

MÜSAD



MAKARNA ÜRETİCİLERİ VE SANAYİCİLERİ DERNEĞİ
Pasta Producers and Industrialists Association

SECTOR REPORT

JANUARY - DECEMBER 2020



Pasta Producers and Industrialists' Association

Sector Report

JANUARY - DECEMBER 2020

PUBLISH DATE

1 February 2021

Hello,

The year 2020 passed in combat with the negativities caused by the pandemic.

Despite the pandemic, our industry has been a pride by meeting the needs of the people in our country fully and completely, while at the same time increasing its exports.

However, a factor that overshadowed these positive and positive developments was our export prices. While our industry was passing a successful test in 2020 with its production and exports, unfortunately, our export prices remained below the value they deserved.




According to TURKSTAT data, our exports increased by 15.7% in amount to 1.47 million tons in 2020 compared to the same period of the previous year, and reached 764 million dollars in terms of value, increasing by 25.5%.

However, although our average export unit price increased from 478 dollars / ton last year to 518 dollars / ton, it is seen that our export price actually did not increase enough when the prices of durum wheat are considered. Despite the favorable international conjuncture, such as the increase in raw material prices and the high demand for basic foodstuffs, the increase in our export prices remained limited.

This is an extremely vital issue for both our industry and our country. If we do not attach importance to value-added production and brand in exports, and if the system does not support this, we continue to transfer an important value such as durum wheat at low export prices. Therefore, we should take steps to strengthen the image of Turkish Pasta in exports as soon as possible and prevent exporting at low prices with the concern of filling capacity.




Nihat Uysallı
Chairman of the Executive Board

DECEMBER 2020

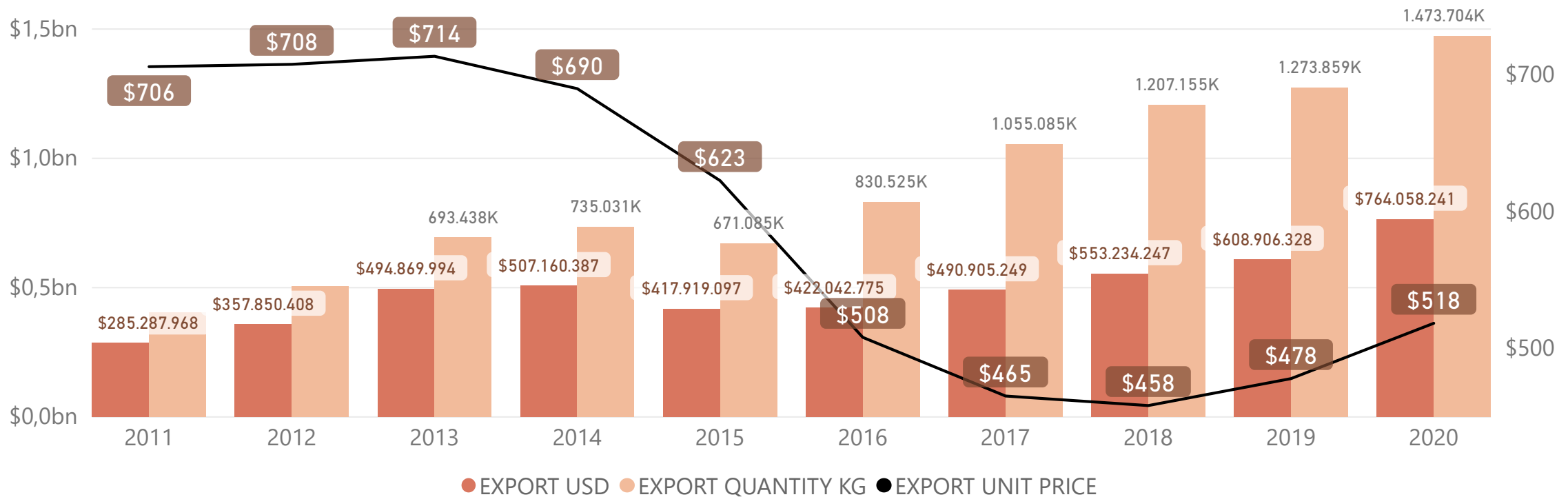
EXPORT QUANTITY (KG)	%41,0	EXPORT VALUE (USD)	%45,0	UNIT PRICE (USD/TON)	%2,8
DECEMBER 2020		DECEMBER 2020		DECEMBER 2020	
143.263.920		\$74.277.679		\$518	
DECEMBER 2019		DECEMBER 2019		DECEMBER 2019	
101.597.350		\$51.242.504		\$504	

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

JANUARY - DECEMBER 2020

EXPORT QUANTITY (KG)	%15,7	EXPORT VALUE (USD)	%25,5	UNIT PRICE (USD/TON)	%8,5
2020 TOTAL		2020 TOTAL		2020 TOTAL	
1.473.703.987		\$764.058.241		\$518	
2019 TOTAL		2019 TOTAL		2019 TOTAL	
1.273.859.313		\$608.906.328		\$478	

* 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 December 2020. But, compared to surge in durum wheat prices, increase in unit export price is still insufficient.

DECEMBER 2020

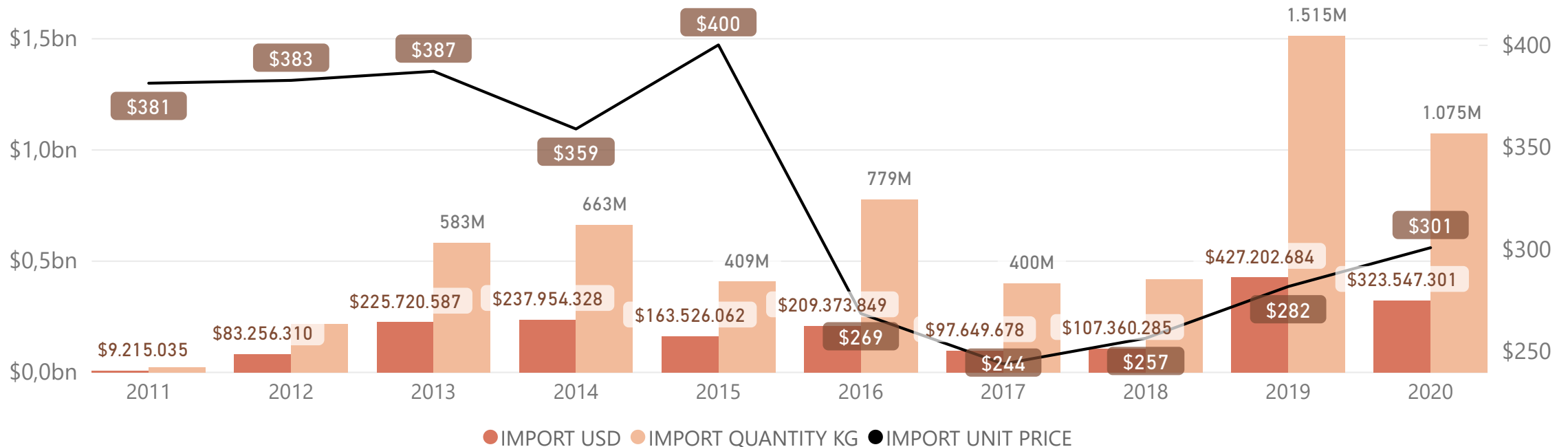
IMPORT QUANTITY (KG)	-%72	IMPORT VALUE (USD)	-%70	UNIT PRICE (USD/TON)	%8,8
DECEMBER 2020		DECEMBER 2020		DECEMBER 2020	
85.970.730		\$27.102.000		\$315	
DECEMBER 2019		DECEMBER 2019		DECEMBER 2019	
310.010.580		\$89.829.942		\$290	

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

JANUARY - DECEMBER 2020

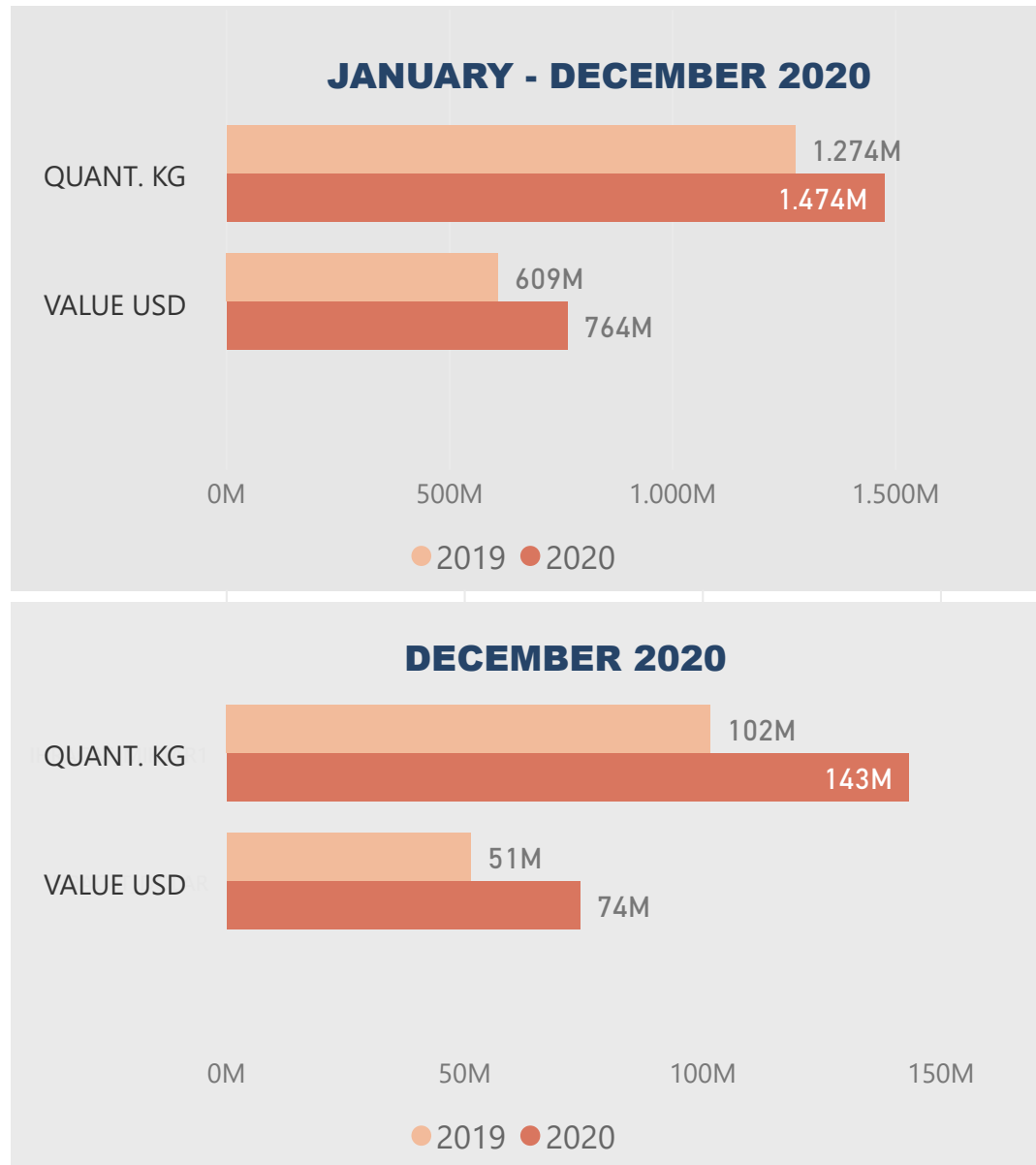
IMPORT QUANTITY (KG)	-%29	IMPORT VALUE (USD)	-%24	UNIT PRICE (USD/TON)	%6,7
2020 TOTAL		2020 TOTAL		2020 TOTAL	
1.074.863.221		\$323.547.301		\$301	
2019 TOTAL		2019 TOTAL		2019 TOTAL	
1.514.847.499		\$427.202.684		\$282	

* 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 \$301/ton level in December 2020.

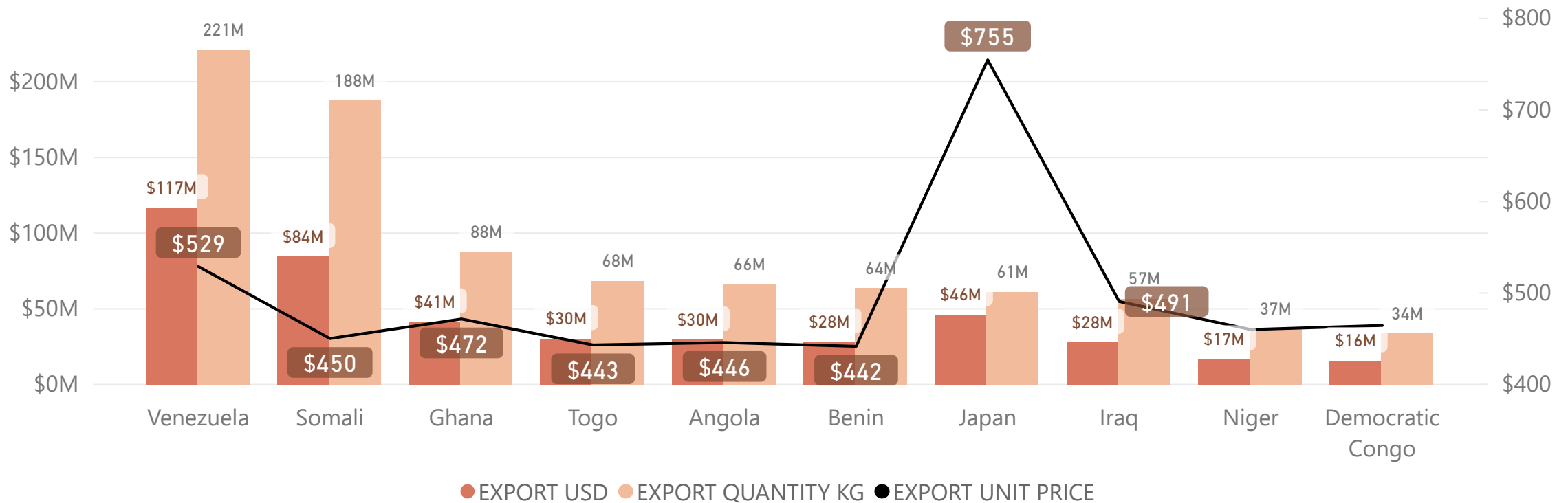


In December 2020 compared to December 2019, Pasta Exports increased 41.01% and reached to 143.26 thousand tons, in quantity; increased 44.95% and reached to \$74.28 million in value.

Between January - December 2020, compared to same period of the previous year, pasta exports increased 15.69% and reached to 1.47 million tons, in quantity; increased 25.48% and reached to \$764.06 million in value.

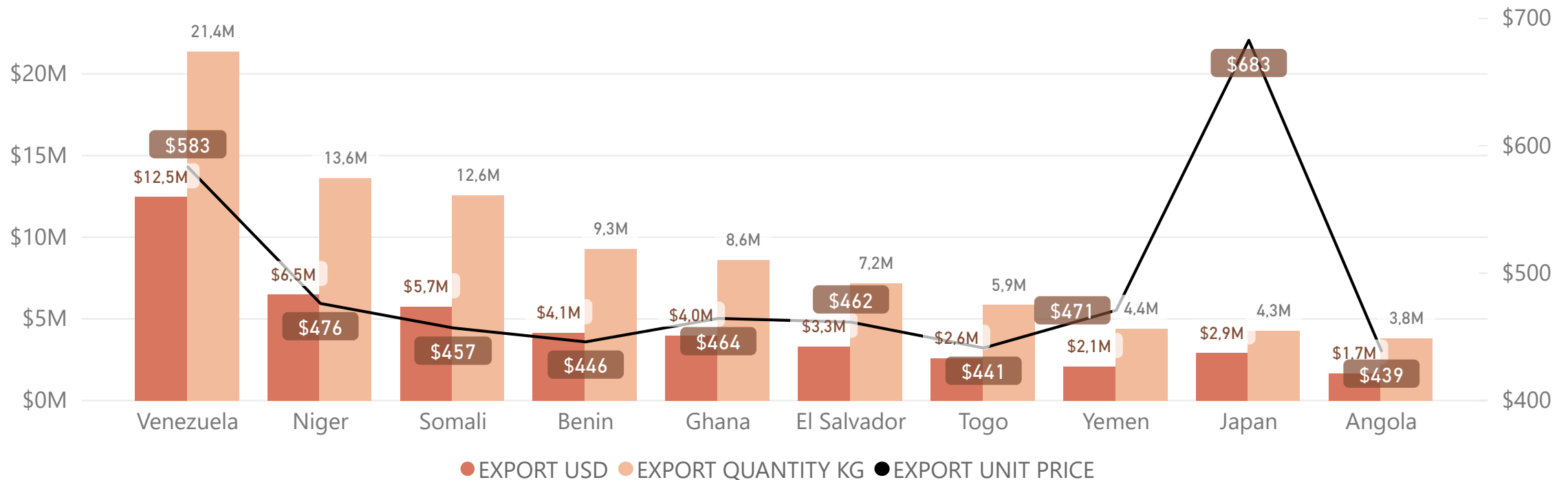
Average unit price per ton was \$504 in December 2019. It increased 2.80% and reached to \$518 in December 2020.

Compared to same period of the previous year, between January and December 2020, average price per ton increased 8.46% and reached to \$518/ton.



Between January and December 2020, biggest exports was made to Venezuela with 221 thousand tons, followed by Somali and Ghana. In terms of value, biggest importer is Venezuela with \$117 million, followed by Somali and Japan, respectively.

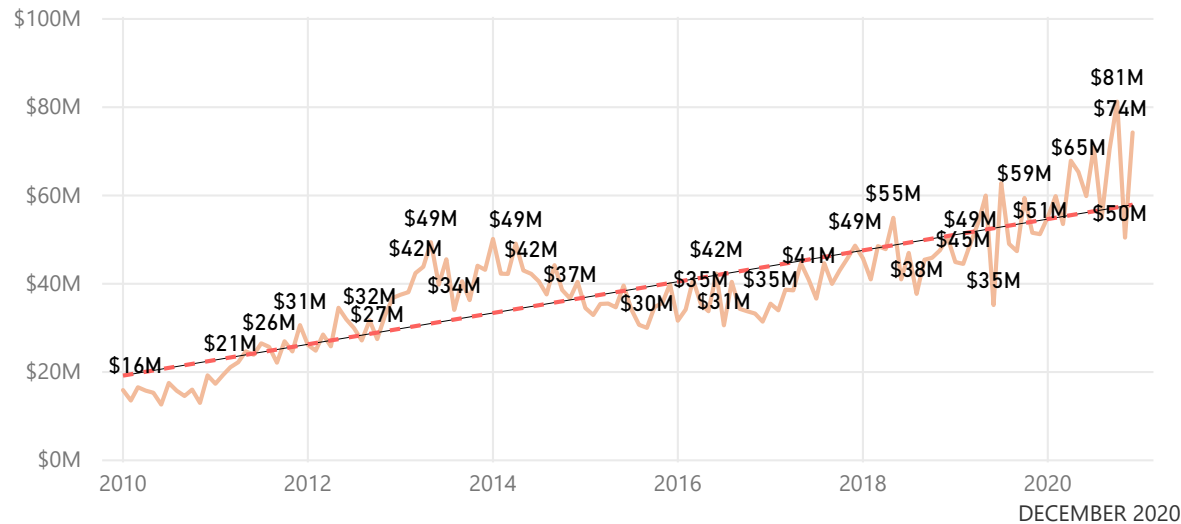
On the basis of unit price amongst top 10 countries we export to in 2020, Japan ranked first with \$755/ton. Benin was on the last place with \$442/ton.



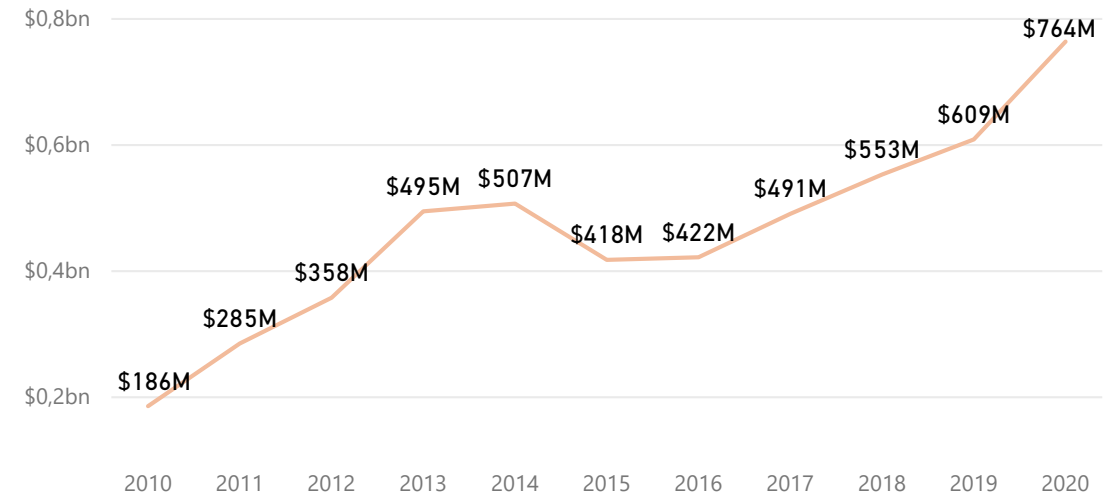
In December 2020, biggest exports, in terms of quantity was made to Venezuela with 21 thousand tons, followed by Niger and Somali.

In ODecember 2020, among the top 10 countries we export to on the basis of unit price, Japan ranked 1st with \$683/ton, followed by Venezuela (\$583/ton) and Niger (\$476/ton) respectively. Angola had the lowest price with \$439/ton.

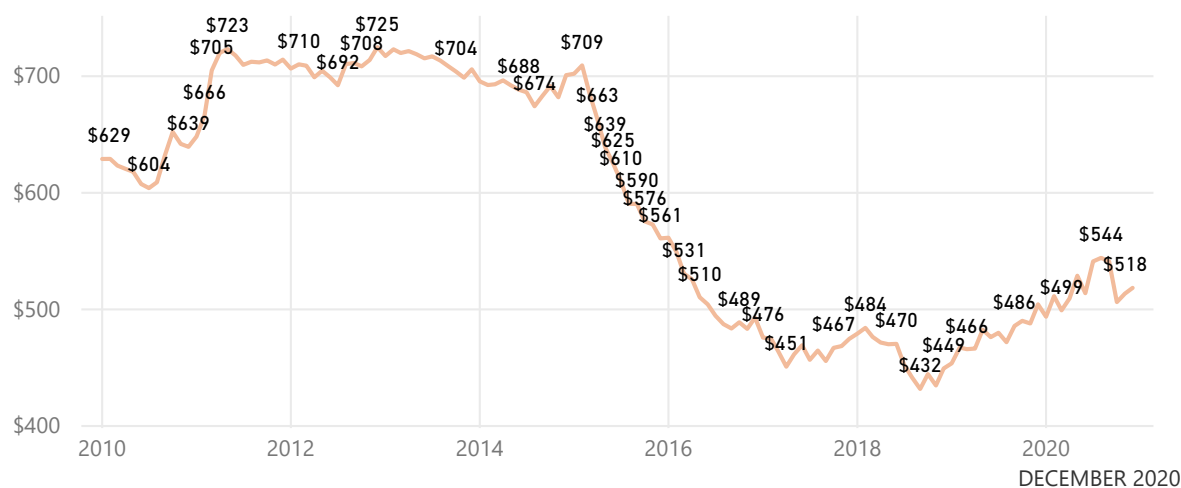
MONTHLY EXPORT VALUE (USD)



YEARLY EXPORT VALUE (USD)



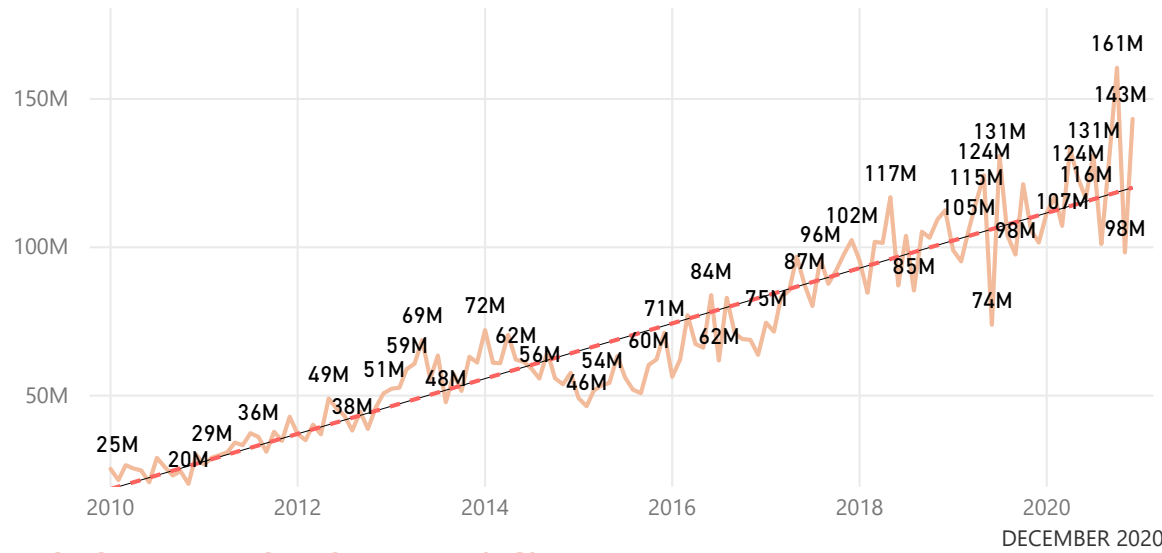
MONTHLY EXPORT UNIT PRICE (USD/TON)



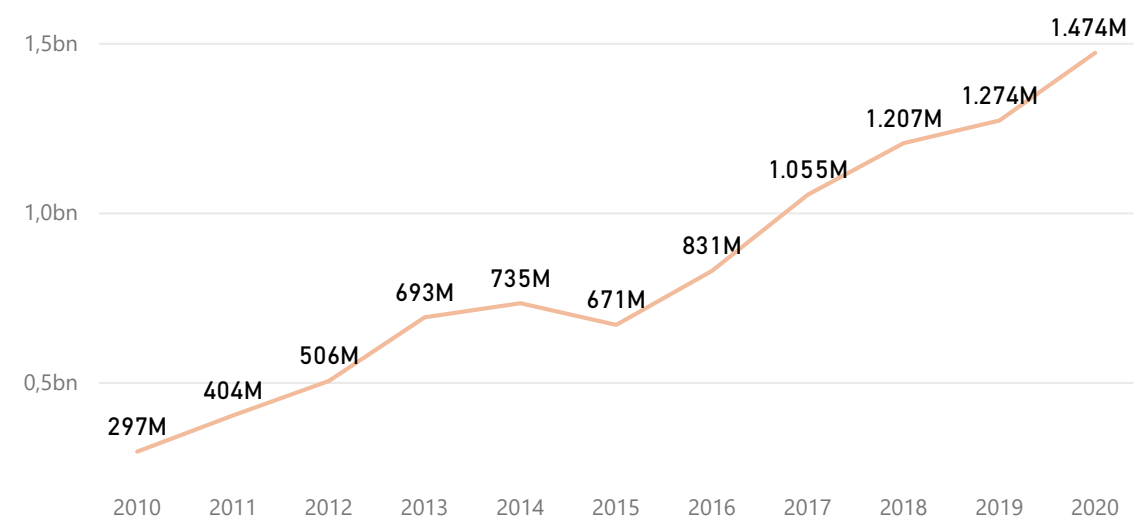
When pasta exports are analyzed by years, exports in October 2020 (\$81.26 million) is the highest export value ever.

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

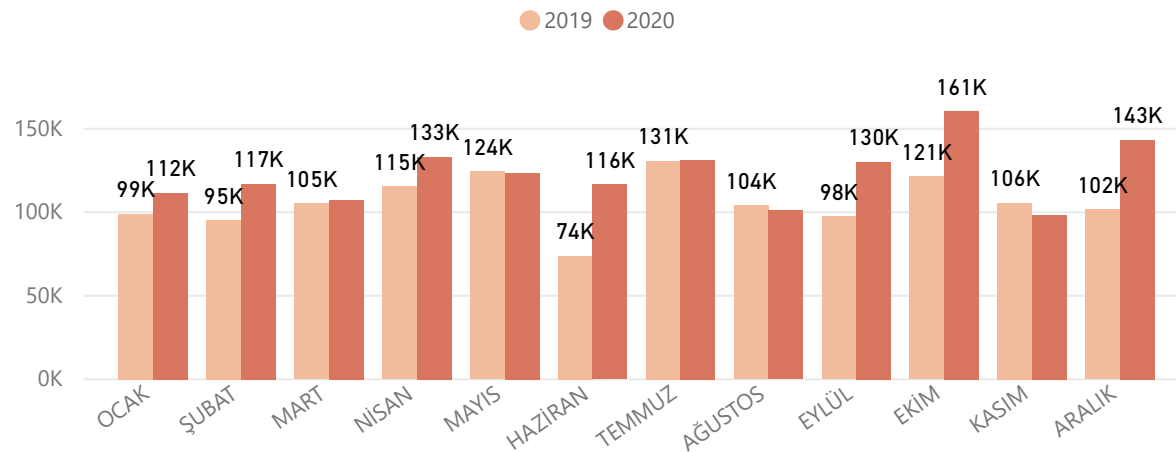
MONTHLY EXPORT QUANTITY (KG)



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 160.51 thousand tons, second highest month is December with 143.26 tons.

2019 - 2020 EXPORT COMPARISON CHART

JANUARY - DECEMBER 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	30.252.000	\$10.521.787	%65,0	%65,8
Durum wheat (excl. seed for sowing)	49.924.851	\$17.446.782	30.252.000	\$10.521.787	%65,0	%65,8
190211	4.707.438	\$4.749.571	2.385.486	\$2.259.962	%97,3	%110,2
Uncooked pasta, containing common wheat flour or meal or eggs	2.696.311	\$3.460.633	1.081.187	\$1.356.845	%149,4	%155,0
Uncooked pasta, not stuffed containing eggs (Excl. phenylketonuria pt.), others	2.011.127	\$1.288.938	1.304.299	\$903.117	%54,2	%42,7
190219	1.406.522.529	\$722.592.682	1.213.153.312	\$577.467.336	%15,9	%25,1
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	482.950.976	\$222.573.368	354.548.793	\$157.885.890	%36,2	%41,0
Uncooked pasta, not stuffed or otherwise prepared, containing vegetables	393.896	\$617.286	260.444	\$583.904	%51,2	%5,7
Uncooked pasta, not stuffed or otherwise prepared, not containing common wheat flour or meal or eggs (Excl. fenilketonüri pt.)	916.078.275	\$495.888.912	851.802.973	\$415.632.822	%7,5	%19,3
Uncooked pasta, not stuffed, others	7.093.902	\$3.502.927	6.537.902	\$3.358.821	%8,5	%4,3
190220	821.860	\$1.066.219	379.347	\$601.782	%116,7	%77,2
Cooked pasta, cooked, stuffed with meat or other substances	37.918	\$99.864	26.261	\$78.758	%44,4	%26,8
Cooked pasta, stuffed with meat or other substances, others	621.470	\$812.339	337.779	\$480.003	%84,0	%69,2
Pasta, stuffed with meat, containing > 20% by weight of meat and meat offal of any kind	15.184	\$41.804	11.334	\$31.193	%34,0	%34,0
Pasta, stuffed with meat, containing > 20% by weight of sausages and the like	1.678	\$6.191	3.925	\$10.428	-%57,2	-%40,6
Pasta, stuffed, containing > 20% by weight of fish, etc	145.610	\$106.021	48	\$1.400	%303254,2	%7472,9
190230	61.220.398	\$35.381.627	57.625.633	\$28.361.900	%6,2	%24,8
Pasta, dried	9.854.136	\$10.405.995	6.972.619	\$7.077.686	%41,3	%47,0
Pasta, others	51.366.262	\$24.975.632	50.653.014	\$21.284.214	%1,4	%17,3
190240	431.762	\$268.142	315.535	\$215.348	%36,8	%24,5
Couscous unprepared	303.509	\$175.838	201.439	\$118.843	%50,7	%48,0
Couscous, cooked or otherwise prepared	128.253	\$92.304	114.096	\$96.505	%12,4	-%4,4
Total	1.523.628.838	\$781.505.023	1.304.111.313	\$619.428.115	%16,8	%26,2

* 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

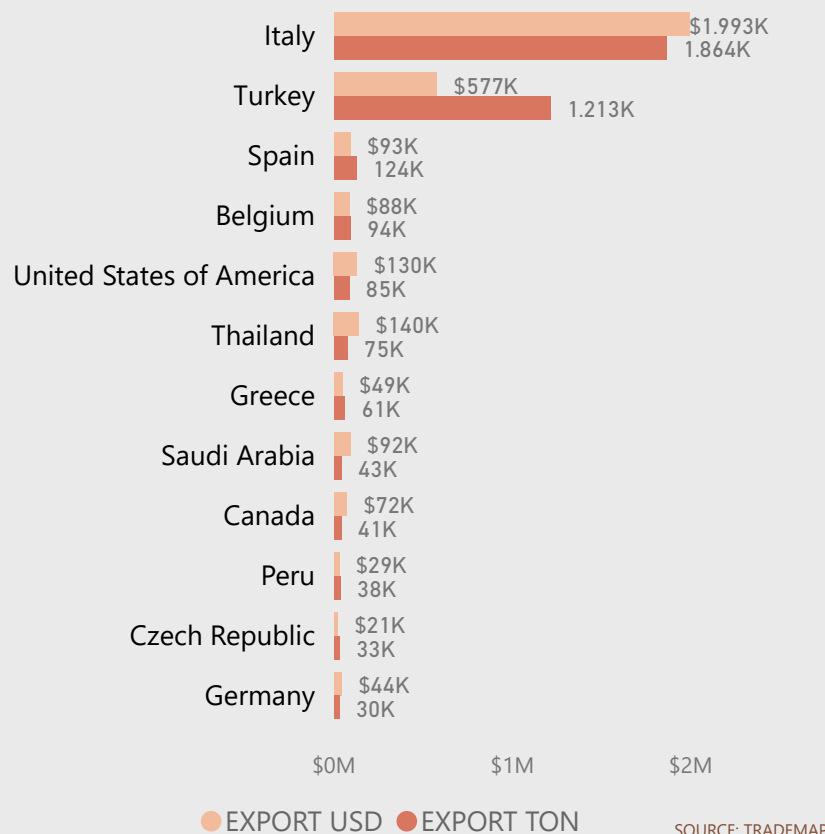
WORLD PASTA (1902.19)
EXPORT IN 2019 (USD)

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

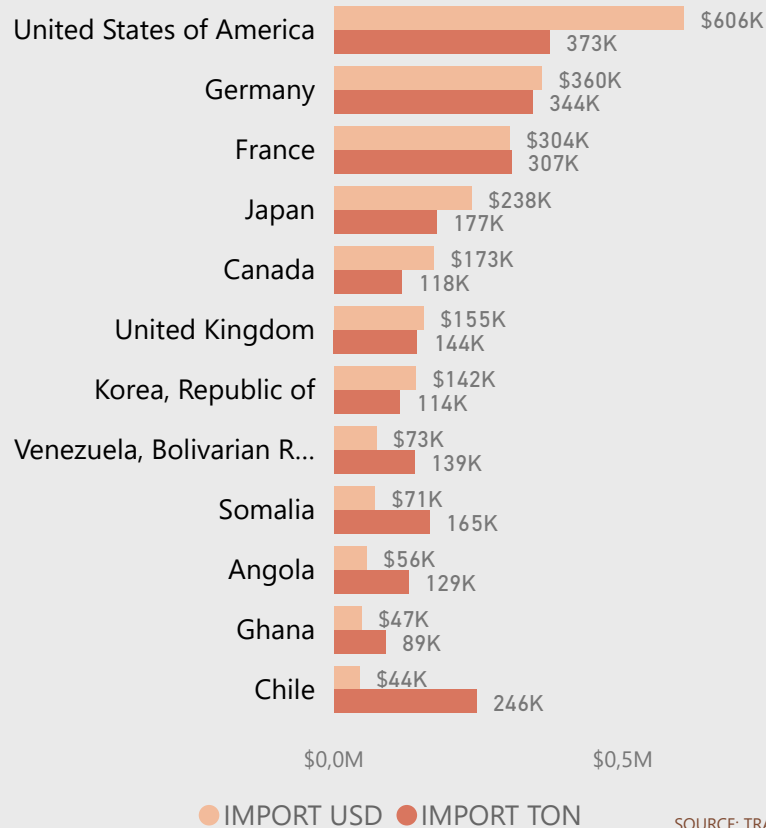
WORLD PASTA (1902.19)
IMPORT IN 2019 (USD)

4.268.211

WORLD PASTA (1902.19)
IMPORT IN 2019 (TON)

4.276.378

WORLD PASTA IMPORTS IN 2019 (1902.19 HS CODE)



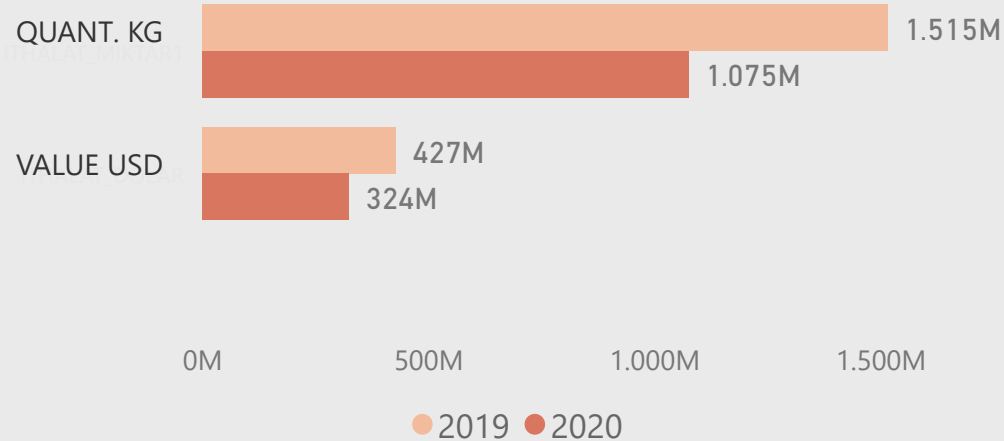
UNIT IMPORT PRICE OF COUNTRIES OVER 55K IMPORT QUANT. (\$/TON)

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.

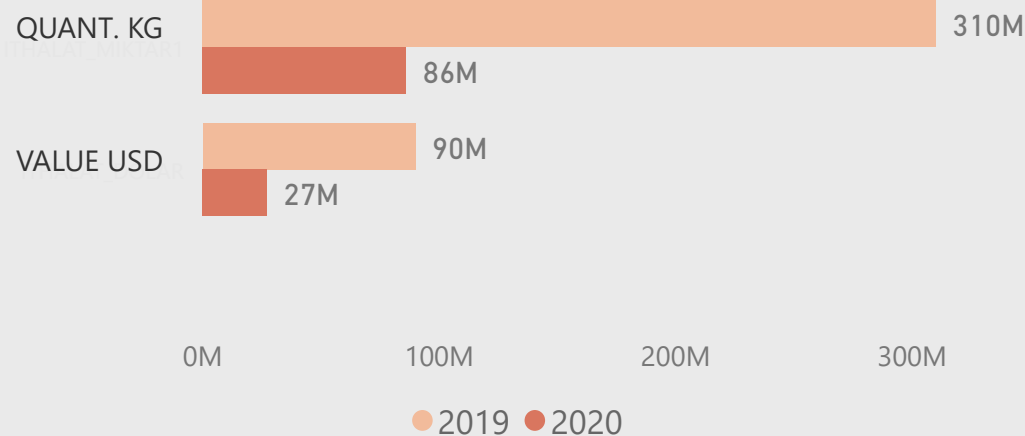
JANUARY - DECEMBER 2020



In December 2020 compared to December 2019, durum wheat imports decreased -72.27% and fell to 85.97 thousand tons, in quantity; decreased -69.83% and fell to \$27.1 million in value.

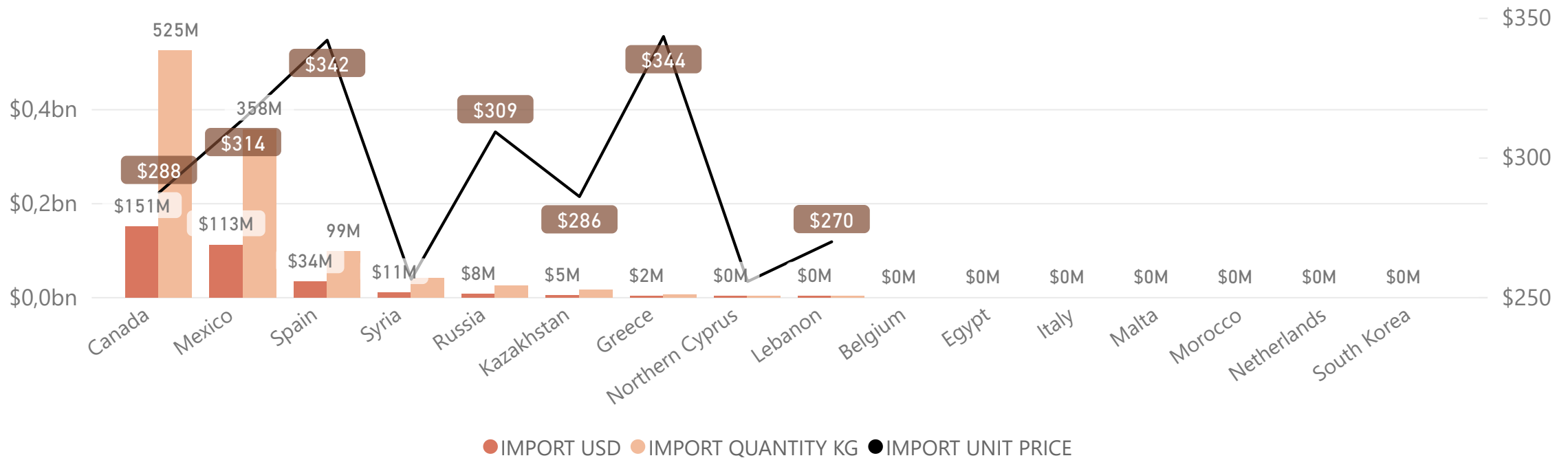
Between January - December 2020, compared to same period of the previous year, durum wheat imports decreased -29.04% and fell to 1.07 million tons, in quantity; decreased -24.26% and fell to \$323.55 million in value.

DECEMBER 2020



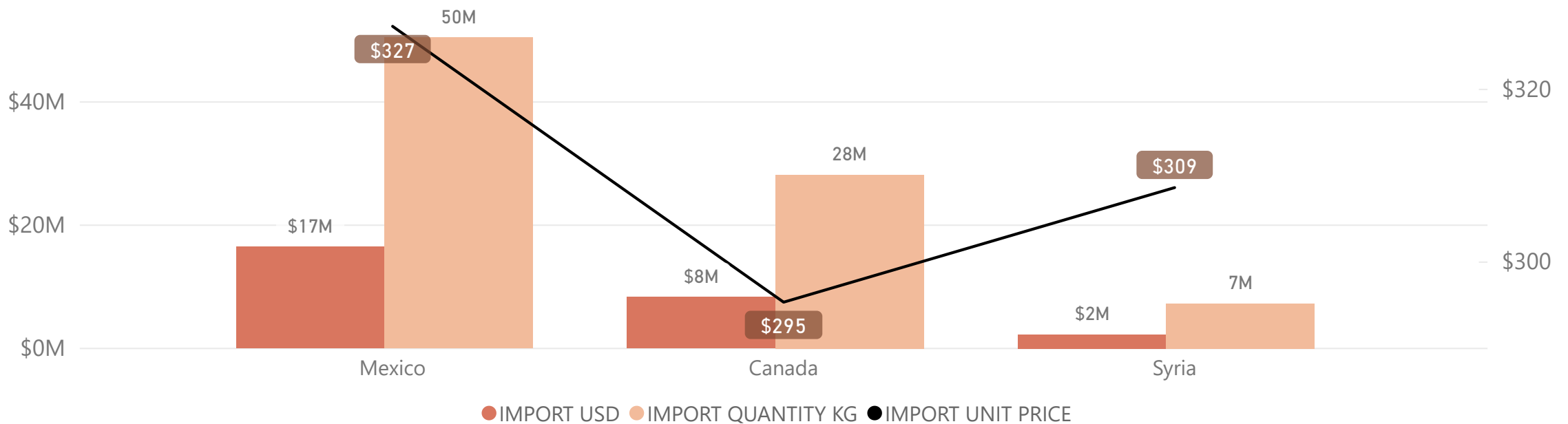
Average unit price per ton was \$290 in December 2019. It increased 8.79% and reached to \$315 in December 2020.

Compared to same period of the previous year, between January and December 2020, average price per ton increased 6.74% and reached to \$301/ton.



During the period between January and December 2020, biggest importer of durum wheat was Canada with 525 thousand tons (\$151 million), followed by Mexico and Spain.

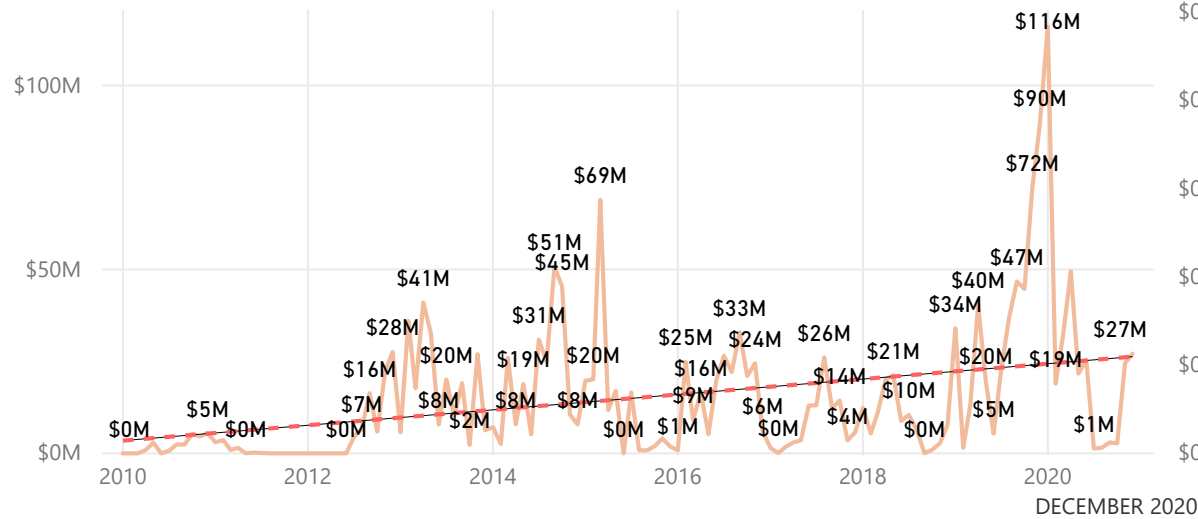
Average unit price of durum wheat imported by Canada was \$288/ton. Lowest price belonged to Northern Cyprus with \$256/ton, while the highest unit price belongs to Greece with \$344/ton.



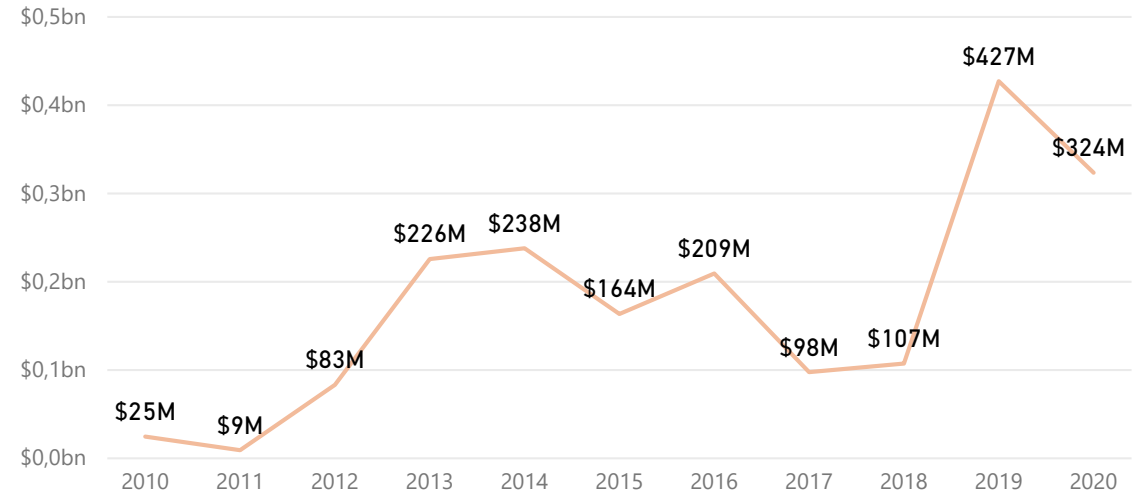
In December 2020, most of the durum wheat imports was made by Mexico. Mexico imported 50 thousand tons of durum wheat (\$17 million), with \$327/ton average unit price.

In December 2020, countries that imported durum wheat were Mexico, Canada, Syria, respectively.

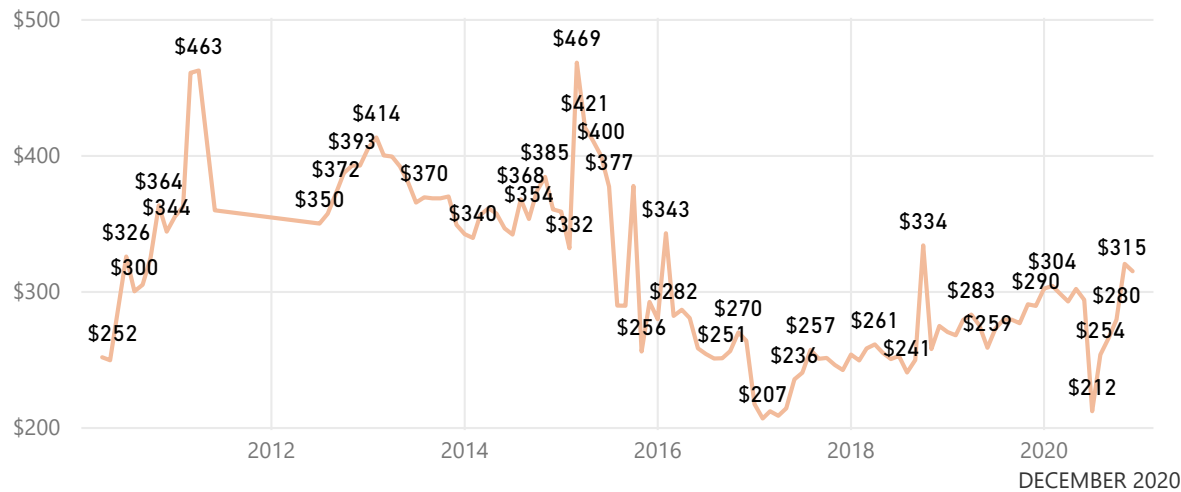
MONTHLY IMPORT VALUE (USD)



YEARLY IMPORT VALUE (USD)



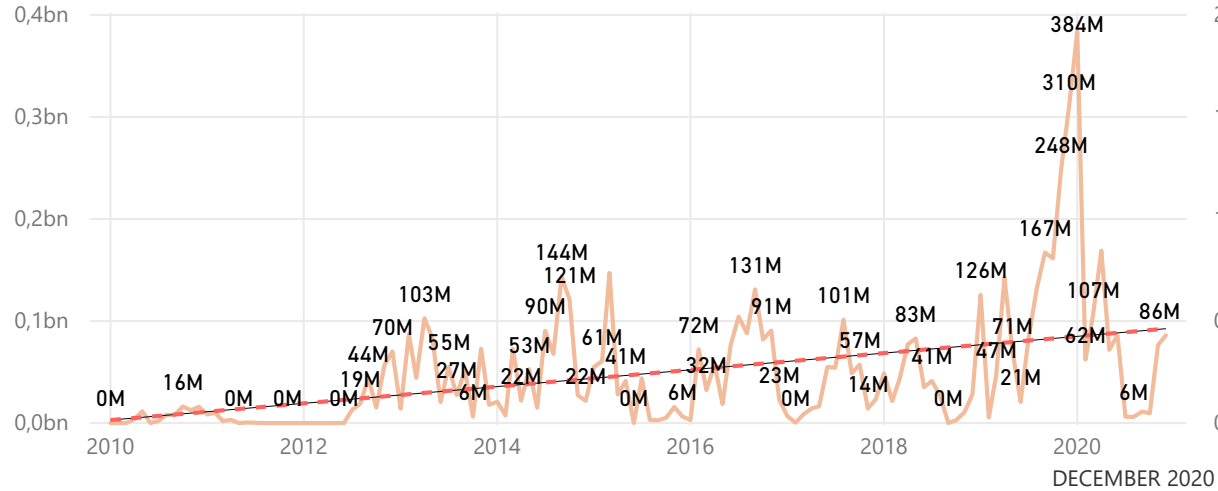
MONTHLY IMPORT UNIT PRICE (USD/TON)



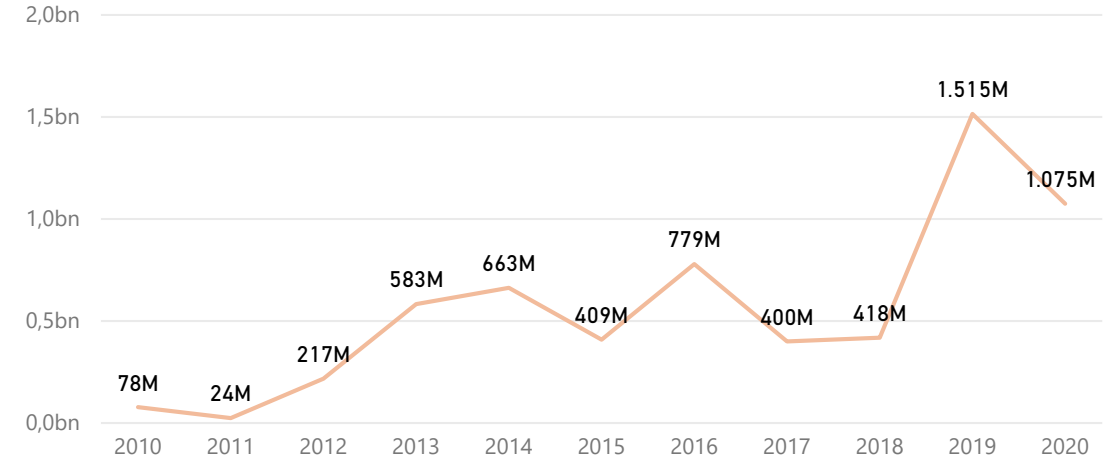
When the monthly import values are analyzed by years, it is seen that imports in January 2020 (\$116 million) is the highest monthly import ever.

Also, unit value of imports past \$300 level in May 2020, reaching the highest value in last 4 years. It is seen that the imports made in 2020 exceeded the imports made in the total of all years except 2019.

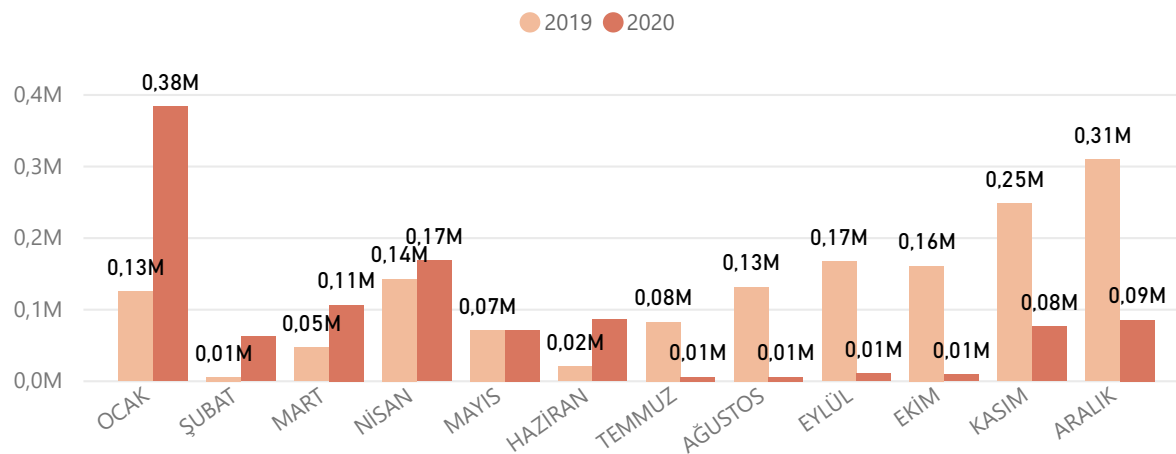
MONTHLY IMPORT QUANTITY (KG)



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.

It is seen that the amount of imports made in 2020 was above the amount imported in all years except 2019.

2019 - 2020 IMPORT COMPARISON CHART

JANUARY - DECEMBER 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	1.074.863.221	\$323.547.301	1.514.847.499	\$427.202.684	-%29,0	-%24,3
Durum wheat (excl. seed for sowing)	1.074.863.221	\$323.547.301	1.514.847.499	\$427.202.684	-%29,0	-%24,3
190219	4.844.689	\$5.836.970	3.764.178	\$5.513.702	%28,7	%5,9
Uncooked pasta, not stuffed or otherwise prepared, not containing common wheat flour or meal or eggs (Excl. fenilketonüri pt.)	3.136.368	\$4.456.850	3.347.369	\$4.663.007	-%6,3	-%4,4
Uncooked pasta, not stuffed or otherwise prepared	327.420	\$429.766	212.932	\$375.003	%53,8	%14,6
Uncooked pasta, not stuffed, others	1.377.287	\$925.266	156.281	\$261.245	%781,3	%254,2
Uncooked pasta, not stuffed or otherwise prepared, containing vegetables	3.614	\$25.088	47.596	\$214.447	-%92,4	-%88,3
Low protein pasta for phenylketonuria patients	0	\$0	0	\$0		
190230	605.935	\$926.881	879.605	\$1.957.108	-%31,1	-%52,6
Pasta, dried	381.732	\$717.896	376.331	\$1.258.079	%1,4	-%42,9
Pasta, others	224.203	\$208.985	503.274	\$699.029	-%55,5	-%70,1
190211	469.920	\$806.775	1.196.699	\$1.730.719	-%60,7	-%53,4
Uncooked pasta, not stuffed containing eggs (Excl. phenylketonuria pt.), others	234.002	\$284.056	852.558	\$1.071.497	-%72,6	-%73,5
Uncooked pasta, containing common wheat flour or meal or eggs	235.918	\$522.719	344.141	\$659.222	-%31,4	-%20,7
190220	429.240	\$1.064.845	302.740	\$1.022.000	%41,8	%4,2
Cooked pasta, stuffed with meat or other substances, others	415.094	\$1.007.653	164.728	\$591.129	%152,0	%70,5
Cooked pasta, cooked, stuffed with meat or other substances	12.615	\$36.254	136.430	\$406.599	-%90,8	-%91,1
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	108.428	\$84.628	-%99,5	-%97,4
Couscous unprepared	0	\$0	100.000	\$61.800	-%100,0	-%100,0
Couscous, cooked or otherwise prepared	530	\$2.212	8.428	\$22.828	-%93,7	-%90,3
100111	212.737	\$180.343	59.420	\$59.425	%258,0	%203,5
Durum wheat seed for sowing	212.737	\$180.343	59.420	\$59.425	%258,0	%203,5
Total	1.081.426.272	\$332.365.327	1.521.158.569	\$437.570.266	-%28,9	-%24,0

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

3.150.000

TON PRODUCTION

288

KG/DECARE (YIELD)

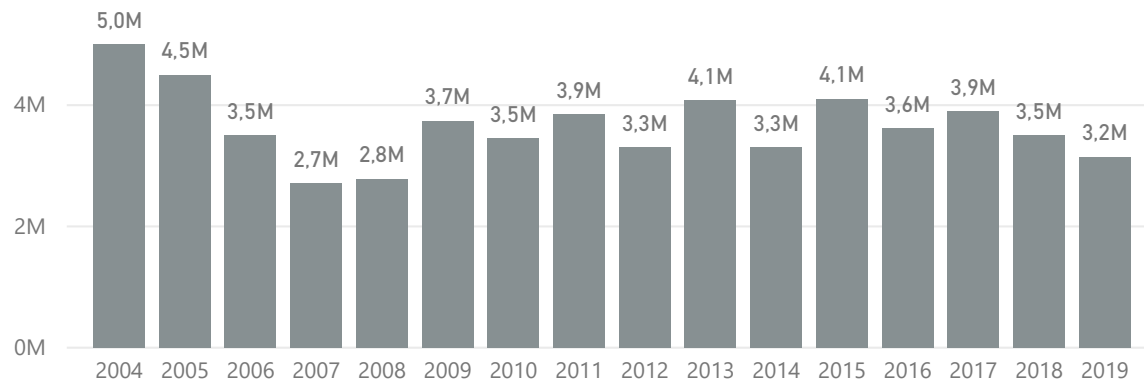
10.955.635

DECARE HARVEST AREA

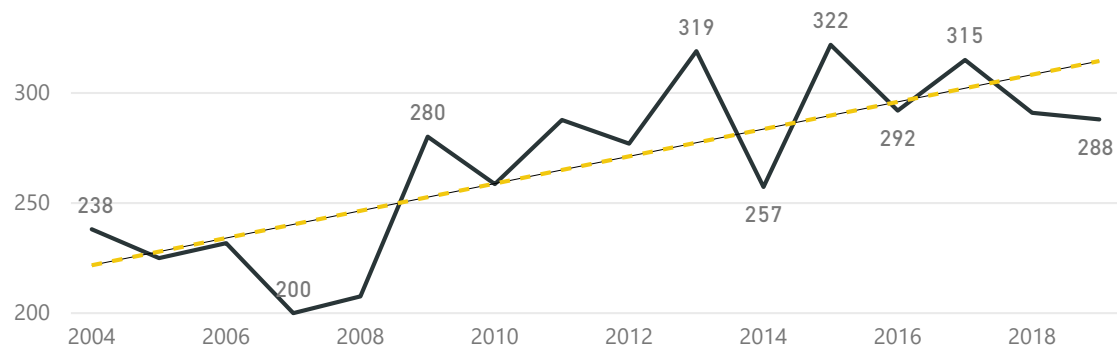
%16,0

RATIO PER TOTAL WHEAT

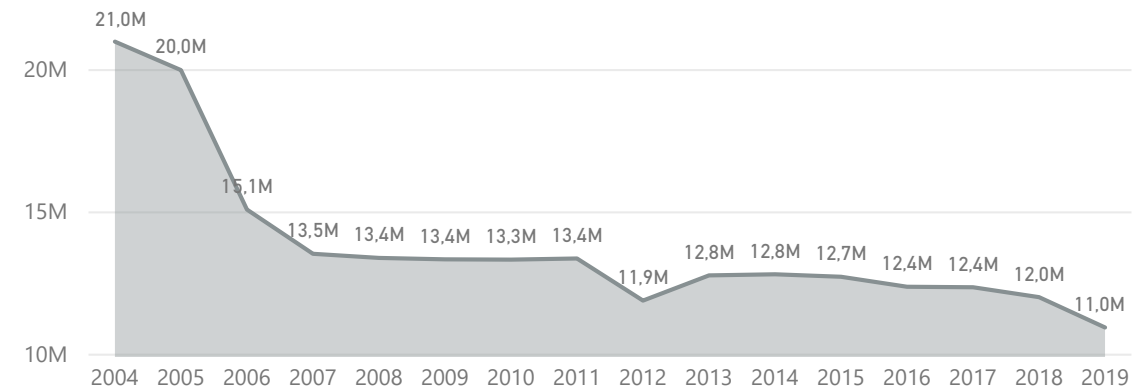
DURUM WHEAT PRODUCTION PER YEAR



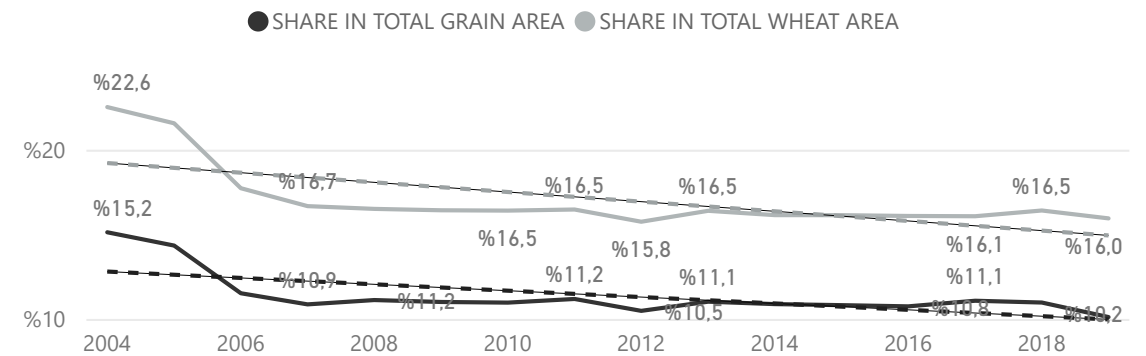
DURUM WHEAT YIELD PER YEAR (KG/DECARE)



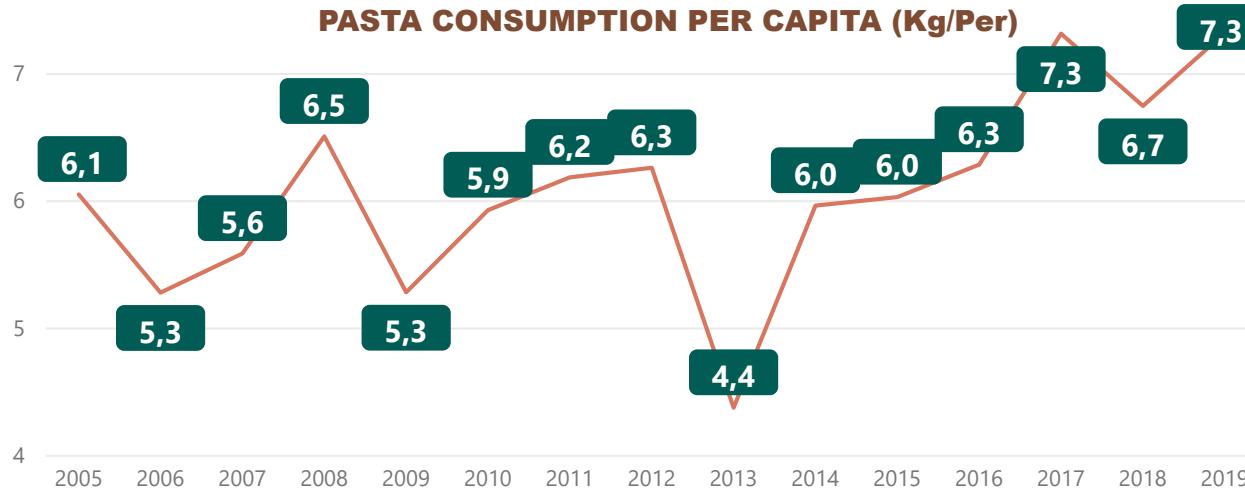
DURUM WHEAT HARVEST AREA PER YER (DECARE)



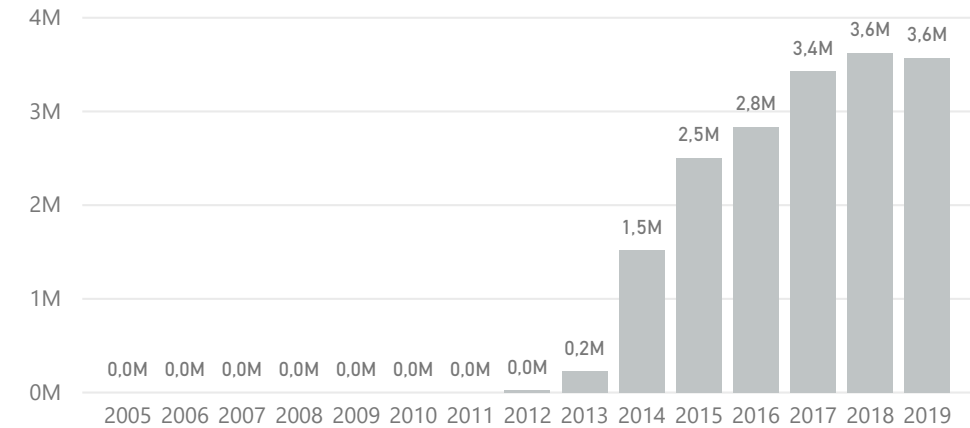
RATIO OF DURUM WHEAT HARVEST AREA



PASTA CONSUMPTION PER CAPITA (Kg/Per)

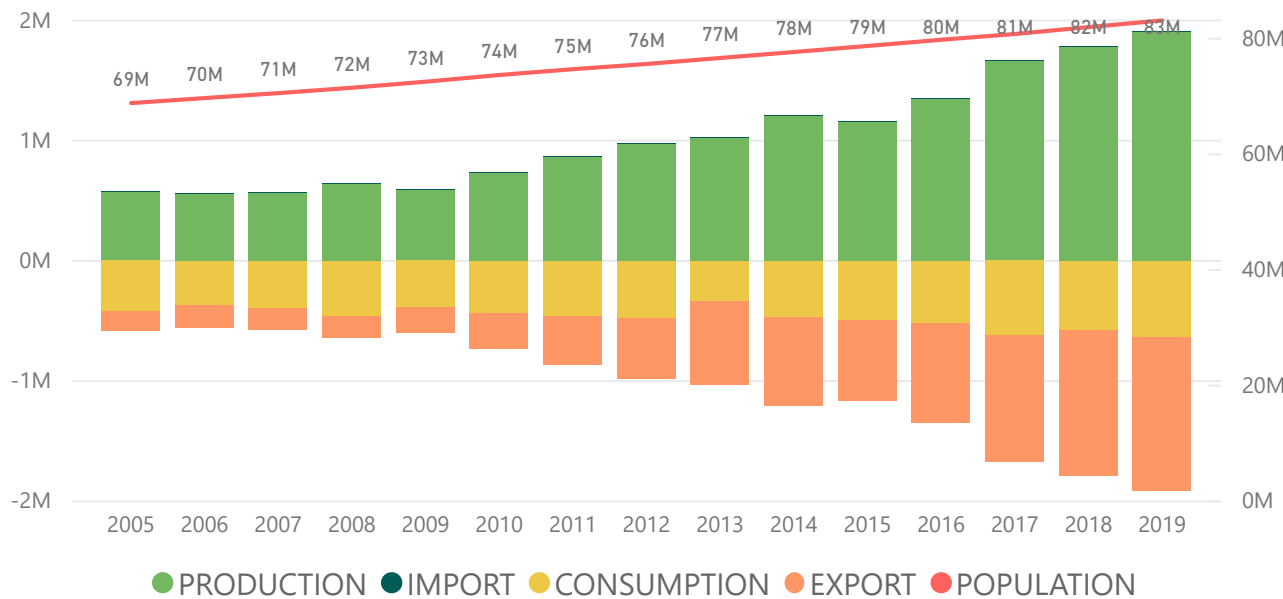


REFUGEE NUMBERS PER YEAR



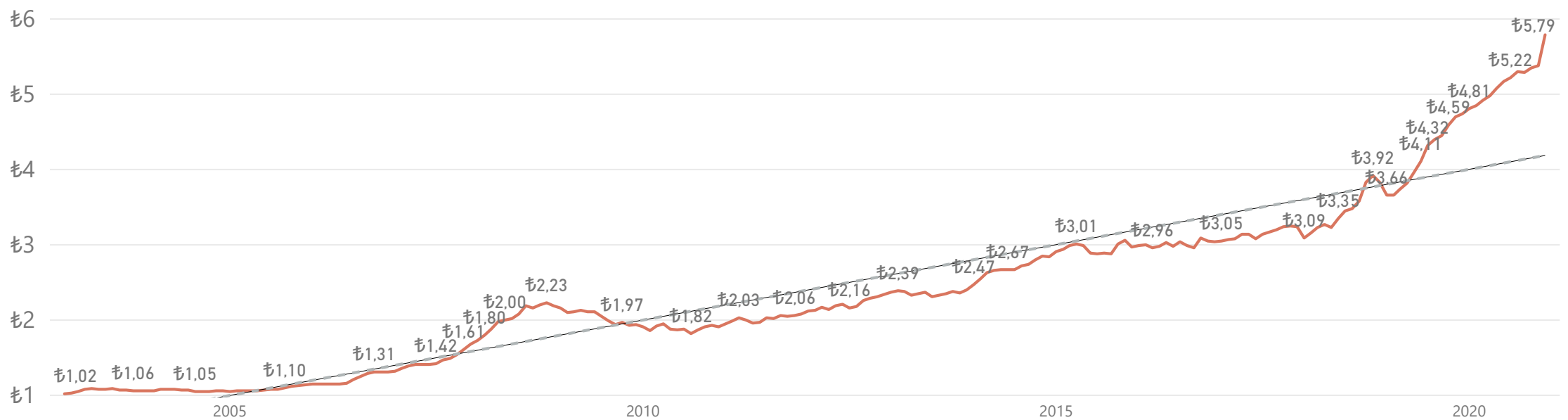
* Calculations were made with population of Turkey and additional refugee numbers.

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 december pasta market price: ₺5,79 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

