

MÜSAD



MAKARNA ÜRETİCİLERİ VE SANAYİCİLERİ DERNEĞİ
Pasta Producers and Industrialists Association

SECTOR REPORT

JANUARY - NOVEMBER 2020



Pasta Producers and Industrialists' Association



Sector Report

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PUBLISH DATE




1 January 2021

NOVEMBER 2020

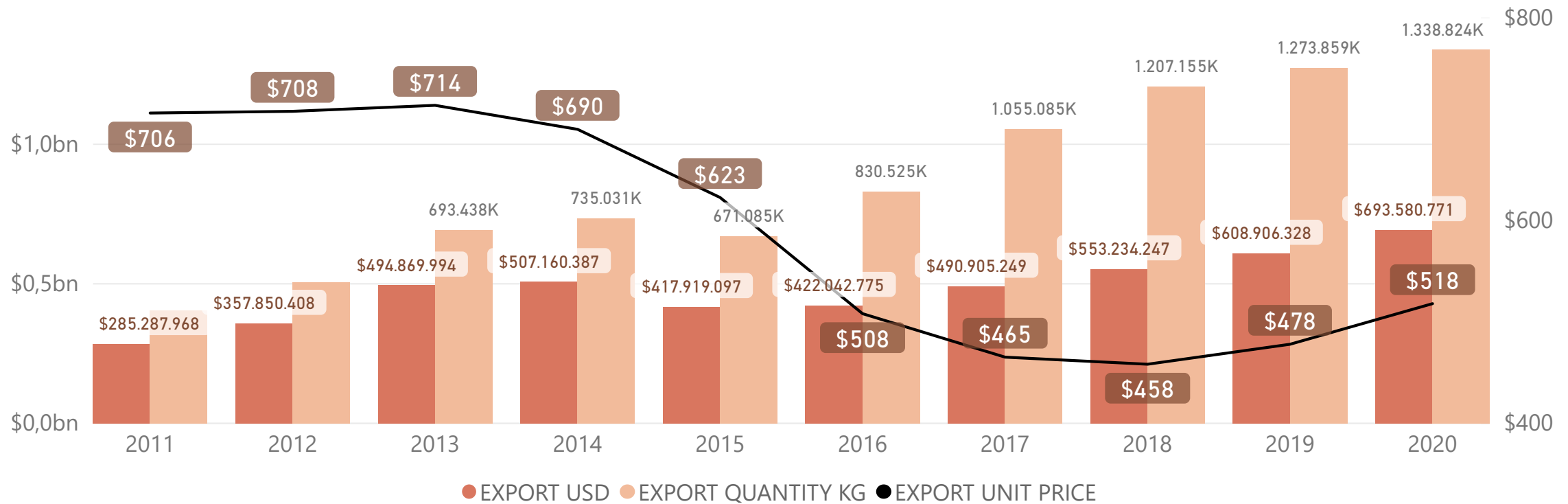
EXPORT QUANTITY (KG)	-%7,0	EXPORT VALUE (USD)	-%2,1	UNIT PRICE (USD/TON)	%5,2
NOVEMBER 2020		NOVEMBER 2020		NOVEMBER 2020	
98.269.187		\$50.461.934		\$514	
NOVEMBER 2019		NOVEMBER 2019		NOVEMBER 2019	
105.659.815		\$51.557.025		\$488	

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

JANUARY - NOVEMBER 2020

EXPORT QUANTITY (KG)	%14,2	EXPORT VALUE (USD)	%24,4	UNIT PRICE (USD/TON)	%8,9
2020 TOTAL		2020 TOTAL		2020 TOTAL	
1.338.824.367		\$693.580.771		\$518	
2019 TOTAL		2019 TOTAL		2019 TOTAL	
1.172.261.963		\$557.663.824		\$476	




* 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 \$518/ton by November 2020. But, compared to surge in durum wheat prices, increase in unit export price is still insufficient.

NOVEMBER 2020

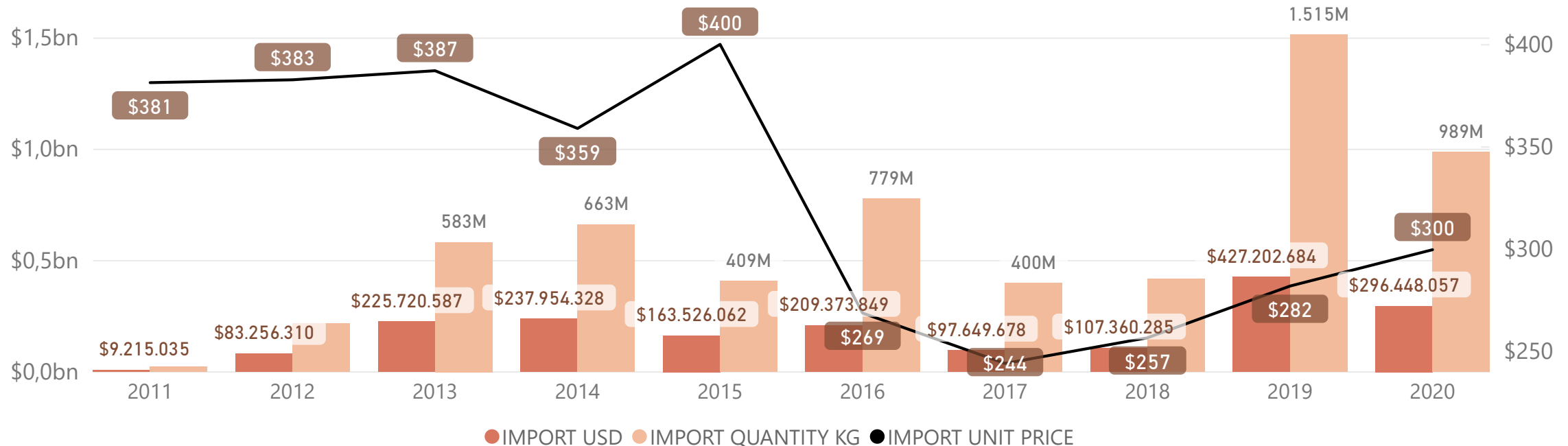
IMPORT QUANTITY (KG)	- %69	IMPORT VALUE (USD)	- %66	UNIT PRICE (USD/TON)	%10,2
NOVEMBER 2020		NOVEMBER 2020		NOVEMBER 2020	
76.376.304		\$24.491.486		\$321	
NOVEMBER 2019		NOVEMBER 2019		NOVEMBER 2019	
248.323.319		\$72.253.124		\$291	

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

JANUARY - NOVEMBER 2020

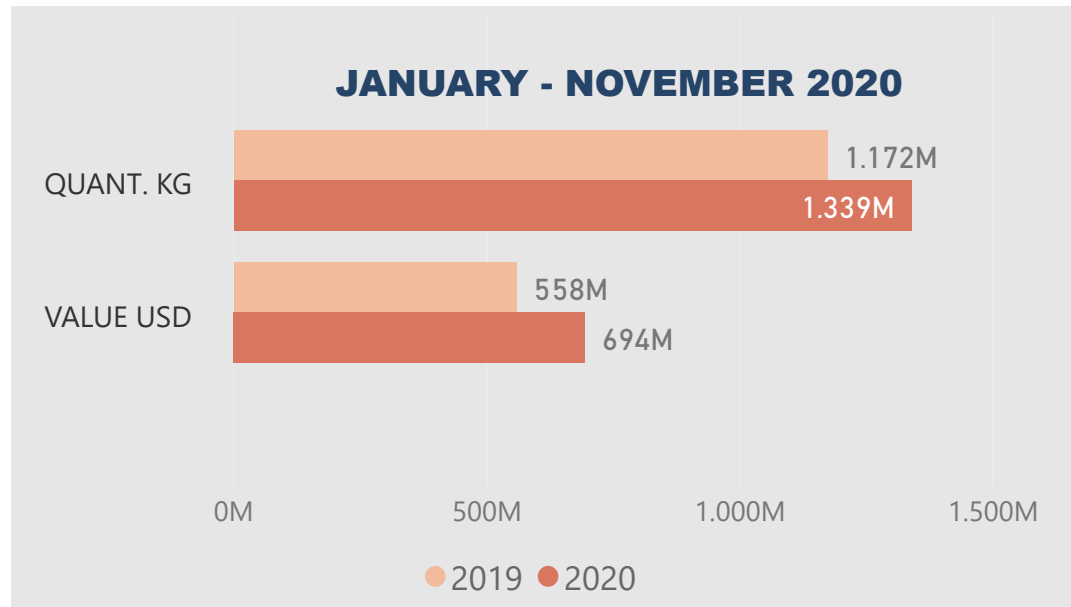
IMPORT QUANTITY (KG)	- %18	IMPORT VALUE (USD)	- %12	UNIT PRICE (USD/TON)	%7,1
2020 TOTAL		2020 TOTAL		2020 TOTAL	
988.900.971		\$296.448.057		\$300	
2019 TOTAL		2019 TOTAL		2019 TOTAL	
1.204.836.919		\$337.372.742		\$280	

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



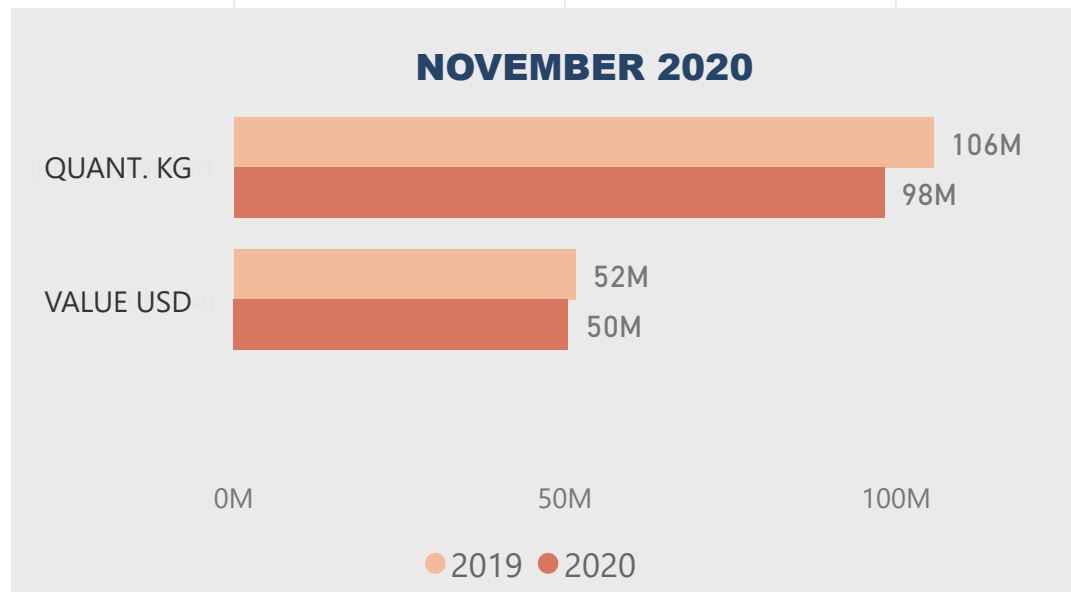
Durum Wheat Imports by years shows us that, compared to other years, durum wheat imports in 2019 and 2020 comes to the fore. Also, compared to 2016, durum wheat imports in 2019 are two times higher in terms of quantity and value.

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 \$300/ton level in November 2020.



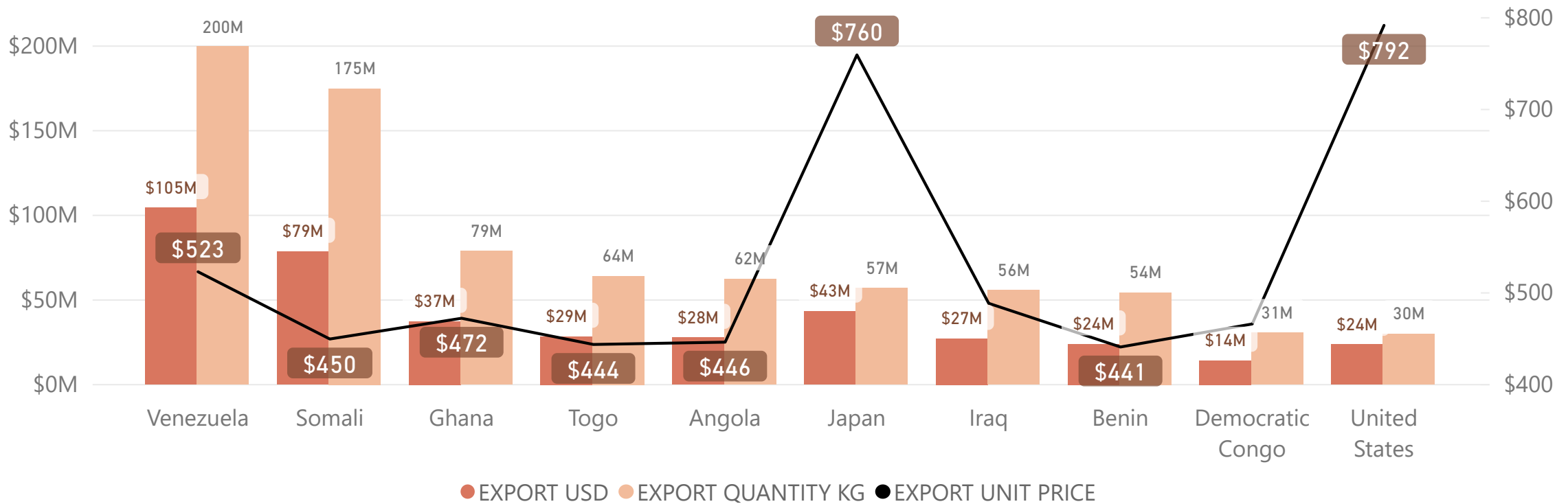
In November 2020 compared to November 2019, Pasta Exports decreased -6.99% and fell to 98.27 thousand tons, in quantity; decreased -2.12% and fell to \$50.46 million in value.

Between January - November 2020, compared to same period of the previous year, pasta exports increased 14.21% and reached to 1.34 million tons, in quantity; increased 24.37% and reached to \$693.58 million in value.



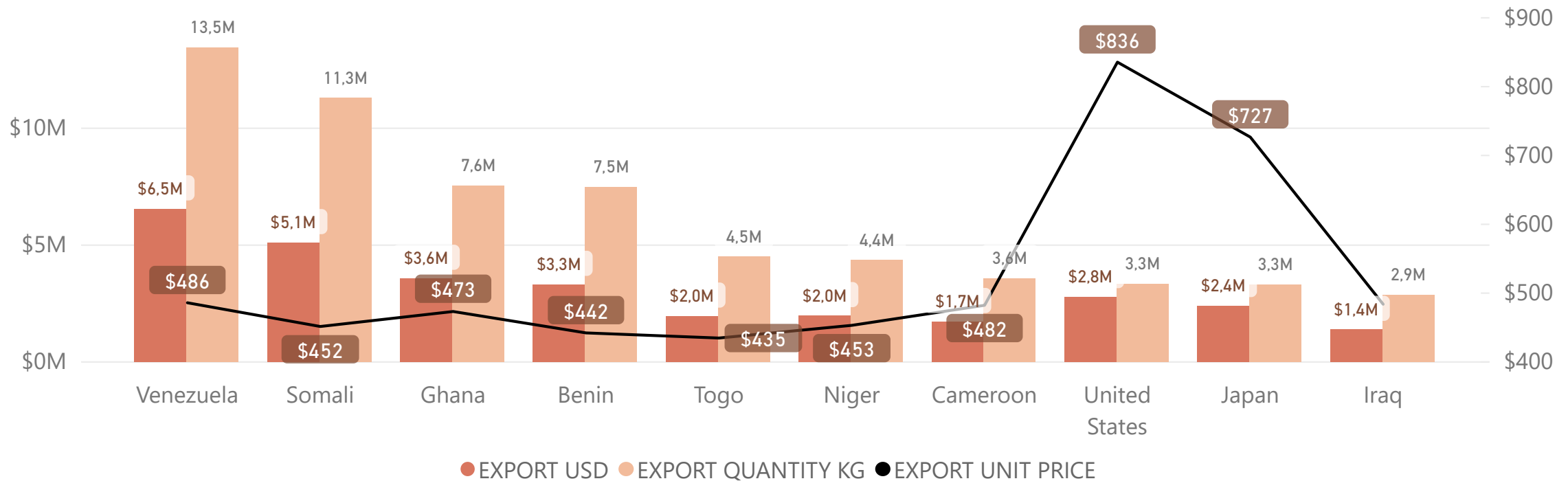
Average unit price per ton was \$488 in November 2019. It increased 5.24% and reached to \$514 in November 2020.

Compared to same period of the previous year, between January and November 2020, average price per ton increased 8.90% and reached to \$518/ton.



Between January and November 2020, biggest exports was made to Venezuela with 200 thousand tons, followed by Somali and Ghana. In terms of value, biggest importer is Venezuela with \$105 million, followed by Somali and Japan, respectively.

On the basis of unit price amongst top 10 countries we export to in 2020, United States ranked first with \$792/ton. Benin was on the last place with \$441/ton.

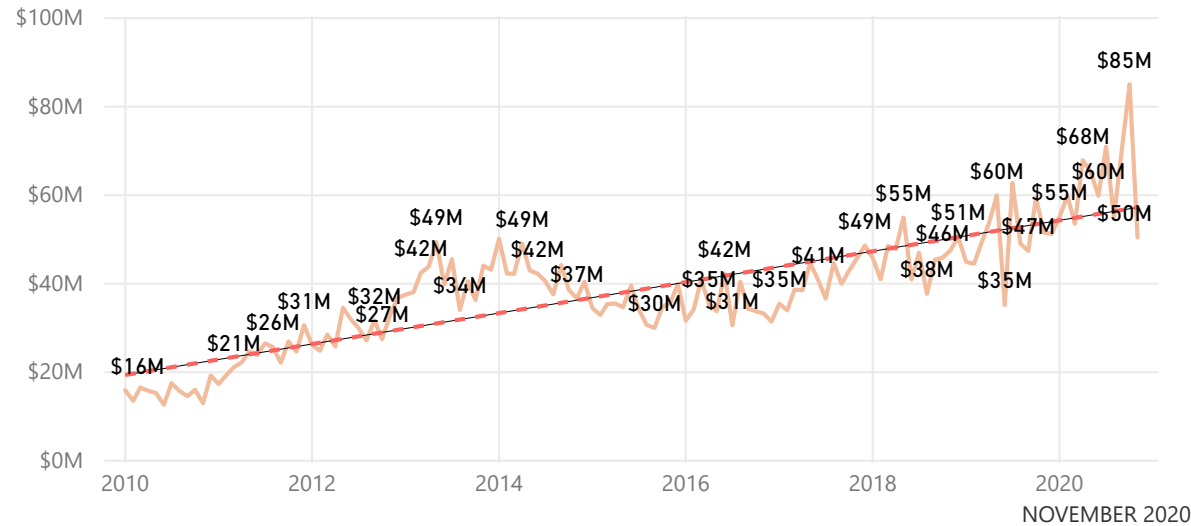


In November 2020, biggest exports, in terms of quantity was made to Venezuela with 13 thousand tons, followed by Somali and Ghana.

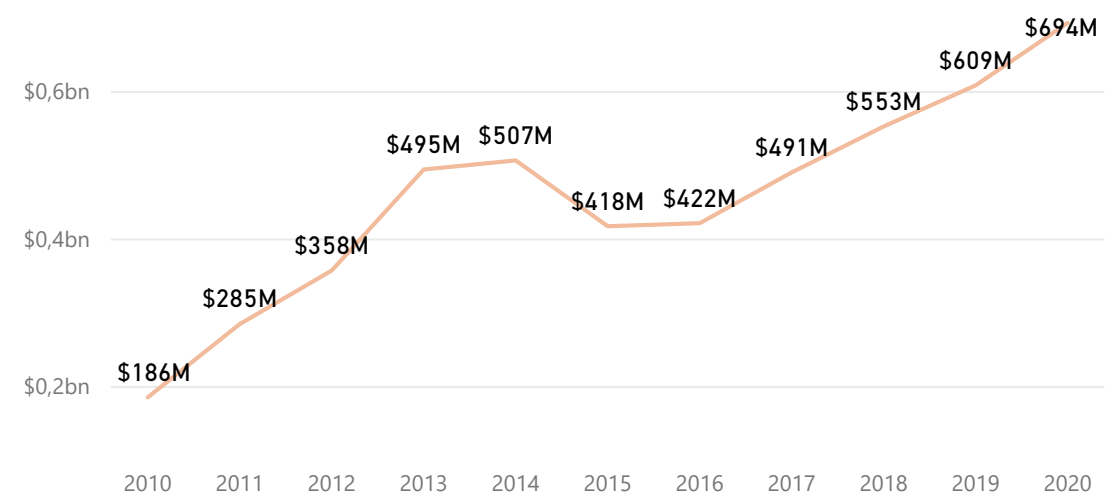
In November 2020, among the top 10 countries we export to on the basis of unit price, United States ranked 1st with \$836/ton, followed by Japan (\$727/ton) and Venezuela (\$486/ton) respectively. Togo had the lowest price with \$435/ton.

PASTA EXPORT VALUE BY YEARS (USD)

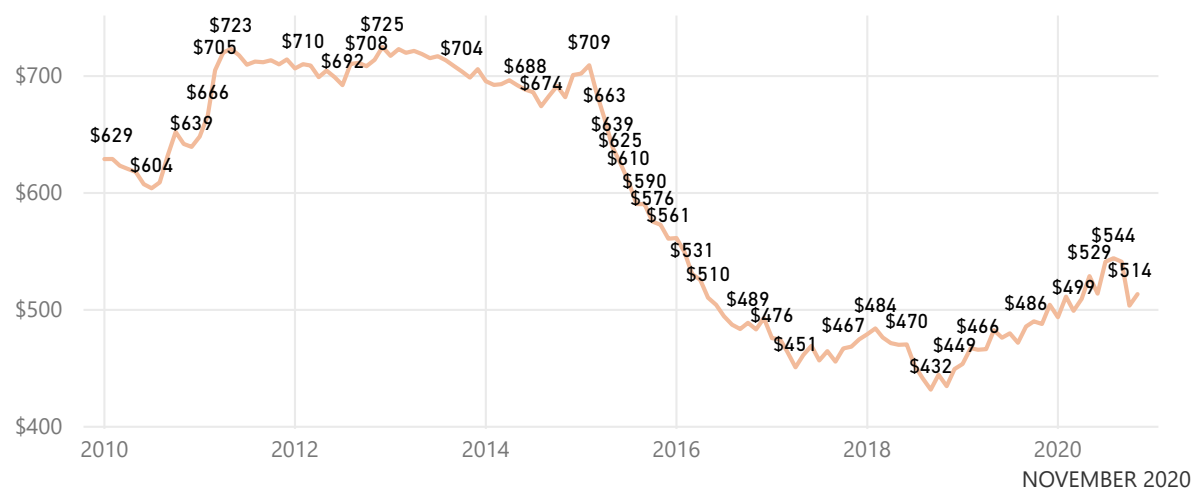
MONTHLY EXPORT VALUE (USD)



YEARLY EXPORT VALUE (USD)



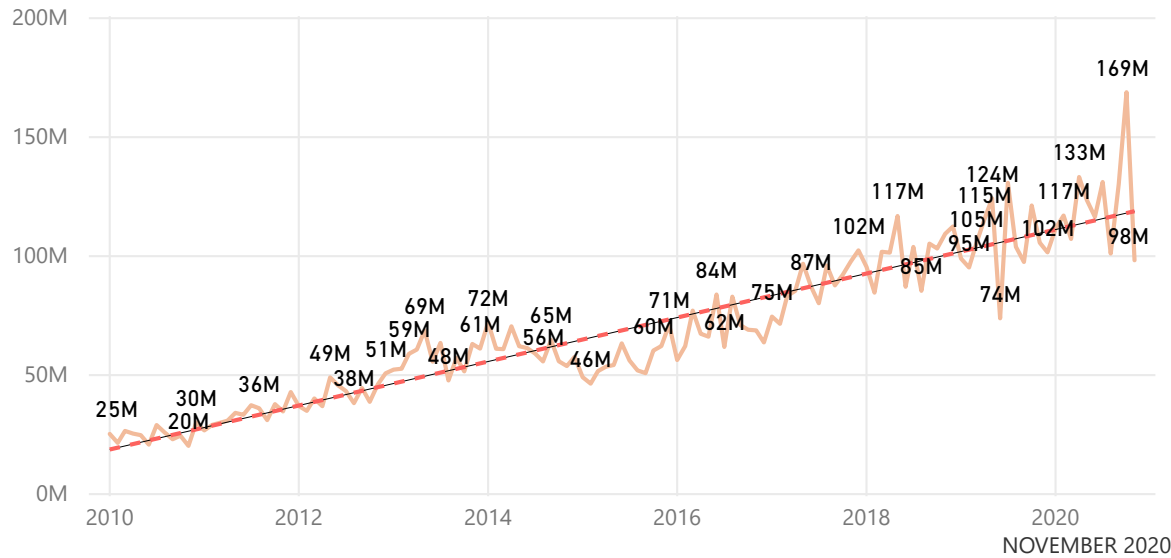
MONTHLY EXPORT UNIT PRICE (USD/TON)



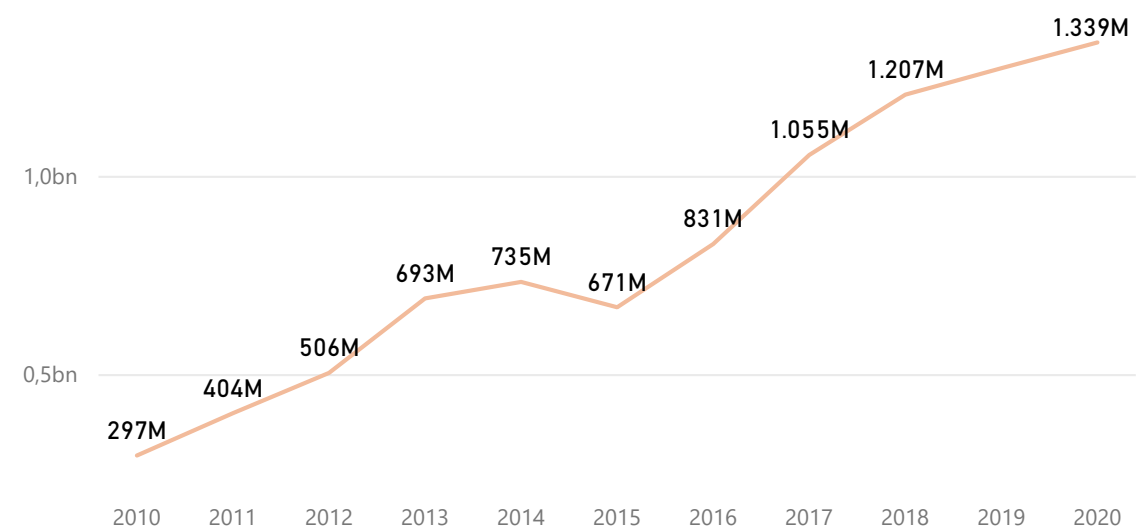
When pasta exports are analyzed by years, exports in October 2020 (\$85.53 million) is the highest export value ever.

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

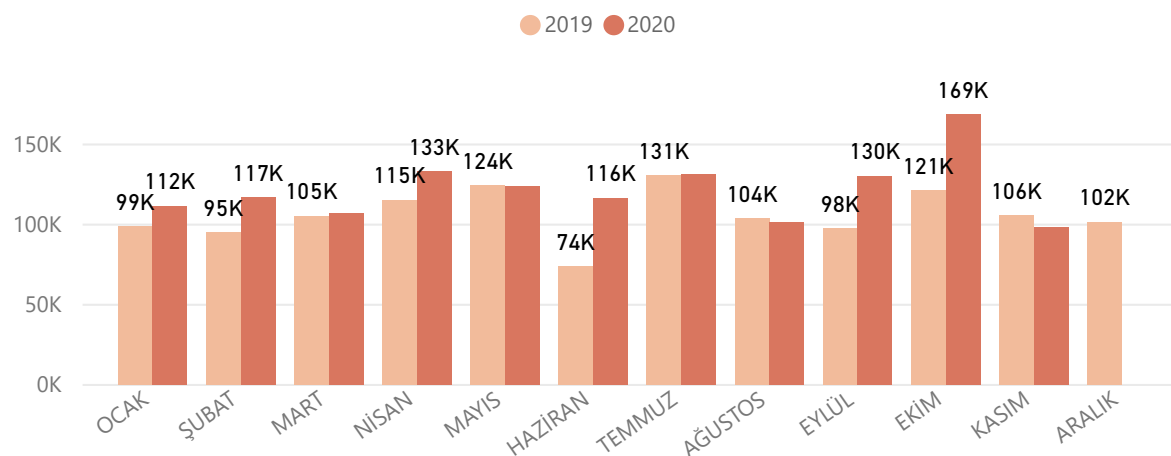
MONTHLY EXPORT QUANTITY (KG)



YEARLY EXPORT QUANTITY (KG)



LAST 2 YEAR EXPORT QUANTITY (KG)



Considering the monthly exports in 2020, after highest amount of exports was made in October with 169.86 thousand tons, second highest month is April with 133.25 tons.

Total exports in the first eleven 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 - NOVEMBER 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	49.924.851	\$17.446.782	25.458.360	\$8.690.116	%96,1	%100,8
Durum wheat (excl. seed for sowing)	49.924.851	\$17.446.782	25.458.360	\$8.690.116	%96,1	%100,8
190211	4.332.473	\$4.417.455	2.039.146	\$1.915.240	%112,5	%130,6
Uncooked pasta, containing common wheat flour or meal or eggs	2.515.872	\$3.237.226	919.311	\$1.143.478	%173,7	%183,1
Uncooked pasta, not stuffed containing eggs (Excl. phenylketonuria pt.), others	1.816.601	\$1.180.229	1.119.835	\$771.762	%62,2	%52,9
190219	1.274.774.742	\$654.559.973	1.117.117.688	\$529.572.715	%14,1	%23,6
Low protein pasta for phenylketonuria patients	5.480	\$10.189	3.200	\$5.899	%71,3	%72,7
Uncooked pasta, not stuffed or otherwise prepared	462.289.524	\$212.934.710	290.167.073	\$128.429.354	%59,3	%65,8
Uncooked pasta, not stuffed or otherwise prepared, containing vegetables	366.872	\$570.347	203.932	\$480.236	%79,9	%18,8
Uncooked pasta, not stuffed or otherwise prepared, not containing common wheat flour or meal or eggs (Excl. fenilketonüri pt.)	805.277.114	\$437.719.683	821.406.870	\$397.872.599	-%2,0	%10,0
Uncooked pasta, not stuffed, others	6.835.752	\$3.325.044	5.336.613	\$2.784.627	%28,1	%19,4
190220	801.588	\$1.039.796	342.709	\$547.496	%133,9	%89,9
Cooked pasta, cooked, stuffed with meat or other substances	37.781	\$99.384	26.261	\$78.758	%43,9	%26,2
Cooked pasta, stuffed with meat or other substances, others	601.836	\$787.158	303.018	\$434.407	%98,6	%81,2
Pasta, stuffed with meat, containing > 20% by weight of meat and meat offal of any kind	14.683	\$41.042	9.595	\$22.871	%53,0	%79,4
Pasta, stuffed with meat, containing > 20% by weight of sausages and the like	1.678	\$6.191	3.787	\$10.060	-%55,7	-%38,5
Pasta, stuffed, containing > 20% by weight of fish, etc	145.610	\$106.021	48	\$1.400	%303254,2	%7472,9
190230	58.502.353	\$33.307.889	52.450.395	\$25.415.503	%11,5	%31,1
Pasta, dried	8.888.477	\$9.290.949	5.861.561	\$6.300.896	%51,6	%47,5
Pasta, others	49.613.876	\$24.016.940	46.588.834	\$19.114.607	%6,5	%25,6
190240	413.211	\$255.658	312.025	\$212.870	%32,4	%20,1
Couscous unprepared	286.929	\$165.211	198.329	\$117.197	%44,7	%41,0
Couscous, cooked or otherwise prepared	126.282	\$90.447	113.696	\$95.673	%11,1	-%5,5
Total	1.388.749.218	\$711.027.553	1.197.720.323	\$566.353.940	%15,9	%25,5

* 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

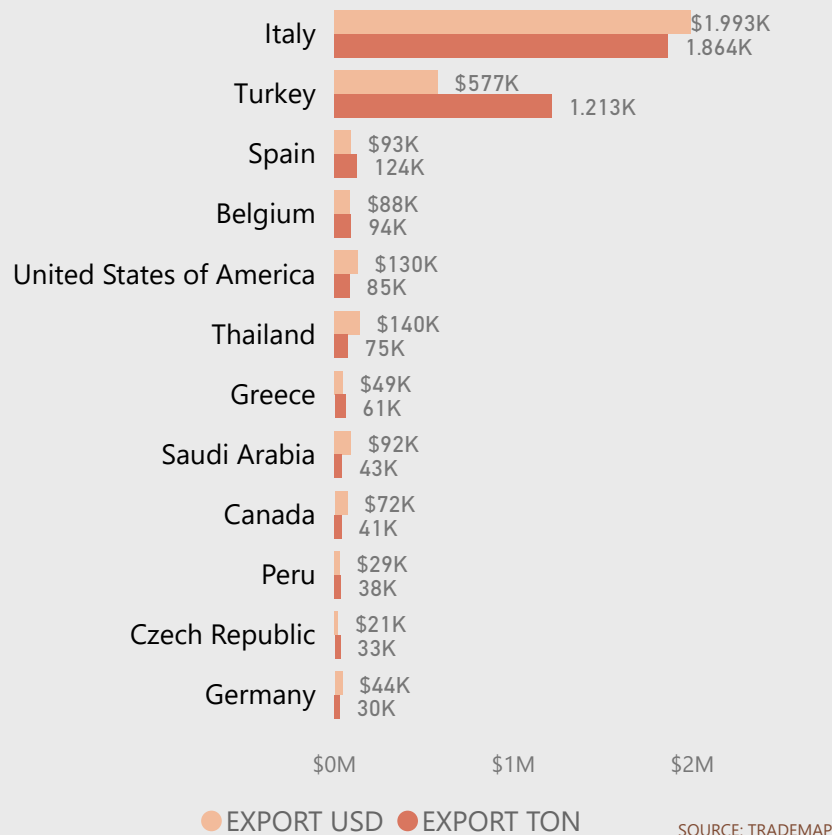
WORLD PASTA (1902.19)
EXPORT IN 2019 (USD)

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

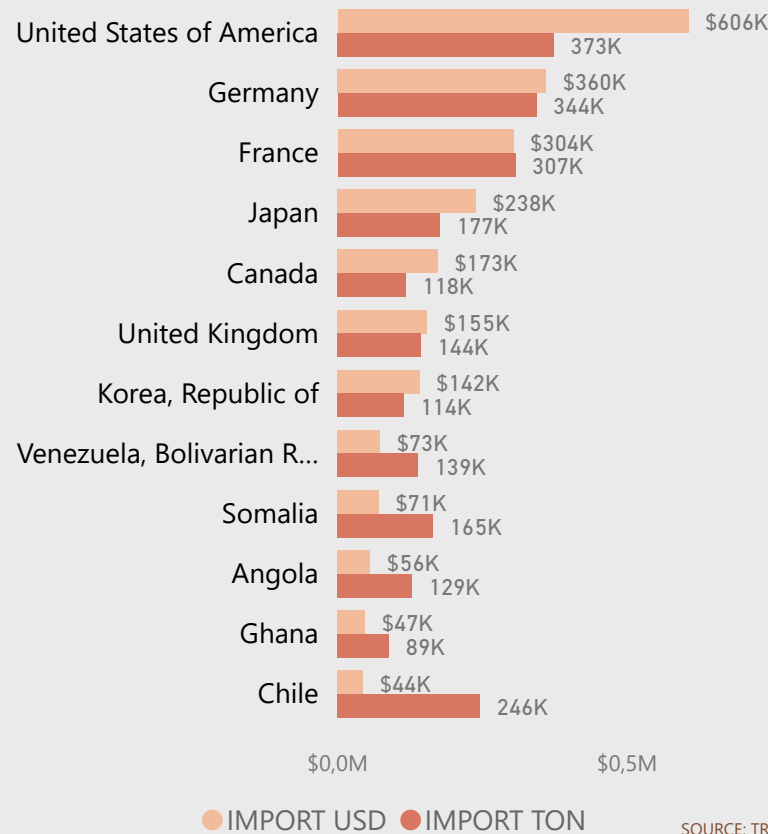
WORLD PASTA (1902.19)
IMPORT IN 2019 (USD)

4.268.211

WORLD PASTA (1902.19)
IMPORT IN 2019 (TON)

4.276.378

WORLD PASTA IMPORTS IN 2019 (1902.19 HS CODE)



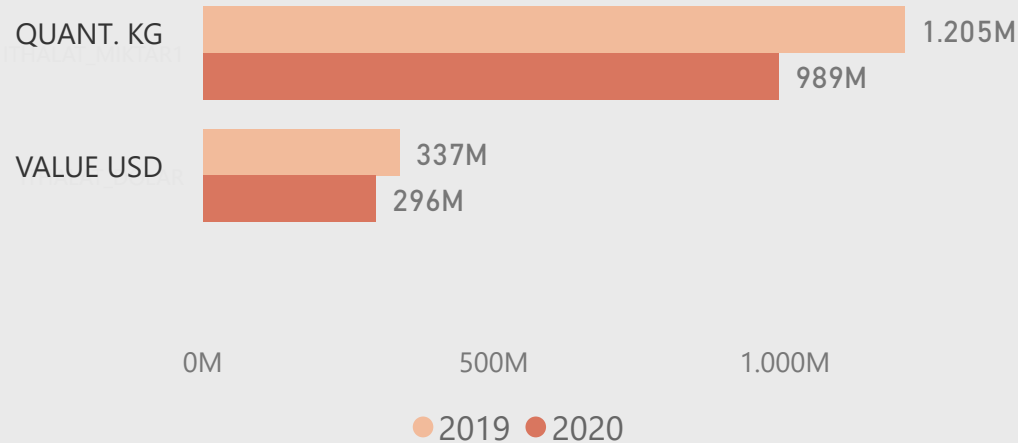
UNIT IMPORT PRICE OF COUNTRIES OVER 55K IMPORT QUANT. (\$/TON)

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.

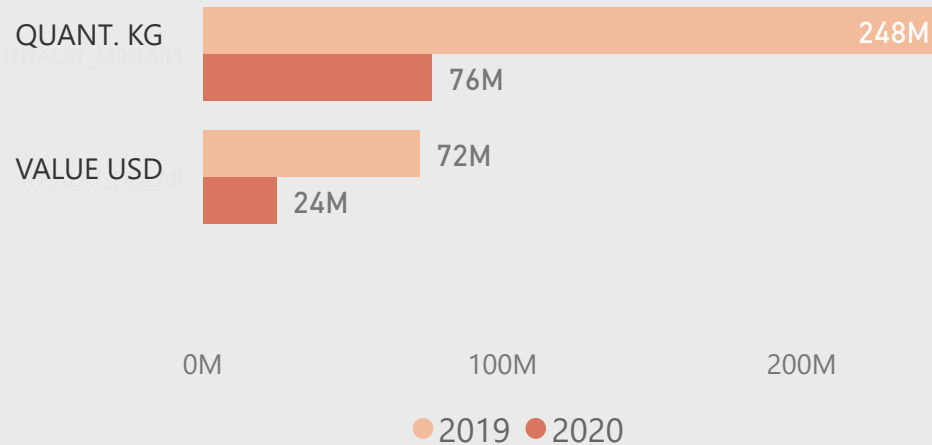
JANUARY - NOVEMBER 2020



In November 2020 compared to November 2019, durum wheat imports decreased -69.24% and fell to 76.38 thousand tons, in quantity; decreased -66.10% and fell to \$24.49 million in value.

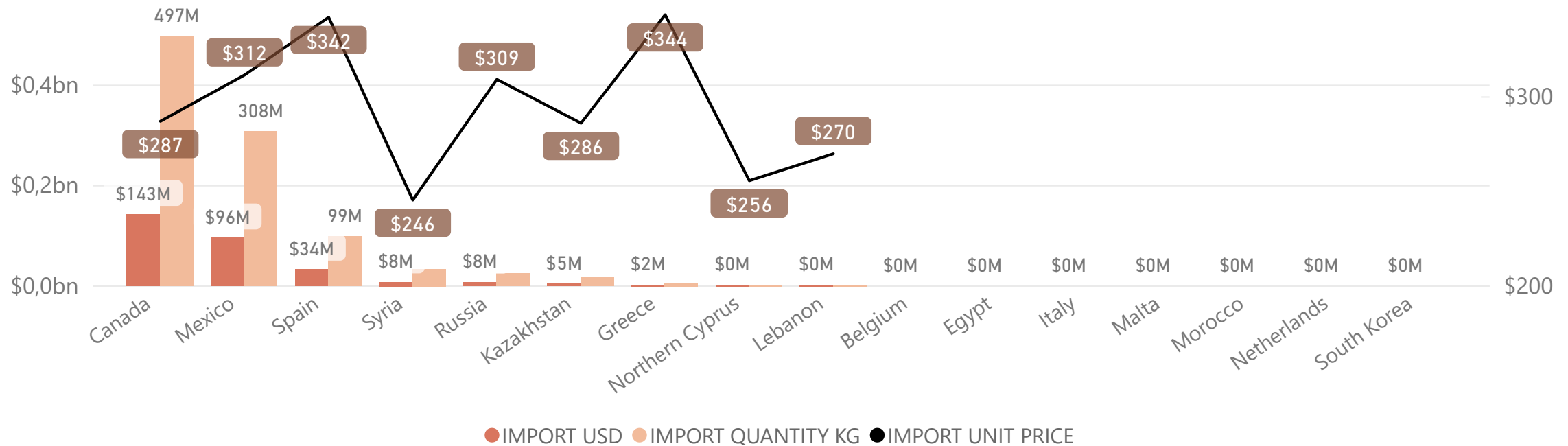
Between January - November 2020, compared to same period of the previous year, durum wheat imports decreased -17.92% and fell to 988.9 thousand tons, in quantity; decreased -12.13% and fell to \$296.45 million in value.

NOVEMBER 2020



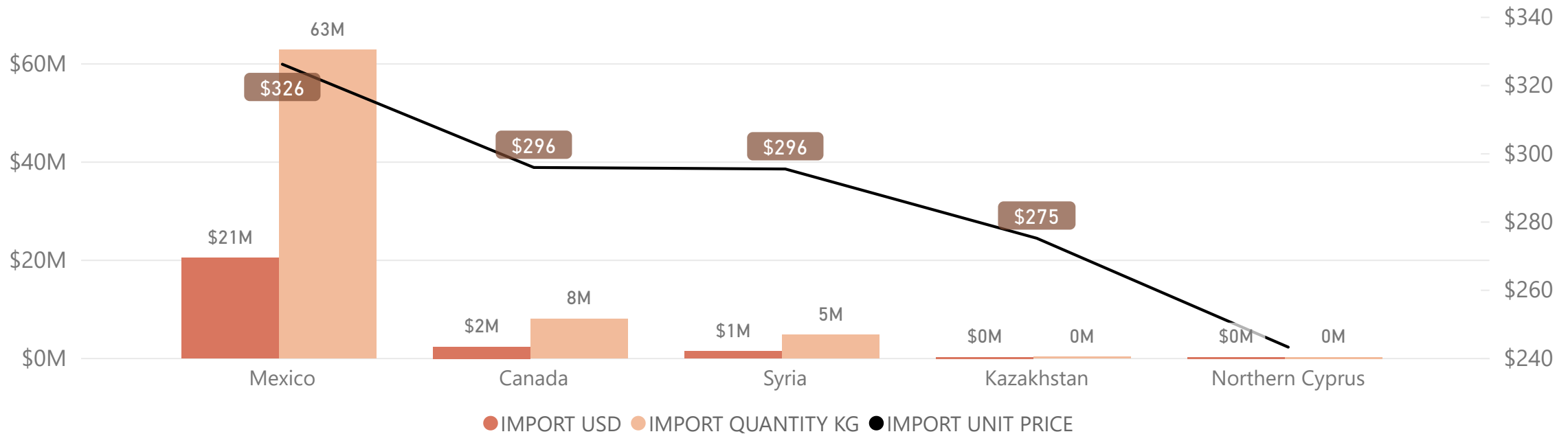
Average unit price per ton was \$291 in November 2019. It increased 10.21% and reached to \$321 in November 2020.

Compared to same period of the previous year, between January and November 2020, average price per ton increased 7.06% and reached to \$300/ton.



During the period between January and November 2020, biggest importer of durum wheat was Canada with 497 thousand tons (\$143 million), followed by Mexico and Spain.

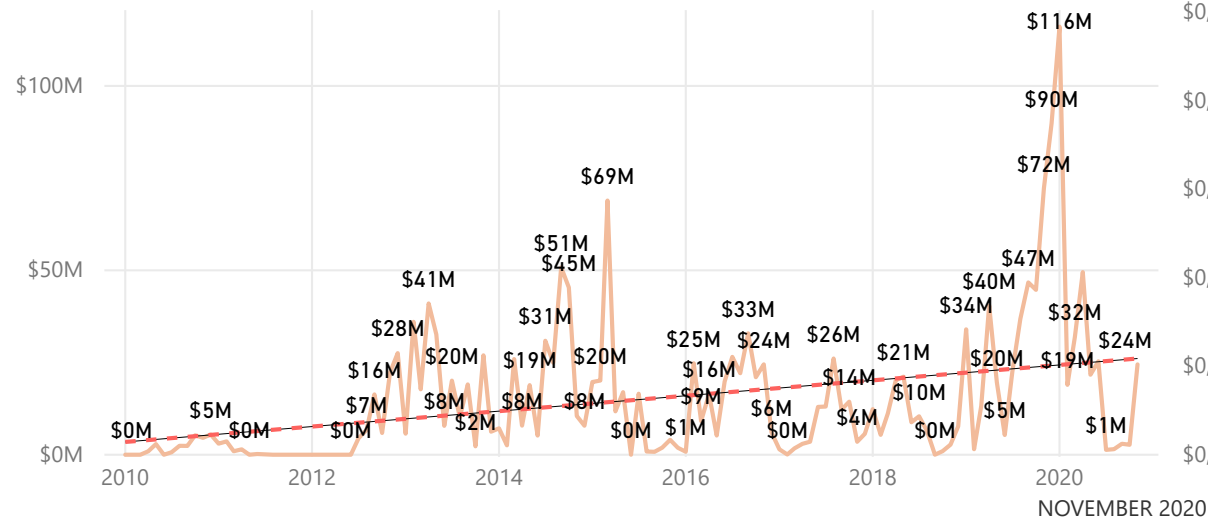
Average unit price of durum wheat imported by Canada was \$287/ton. Lowest price belonged to Syria with \$246/ton, while the highest unit price belongs to Greece with \$344/ton.



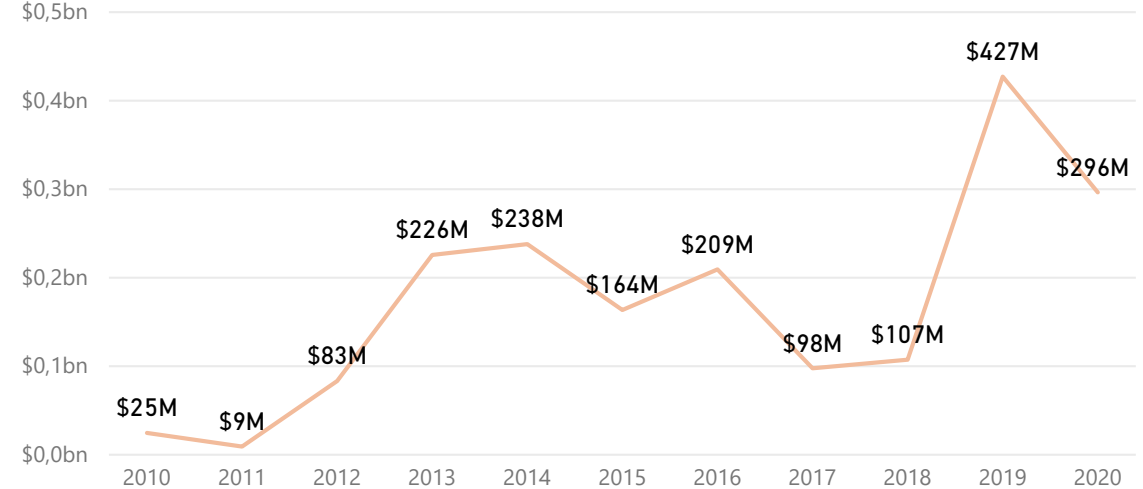
In November 2020, most of the durum wheat imports was made by Mexico. Mexico imported 63 thousand tons of durum wheat (\$21 million), with \$326/ton average unit price.

In November 2020, countries that imported durum wheat were Mexico, Canada, Syria, Kazakhstan, Northern Cyprus, respectively.

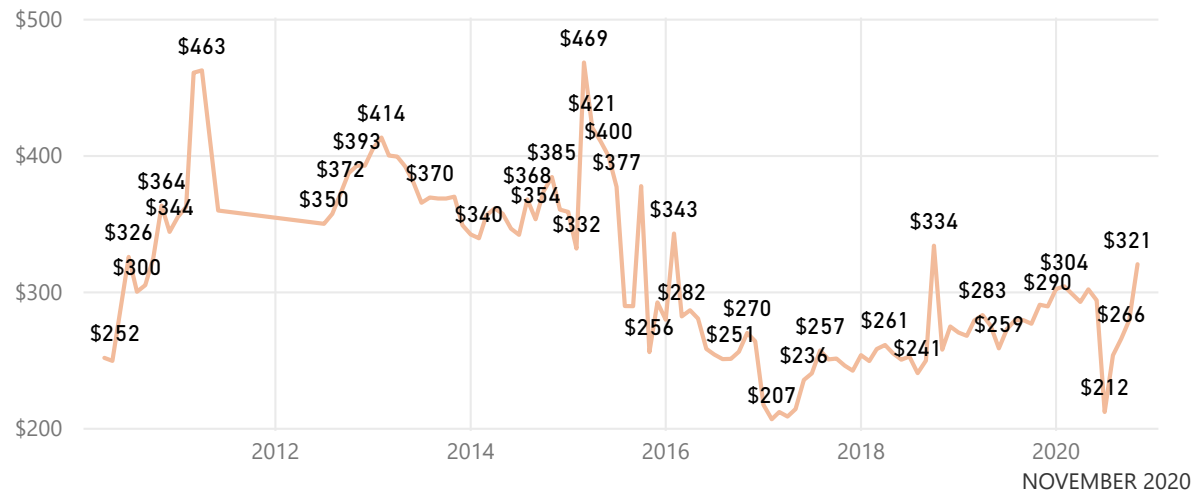
MONTHLY IMPORT VALUE (USD)



YEARLY IMPORT VALUE (USD)



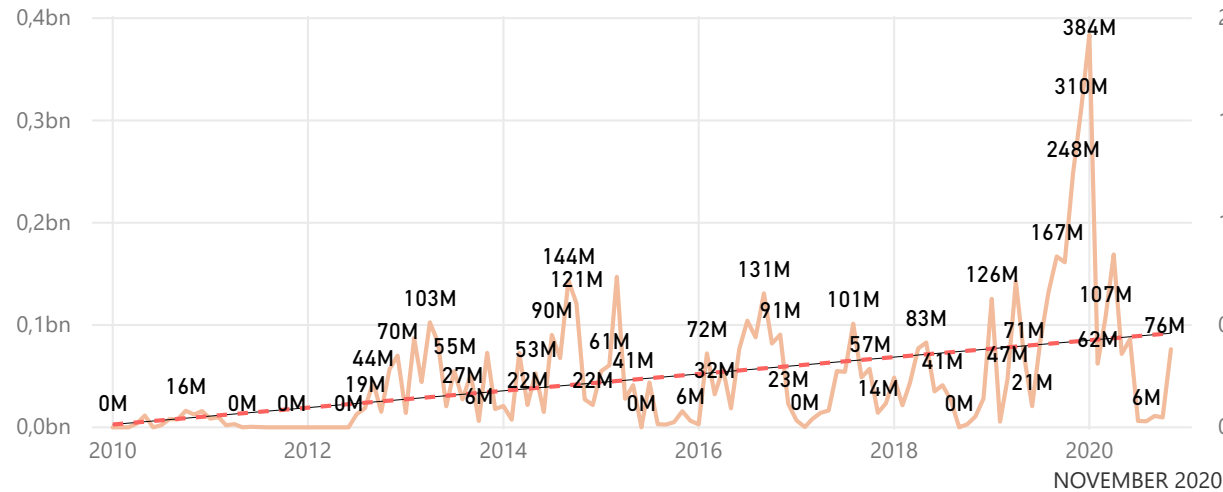
MONTHLY IMPORT UNIT PRICE (USD/TON)



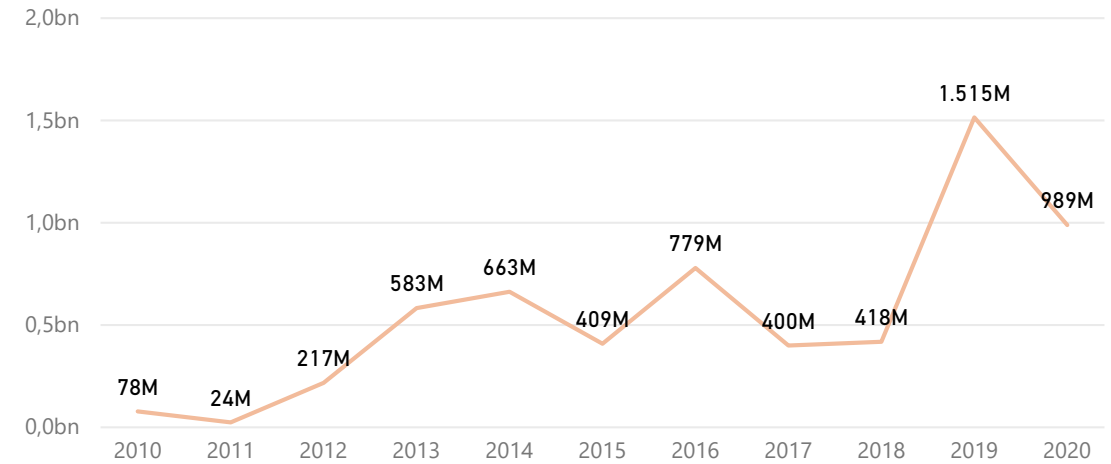
When the monthly import values are analyzed by years, it is seen that imports in January 2020 (\$116 million) is the highest monthly import ever.

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

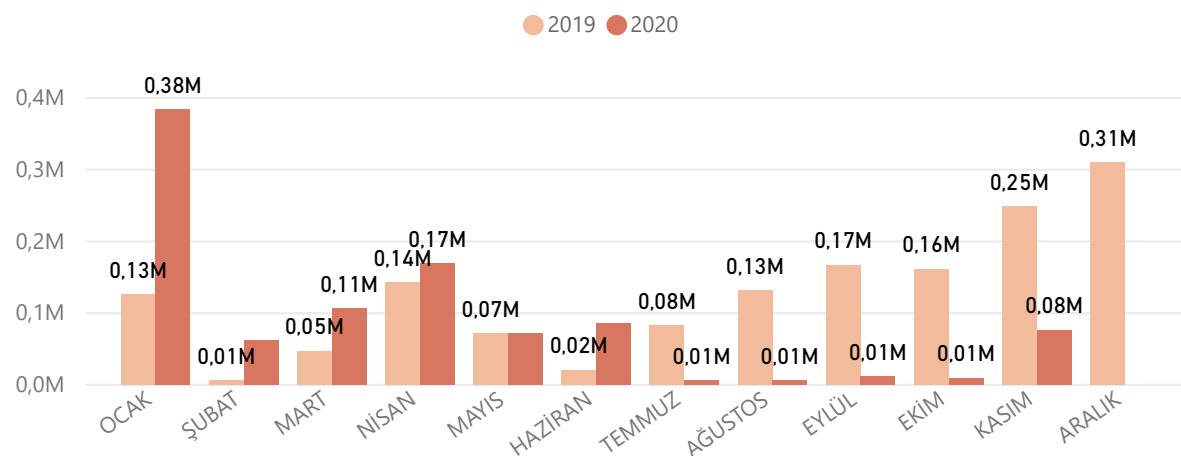
MONTHLY IMPORT QUANTITY (KG)



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

2019 - 2020 IMPORT COMPARISON CHART

JANUARY - NOVEMBER 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	988.900.971	\$296.448.057	1.204.836.919	\$337.372.742	-%17,9	-%12,1
Durum wheat (excl. seed for sowing)	988.900.971	\$296.448.057	1.204.836.919	\$337.372.742	-%17,9	-%12,1
190219	4.465.605	\$5.343.151	3.299.707	\$4.870.693	%35,3	%9,7
Uncooked pasta, not stuffed or otherwise prepared, not containing common wheat flour or meal or eggs (Excl. fenilketonüri pt.)	2.890.155	\$4.044.612	2.980.037	\$4.167.471	-%3,0	-%2,9
Uncooked pasta, not stuffed or otherwise prepared	313.043	\$411.161	159.307	\$313.167	%96,5	%31,3
Uncooked pasta, not stuffed or otherwise prepared, containing vegetables	3.614	\$25.088	45.890	\$201.221	-%92,1	-%87,5
Uncooked pasta, not stuffed, others	1.258.793	\$862.290	114.473	\$188.834	%999,6	%356,6
Low protein pasta for phenylketonuria patients	0	\$0	0	\$0		
190230	580.342	\$867.916	781.005	\$1.891.084	-%25,7	-%54,1
Pasta, dried	357.343	\$666.325	358.659	\$1.227.127	-%0,4	-%45,7
Pasta, others	222.999	\$201.591	422.346	\$663.957	-%47,2	-%69,6
190211	408.088	\$697.364	1.063.958	\$1.540.028	-%61,6	-%54,7
Uncooked pasta, not stuffed containing eggs (Excl. phenylketonuria pt.), others	200.970	\$240.457	758.245	\$957.131	-%73,5	-%74,9
Uncooked pasta, containing common wheat flour or meal or eggs	207.118	\$456.907	305.713	\$582.897	-%32,3	-%21,6
190220	378.796	\$888.578	261.085	\$895.087	%45,1	-%0,7
Cooked pasta, stuffed with meat or other substances, others	364.650	\$831.386	127.123	\$475.112	%186,8	%75,0
Cooked pasta, cooked, stuffed with meat or other substances	12.615	\$36.254	132.380	\$395.703	-%90,5	-%90,8
Pasta, stuffed, containing > 20% by weight of fish, etc	1.531	\$20.938	1.582	\$24.272	-%3,2	-%13,7
190240	530	\$2.212	106.878	\$78.190	-%99,5	-%97,2
Couscous unprepared	0	\$0	100.000	\$61.800	-%100,0	-%100,0
Couscous, cooked or otherwise prepared	530	\$2.212	6.878	\$16.390	-%92,3	-%86,5
100111	211.327	\$176.751	57.410	\$56.321	%268,1	%213,8
Durum wheat seed for sowing	211.327	\$176.751	57.410	\$56.321	%268,1	%213,8
Total	994.945.659	\$304.424.029	1.210.406.962	\$346.704.145	-%17,8	-%12,2

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

3.150.000

TON PRODUCTION

288

KG/DECARE (YIELD)

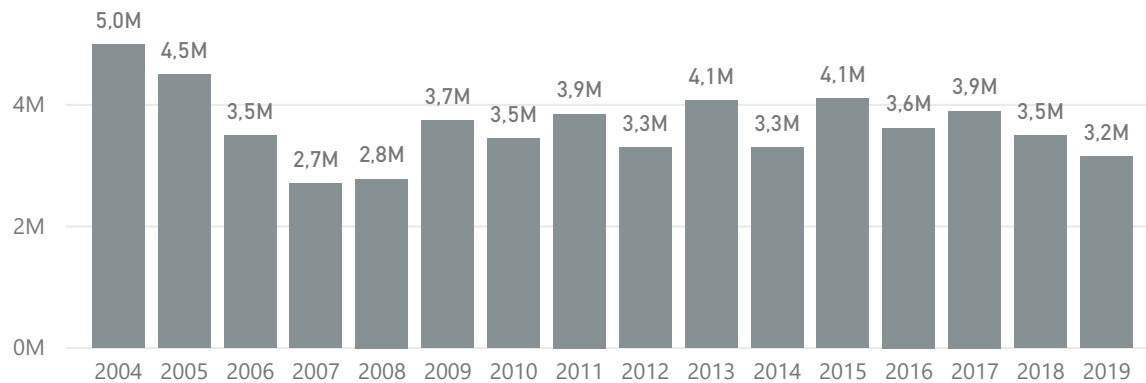
10.955.635

DECARE HARVEST AREA

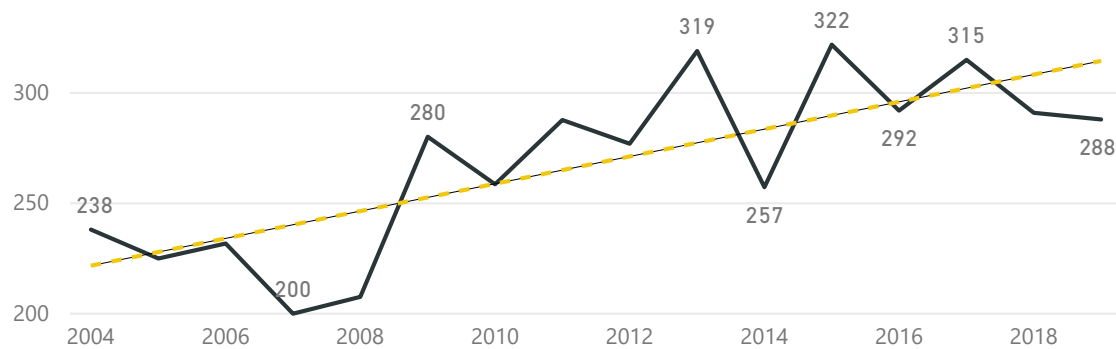
%16,0

RATIO PER TOTAL WHEAT

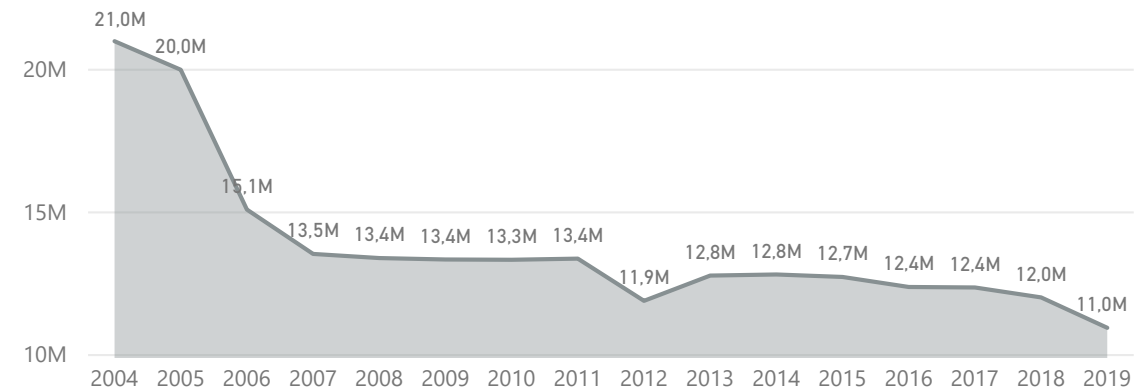
DURUM WHEAT PRODUCTION PER YEAR



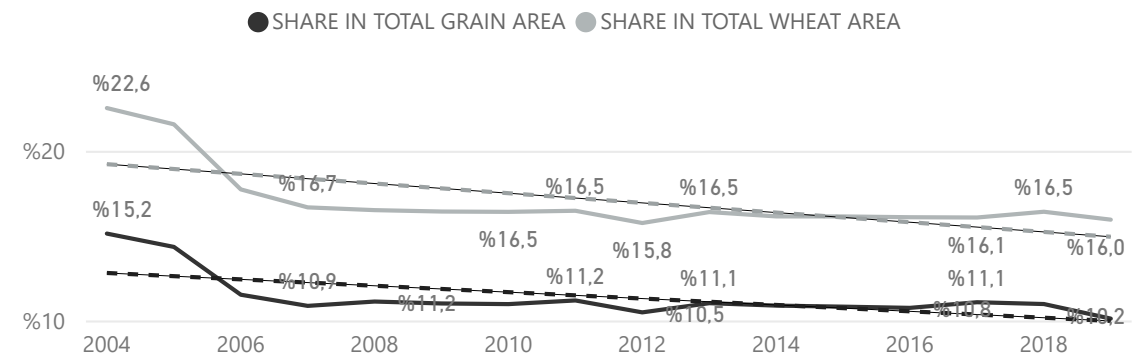
DURUM WHEAT YIELD PER YEAR (KG/DECARE)



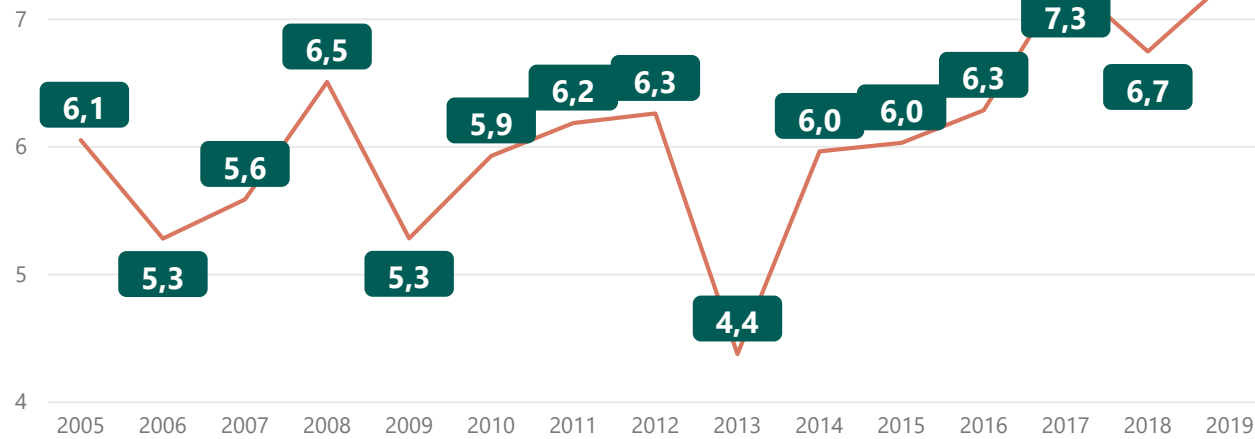
DURUM WHEAT HARVEST AREA PER YER (DECARE)



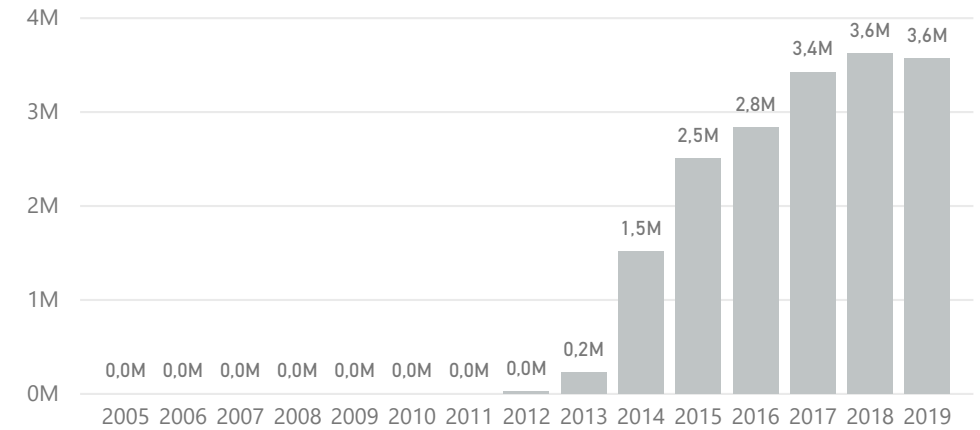
RATIO OF DURUM WHEAT HARVEST AREA



PASTA CONSUMPTION PER CAPITA (Kg/Per)

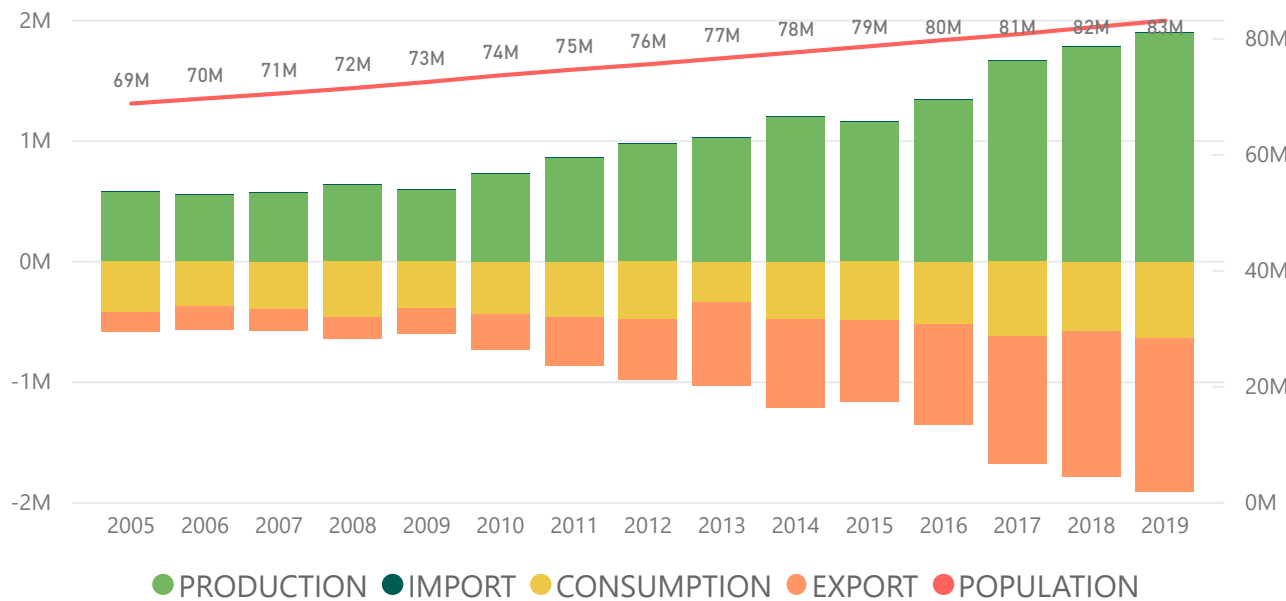


REFUGEE NUMBERS PER YEAR



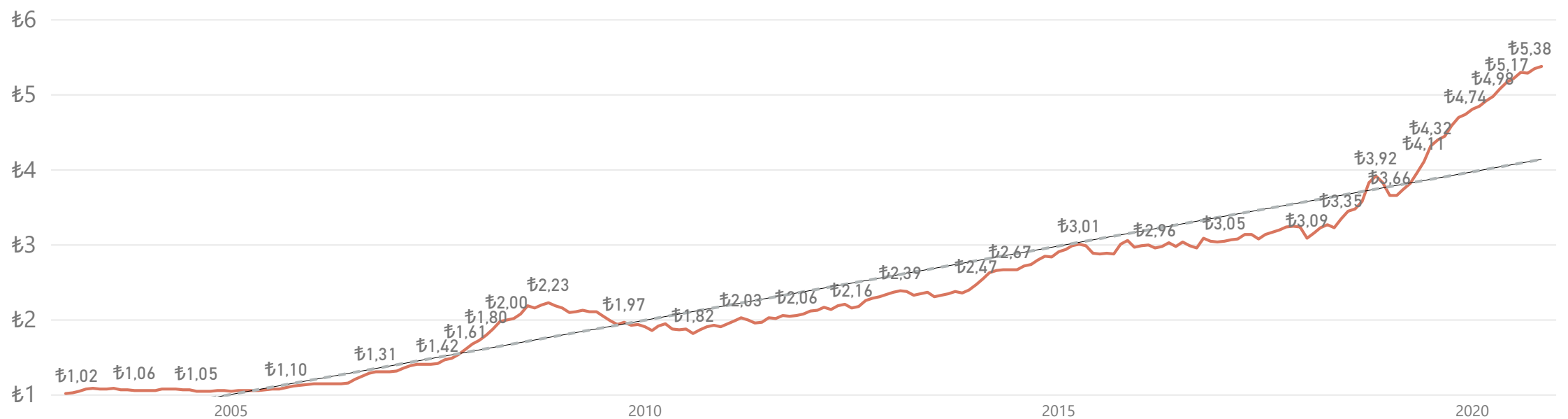
* Calculations were made with population of Turkey and additional refugee numbers.

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 november pasta market price: ₺5,38 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

