



MAKARNA ÜRETİCİLERİ VE SANAYİCİLERİ DERNEĞİ  
Pasta Producers and Industrialists Association

## SECTOR REPORT

JANUARY - SEPTEMBER 2020



# Pasta Producers and Industrialists' Association

## Sector Report

JANUARY - SEPTEMBER 2020

PUBLISH DATE

1 September 2020

Hello,

COVID-19 pandemic conditions and economic fluctuations happening at the same time deeply affects our sector, as well as other sectors.

For the last harvest period, with a price increase of 23% over the previous year's price, purchase price of durum wheat was announced as 1,850 TL/tons. This price was welcomed by both producers and industry.

But, due to the COVID-19 pandemic, exchange rate increases and some corporations entering the market as buyers, price of durum wheat increased to 2,400 – 2,500 TL/ton range.

Based on the international prices (~330 \$/ton and 1 \$= 8,25 TL), port delivery price of imported durum wheat is near 2,700 TL/ton these days. This means 45% increase from declared purchase price. Under these conditions, there is a serious inflation threat in pasta, bulgur and other products made from durum wheat.

To combat the mentioned price surges that negatively affects food inflation, it is seen that relevant institutions are considering some measures in pasta exports.

We think that measures should not only aim to curb the domestic wheat price surges, but also be planned in a way that they will not cause the loss of our export markets, which have been achieved over decades of labor.

At this point, we communicated our suggestions to lawful authorities. With the hope that the right steps will be taken for both the industry and our consumers, we present our sector report, covering the January-September period.

Hope to reach the days without pandemic, with wellbeing...

Nihat Uysallı  
Chairman of the Executive Board

## SEPTEMBER 2020

**EXPORT  
QUANTITY (KG)** **%33,5**

SEPTEMBER 2020

**130.269.595**

SEPTEMBER 2019

97.553.077



**EXPORT VALUE  
(USD)** **%48,8**

SEPTEMBER 2020

**\$70.498.878**

SEPTEMBER 2019

\$47.391.032



**UNIT PRICE  
(USD/TON)** **%11,4**

SEPTEMBER 2020

**\$541**

SEPTEMBER 2019

\$486



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

## JANUARY - SEPTEMBER 2020

**EXPORT  
QUANTITY (KG)** **%13,4**

2020 TOTAL

**1.071.697.06**

2019 TOTAL

945.316.097



**EXPORT VALUE  
(USD)** **%24,9**

2020 TOTAL

**\$558.063.816**

2019 TOTAL

\$446.654.017



**UNIT PRICE  
(USD/TON)** **%10,2**

2020 TOTAL

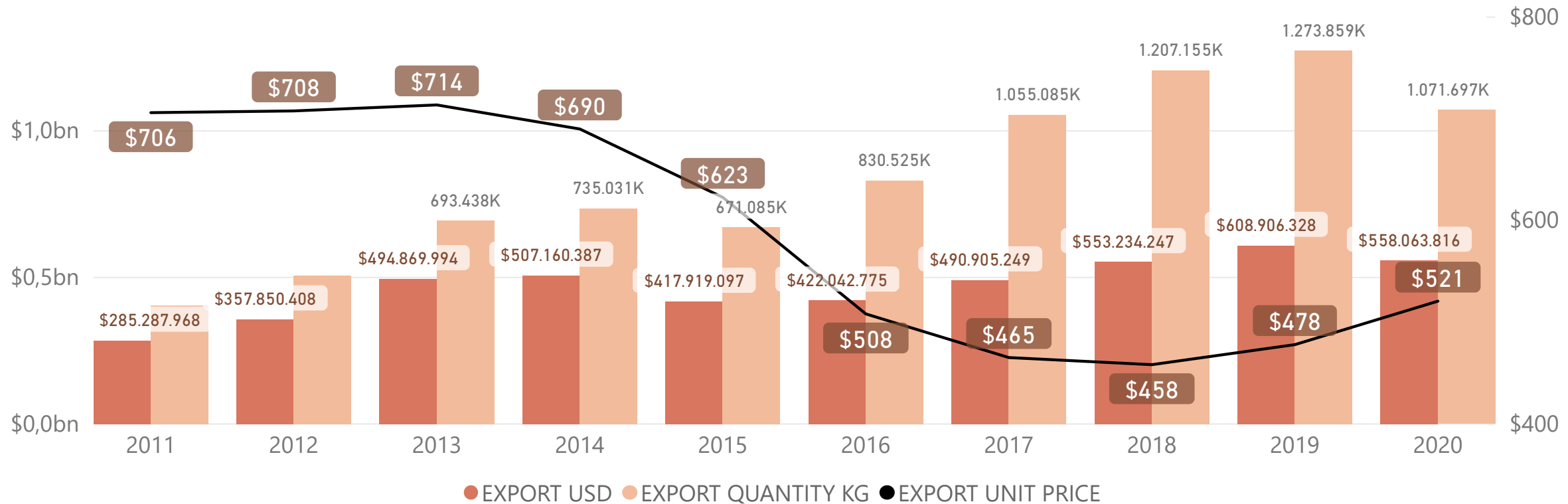
**\$521**

2019 TOTAL

\$472



\* 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 \$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 \$521/ton by September 2020. But, compared to surge in durum wheat prices, increase in unit export price is still insufficient.

## SEPTEMBER 2020

**IMPORT  
QUANTITY (KG)**

**-%93**

SEPTEMBER 2020

**11.157.538**

SEPTEMBER 2019

167.071.820



**IMPORT VALUE  
(USD)**

**-%94**

SEPTEMBER 2020

**\$2.968.398**

SEPTEMBER 2019

\$46.715.412



**UNIT PRICE  
(USD/TON)**

**-%4,9**

SEPTEMBER 2020

**\$266**

SEPTEMBER 2019

\$280



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

## JANUARY - SEPTEMBER 2020

**IMPORT  
QUANTITY (KG)**

**%14**

2020 TOTAL

**902.866.762**

2019 TOTAL

795.123.177



**IMPORT VALUE  
(USD)**

**%22**

2020 TOTAL

**\$269.255.465**

2019 TOTAL

\$220.408.387



**UNIT PRICE  
(USD/TON)**

**%7,6**

2020 TOTAL

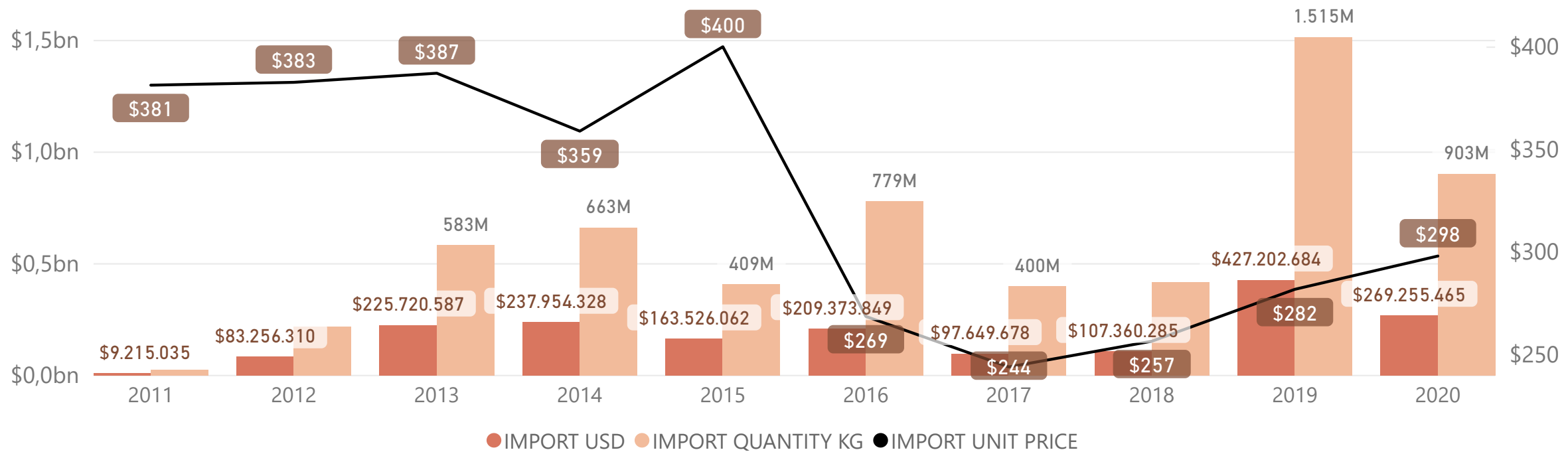
**\$298**

2019 TOTAL

\$277

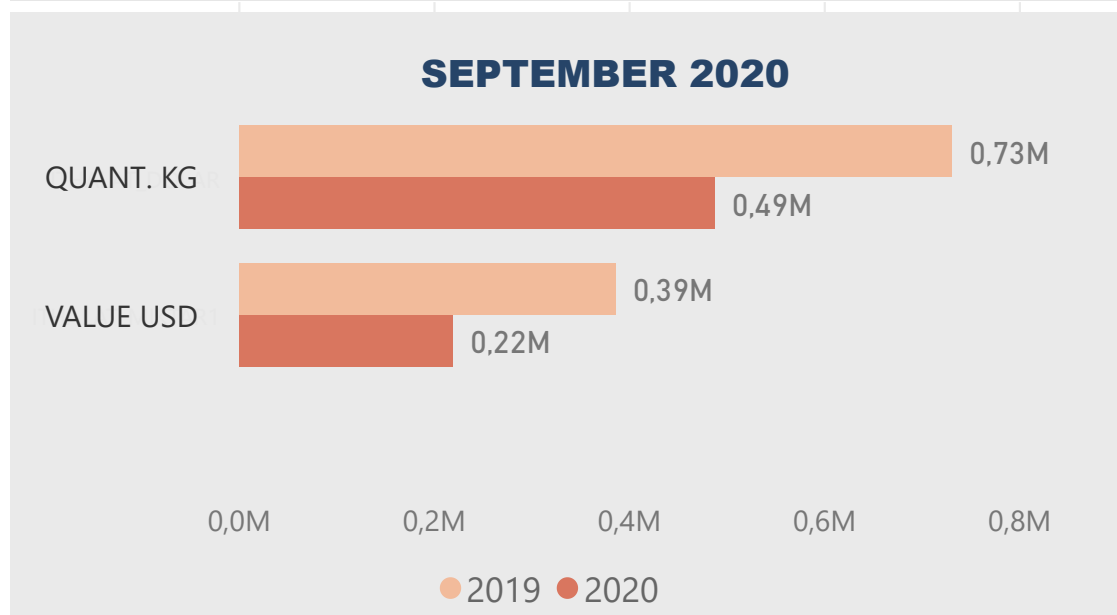
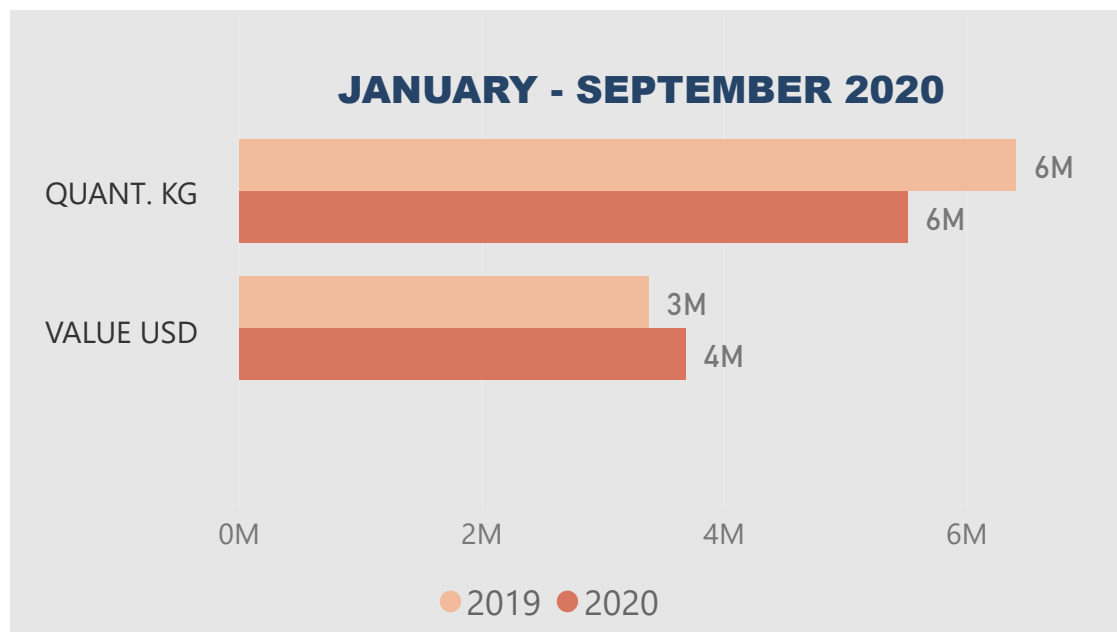


\* Comparisons were made with the same period of the previous year.



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 \$298 level in September 2020.



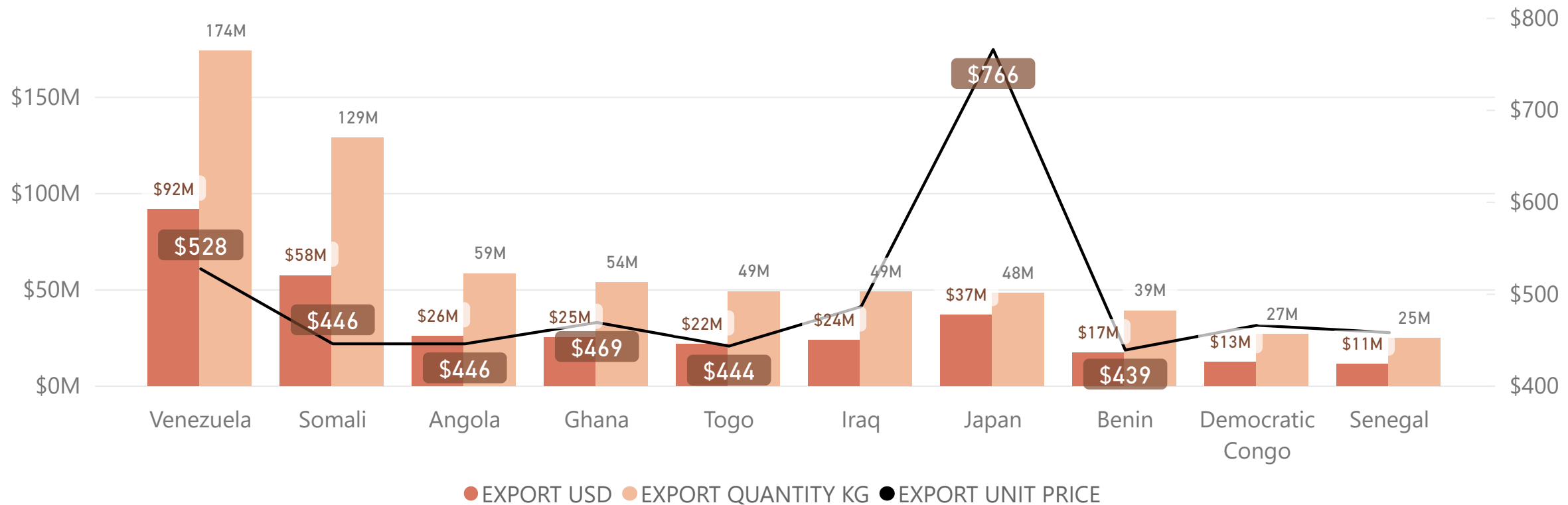
In September 2020, compared to September 2019, Pasta Exports increased 33.54% and reached to 130.27 thousand tons in quantity; increased 48.76% and reached \$70.5 million in value.

Between January - September 2020, compared to same period of the previous year, pasta exports increased 13.37% and reached 1,07 million tons in quantity; increased by 24.94% and reached \$558.06 million in value.

Average unit price per ton was \$486 in September 2019. It increased 11.4% and reached to \$541 in September 2020.

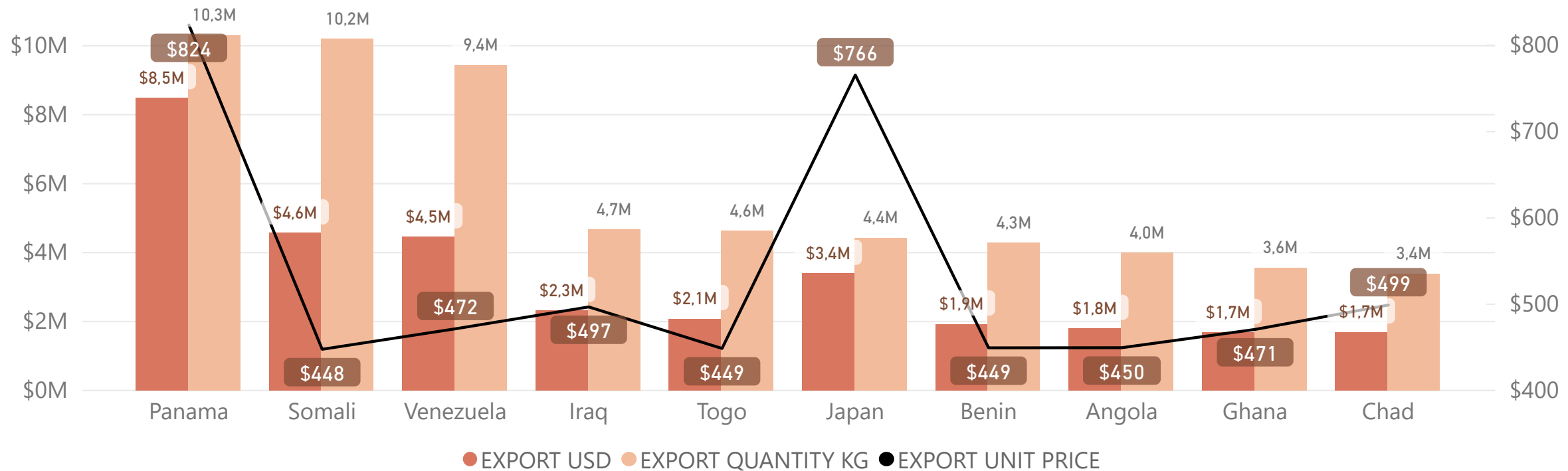
Compared to same period of the previous year, between January and September 2020, average price per ton increased 10.21% and reached \$521/ton.





Between January and September 2020, biggest exports was made to Venezuela with 174 thousand tons, followed by Somalia and Angola. In terms of value, biggest importer is still Venezuela with \$92 million, followed by Somalia and Japan, respectively.

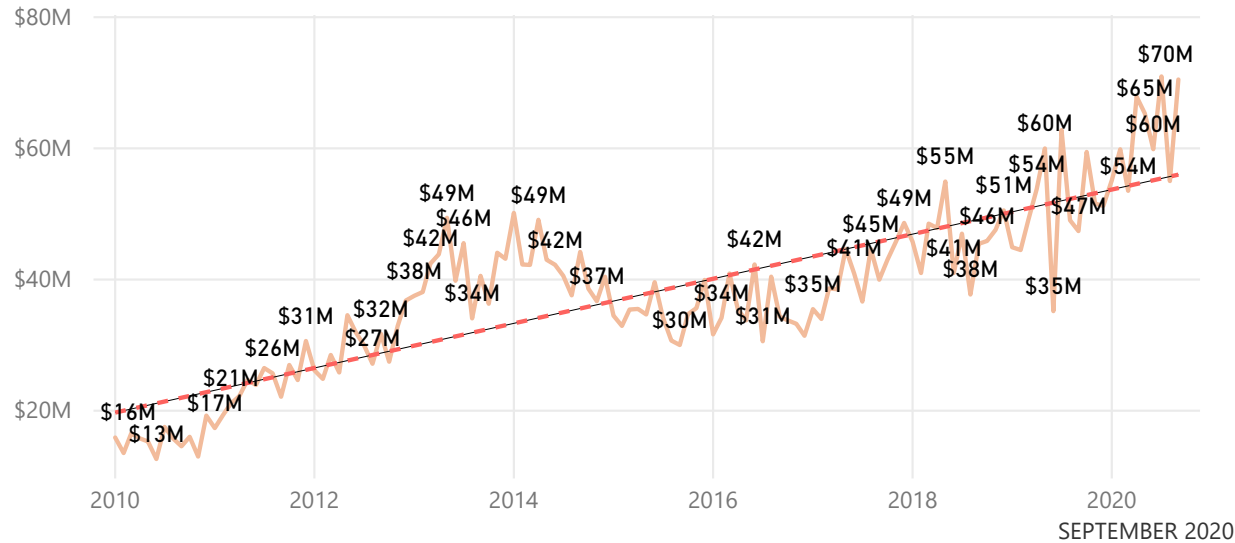
On the basis of unit price amongst top 10 countries we export to in 2020, Japan ranked first with \$766/ton. Benin was on the last place with \$439/ton.



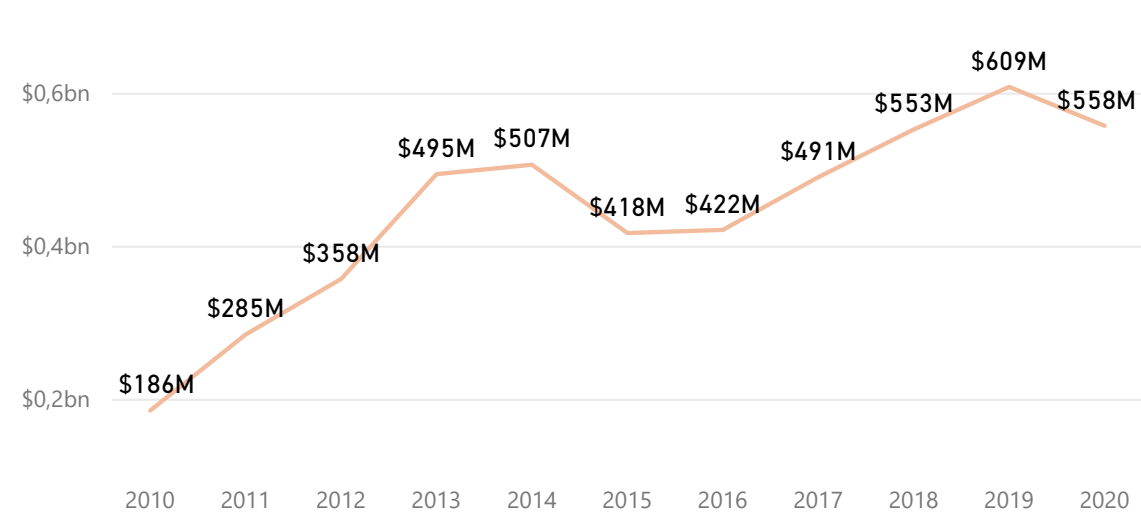
In September 2020, biggest exports, in terms of quantity was made to Venezuela with 16 thousand tons, followed by Somalia and Dominican Republic.

In September 2020, among the top 10 countries we export to on the basis of unit price, Dominican Republic ranked 1st with \$775/ton, followed by Japan (\$754/ton) and Iraq (\$616/ton) respectively. Togo had the lowest price with \$438/ton.

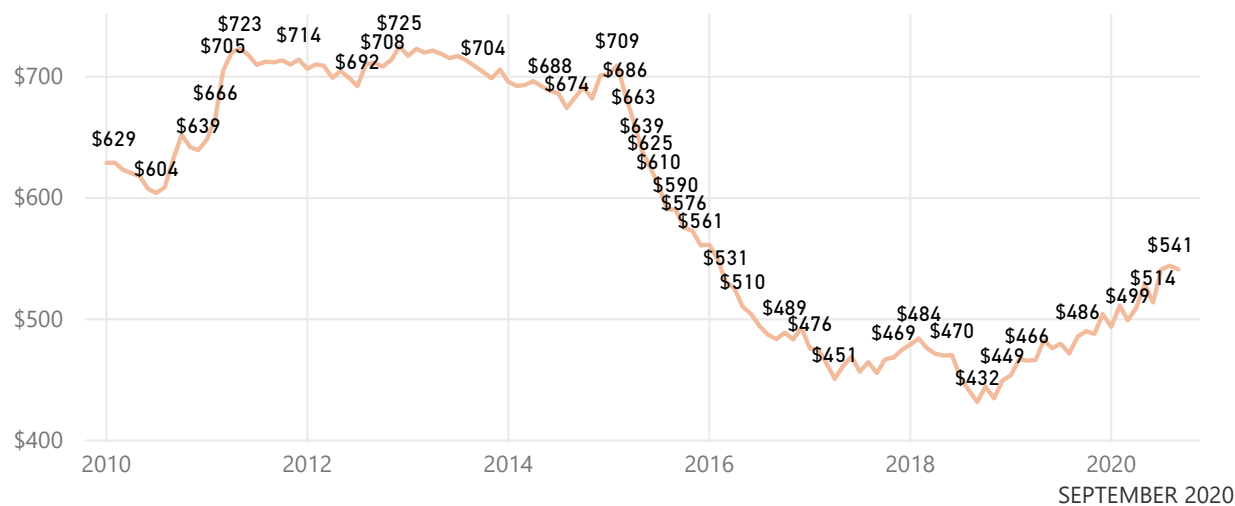
## MONTHLY EXPORT VALUE (USD)



## YEARLY EXPORT VALUE (USD)



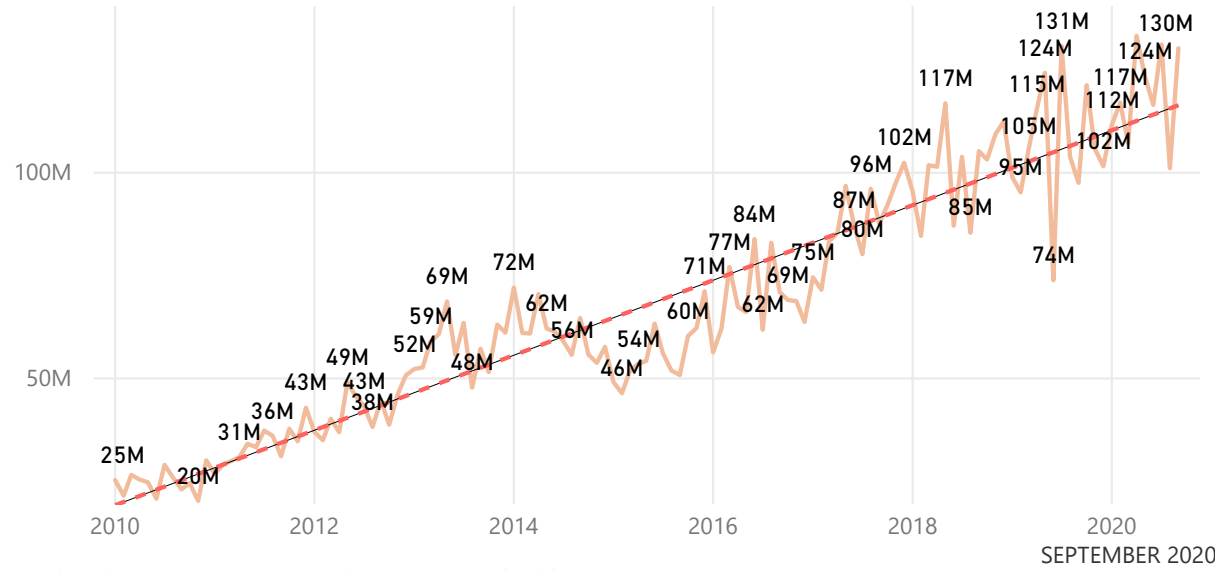
## MONTHLY EXPORT UNIT PRICE (USD/TON)



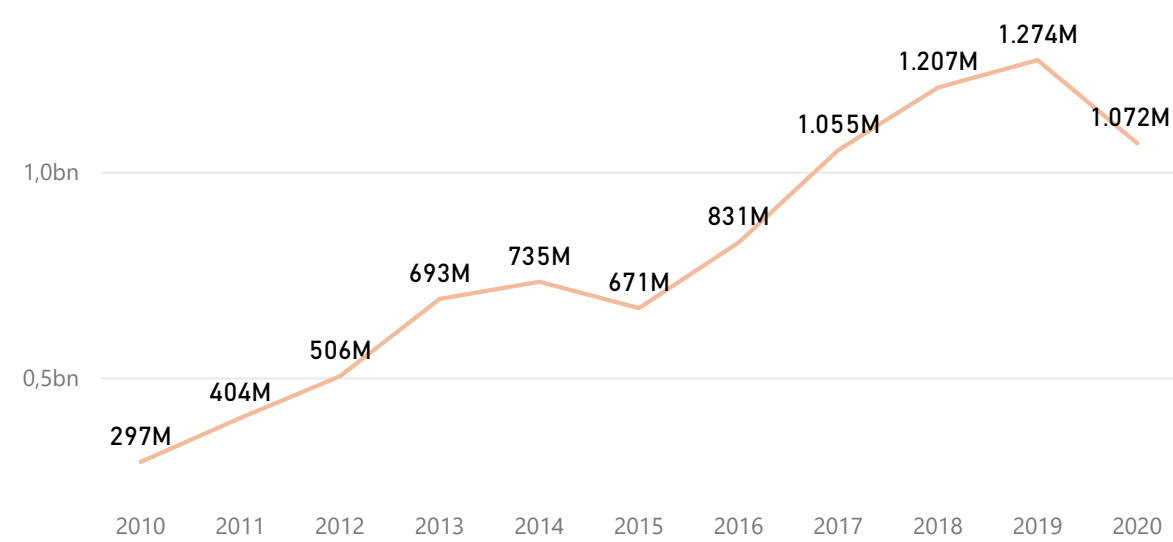
When pasta exports are analyzed by years, exports in July 2020 (\$70.96 million) is the highest export value ever.

When unit price is analyzed by months, highest value of the recent years is observed again in July.

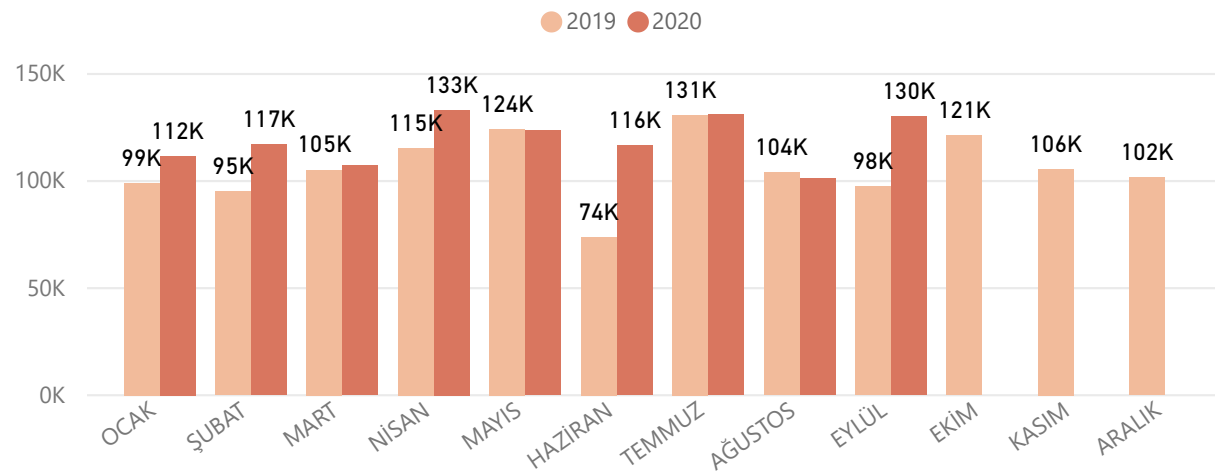
## MONTHLY EXPORT QUANTITY (KG)



## YEARLY EXPORT QUANTITY (KG)



## LAST 2 YEAR EXPORT QUANTITY (KG)



Considering the monthly exports in 2020, after highest amount of exports was made in April, second highest month is July with 131.2 tons.

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

# 2019 - 2020 EXPORT COMPARISON CHART

JANUARY - SEPTEMBER 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>42.323.490</b>	<b>\$14.511.518</b>	<b>17.008.140</b>	<b>\$5.829.507</b>	<b>%148,8</b>	<b>%148,9</b>
Durum wheat (excl. seed for sowing)	42.323.490	\$14.511.518	17.008.140	\$5.829.507	%148,8	%148,9
<b>190211</b>	<b>3.827.823</b>	<b>\$3.812.718</b>	<b>1.682.516</b>	<b>\$1.496.838</b>	<b>%127,5</b>	<b>%154,7</b>
Uncooked pasta, containing common wheat flour or meal or eggs	2.160.452	\$2.755.606	652.545	\$805.061	%231,1	%242,3
Uncooked pasta, not stuffed containing eggs (Excl. phenylketonuria pt.), others	1.667.371	\$1.057.112	1.029.971	\$691.777	%61,9	%52,8
<b>190219</b>	<b>1.017.701.292</b>	<b>\$525.973.377</b>	<b>901.091.062</b>	<b>\$424.568.130</b>	<b>%12,9</b>	<b>%23,9</b>
Low protein pasta for phenylketonuria patients	5.480	\$10.189				
Uncooked pasta, not stuffed or otherwise prepared	425.915.550	\$195.627.683	167.271.363	\$73.474.684	%154,6	%166,3
Uncooked pasta, not stuffed or otherwise prepared, containing vegetables	318.682	\$495.075	172.023	\$405.358	%85,3	%22,1
Uncooked pasta, not stuffed or otherwise prepared, not containing common wheat flour or meal or eggs (Excl. fenilketonüri pt.)	585.965.401	\$327.157.045	729.089.439	\$348.283.634	-%19,6	-%6,1
Uncooked pasta, not stuffed, others	5.496.179	\$2.683.385	4.558.237	\$2.404.454	%20,6	%11,6
<b>190220</b>	<b>676.370</b>	<b>\$855.361</b>	<b>267.821</b>	<b>\$427.062</b>	<b>%152,5</b>	<b>%100,3</b>
Cooked pasta, cooked, stuffed with meat or other substances	19.810	\$61.862	12.906	\$53.990	%53,5	%14,6
Cooked pasta, stuffed with meat or other substances, others	497.342	\$650.169	243.619	\$345.055	%104,1	%88,4
Pasta, stuffed with meat, containing > 20% by weight of meat and meat offal of any kind	12.516	\$35.273	7.812	\$17.549	%60,2	%101,0
Pasta, stuffed with meat, containing > 20% by weight of sausages and the like	1.092	\$2.036	3.436	\$9.068	-%68,2	-%77,5
Pasta, stuffed, containing > 20% by weight of fish, etc	145.610	\$106.021	48	\$1.400	%303254,2	%7472,9
<b>190230</b>	<b>49.155.500</b>	<b>\$27.210.337</b>	<b>41.996.333</b>	<b>\$19.986.927</b>	<b>%17,0</b>	<b>%36,1</b>
Pasta, dried	6.340.964	\$6.392.721	3.154.416	\$4.189.587	%101,0	%52,6
Pasta, others	42.814.536	\$20.817.616	38.841.917	\$15.797.340	%10,2	%31,8
<b>190240</b>	<b>336.077</b>	<b>\$212.023</b>	<b>278.365</b>	<b>\$175.060</b>	<b>%20,7</b>	<b>%21,1</b>
Couscous unprepared	277.368	\$160.221	185.934	\$109.947	%49,2	%45,7
Couscous, cooked or otherwise prepared	58.709	\$51.802	92.431	\$65.113	-%36,5	-%20,4
<b>Total</b>	<b>1.114.020.552</b>	<b>\$572.575.334</b>	<b>962.324.237</b>	<b>\$452.483.524</b>	<b>%15,8</b>	<b>%26,5</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

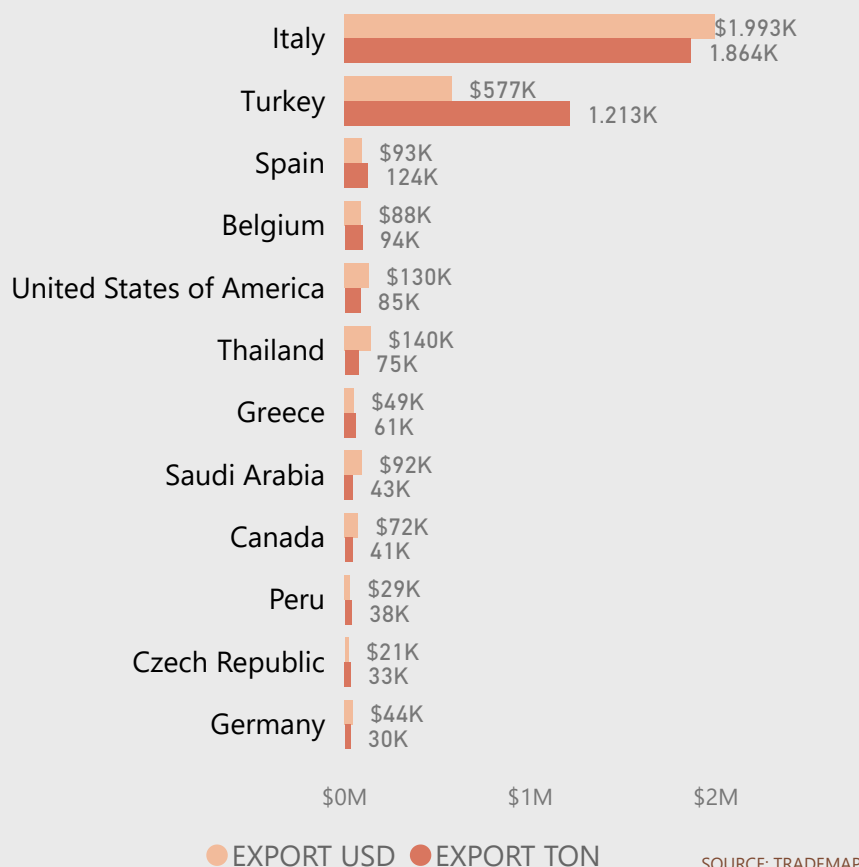
WORLD PASTA (1902.19)  
EXPORT IN 2019 (USD)

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

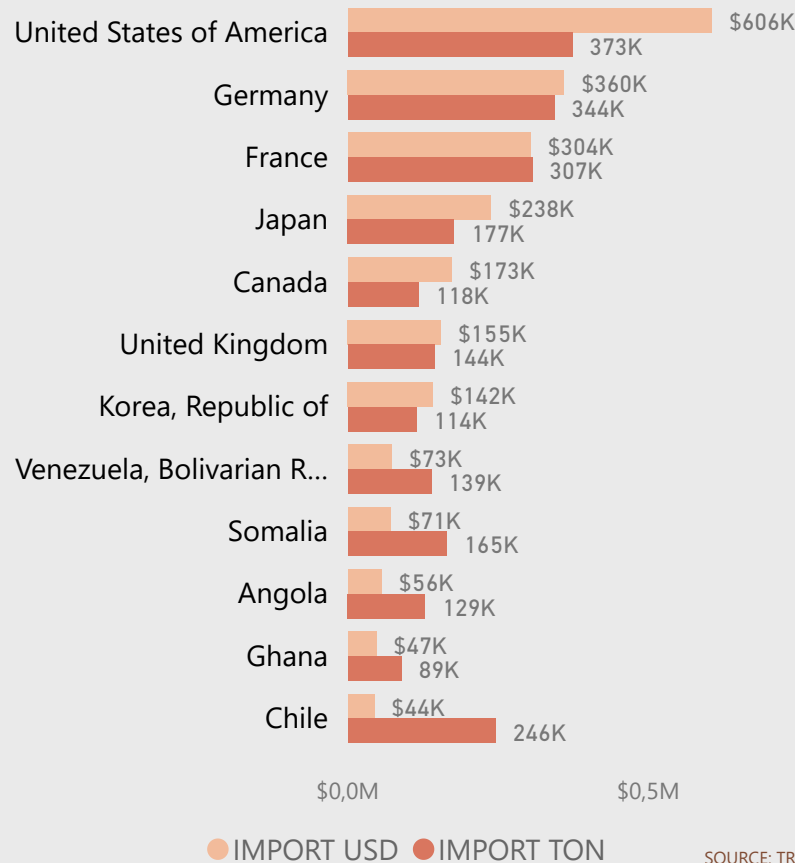
WORLD PASTA (1902.19)  
IMPORT IN 2019 (USD)

4.268.211

WORLD PASTA (1902.19)  
IMPORT IN 2019 (TON)

4.276.378

WORLD PASTA IMPORTS IN 2019 (1902.19 HS CODE)



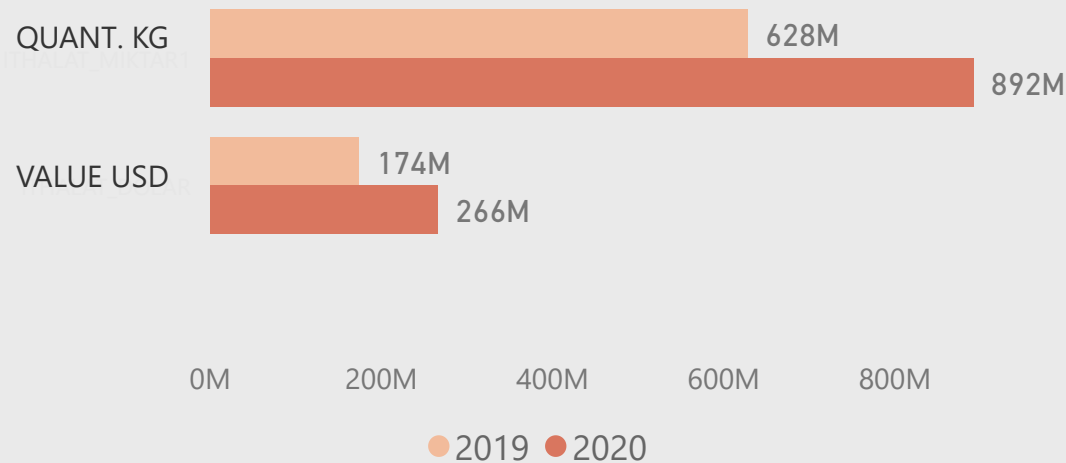
UNIT IMPORT PRICE OF COUNTRIES OVER 55K IMPORT QUANT. (\$/TON)

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.

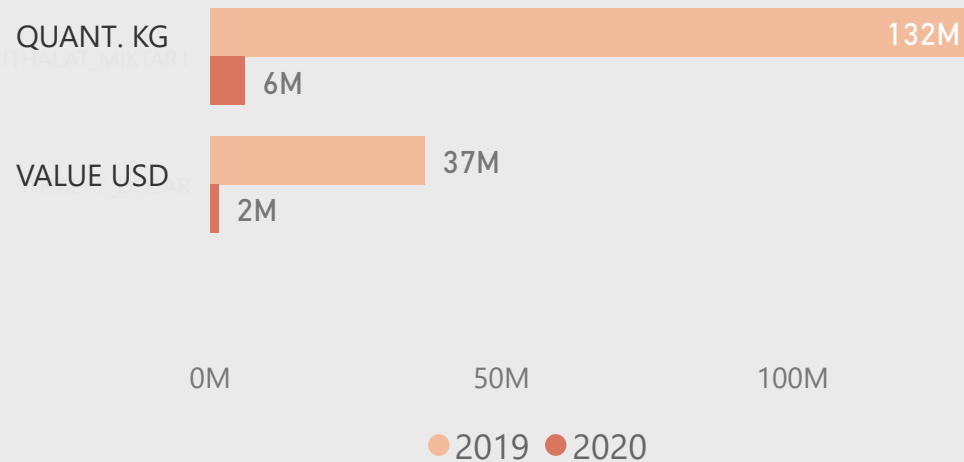
**JANUARY - SEPTEMBER 2020**



In September 2020, compared to September 2019, durum wheat imports decreased 93.32% and fell to 11.16 thousand tons; in terms of value, decreased by 93.65% to \$2.97 million.

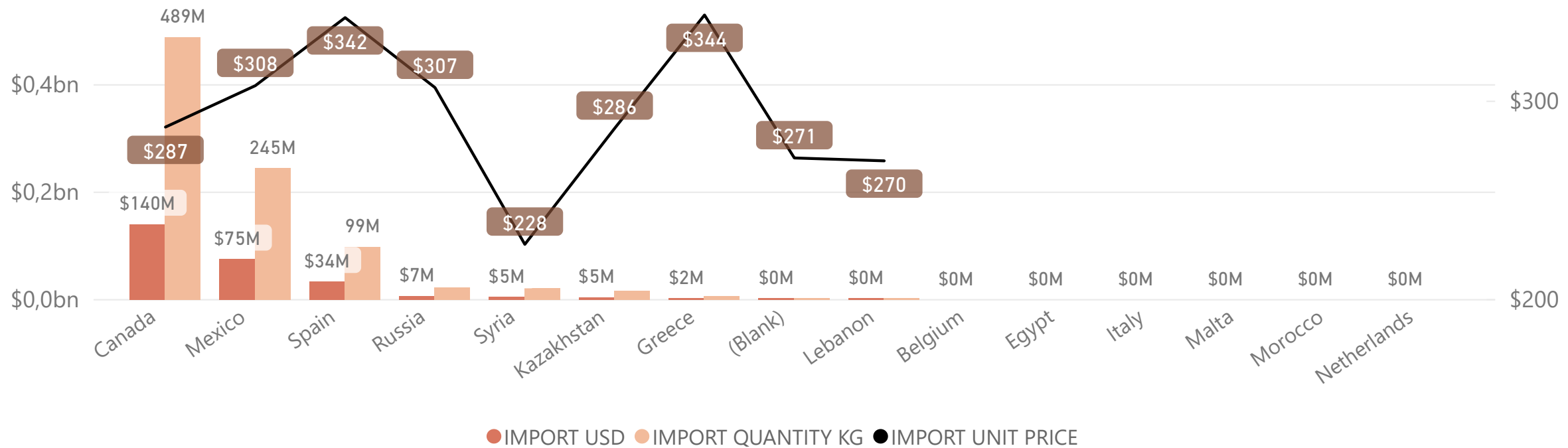
Between January and September 2020, compared to same period of the previous year, amount of durum wheat imports increased by 13.55% and reached 902.87 thousand tons; in terms of value, increased 22.16% and reached \$269.26 million.

**SEPTEMBER 2020**



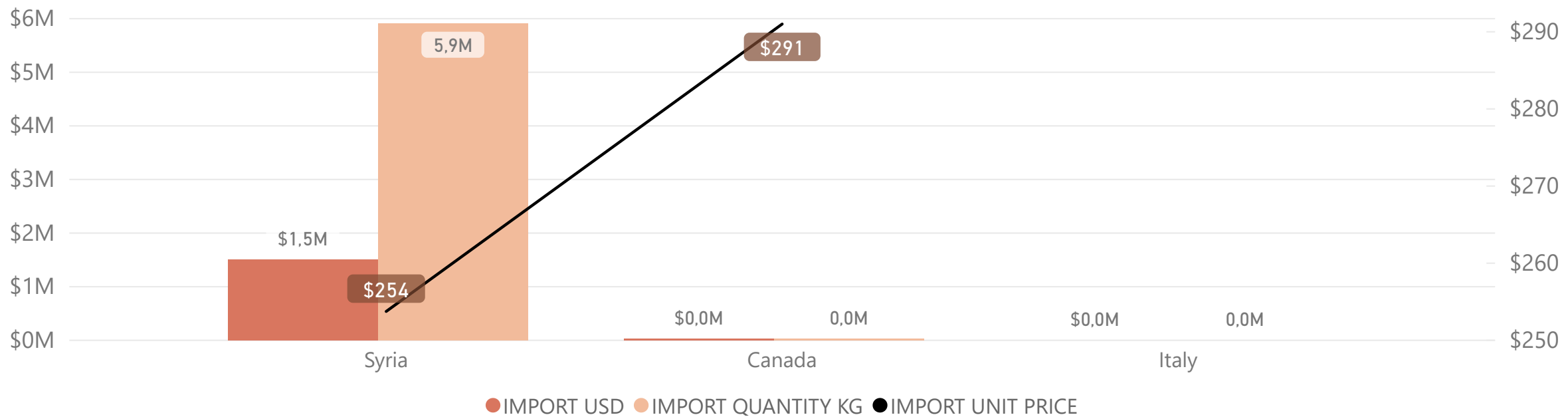
Average unit price per ton was \$280/ton in September 2019. In September 2020, it decreased by 4.85% and fell to \$266/ton. Between January and September 2020, compared to same period of the previous year, average unit price increased by 7.58% and reached \$298/ton.





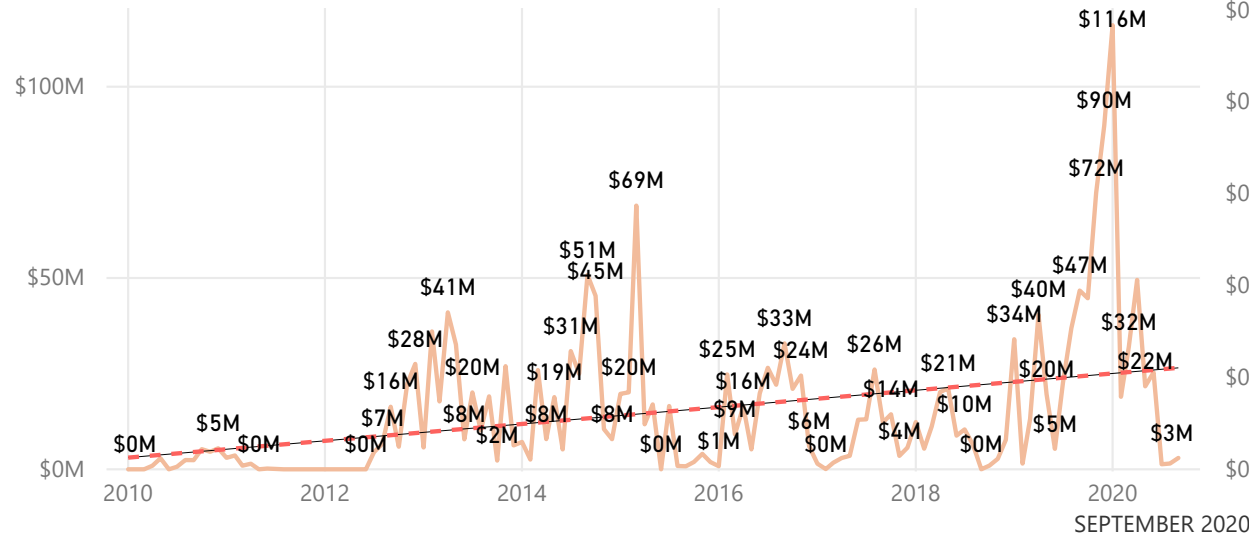
During the period between January and September 2020, biggest importer of durum wheat was Canada with 489 thousand tons (\$140 million), followed by Mexico and Spain.

Average unit price of durum wheat imported by Canada was \$287/ton. Lowest price belonged to Syria with \$228/ton, while the highest unit price belongs to Greece with \$344/ton.

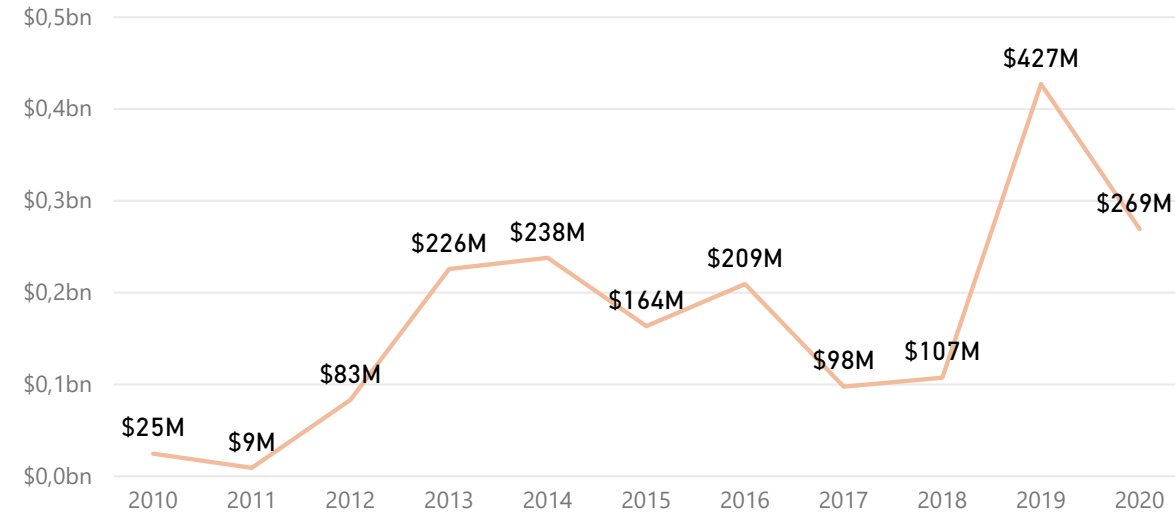


In September 2020, most of the durum wheat imports was made by Syria. Syria imported 7,9 thousand tons of durum wheat (\$1,7 million), with \$215/ton average unit price. In September 2020, other two countries imported durum wheat was Russia and TRNC (Turkish Republic of Northern Cyprus).

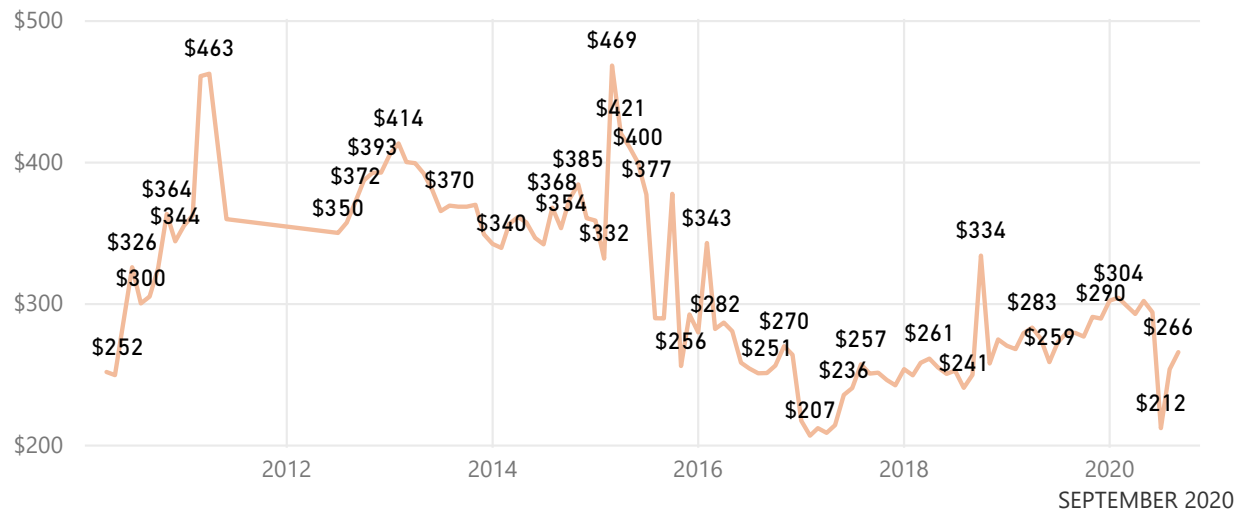
## MONTHLY IMPORT VALUE (USD)



## YEARLY IMPORT VALUE (USD)



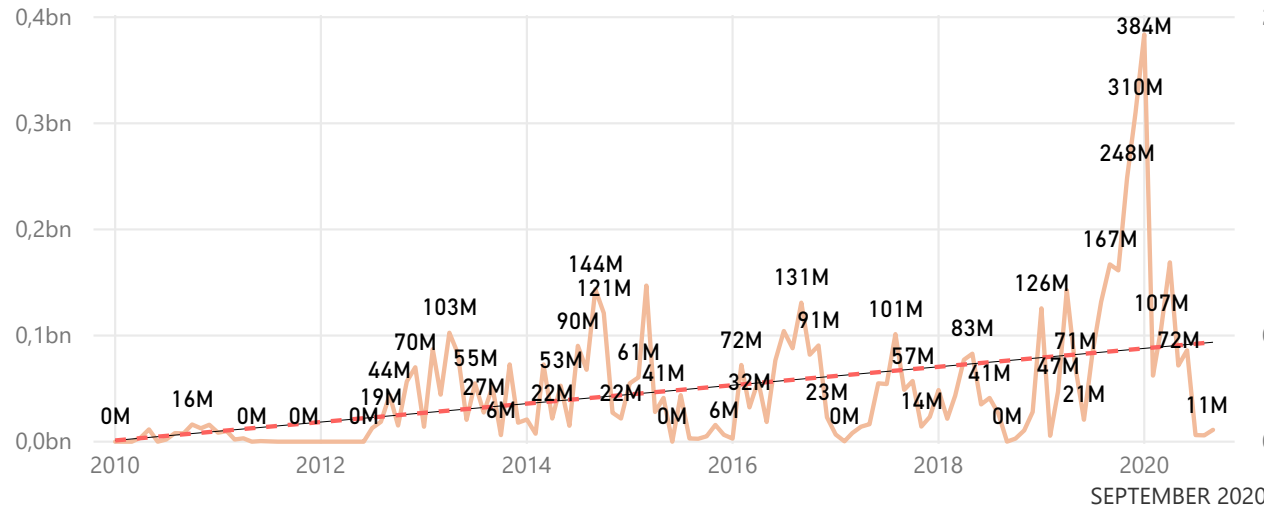
## MONTHLY IMPORT UNIT PRICE (USD/TON)



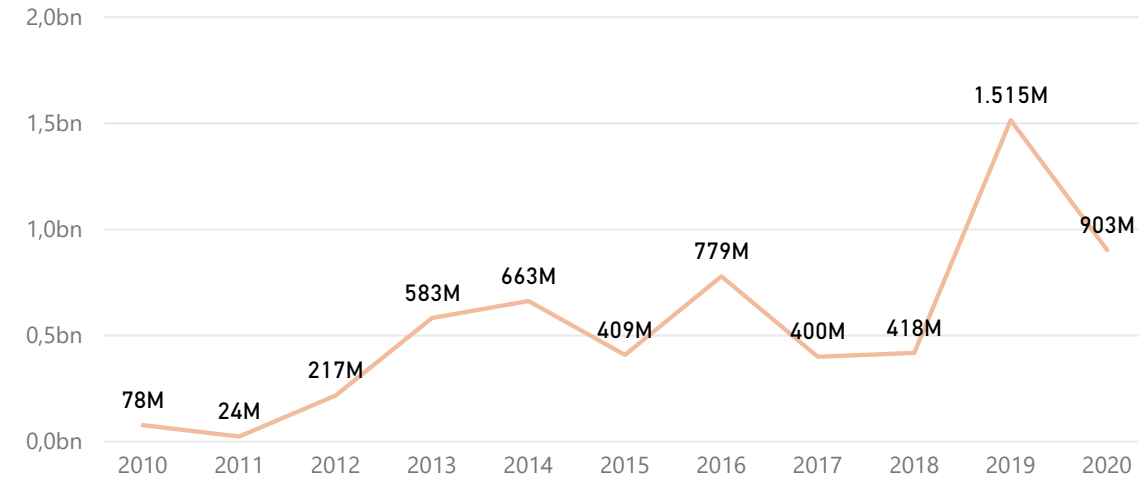
When the monthly import values are analyzed by years, it is seen that imports in January 2020 (\$116 million) is the highest monthly import ever.

Also, unit value of imports past \$300 level in May 2020, reaching the highest value in last 4 years. The value of imports made in the first eight months of 2020 has already past the 12 months total of all years, except 2019.

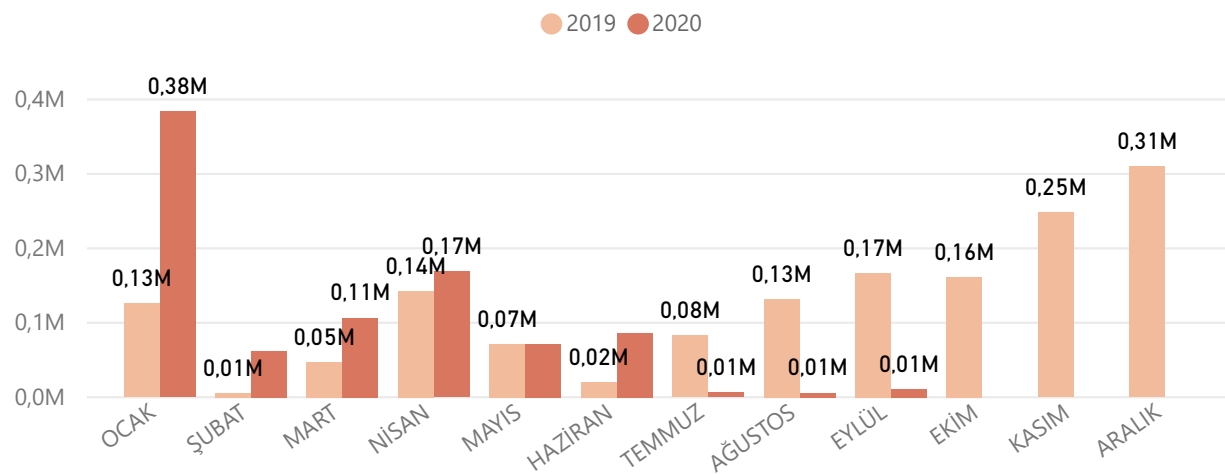
## MONTHLY IMPORT QUANTITY (KG)



## YEARLY IMPORT QUANTITY (KG)



## LAST 2 YEAR IMPORT QUANTITY (KG)



From data, it is seen that record high Durum Wheat imports in 2019, continued in 2020. Imports in January 2020 (384 thousand tons) is the highest monthly amount of import of all times.

Amount of imports made in the first eight months of 2020 has past the 12 months total of all years, except 2019.

# 2019 - 2020 IMPORT COMPARISON CHART

JANUARY - SEPTEMBER 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>902.866.762</b>	<b>\$269.255.465</b>	<b>795.123.177</b>	<b>\$220.408.387</b>	<b>%13,6</b>	<b>%22,2</b>
Durum wheat (excl. seed for sowing)	902.866.762	\$269.255.465	795.123.177	\$220.408.387	%13,6	%22,2
<b>190219</b>	<b>3.980.568</b>	<b>\$4.580.931</b>	<b>2.317.317</b>	<b>\$3.739.200</b>	<b>%71,8</b>	<b>%22,5</b>
Uncooked pasta, not stuffed or otherwise prepared, not containing common wheat flour or meal or eggs (Excl. fenilketonüri pt.)	2.435.198	\$3.364.618	2.079.474	\$3.188.722	%17,1	%5,5
Uncooked pasta, not stuffed or otherwise prepared	306.183	\$395.061	92.914	\$210.270	%229,5	%87,9
Uncooked pasta, not stuffed, others	1.235.833	\$803.086	113.461	\$185.540	%989,2	%332,8
Uncooked pasta, not stuffed or otherwise prepared, containing vegetables	3.354	\$18.166	31.468	\$154.668	-%89,3	-%88,3
Low protein pasta for phenylketonuria patients	0	\$0				
<b>190230</b>	<b>370.404</b>	<b>\$618.250</b>	<b>674.106</b>	<b>\$1.797.620</b>	<b>-%45,1</b>	<b>-%65,6</b>
Pasta, dried	230.141	\$462.075	335.377	\$1.178.079	-%31,4	-%60,8
Pasta, others	140.263	\$156.175	338.729	\$619.541	-%58,6	-%74,8
<b>190211</b>	<b>273.597</b>	<b>\$471.314</b>	<b>968.263</b>	<b>\$1.387.042</b>	<b>-%71,7</b>	<b>-%66,0</b>
Uncooked pasta, not stuffed containing eggs (Excl. phenylketonuria pt.), others	122.412	\$150.375	700.470	\$877.331	-%82,5	-%82,9
Uncooked pasta, containing common wheat flour or meal or eggs	151.185	\$320.939	267.793	\$509.711	-%43,5	-%37,0
<b>190220</b>	<b>324.497</b>	<b>\$675.649</b>	<b>230.807</b>	<b>\$786.062</b>	<b>%40,6</b>	<b>-%14,0</b>
Cooked pasta, stuffed with meat or other substances, others	312.031	\$623.770	114.125	\$420.135	%173,4	%48,5
Cooked pasta, cooked, stuffed with meat or other substances	10.935	\$30.941	115.100	\$341.655	-%90,5	-%90,9
Pasta, stuffed, containing > 20% by weight of fish, etc	1.531	\$20.938	1.582	\$24.272	-%3,2	-%13,7
<b>190240</b>	<b>530</b>	<b>\$2.212</b>	<b>104.628</b>	<b>\$71.374</b>	<b>-%99,5</b>	<b>-%96,9</b>
Couscous unprepared	0	\$0	100.000	\$61.800	-%100,0	-%100,0
Couscous, cooked or otherwise prepared	530	\$2.212	4.628	\$9.574	-%88,5	-%76,9
<b>100111</b>	<b>1.545</b>	<b>\$2.737</b>	<b>20</b>	<b>\$137</b>	<b>%7625,0</b>	<b>%1897,8</b>
Durum wheat seed for sowing	1.545	\$2.737	20	\$137	%7625,0	%1897,8
<b>Total</b>	<b>907.817.903</b>	<b>\$275.606.558</b>	<b>799.418.318</b>	<b>\$228.189.822</b>	<b>%13,6</b>	<b>%20,8</b>

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

3.150.000

TON PRODUCTION

288

KG/DECARE (YIELD)

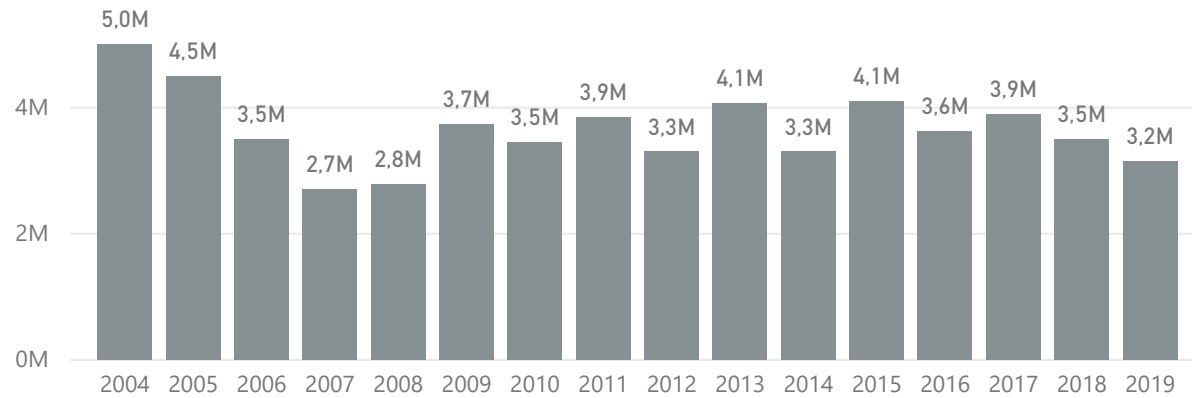
10.955.635

DECARE HARVEST AREA

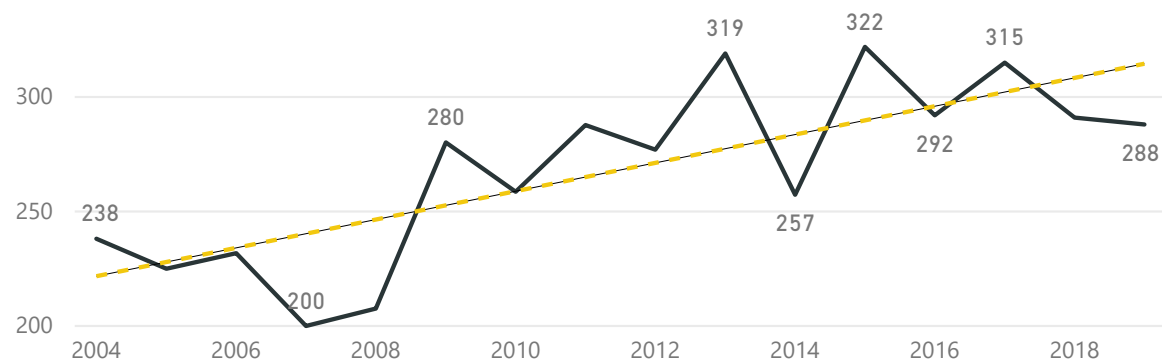
%16,0

RATIO PER TOTAL WHEAT

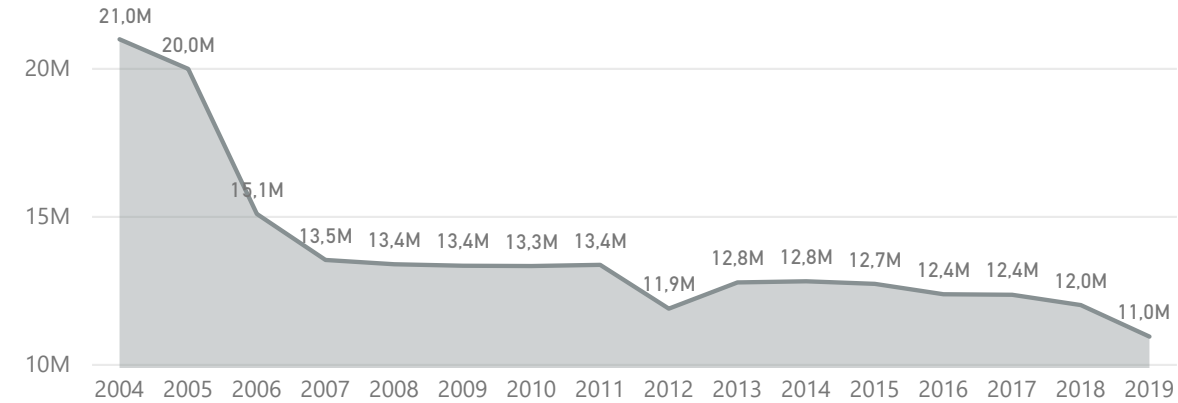
DURUM WHEAT PRODUCTION PER YEAR



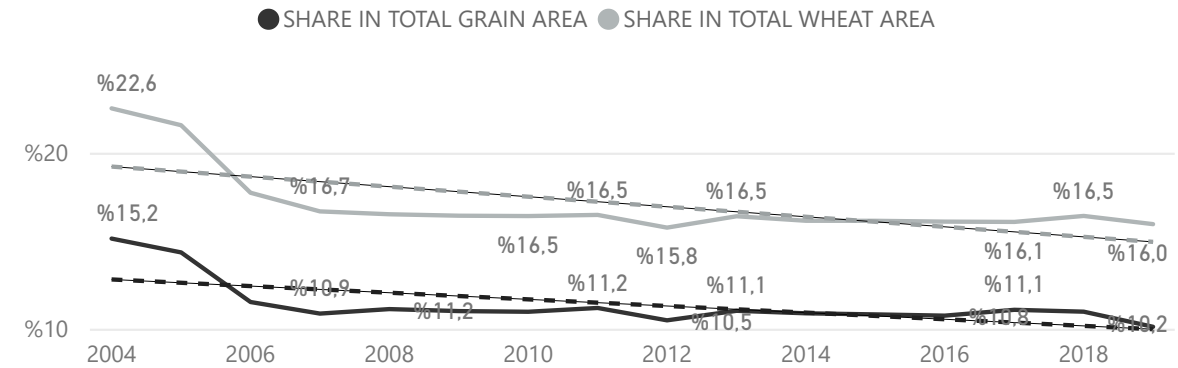
DURUM WHEAT YIELD PER YEAR (KG/DECARE)



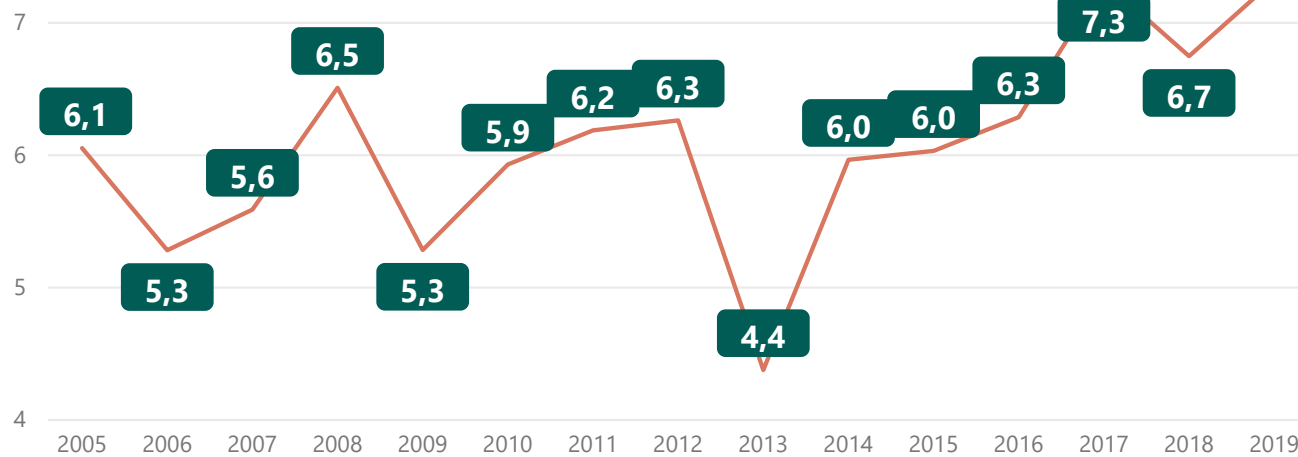
DURUM WHEAT HARVEST AREA PER YER (DECARE)



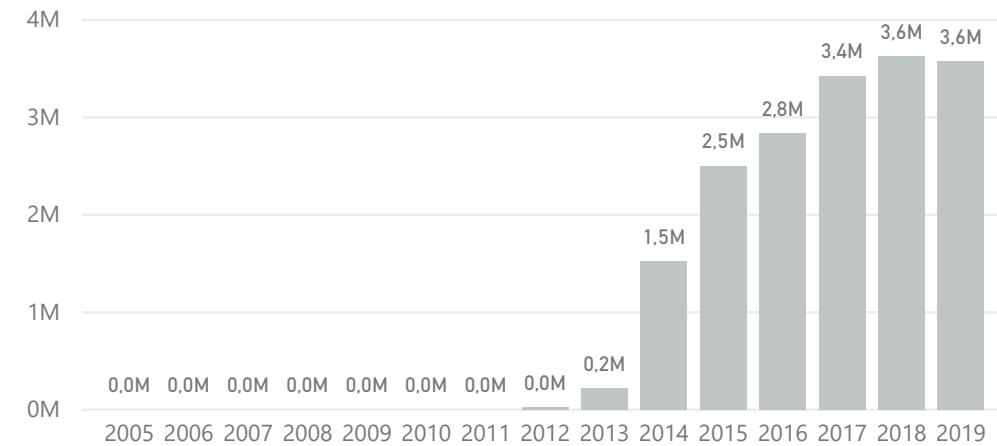
RATIO OF DURUM WHEAT HARVEST AREA



PASTA CONSUMPTION PER CAPITA (Kg/Per)

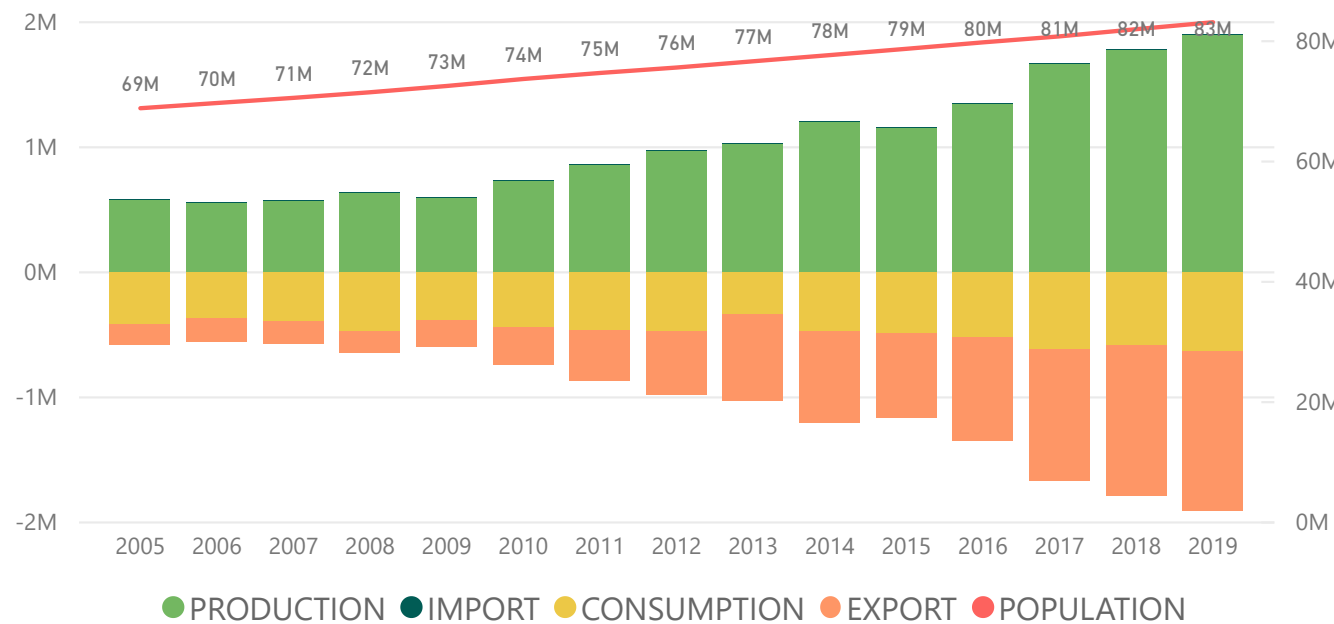


REFUGEE NUMBERS PER YEAR



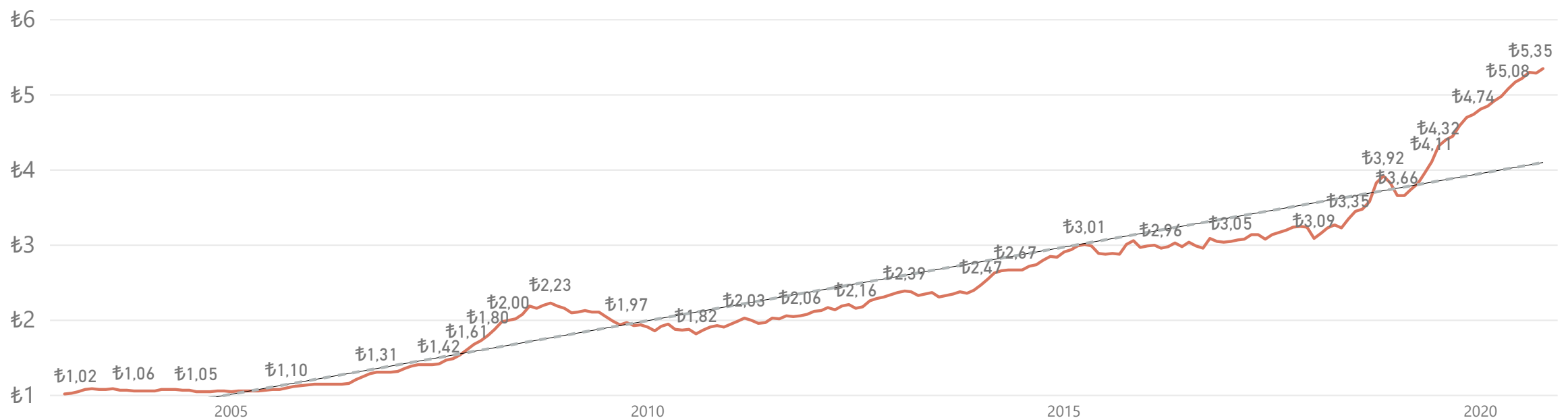
\* Calculations were made with population of Turkey and additional refugee numbers.

Source : Ministry of the interior and TÜİK



Year	Product. (Ton)	Import (Ton)	Export (Ton)	Consumption (Ton)
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
2019	1.902.423	6.143	1.273.541	635.025

2020 september pasta market price: ₺5,35 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

