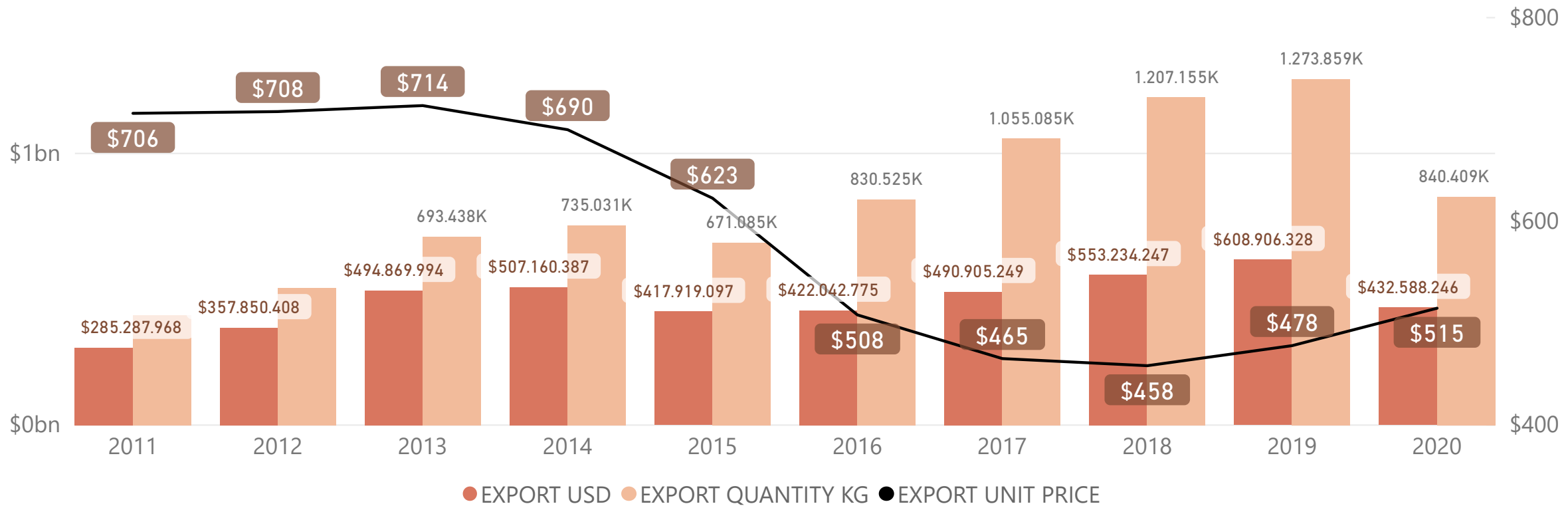
\$515

2019 TOTAL

\$471



* 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 unit export price 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 \$515/ton by July 2020. But, compared to surge in durum wheat prices, increase in unit export price is still insufficient.

JULY 2020

**IMPORT
QUANTITY (KG)** **-%93**

JULY 2020

6.210.795

JULY 2019

83.133.443



**IMPORT VALUE
(USD)** **-%94**

JULY 2020

\$1.318.772

JULY 2019

\$22.697.785



**UNIT PRICE
(USD/TON)** **-%22,2**

JULY 2020

\$212

JULY 2019

\$273



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

JANUARY - JULY 2020

**IMPORT
QUANTITY (KG)** **%78**

2020 TOTAL

885.769.559

2019 TOTAL

496.262.656



**IMPORT VALUE
(USD)** **%94**

2020 TOTAL

\$264.779.083

2019 TOTAL

\$136.830.096



**UNIT PRICE
(USD/TON)** **%8,4**

2020 TOTAL

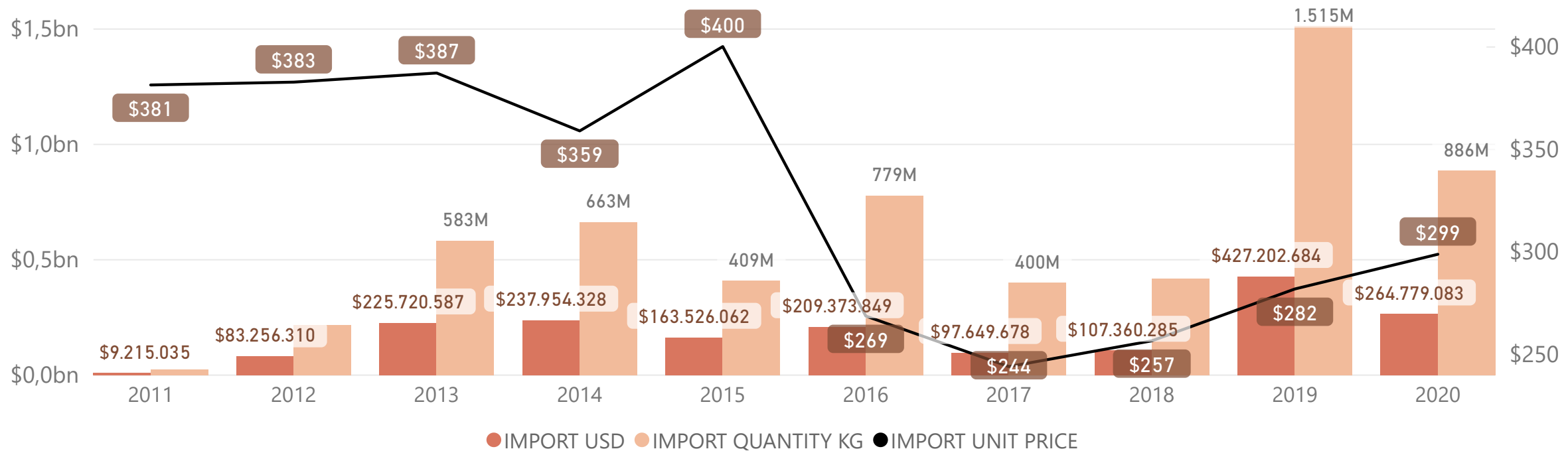
\$299

2019 TOTAL

\$276

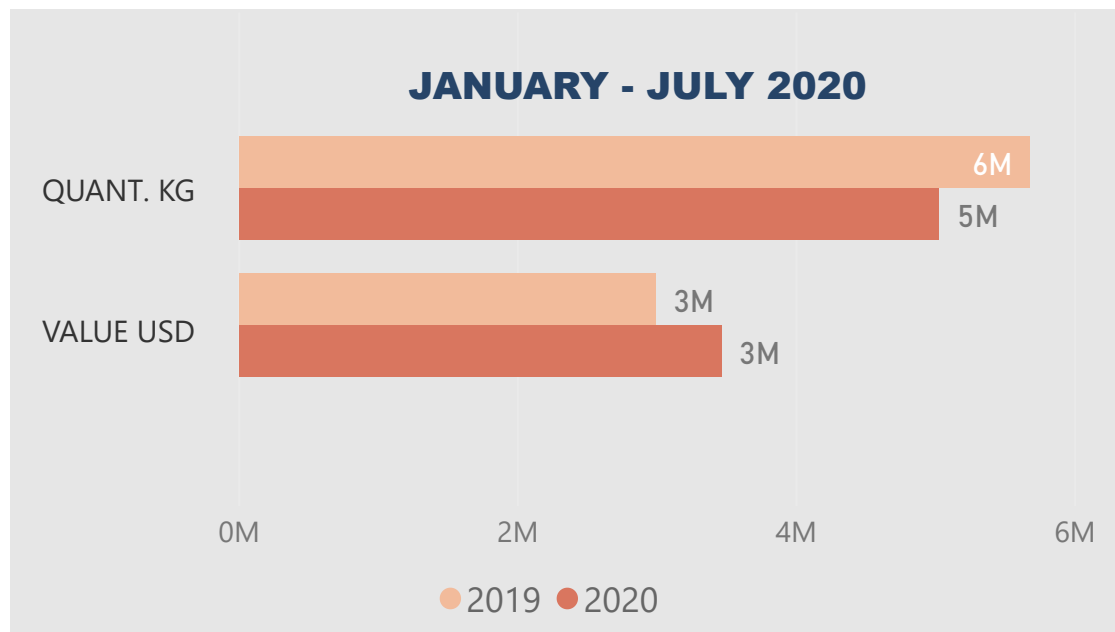


* Comparisons were made with the same period of the previous year.



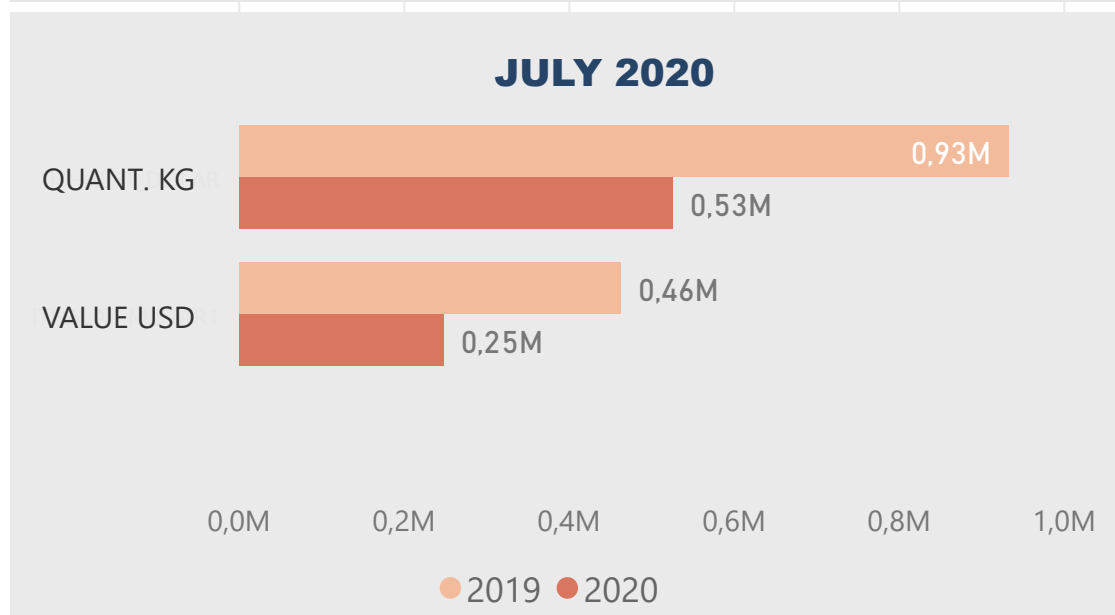
Durum Wheat Imports by years shows us that, compared to other years, durum wheat imports in 2019 and 2020 comes to the fore. Also, compared to 2016, durum wheat imports in 2019 are two times higher in terms of quantity and value.

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.



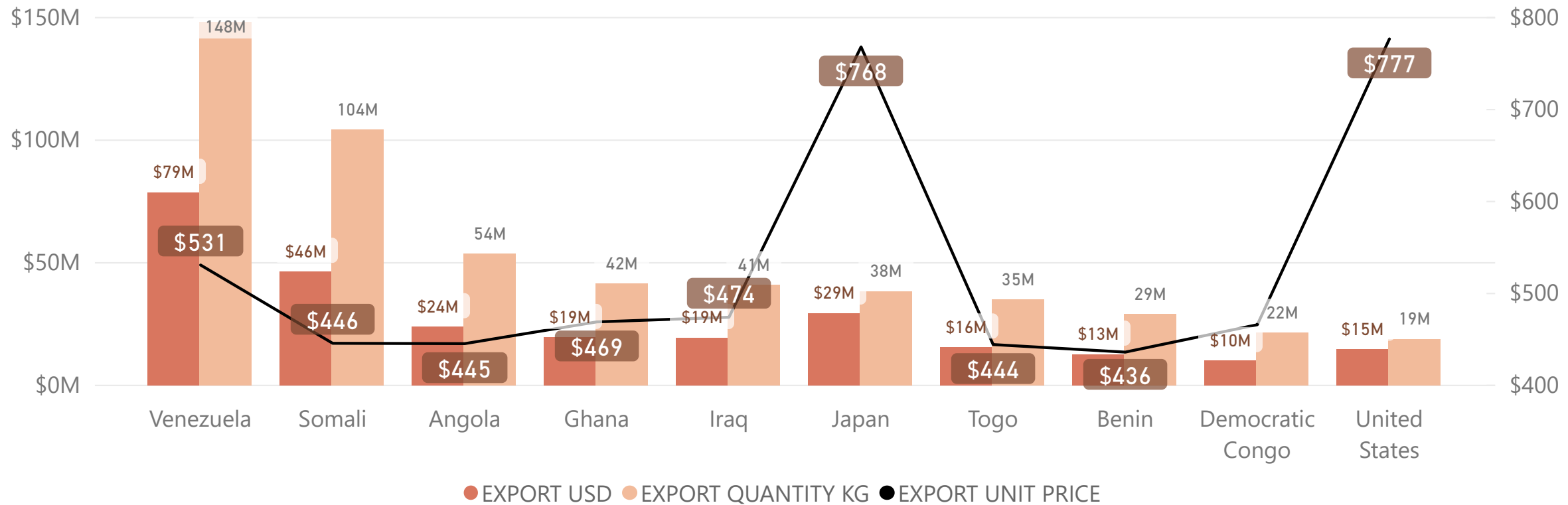
In July 2020, compared to July 2019, Pasta Exports increased 0.3% and reached 131.1 thousand tons in quantity; increased 13% and reached \$70.96 million in value.

In the first seven months of 2020, compared to same period of the previous year, pasta exports increased 13% and reached 840.4 thousand tons in quantity; increased by 23.5% and reached \$432.6 million in value.



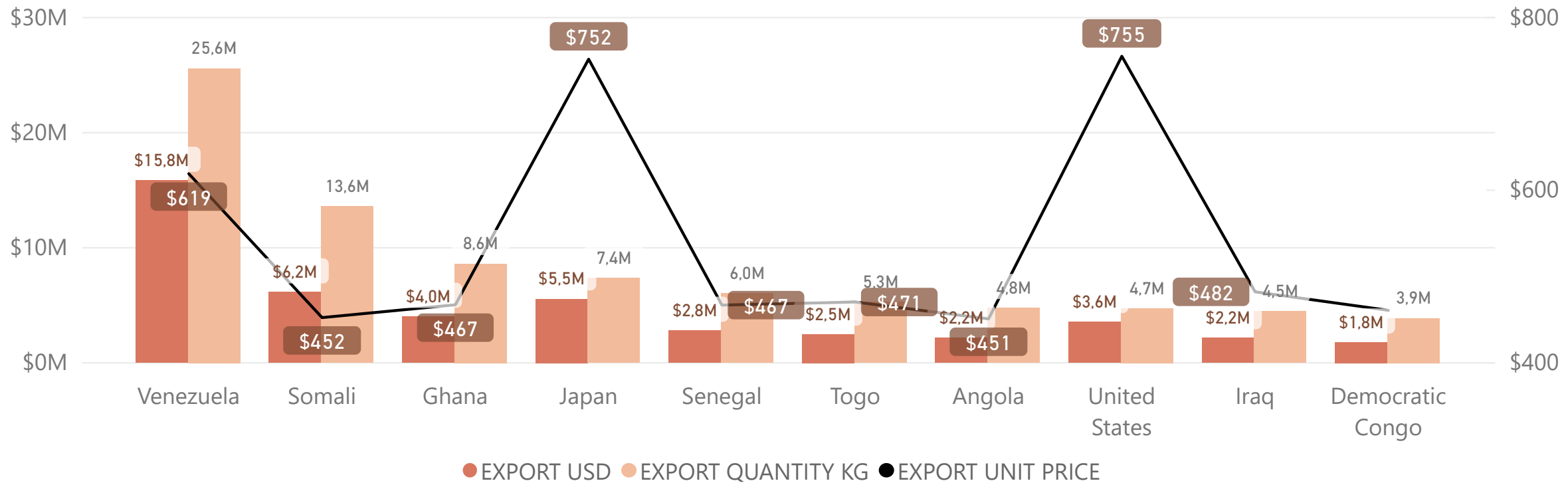
Average unit price per ton was \$480 in July 2019. It increased 12.7% and reached to \$541 in July 2020.

Compared to same period of the previous year, in the first seven months of 2020, average price per ton increased 9.3% and reached \$515/ton.



In the first seven months of 2020, biggest importer was Venezuela with 148.2 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.

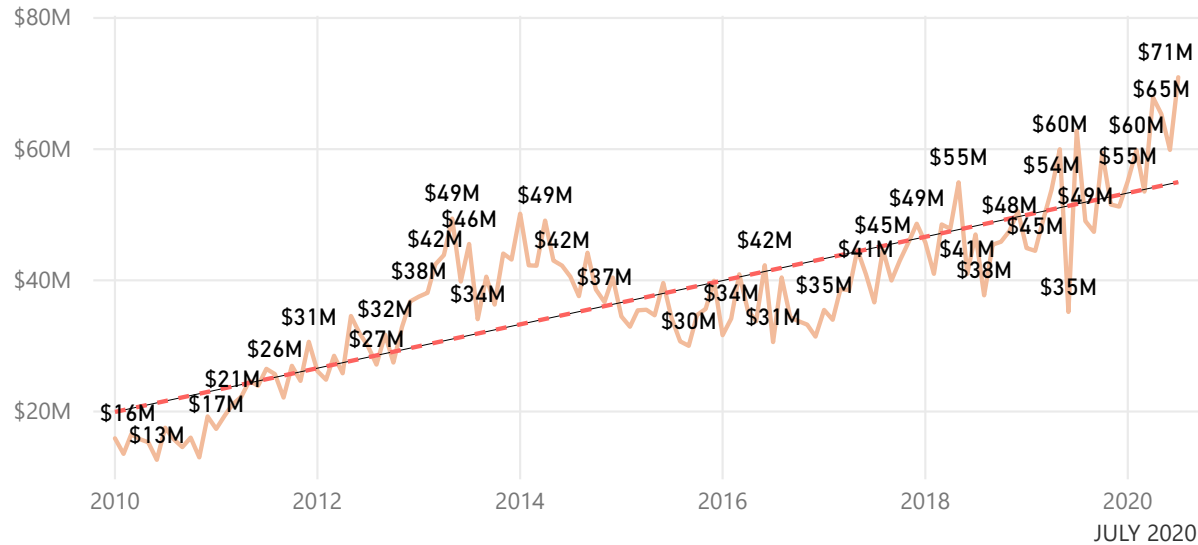
On the basis of unit price amongst top 10 countries we export to in 2020, USA ranked first with \$777/ton. Benin was on the last place on the basis of unit price with \$436/ton.



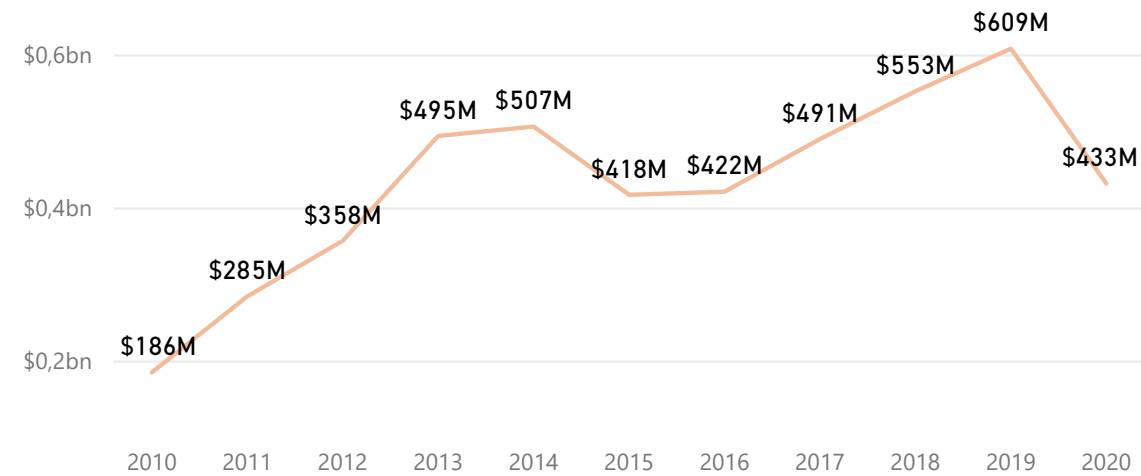
In July 2020, biggest importer in terms of quantity was Venezuela with 25.6 thousand tons, followed by Somalia and Ghana.

In July 2020, among the top 10 countries we export to on the basis of unit price, USA ranked 1st with \$755/ton, followed by Japan (\$752/ton) and Venezuela (\$619/ton) respectively. Angola had the lowest price with \$451/ton.

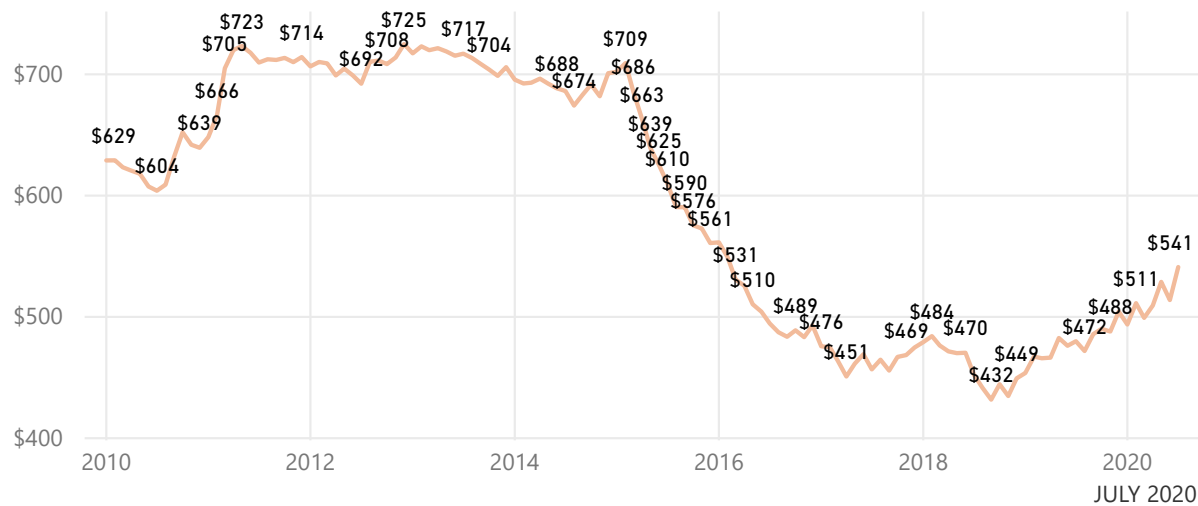
MONTHLY EXPORT VALUE (USD)



YEARLY EXPORT VALUE (USD)



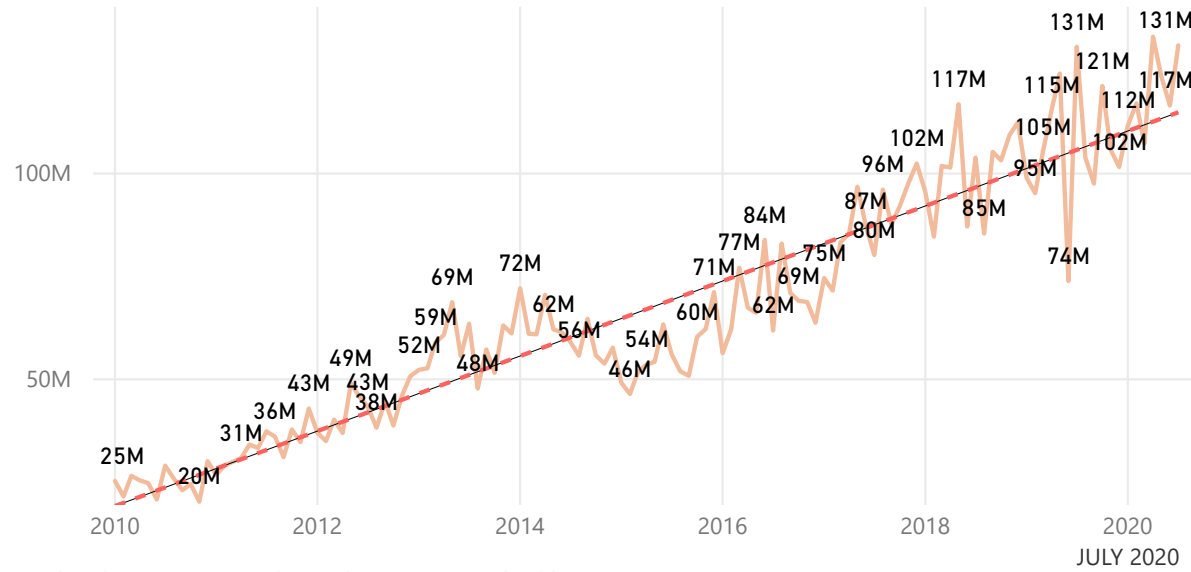
MONTHLY EXPORT UNIT PRICE (USD/TON)



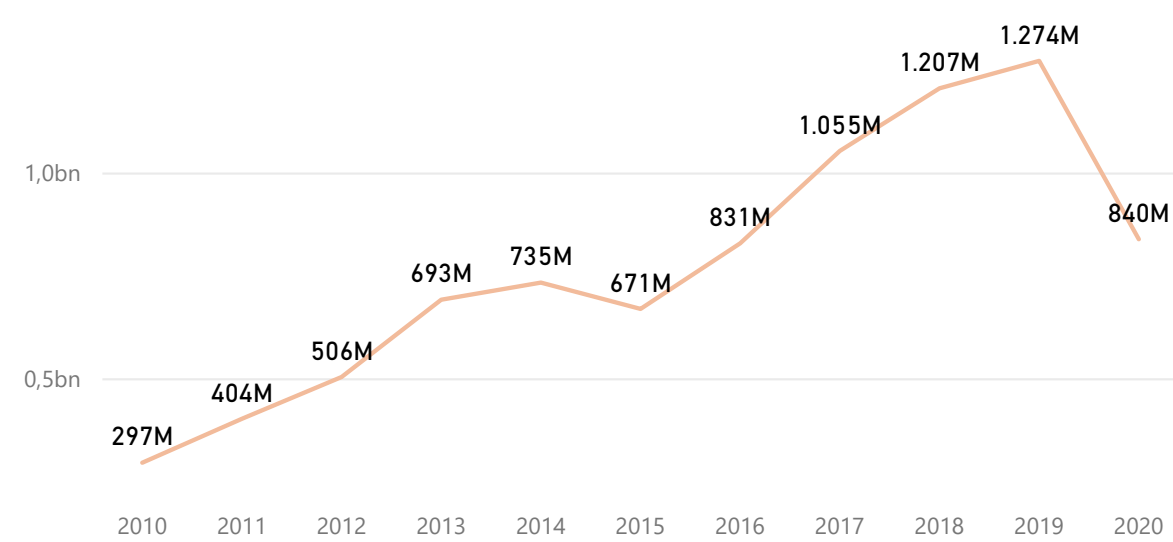
When pasta exports are analyzed by years, \$70.96 million worth of exports were made in July 2020 is the highest monthly export value.

Also, when pasta exports are analyzed on the basis of unit price, highest value of the recent years has been observed in July 2020, with \$541/ton.

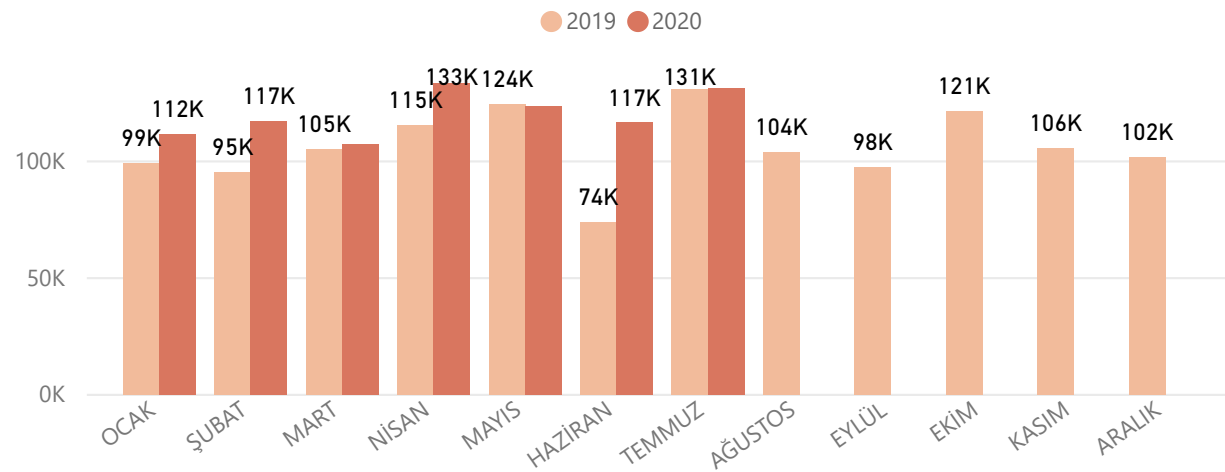
MONTHLY EXPORT QUANTITY (KG)



YEARLY EXPORT QUANTITY (KG)



LAST 2 YEAR EXPORT QUANTITY (KG)



Considering the monthly exports by years, highest amount of exports was made in April 2020 (133 tons). July 2020 became the second highest month, with an export of 131.2 tons.

Total exports in the first seven months of 2020, is higher 12 months total of all years between 2010 and 2016. Data shows us that exports continued despite ongoing pandemic.

2019 - 2020 EXPORT COMPARISON CHART

JANUARY - JULY 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	10.472.830	\$3.644.112	%239,6	%229,9
Durum wheat (excl. seed for sowing)	35.565.650	\$12.020.329	10.472.830	\$3.644.112	%239,6	%229,9
190211	3.408.198	\$3.407.443	1.209.319	\$1.061.428	%181,8	%221,0
Uncooked pasta, containing common wheat flour or meal or eggs	1.923.586	\$2.494.937	408.675	\$488.125	%370,7	%411,1
Uncooked pasta, not stuffed containing eggs (Excl. phenylketonuria pt.), others	1.484.612	\$912.506	800.644	\$573.303	%85,4	%59,2
190219	795.817.926	\$406.695.819	708.080.645	\$332.850.319	%12,4	%22,2
Low protein pasta for phenylketonuria patients	5.000	\$9.255				
Uncooked pasta, not stuffed or otherwise prepared	336.853.410	\$154.369.191	94.466.566	\$41.191.900	%256,6	%274,8
Uncooked pasta, not stuffed or otherwise prepared, containing vegetables	275.667	\$427.236	122.161	\$305.762	%125,7	%39,7
Uncooked pasta, not stuffed or otherwise prepared, not containing common wheat flour or meal or eggs (Excl. fenilketonüri pt.)	454.484.728	\$249.844.632	611.017.277	\$289.958.205	-%25,6	-%13,8
Uncooked pasta, not stuffed, others	4.199.121	\$2.045.505	2.474.641	\$1.394.452	%69,7	%46,7
190220	614.641	\$761.164	195.688	\$301.532	%214,1	%152,4
Cooked pasta, cooked, stuffed with meat or other substances	18.530	\$55.385	11.947	\$47.782	%55,1	%15,9
Cooked pasta, stuffed with meat or other substances, others	436.998	\$562.665	173.643	\$230.277	%151,7	%144,3
Pasta, stuffed with meat, containing > 20% by weight of meat and meat offal of any kind	12.411	\$35.057	6.978	\$14.686	%77,9	%138,7
Pasta, stuffed with meat, containing > 20% by weight of sausages and the like	1.092	\$2.036	3.072	\$7.387	-%64,5	-%72,4
Pasta, stuffed, containing > 20% by weight of fish, etc	145.610	\$106.021	48	\$1.400	%303254,2	%7472,9
190230	40.255.354	\$21.529.288	34.137.864	\$15.872.121	%17,9	%35,6
Pasta, dried	4.816.318	\$4.256.871	2.530.327	\$3.325.455	%90,3	%28,0
Pasta, others	35.439.036	\$17.272.417	31.607.537	\$12.546.666	%12,1	%37,7
190240	313.269	\$194.532	219.379	\$136.978	%42,8	%42,0
Couscous unprepared	270.768	\$155.853	143.934	\$84.000	%88,1	%85,5
Couscous, cooked or otherwise prepared	42.501	\$38.679	75.445	\$52.978	-%43,7	-%27,0
Total	875.975.038	\$444.608.575	754.315.725	\$353.866.490	%16,1	%25,6

* 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

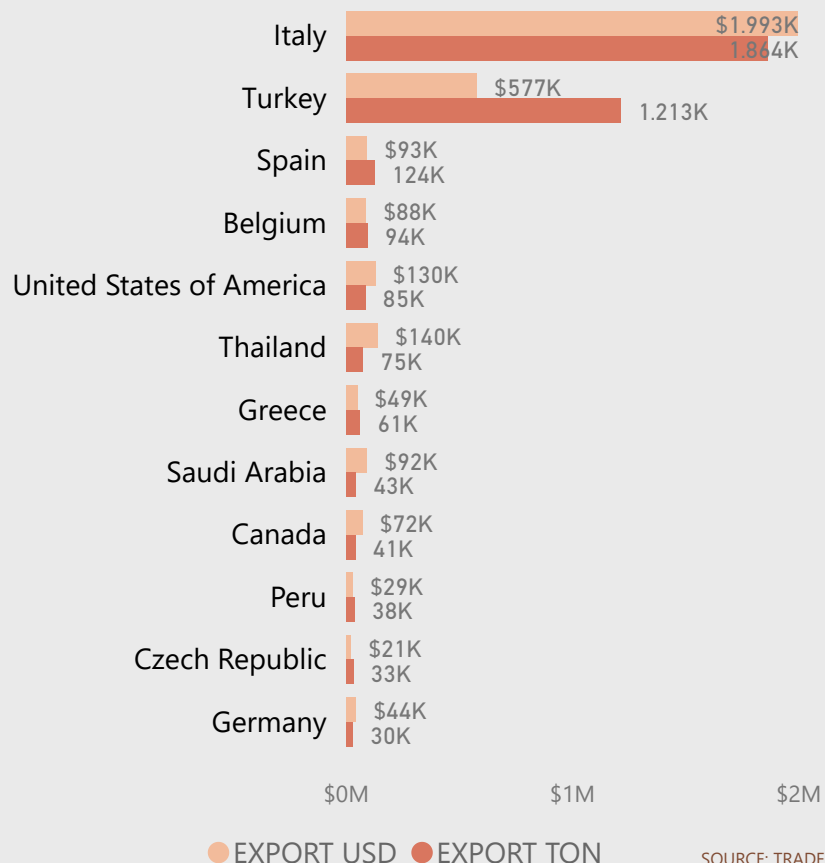
WORLD PASTA (1902.19)
EXPORT IN 2019 (USD)

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

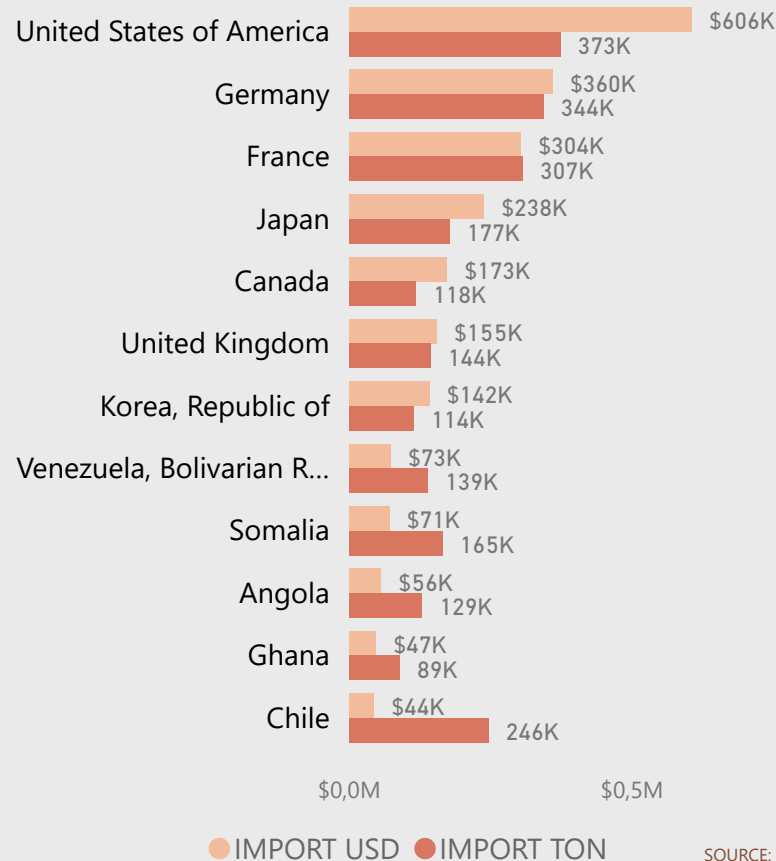
WORLD PASTA (1902.19)
IMPORT IN 2019 (USD)

4.268.211

WORLD PASTA (1902.19)
IMPORT IN 2019 (TON)

4.276.378

WORLD PASTA IMPORTS IN 2019 (1902.19 HS CODE)



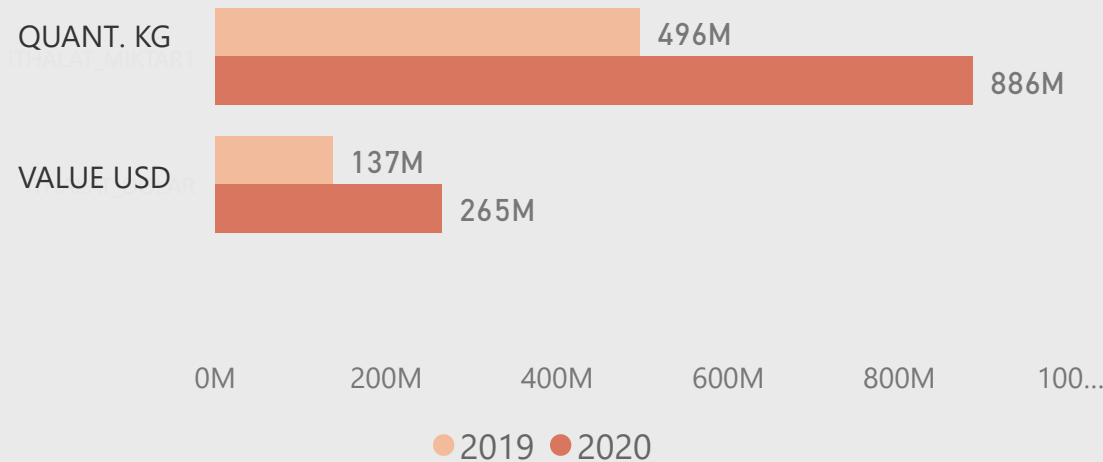
UNIT IMPORT PRICE OF COUNTRIES OVER 55K IMPORT QUANT. (\$/TON)

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.

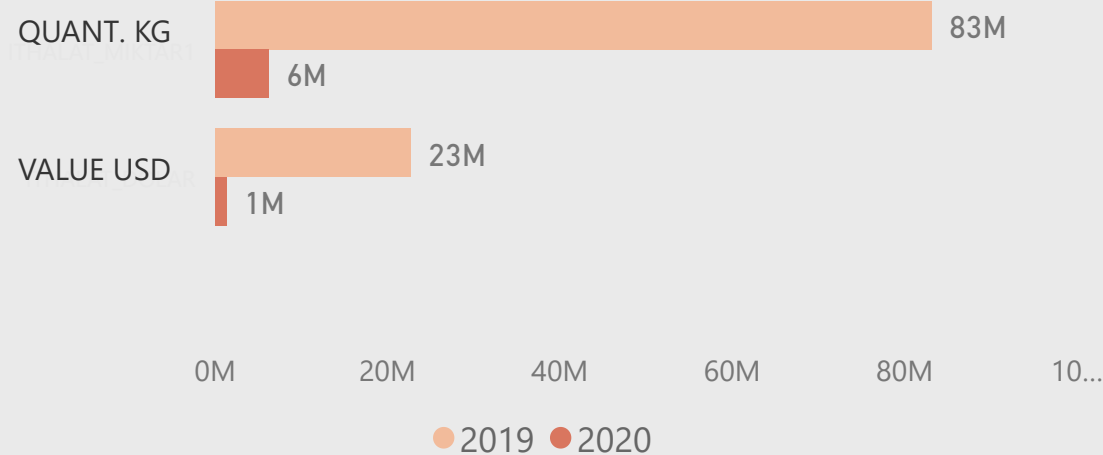
JANUARY - JULY 2020



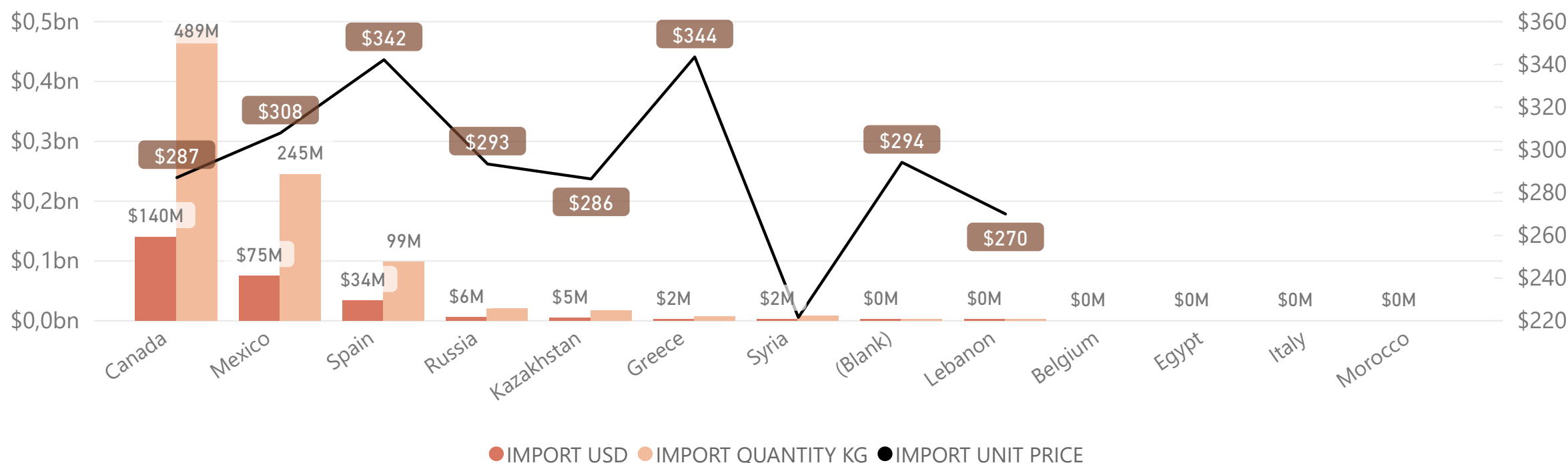
In July 2020, compared to July 2019, durum wheat imports decreased 92.5% and fell to 6.2 thousand tons; in terms of value, decreased by 94.2% to \$1.3 million.

In the first seven months 2020, compared to same period of the previous year, amount of durum wheat imports increased 78%, value of durum wheat imports increased 94%.

JULY 2020

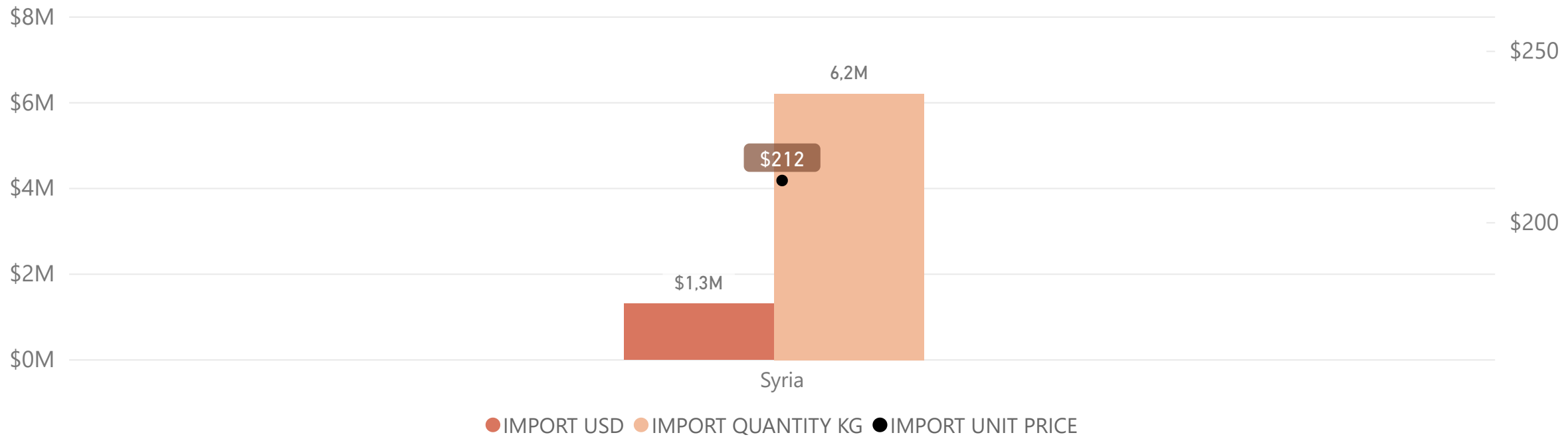


Average unit price per ton was \$273/ton in July 2019. In July 2020, it decreased by 22.2% and reached \$212/ton. In the first seven months of 2020, average unit price was \$299/tons.



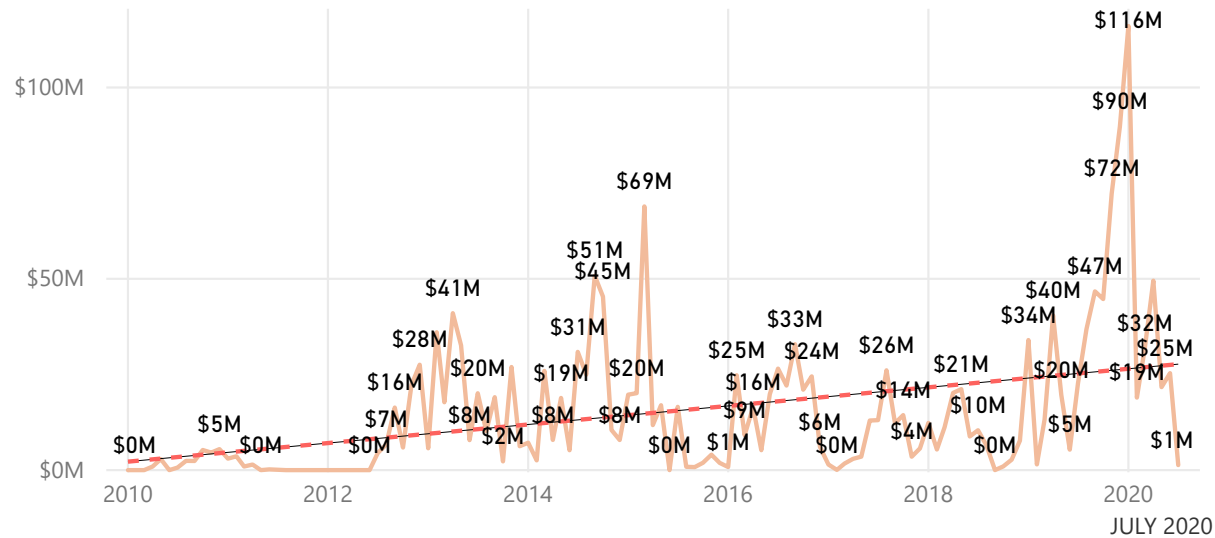
In the first seven months of 2020, biggest importer of durum wheat was Canada with 489.2 thousand tons (\$140.4 million), followed by Mexico and Spain.

In the first seven months of 2020, average unit price of durum wheat imported by Canada was \$287/ton. Lowest price amongst top 10 exporter countries belonged to Syria with \$222/ton, while the highest unit price belongs to Greece with \$344/ton.

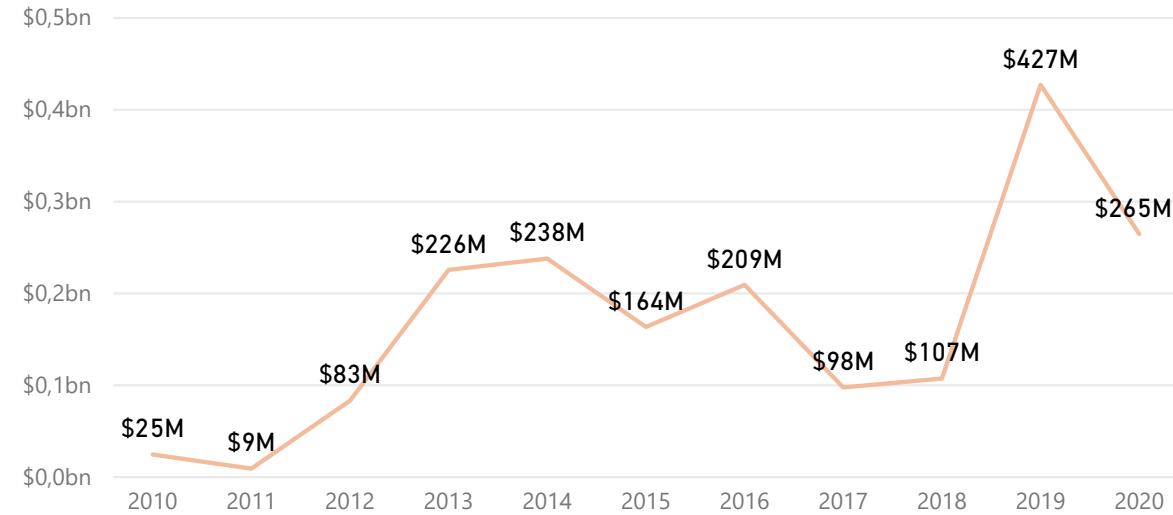


In July 2020, Syria was the only country imported durum wheat. Syria imported 6,2 thousand tons of durum wheat (\$1,3 million), with \$212/ton average unit price.

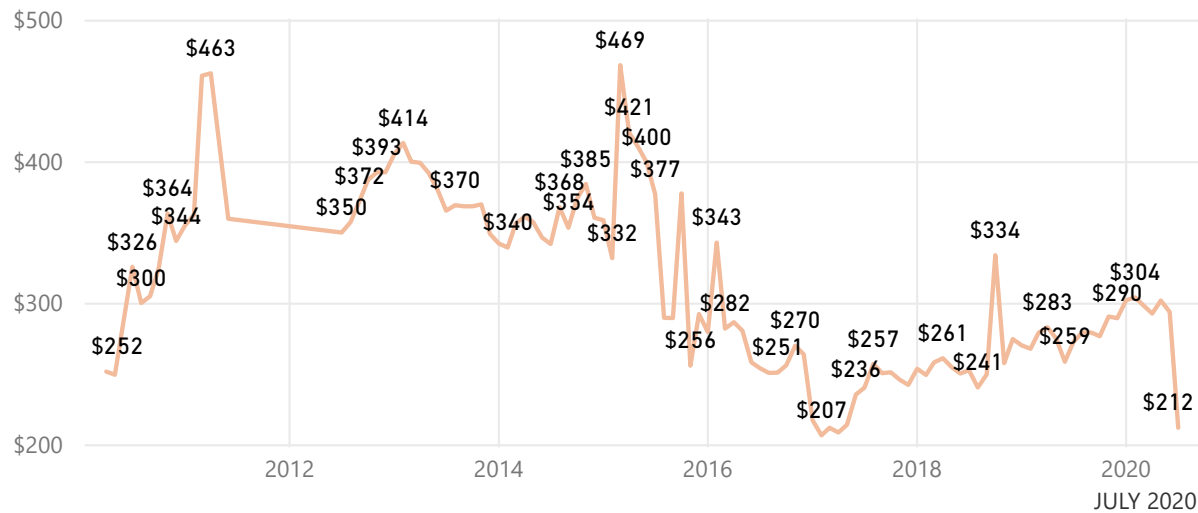
MONTHLY IMPORT VALUE (USD)



YEARLY IMPORT VALUE (USD)



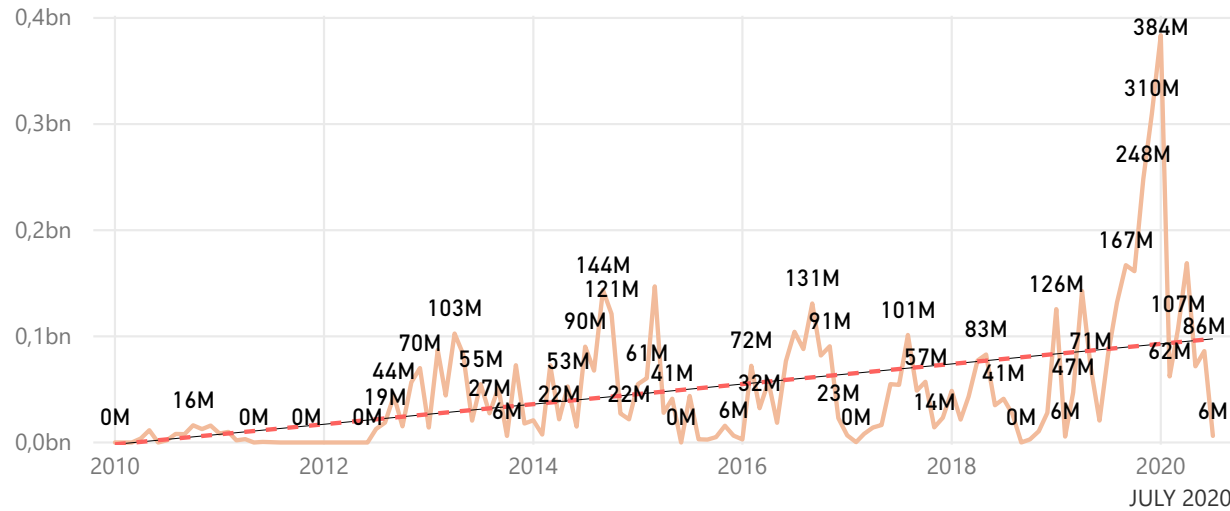
MONTHLY IMPORT UNIT PRICE (USD/TON)



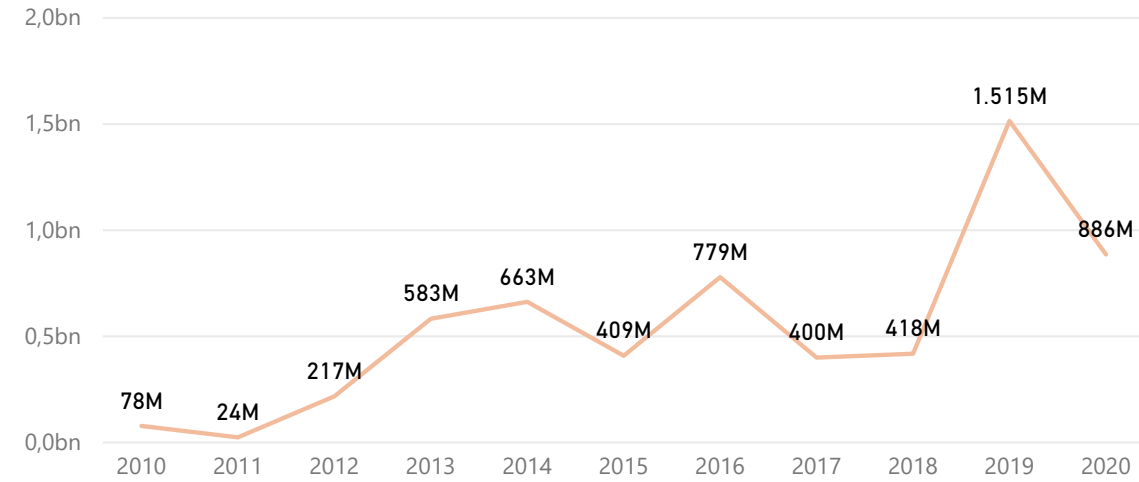
When the monthly import values are analyzed by years, it is seen that imports in January 2020 (\$116 million) is the highest monthly import ever.

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

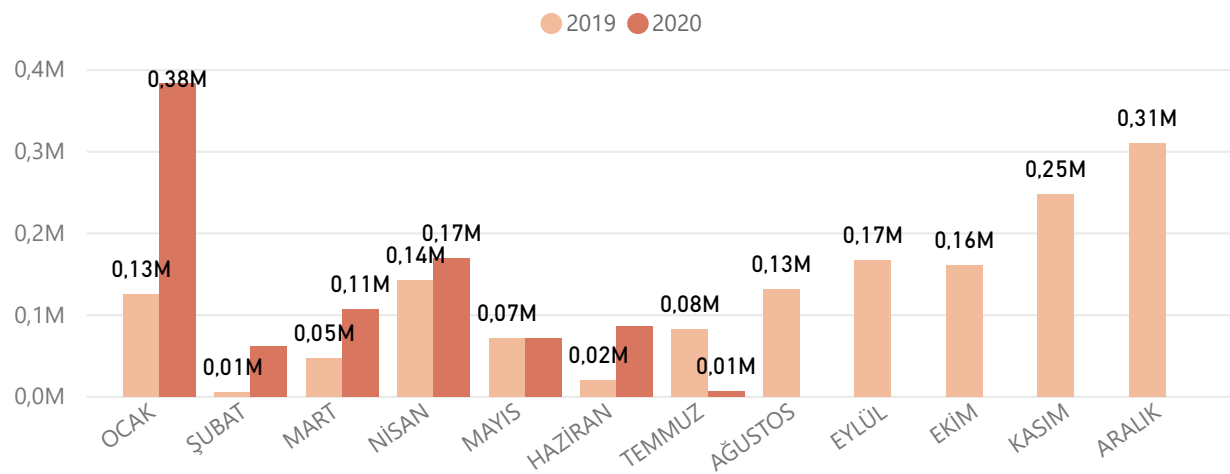
MONTHLY IMPORT QUANTITY (KG)



YEARLY IMPORT QUANTITY (KG)



LAST 2 YEAR 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 import at all times. Imports in the first seven months of 2020 is more than the amounts of 12 months total of all years, except 2019.

2019 - 2020 IMPORT COMPARISON CHART

JANUARY - JULY 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	885.769.559	\$264.779.083	496.262.656	\$136.830.096	%78,5	%93,5
Durum wheat (excl. seed for sowing)	885.769.559	\$264.779.083	496.262.656	\$136.830.096	%78,5	%93,5
190219	2.720.112	\$3.652.136	1.655.409	\$2.812.465	%64,3	%29,9
Uncooked pasta, not stuffed or otherwise prepared, not containing common wheat flour or meal or eggs (Excl. fenilketonüri pt.)	2.220.852	\$2.949.130	1.436.985	\$2.321.152	%54,5	%27,1
Uncooked pasta, not stuffed, others	209.990	\$353.027	113.331	\$184.972	%85,3	%90,9
Uncooked pasta, not stuffed or otherwise prepared	285.916	\$331.813	79.859	\$183.117	%258,0	%81,2
Uncooked pasta, not stuffed or otherwise prepared, containing vegetables	3.354	\$18.166	25.234	\$123.224	-%86,7	-%85,3
Low protein pasta for phenylketonuria patients	0	\$0				
190211	179.555	\$324.819	748.541	\$1.099.533	-%76,0	-%70,5
Uncooked pasta, not stuffed containing eggs (Excl. phenylketonuria pt.), others	60.213	\$75.794	519.928	\$663.218	-%88,4	-%88,6
Uncooked pasta, containing common wheat flour or meal or eggs	119.342	\$249.025	228.613	\$436.315	-%47,8	-%42,9
190230	262.556	\$456.448	333.134	\$1.062.414	-%21,2	-%57,0
Pasta, dried	193.001	\$357.453	286.297	\$973.687	-%32,6	-%63,3
Pasta, others	69.555	\$98.995	46.837	\$88.727	%48,5	%11,6
190220	301.667	\$586.876	190.931	\$657.530	%58,0	-%10,7
Cooked pasta, stuffed with meat or other substances, others	300.136	\$565.938	87.711	\$348.597	%242,2	%62,3
Cooked pasta, cooked, stuffed with meat or other substances	0	\$0	103.220	\$308.933	-%100,0	-%100,0
Pasta, stuffed, containing > 20% by weight of fish, etc	1.531	\$20.938	0	\$0		
190240	530	\$2.212	63.568	\$43.407	-%99,2	-%94,9
Couscous unprepared	0	\$0	60.000	\$36.050	-%100,0	-%100,0
Couscous, cooked or otherwise prepared	530	\$2.212	3.568	\$7.357	-%85,1	-%69,9
100111	1.500	\$2.448				
Durum wheat seed for sowing	1.500	\$2.448				
Total	889.235.479	\$269.804.022	499.254.239	\$142.505.445	%78,1	%89,3

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

3.150.000

TON PRODUCTION

288

KG/DECARE (YIELD)

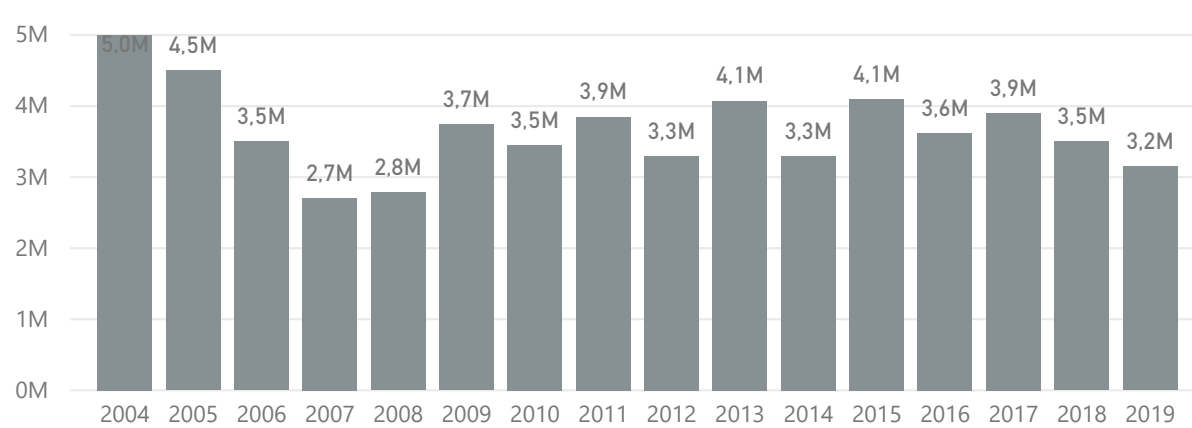
10.955.635

DECARE HARVEST AREA

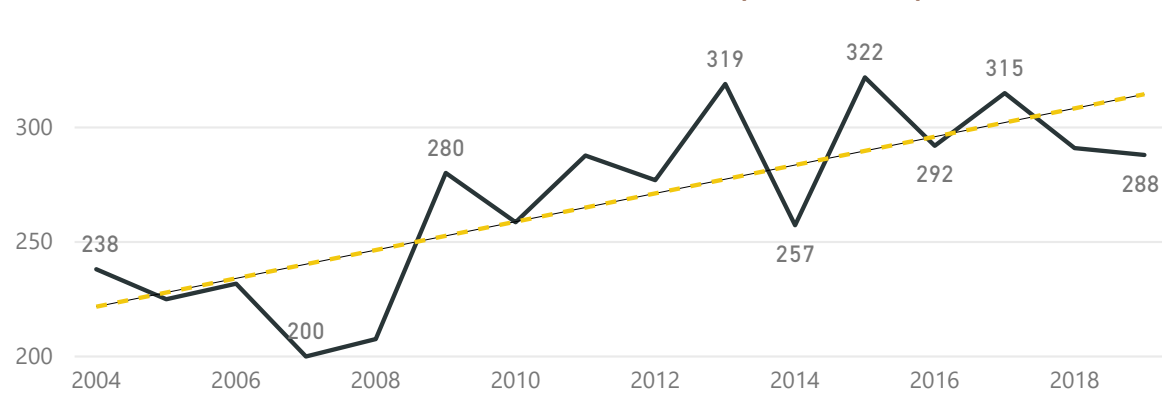
%16,0

RATIO PER TOTAL WHEAT

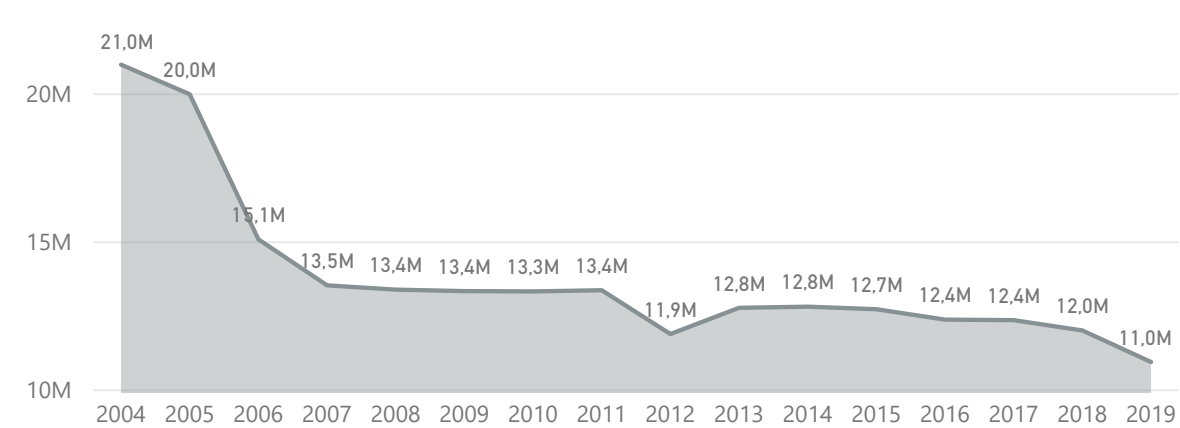
DURUM WHEAT PRODUCTION PER YEAR



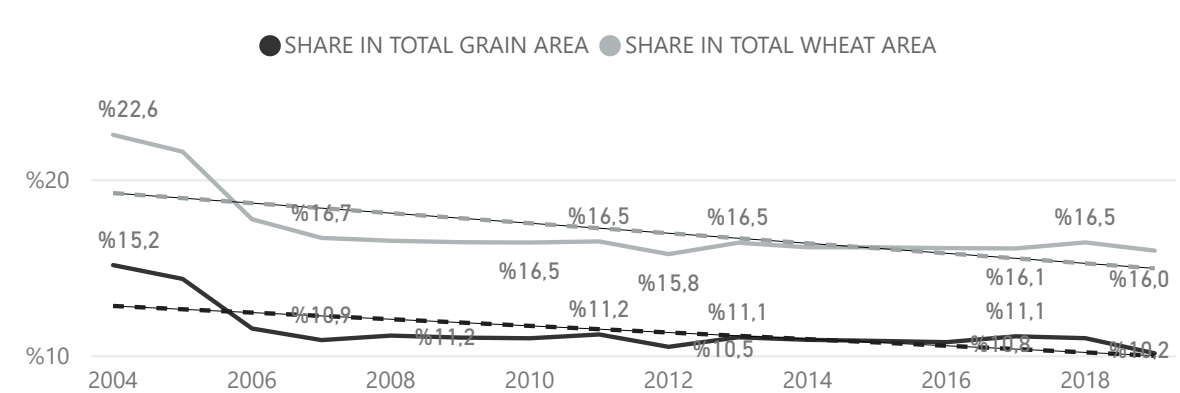
DURUM WHEAT YIELD PER YEAR (KG/DECARE)



DURUM WHEAT HARVEST AREA PER YER (DECARE)



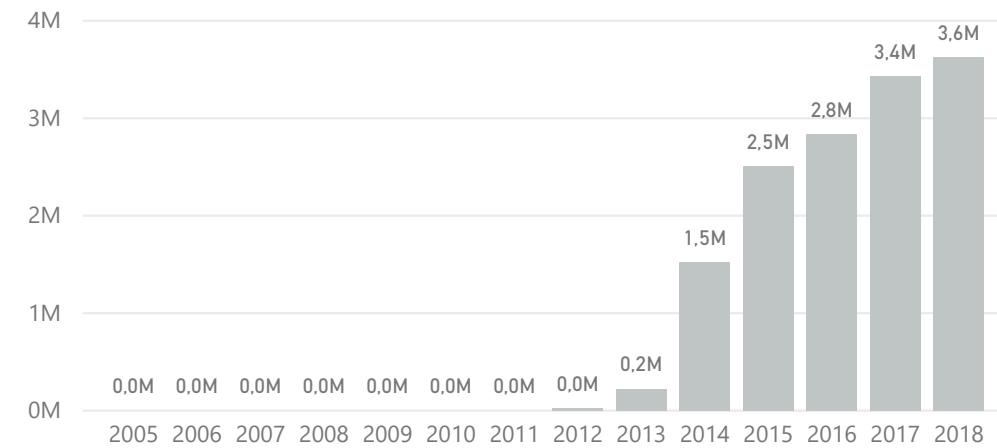
RATIO OF DURUM WHEAT HARVEST AREA



PASTA CONSUMPTION PER CAPITA (Kg/Per)

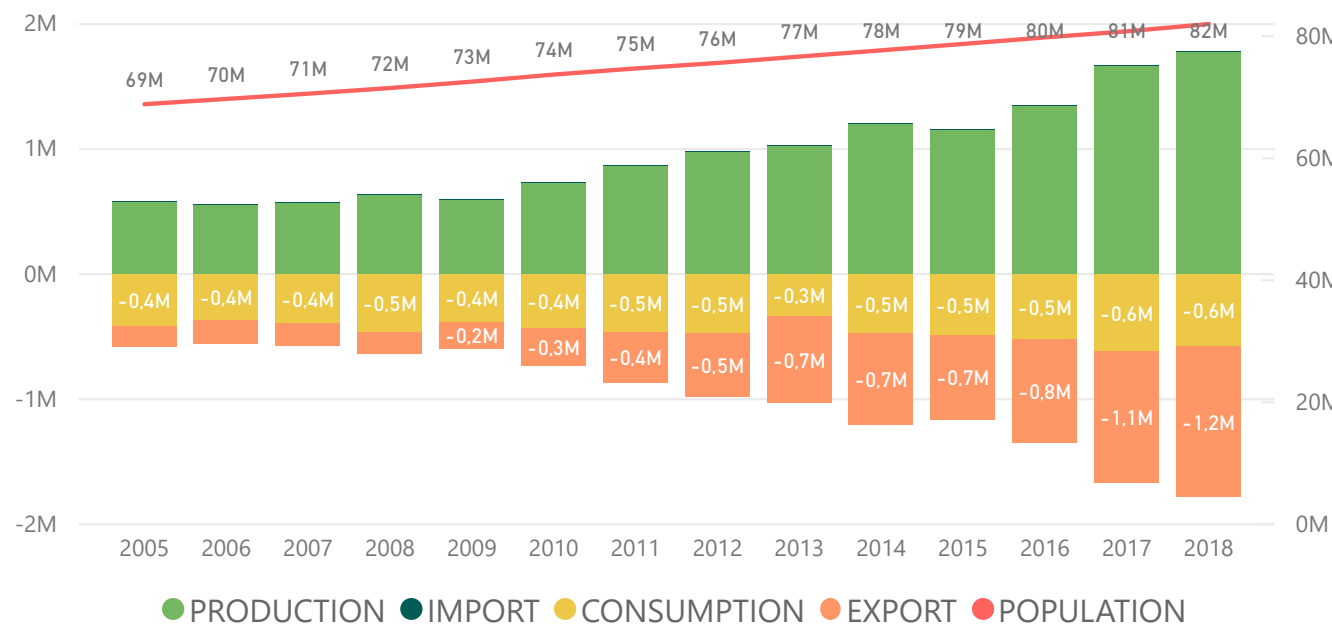


REFUGEE NUMBERS PER YEAR



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

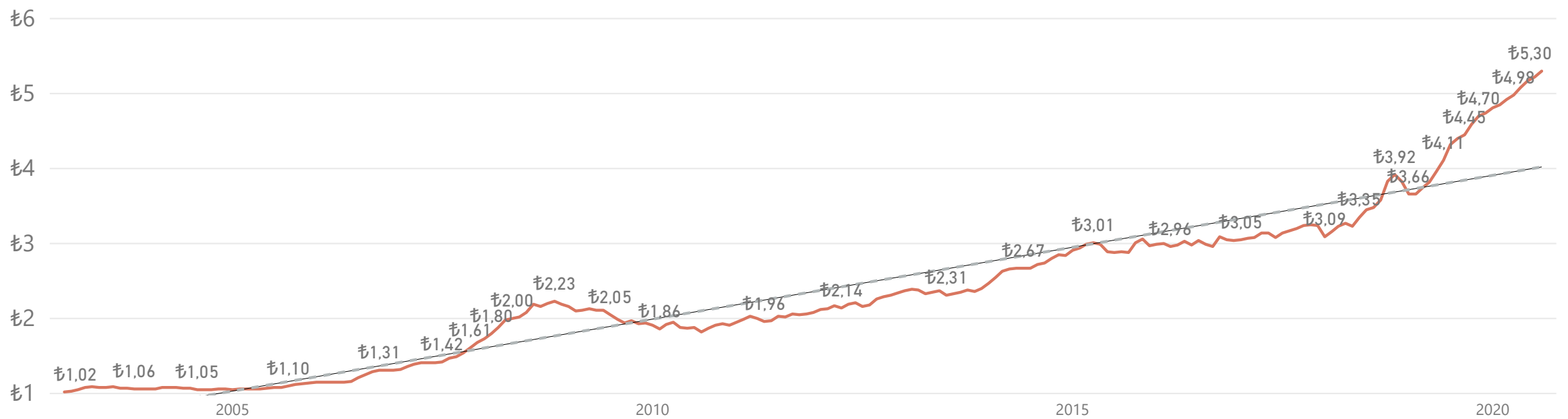
Source : Ministry of the interior and TÜİK



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 july pasta market price:

₺5,30 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

