

# MÜSAD



MAKARNA ÜRETİCİLERİ VE SANAYİCİLERİ DERNEĞİ  
Pasta Producers and Industrialists Association

## SECTOR REPORT

JANUARY 2021



# Pasta Producers and Industrialists' Association

## Sector Report

YEAR TOTAL

PUBLISH DATE

1 March 2021

## JANUARY 2021

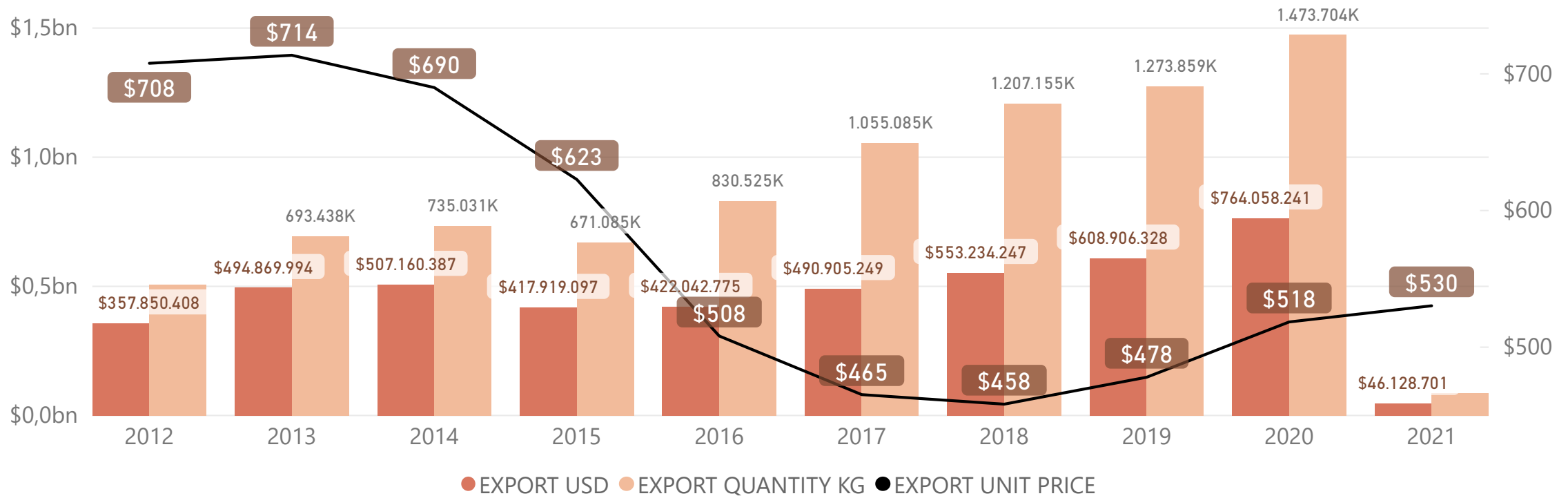
EXPORT QUANTITY (KG) -%22,1	EXPORT VALUE (USD) -%16,3	UNIT PRICE (USD/TON) %7,4
<b>JANUARY 2021</b> <b>86.987.740</b> <small>JANUARY 2020</small> <small>111.615.902</small>	<b>JANUARY 2021</b> <b>\$46.128.701</b> <small>JANUARY 2020</small> <small>\$55.107.970</small>	<b>JANUARY 2021</b> <b>\$530</b> <small>JANUARY 2020</small> <small>\$494</small>

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

## YEAR TOTAL

EXPORT QUANTITY (KG) -%22,1	EXPORT VALUE (USD) -%16,3	UNIT PRICE (USD/TON) %7,4
<b>2021 TOTAL</b> <b>86.987.740</b> <small>2020 TOTAL</small> <small>111.615.902</small>	<b>2021 TOTAL</b> <b>\$46.128.701</b> <small>2020 TOTAL</small> <small>\$55.107.970</small>	<b>2021 TOTAL</b> <b>\$530</b> <small>2020 TOTAL</small> <small>\$494</small>




\* 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 \$530/ton by January 2021. But, compared to surge in durum wheat prices, increase in unit export price is still insufficient.

## JANUARY 2021

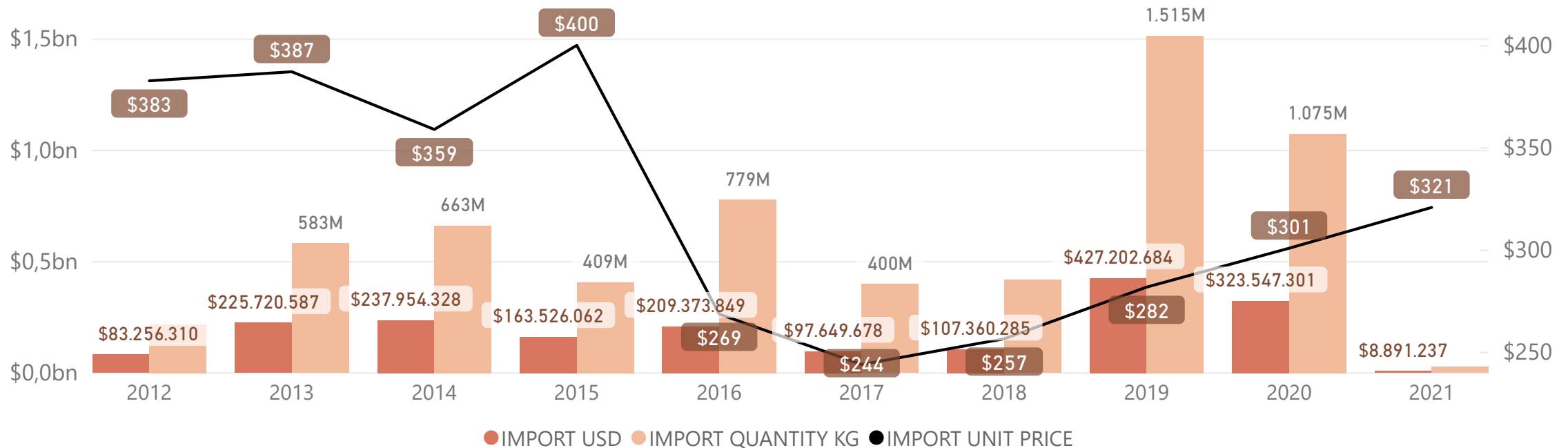
IMPORT QUANTITY (KG)	-%93	IMPORT VALUE (USD)	-%92	UNIT PRICE (USD/TON)	%6,1
JANUARY 2021		JANUARY 2021		JANUARY 2021	
27.702.140		\$8.891.237		\$321	
JANUARY 2020		JANUARY 2020		JANUARY 2020	
383.731.401		\$116.071.718		\$302	

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

## YEAR TOTAL

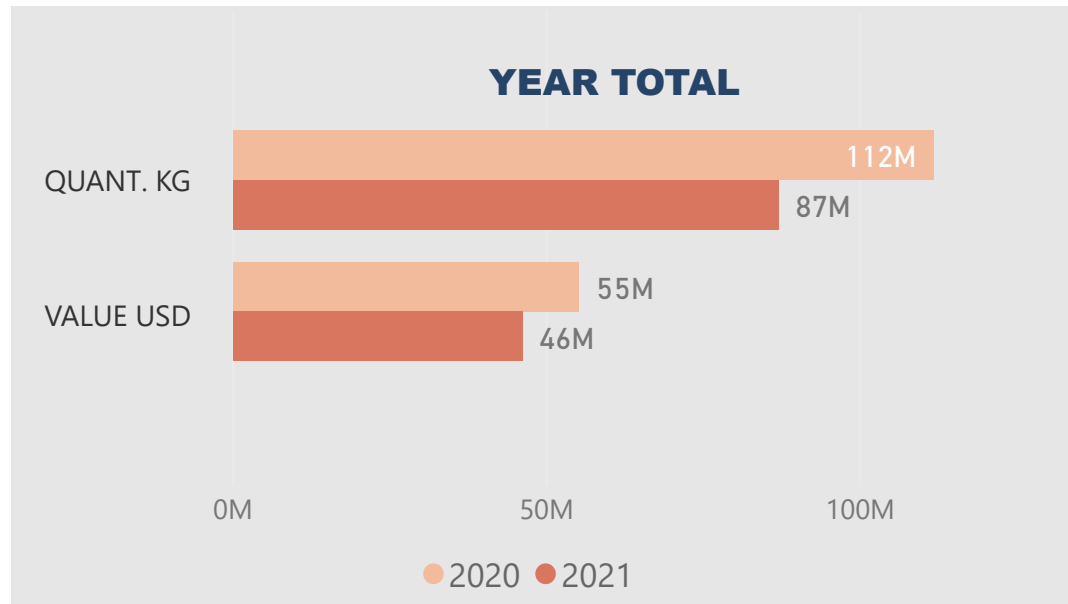
IMPORT QUANTITY (KG)	-%93	IMPORT VALUE (USD)	-%92	UNIT PRICE (USD/TON)	%6,1
2021 TOTAL		2021 TOTAL		2021 TOTAL	
27.702.140		\$8.891.237		\$321	
2020 TOTAL		2020 TOTAL		2020 TOTAL	
383.731.401		\$116.071.718		\$302	

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



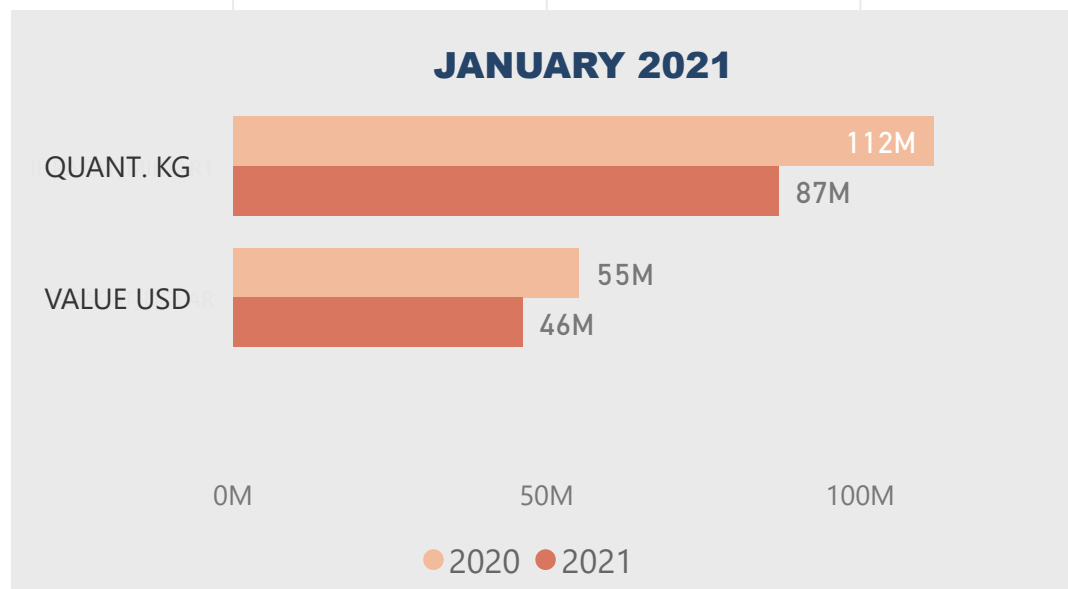
Durum Wheat Imports by years shows us that, compared to other years, durum wheat imports in 2019 and 2020 comes to the fore. Also, compared to 2016, durum wheat imports in 2019 are two times higher in terms of quantity and value.

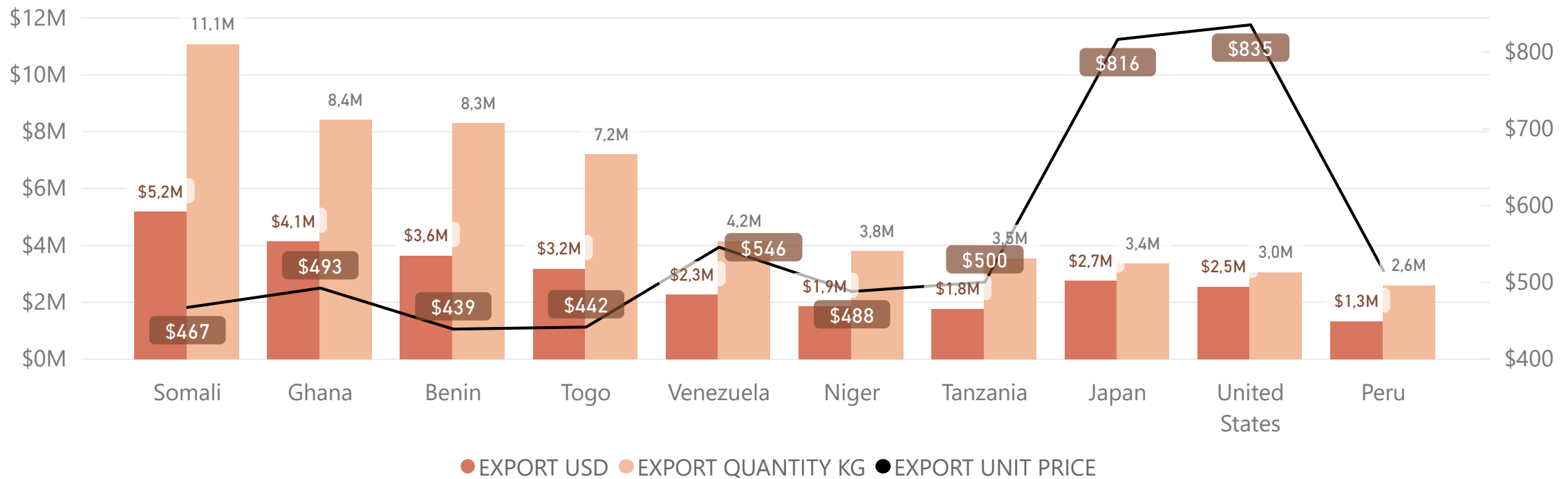
Import Unit Value was around \$400/ton between 2011 – 2015, then it fell sharply to \$250/ton in 2016. After 2018 it began increasing again and reached \$321/ton level in January 2021.



In January 2021 compared to January 2020, Pasta Exports decreased -22.07% and fell to 86.99 thousand tons, in quantity; decreased -16.29% and fell to \$46.13 million in value.

Average unit price per ton was \$494 in January 2020. It increased 7.41% and reached to \$530 in January 2021.



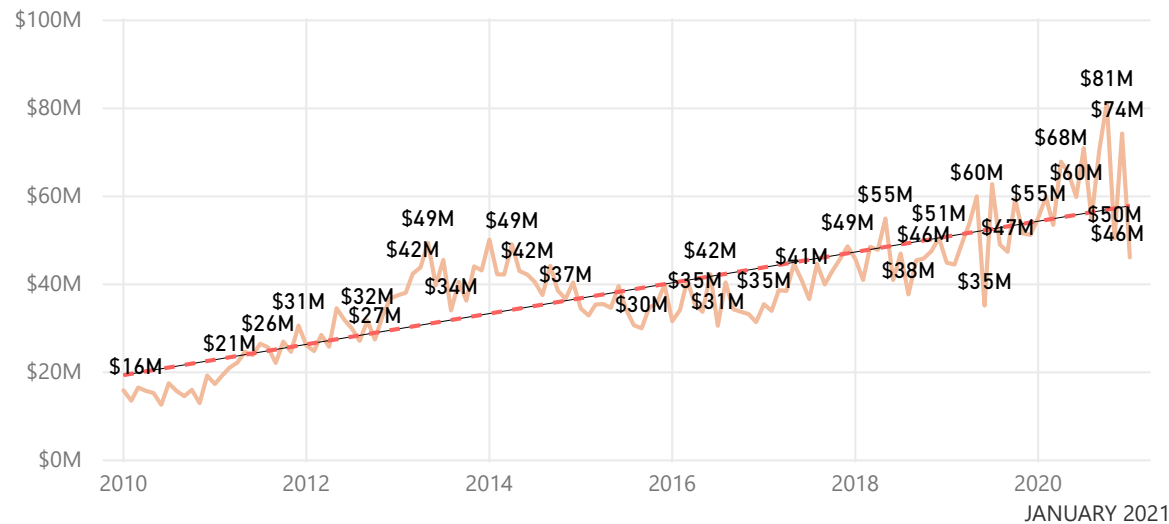


In January 2021, biggest exports, in terms of quantity was made to Somali with 11 thousand tons, followed by Ghana and Benin.

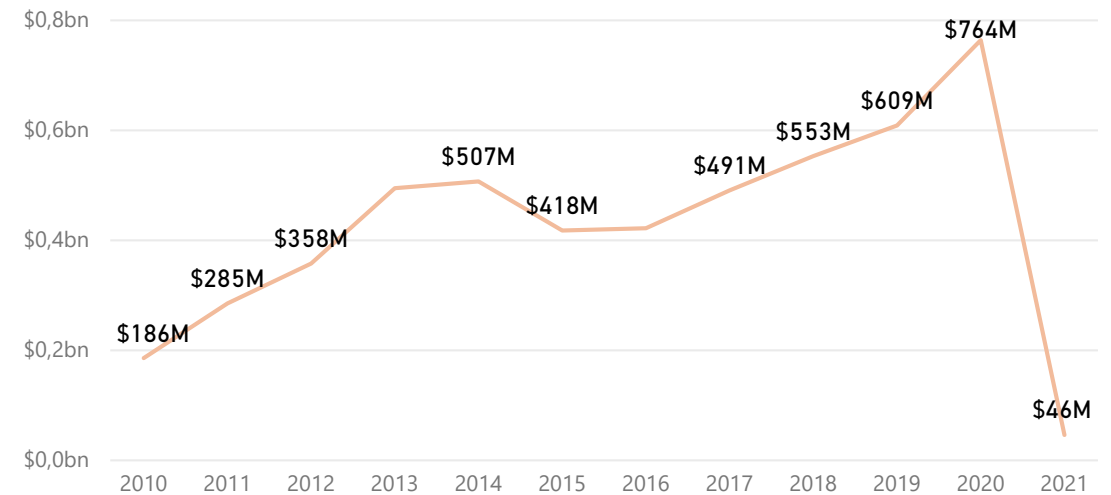
In January 2021, among the top 10 countries we export to on the basis of unit price, United States ranked 1st with \$835/ton, followed by Japan (\$816/ton) and Venezuela (\$546/ton) respectively. Benin had the lowest price with \$439/ton.

## PASTA EXPORT VALUE BY YEARS (USD)

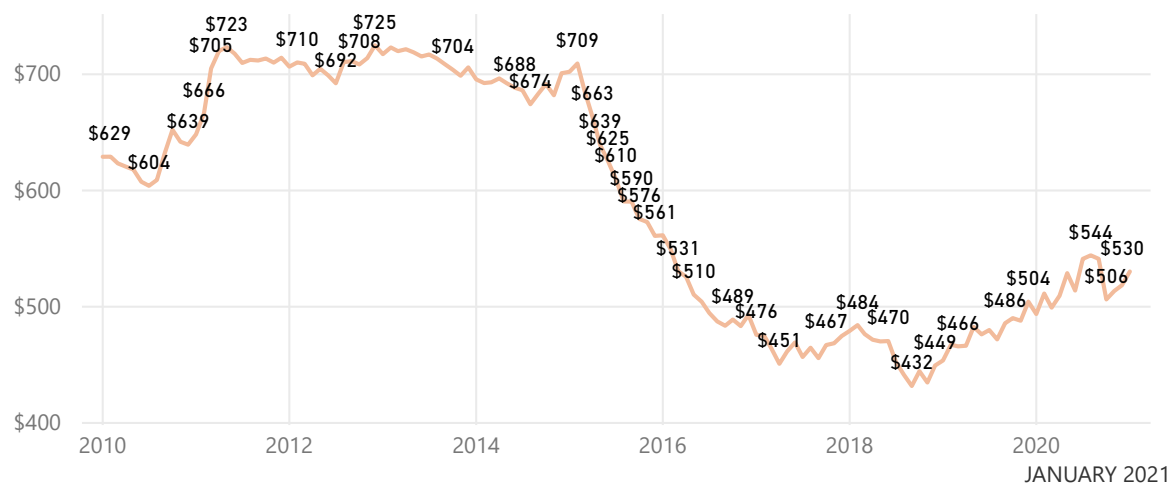
### MONTHLY EXPORT VALUE (USD)



### YEARLY EXPORT VALUE (USD)



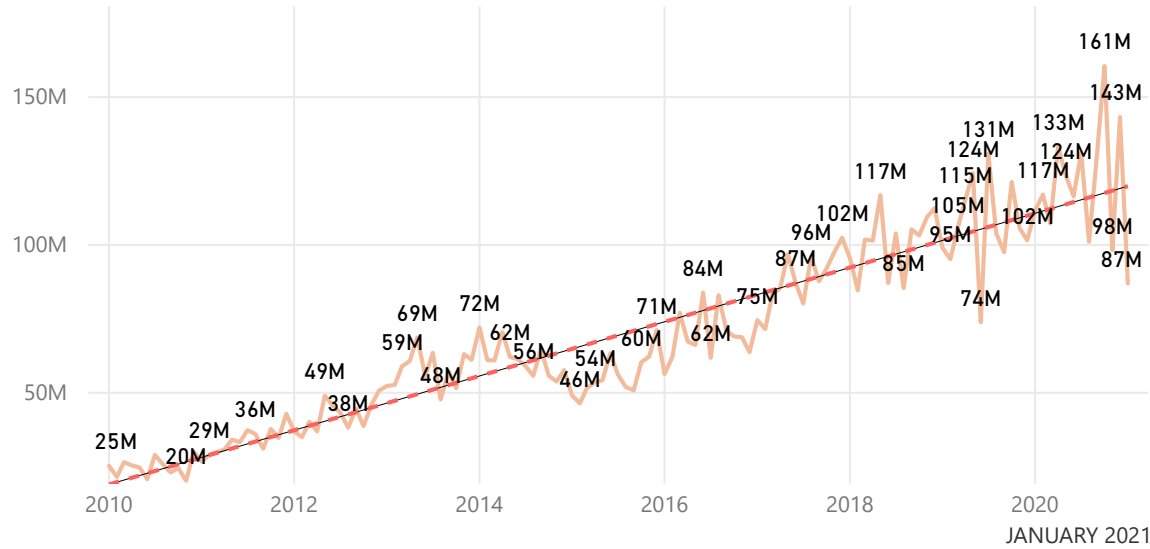
### MONTHLY EXPORT UNIT PRICE (USD/TON)



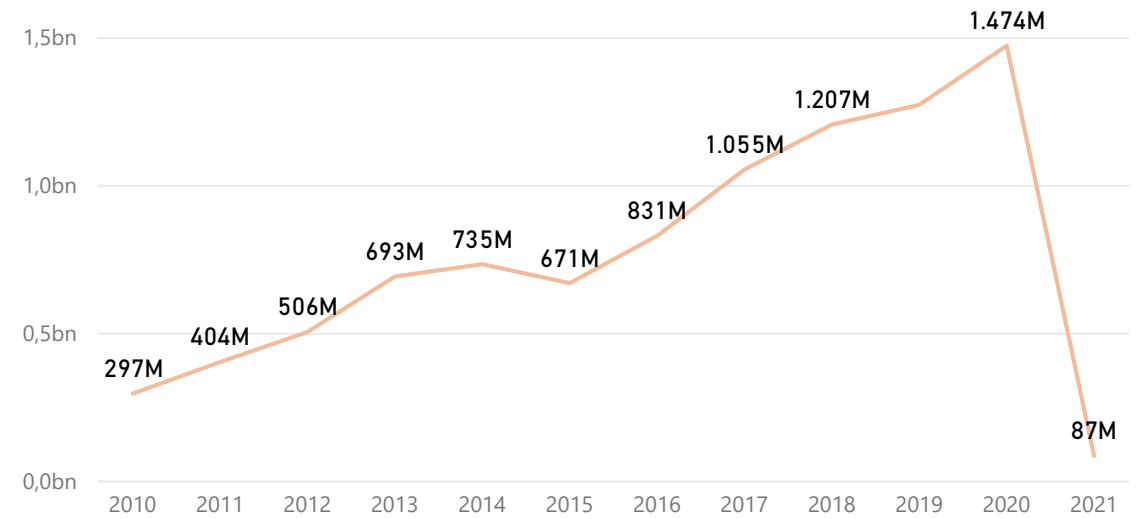
When pasta exports are analyzed by years, exports in October 2020 (\$81.26 million) is the highest export value ever.

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

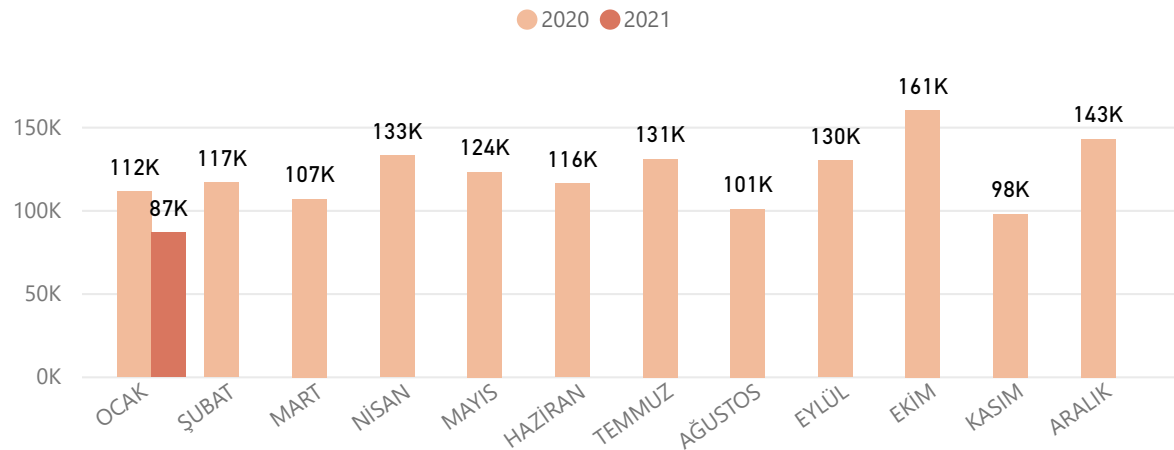
MONTHLY EXPORT QUANTITY (KG)



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. The lowest export is seen to be 86.9 thousand tons in January 2021.

## 2020 - 2021 EXPORT COMPARISON CHART

### YEAR TOTAL

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>5.699.534</b>	<b>\$2.248.014</b>	<b>8.628.610</b>	<b>\$3.000.576</b>	<b>-%33,9</b>	<b>-%25,1</b>
100119000000   Durum wheat (excl. seed for sowing)	5.699.534	\$2.248.014	8.628.610	\$3.000.576	-%33,9	-%25,1
<b>190211</b>	<b>3.106</b>	<b>\$2.495</b>	<b>362.230</b>	<b>\$406.030</b>	<b>-%99,1</b>	<b>-%99,4</b>
190211000011   Uncooked pasta, containing common wheat flour or meal or eggs	0	\$0	257.052	\$331.082	-%100,0	-%100,0
190211000019   Pasta; not cooked, containing eggs but containing only durum wheat (durum wheat) flour and semolina EXCEPT	3.106	\$2.495	105.178	\$74.948	-%97,0	-%96,7
<b>190219</b>	<b>84.181.647</b>	<b>\$44.092.615</b>	<b>105.506.360</b>	<b>\$51.725.050</b>	<b>-%20,2</b>	<b>-%14,8</b>
190219100019   Uncooked pasta, not stuffed or otherwise prepared, not containing common wheat flour or meal or eggs (Excl. fenilketonüri pt.)	39.687.695	\$23.146.260	46.313.580	\$24.874.980	-%14,3	-%6,9
190219900011   Pasta with vegetables; unbaked, not containing eggs but containing bread wheat flour or semolina (unfilled)	5.274	\$15.075	39.244	\$50.341	-%86,6	-%70,1
190219900012   Plain pasta; unbaked, not containing eggs but containing bread wheat flour or semolina (unfilled)	44.173.564	\$20.782.429	58.539.829	\$26.482.009	-%24,5	-%21,5
190219900013   Low protein pasta for phenylketonuria patients			5.000	\$9.255	-%100,0	-%100,0
190219900019   Uncooked pasta, not stuffed, others	315.114	\$148.851	608.707	\$308.465	-%48,2	-%51,7
<b>190220</b>	<b>251</b>	<b>\$920</b>	<b>169.118</b>	<b>\$189.401</b>	<b>-%99,9</b>	<b>-%99,5</b>
190220100000   Pasta (stuffed); containing more than 20% by weight of fish, molluscs, crustaceans and other aquatic invertebrates	0	\$0	63.700	\$47.165	-%100,0	-%100,0
190220301000   Pasta (stuffed, containing more than 20% by weight of meat and meat offal (including any fat)	45	\$239	884	\$3.954	-%94,9	-%94,0
190220309000   Pasta (stuffed, containing more than 20% by weight of sausages and the like (including any fat)	147	\$485	54	\$540	%172,2	-%10,2
190220910000   Cooked pasta, cooked, stuffed with meat or other substances	0	\$0	2.500	\$12.220	-%100,0	-%100,0
190220990000   Cooked pasta, stuffed with meat or other substances, others	59	\$196	101.980	\$125.522	-%99,9	-%99,8
<b>190230</b>	<b>2.774.536</b>	<b>\$2.013.400</b>	<b>5.550.626</b>	<b>\$2.765.636</b>	<b>-%50,0</b>	<b>-%27,2</b>
190230100000   Pasta, dried	883.589	\$1.027.498	1.383.303	\$747.821	-%36,1	%37,4
190230900000   Pasta, others	1.890.947	\$985.902	4.167.323	\$2.017.815	-%54,6	-%51,1
<b>190240</b>	<b>28.200</b>	<b>\$19.271</b>	<b>27.568</b>	<b>\$21.853</b>	<b>%2,3</b>	<b>-%11,8</b>
190240100000   Couscous; unprepared ones	27.200	\$18.626	24.690	\$15.301	%10,2	%21,7
190240900000   Couscous; EXCEPT those that are not prepared	1.000	\$645	2.878	\$6.552	-%65,3	-%90,2
<b>Total</b>	<b>92.687.274</b>	<b>\$48.376.715</b>	<b>120.244.512</b>	<b>\$58.108.546</b>	<b>-%22,9</b>	<b>-%16,7</b>

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

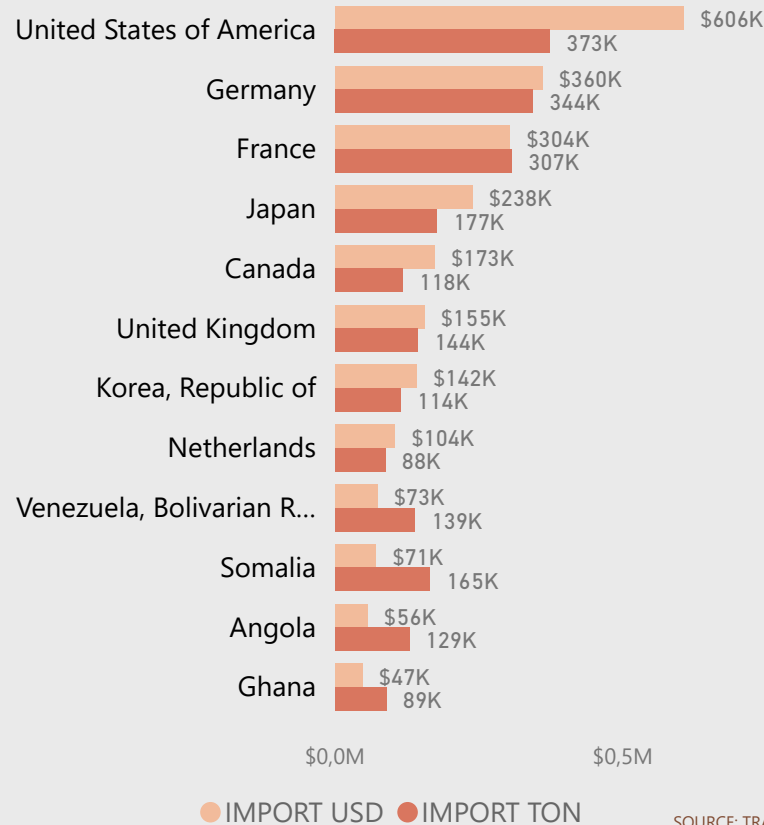
WORLD PASTA (1902.19)  
IMPORT IN 2019 (USD)

4.268.211

WORLD PASTA (1902.19)  
IMPORT IN 2019 (TON)

4.276.378

WORLD PASTA IMPORTS IN 2019 (1902.19 HS CODE)



SOURCE: TRADEMAP

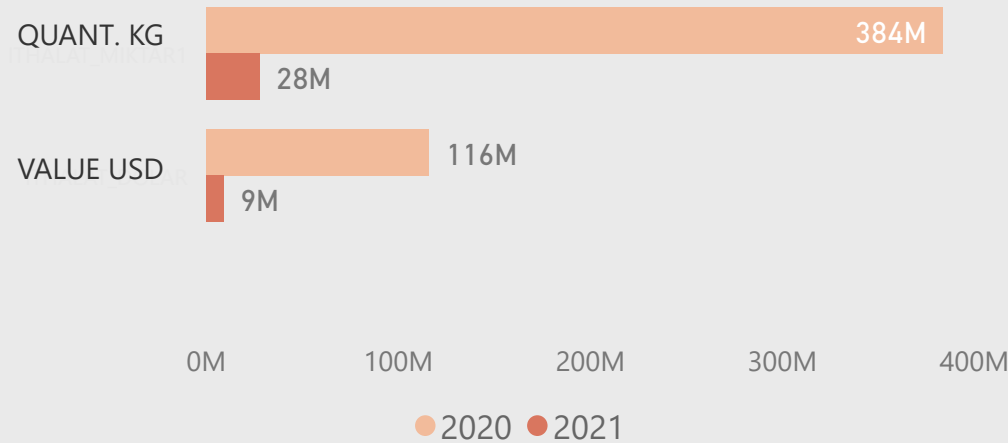
UNIT IMPORT PRICE OF COUNTRIES OVER 55K IMPORT QUANT. (\$/TON)

COUNTRY	IMPORT TON	IMPORT SHARE	UNIT PRICE (\$/TON)
United States of America	373.442	%9,1	\$1.622
Germany	343.571	%8,4	\$1.048
France	307.021	%7,5	\$990
Japan	176.939	%4,3	\$1.348
Somalia	164.685	%4,0	\$430
United Kingdom	143.824	%3,5	\$1.077
Venezuela, Bolivarian Republic of	138.906	%3,4	\$527
Angola	128.702	%3,2	\$438
Canada	117.695	%2,9	\$1.469
Korea, Republic of	114.169	%2,8	\$1.240
Ghana	89.111	%2,2	\$533
Netherlands	87.531	%2,1	\$1.187
Togo	76.945	%1,9	\$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.

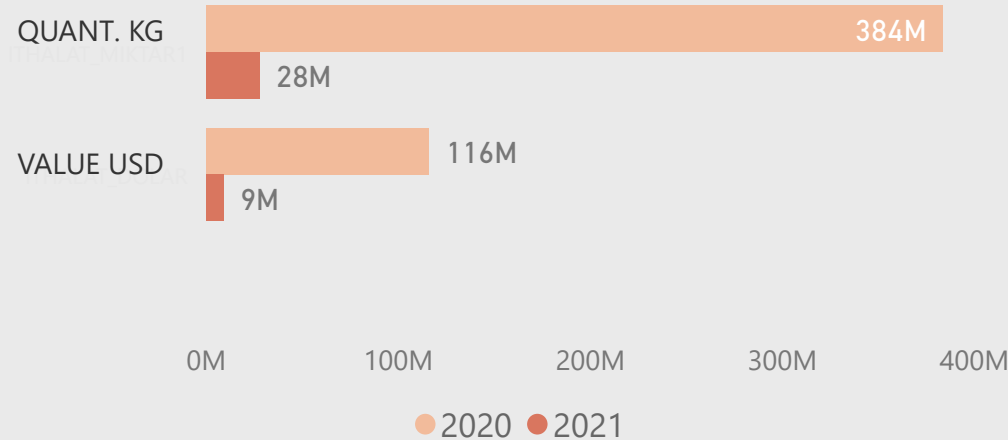
**YEAR TOTAL**

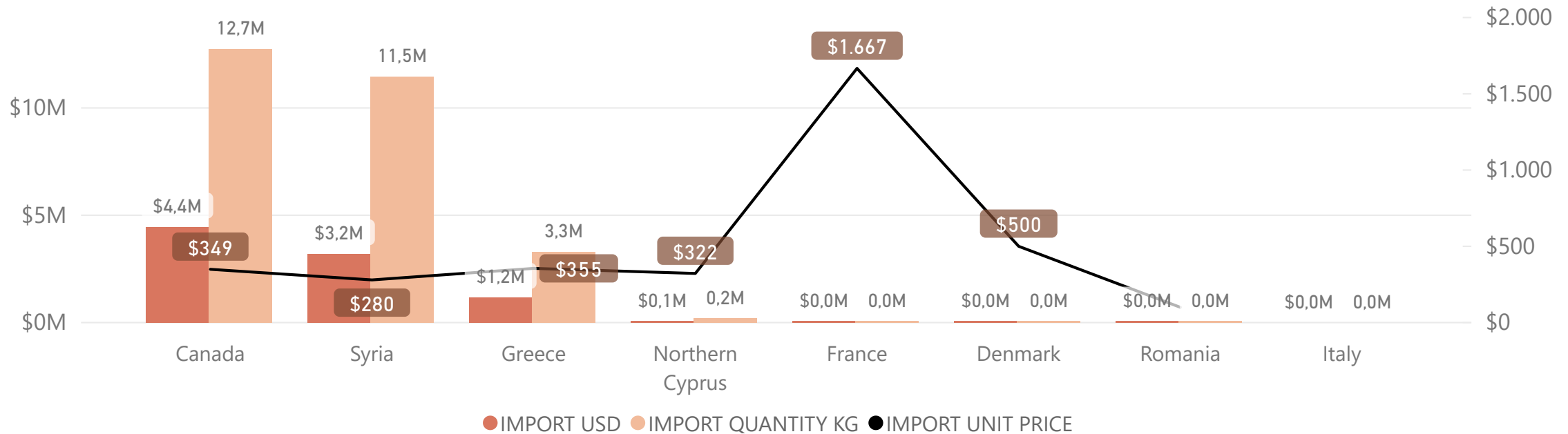


In January 2021 compared to January 2020, durum wheat imports decreased -92.78% and fell to 27.7 thousand tons, in quantity; decreased -92.34% and fell to \$8.89 million in value.

Average unit price per ton was \$302 in January 2020. It increased 6.11% and reached to \$321 in January 2021.

**JANUARY 2021**

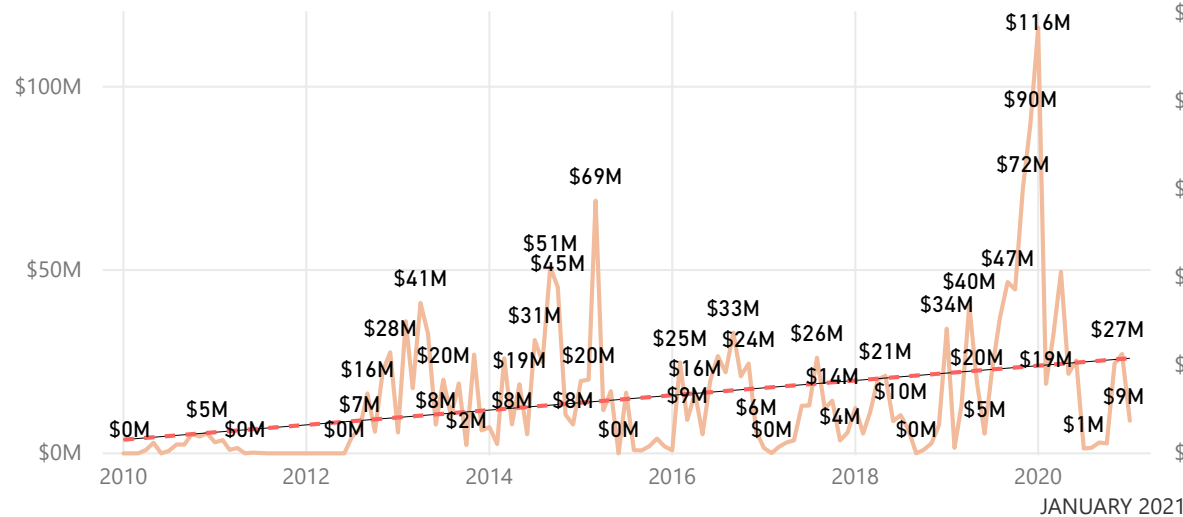




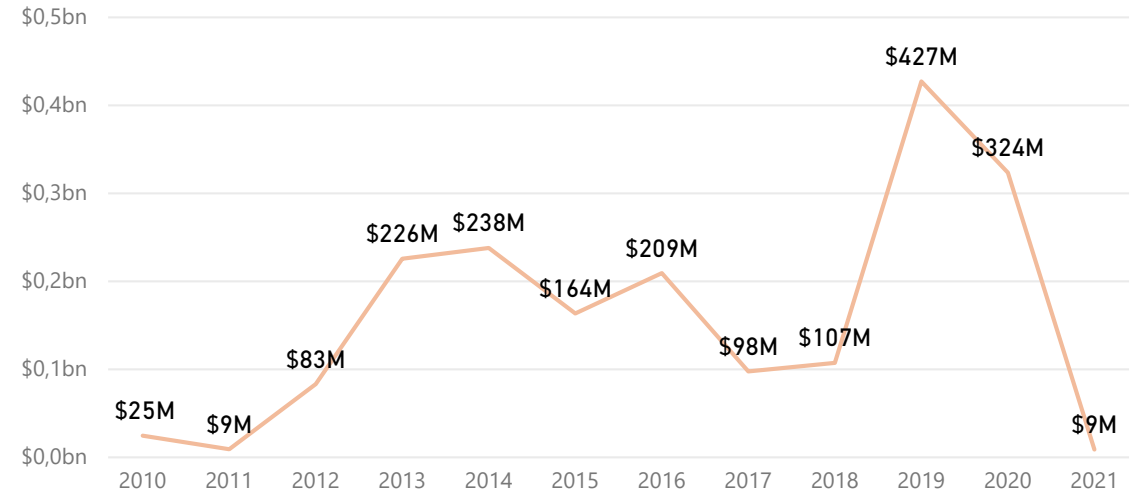
In January 2021, most of the durum wheat imports was made by Canada. Canada imported 13 thousand tons of durum wheat (\$4 million), with \$349/ton average unit price.

In January 2021, countries that imported durum wheat were Canada, Syria, Greece, Northern Cyprus, Romania, Denmark, France, respectively.

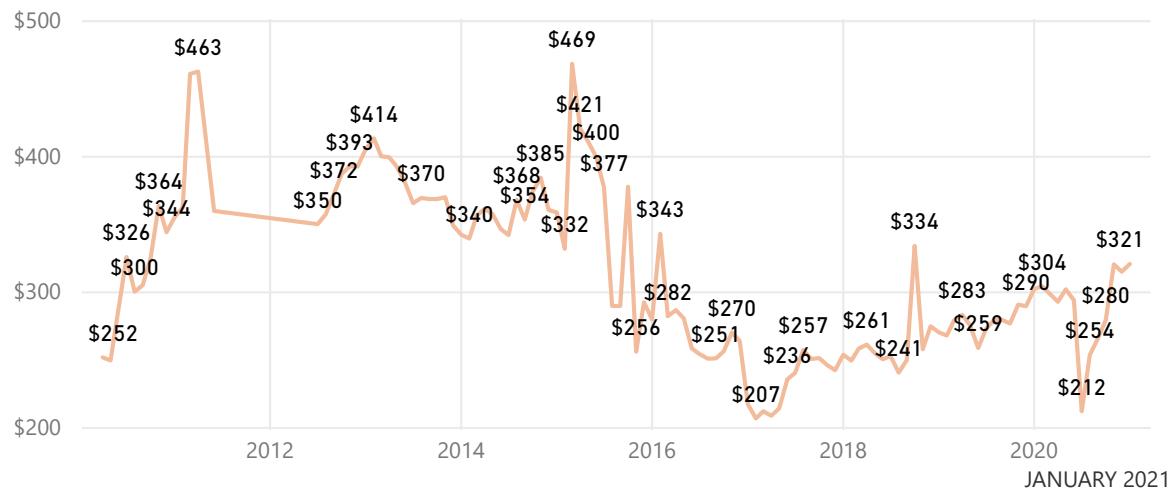
## MONTHLY IMPORT VALUE (USD)



## YEARLY IMPORT VALUE (USD)



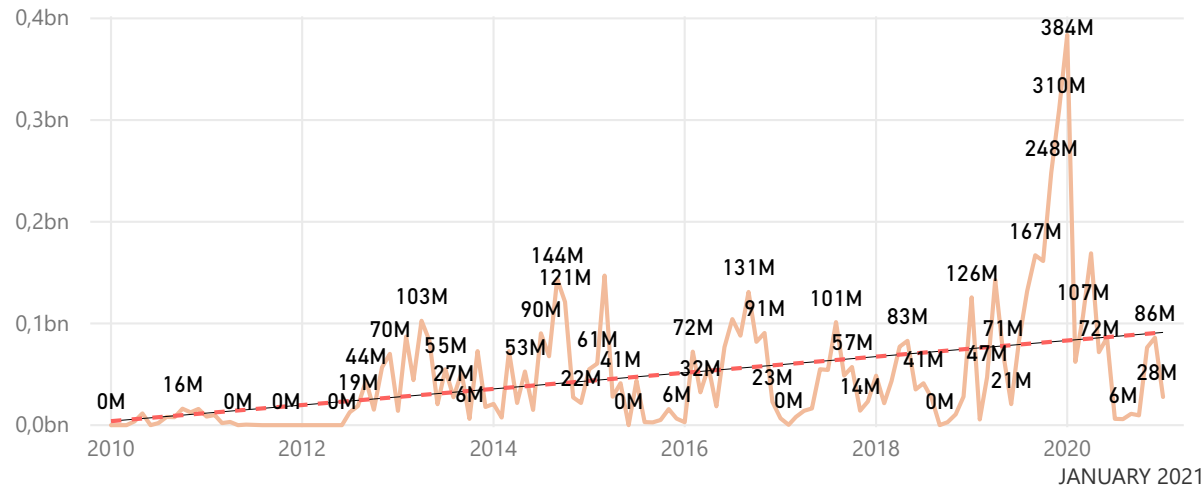
## MONTHLY IMPORT UNIT PRICE (USD/TON)



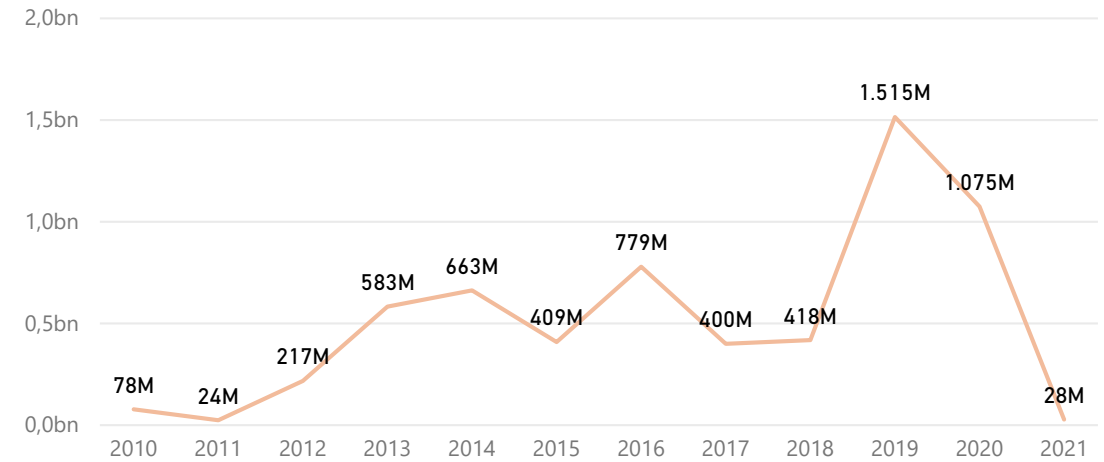
When the monthly import values are analyzed by years, it is seen that imports in January 2020 (\$116 million) is the highest monthly import ever.

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.

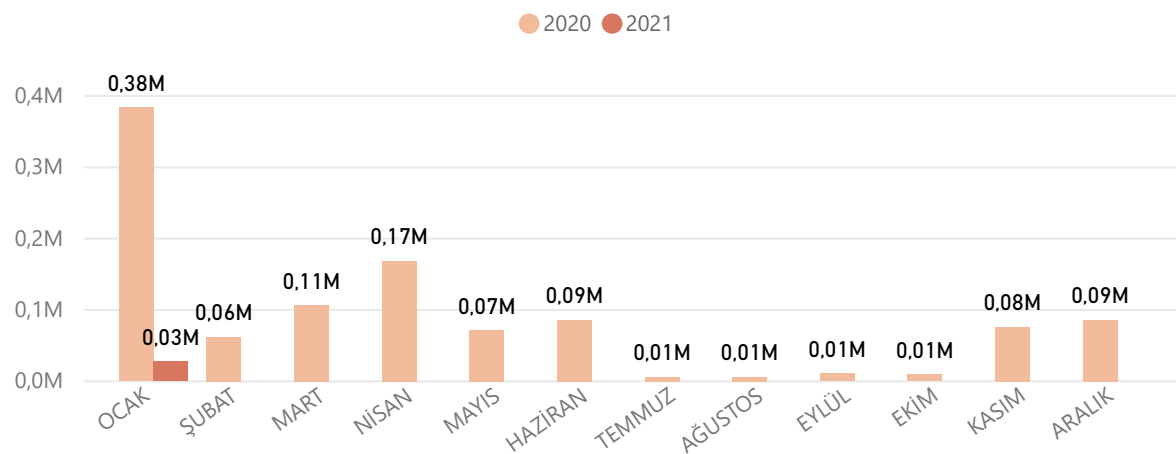
## MONTHLY IMPORT QUANTITY (KG)



## 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.

## 2020 - 2021 IMPORT COMPARISON CHART

### YEAR TOTAL

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>27.702.140</b>	<b>\$8.891.237</b>	<b>383.731.401</b>	<b>\$116.071.718</b>	<b>-%92,8</b>	<b>-%92,3</b>
100119000000   Durum wheat (excl. seed for sowing)	27.702.140	\$8.891.237	383.731.401	\$116.071.718	-%92,8	-%92,3
<b>190219</b>	<b>182.884</b>	<b>\$318.620</b>	<b>413.101</b>	<b>\$657.571</b>	<b>-%55,7</b>	<b>-%51,5</b>
190219100019   Uncooked pasta, not stuffed or otherwise prepared, not containing common wheat flour or meal or eggs (Excl. fenilketonüri pt.)	127.688	\$250.842	348.726	\$545.722	-%63,4	-%54,0
190219900019   Uncooked pasta, not stuffed, others	54.960	\$67.037	33.858	\$74.781	%62,3	-%10,4
190219900012   Plain pasta; unbaked, not containing eggs but containing bread wheat flour or semolina (unfilled)	236	\$741	30.517	\$37.068	-%99,2	-%98,0
<b>190220</b>	<b>20.156</b>	<b>\$73.826</b>	<b>59.664</b>	<b>\$84.236</b>	<b>-%66,2</b>	<b>-%12,4</b>
190220990000   Cooked pasta, stuffed with meat or other substances, others	19.966	\$73.148	59.664	\$84.236	-%66,5	-%13,2
190220100000   Pasta (stuffed); containing more than 20% by weight of fish, molluscs, crustaceans and other aquatic invertebrates	91	\$354	0	\$0		
190220910000   Cooked pasta, cooked, stuffed with meat or other substances	99	\$324	0	\$0		
<b>190211</b>	<b>63.100</b>	<b>\$84.713</b>	<b>34.796</b>	<b>\$55.425</b>	<b>%81,3</b>	<b>%52,8</b>
190211000011   Uncooked pasta, containing common wheat flour or meal or eggs	25	\$49	19.070	\$36.448	-%99,9	-%99,9
190211000019   Pasta; not cooked, containing eggs but containing only durum wheat (durum wheat) flour and semolina EXCEPT	63.075	\$84.664	15.726	\$18.977	%301,1	%346,1
<b>190230</b>	<b>100.274</b>	<b>\$146.547</b>	<b>4.645</b>	<b>\$22.128</b>	<b>%2058,8</b>	<b>%562,3</b>
190230100000   Pasta, dried	97.649	\$131.092	4.445	\$21.687	%2096,8	%504,5
190230900000   Pasta, others	2.625	\$15.455	200	\$441	%1212,5	%3404,5
<b>190240</b>	<b>10</b>	<b>\$43</b>	<b>500</b>	<b>\$2.096</b>	<b>-%98,0</b>	<b>-%97,9</b>
190240900000   Couscous; EXCEPT those that are not prepared	10	\$43	500	\$2.096	-%98,0	-%97,9
<b>Total</b>	<b>28.068.564</b>	<b>\$9.514.986</b>	<b>384.244.107</b>	<b>\$116.893.174</b>	<b>-%92,7</b>	<b>-%91,9</b>

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

**4.000.000**

TON PRODUCTION

**179.682**

KG/DECARE (YIELD)

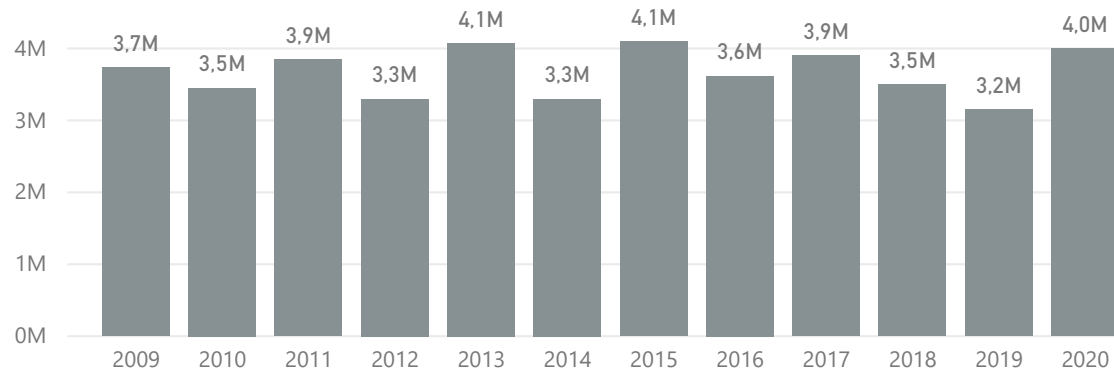
**12.580.562**

DECARE HARVEST AREA

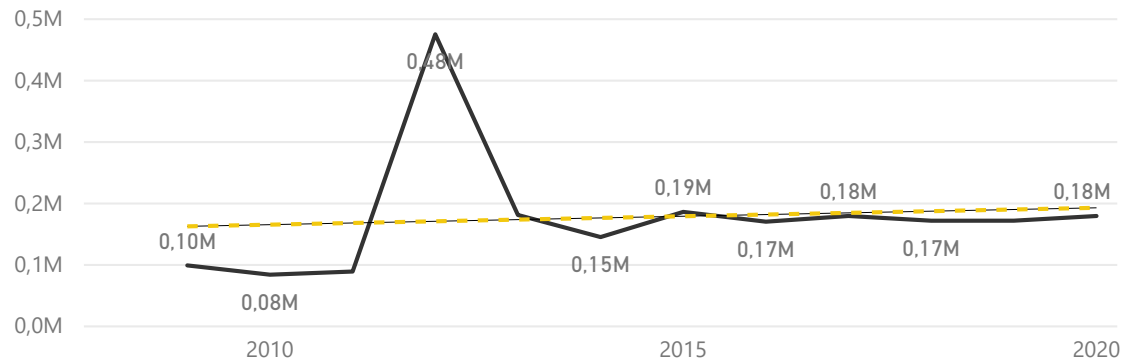
**%18,17**

RATIO PER TOTAL WHEAT

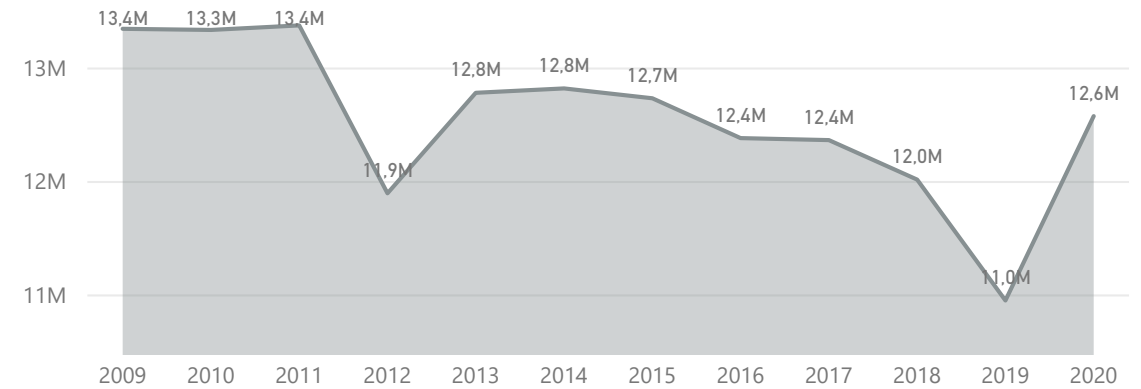
**DURUM WHEAT PRODUCTION PER YEAR**



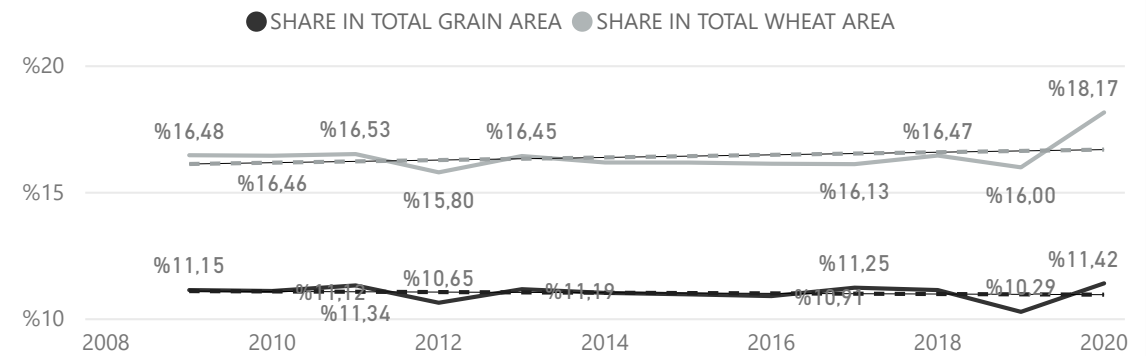
**DURUM WHEAT YIELD PER YEAR (KG/DECARE)**



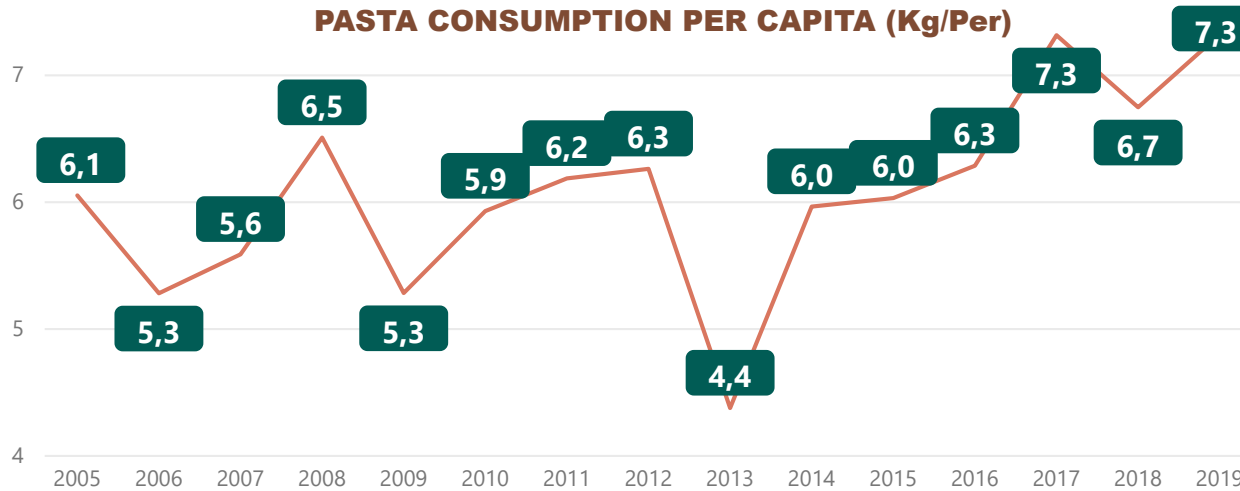
**DURUM WHEAT HARVEST AREA PER YER (DECARE)**



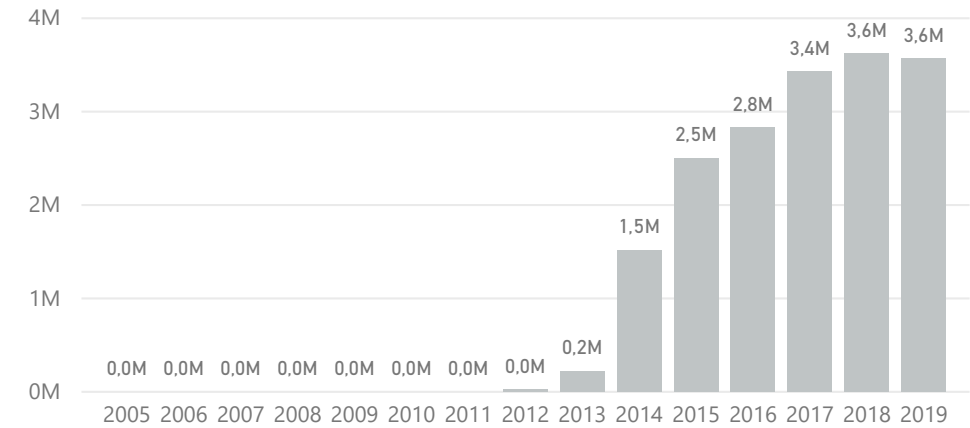
**RATIO OF DURUM WHEAT HARVEST AREA**



PASTA CONSUMPTION PER CAPITA (Kg/Per)

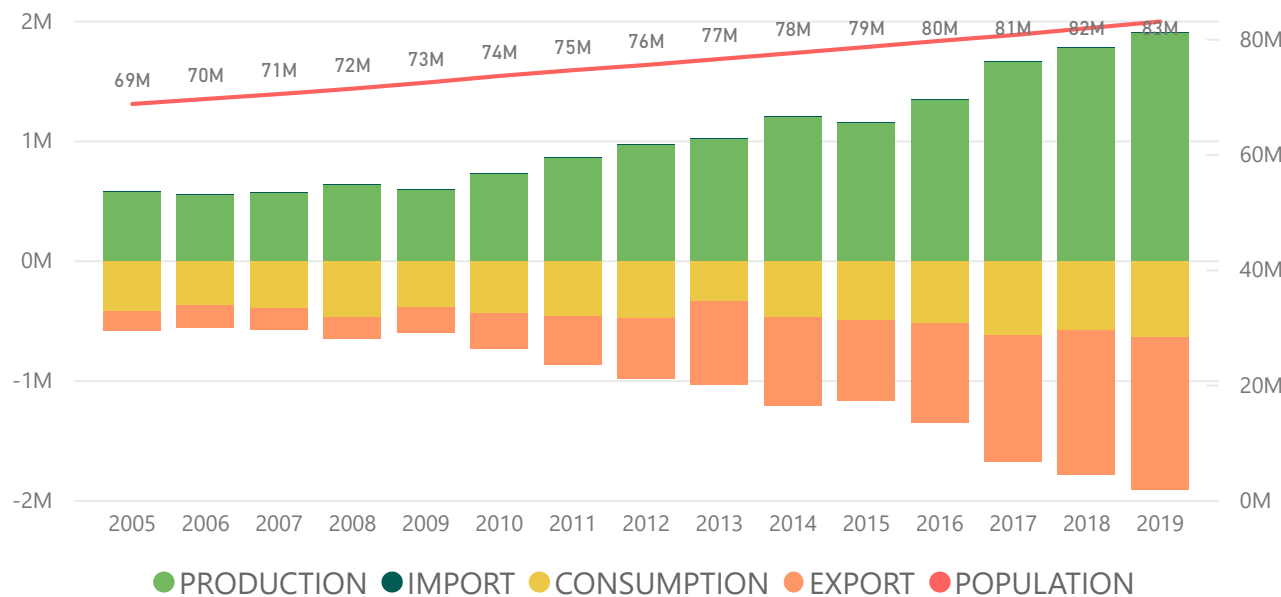


REFUGEE NUMBERS PER YEAR



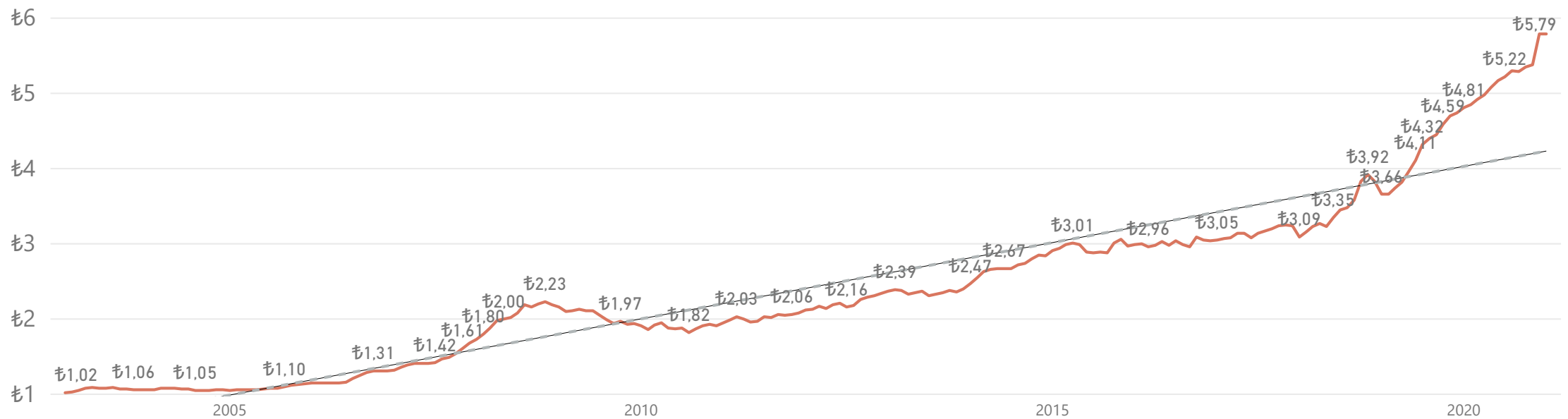
\* Calculations were made with population of Turkey and additional refugee numbers.

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

2021 january pasta market price: **₺5,79 TL/Kg**



\* Consumer price index pasta price

\* Vat included market price

HS12 CODE	CATEGORY	CUSTOM NAME
100119000000	DURUM WHEAT	Durum wheat (excl. seed for sowing)
190211000011	PASTA	Uncooked pasta, containing common wheat flour or meal or eggs
190211000019	PASTA	Pasta; not cooked, containing eggs but containing only durum wheat (durum wheat) flour and semolina EXCEPT
190219100019	PASTA	Uncooked pasta, not stuffed or otherwise prepared, not containing common wheat flour or meal or eggs (Excl. fenilketonüri pt.)
190219900011	PASTA	Pasta with vegetables; unbaked, not containing eggs but containing bread wheat flour or semolina (unfilled)
190219900012	PASTA	Plain pasta; unbaked, not containing eggs but containing bread wheat flour or semolina (unfilled)
190219900019	PASTA	Uncooked pasta, not stuffed, others
190220100000	PASTA	Pasta (stuffed); containing more than 20% by weight of fish, molluscs, crustaceans and other aquatic invertebrates
190220301000	PASTA	Pasta (stuffed, containing more than 20% by weight of meat and meat offal (including any fat)
190220309000	PASTA	Pasta (stuffed, containing more than 20% by weight of sausages and the like (including any fat)
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 ones
190240900000	PASTA	Couscous; EXCEPT those that are not prepared

# MÜSAD

MAKARNA ÜRETİCİLERİ VE SANAYİCİLERİ DERNEĞİ  
Pasta Producers and Industrialists Association

