

MÜSAD



MAKARNA ÜRETİCİLERİ VE SANAYİCİLERİ DERNEĞİ
Pasta Producers and Industrialists Association

SECTOR REPORT

JANUARY - MARCH 2022



Pasta Producers and Industrialists' Association

Sector Report

JANUARY - MARCH 2022

PUBLISH DATE

1 May 2022

This report has been prepared exclusively for the Pasta Producers and Industrialists Association (MÜSAD) by agrimetre®. The source of the data contained in the report is; Turkey Statistical Institute (TUIK) and Trademap. You can reach the PASTA SECTOR STATISTICS Panel prepared by Agrimetre for MÜSAD on the web page www.musad.org.tr.

Foreign trade data has been prepared according to TURKSTAT Special Trade System. In the General Trade System (GTS), goods entering and leaving the Customs areas and free zones are also included in the foreign trade data. In the Special Trade System (STS), the customs border is taken as a basis. According to this definition, free zones and customs warehouses are located outside the customs border.

Hello,

The tension between Russia and Ukraine, which has an important place in the production of agricultural raw materials in the world, especially wheat, and continues with the war, has made the problems even more difficult after the pandemic process.

Despite this process, where prices are rising rapidly and supply problems are felt more than ever, our industry continues uninterrupted in production and exports, and our industry is working day and night to come out of this difficult process with dignity.

In this direction, it is seen that our sector has managed to increase its exports both in terms of quantity and value compared to the same period last year. Although it seems pleasing that the increase in value is higher than the increase in quantity, when compared with the increase in durum wheat, which reached the highest level of the last ten years, it will be seen that the increase in export prices only compensates for the increase in costs.

Although the pandemic process and the war have negatively affected the markets, our country is in an advantageous position due to our transferred stocks and the short time left to harvest. In addition, with the continuation of favorable weather conditions, it is expected that the yield will increase this year. Therefore, no problems are foreseen for our country in the short and medium term, and there is no environment where export restrictions will be required.

Despite this negative environment, the main issue we need to focus on is sustainable agricultural production and value-added exports.

Best regards

Nihat Uysallı




Chairman of the Board

MARCH 2022

| EXPORT QUANTITY (KG) %20,6 | EXPORT VALUE (USD) %45,0 | UNIT PRICE (USD/TON) %20,2 |
|--|--|--|
| MARCH 2022 135.822.274 <small>MARCH 2021</small> <small>112.578.118</small>  | MARCH 2022 \$89.511.827 <small>MARCH 2021</small> <small>\$61.727.463</small>  | MARCH 2022 \$659 <small>MARCH 2021</small> <small>\$548</small>  |

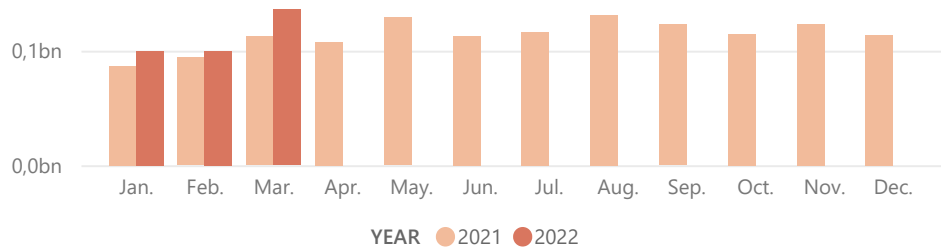
* Comparisons were made with the same month of the previous year.

JANUARY - MARCH 2022

| EXPORT QUANTITY (KG) %14,4 | EXPORT VALUE (USD) %39,4 | UNIT PRICE (USD/TON) %21,8 |
|--|--|--|
| 2022 TOTAL 335.341.947 <small>2021 TOTAL</small> <small>293.132.565</small>  | 2022 TOTAL \$220.368.849 <small>2021 TOTAL</small> <small>\$158.117.405</small>  | 2022 TOTAL \$657 <small>2021 TOTAL</small> <small>\$539</small>  |

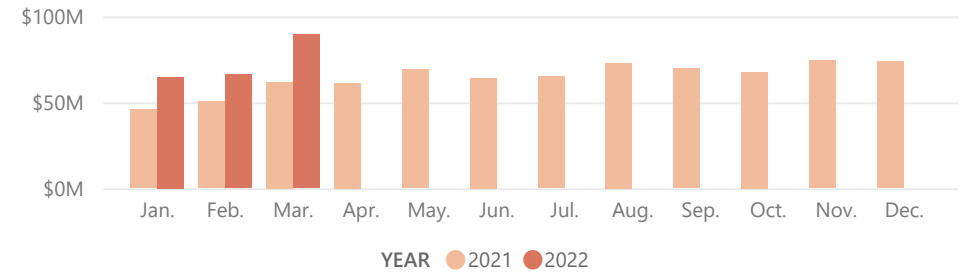
* Comparisons were made with the same period of the previous year. It is prepared on the basis of TURKSTAT Special Trade System data.

EXPORT QUANTITY COMPARISON (1000TONS)



| Year | Jan. | Feb. | Mar. | Apr. | May. | Jun. | Jul. | Aug. | Sep. | Oct. | Nov. | Dec. | Total |
|------|------|------|------|------|------|------|------|------|------|------|------|------|-------|
| 2021 | 86 | 94 | 113 | 108 | 129 | 113 | 116 | 131 | 123 | 115 | 123 | 114 | 1.365 |
| 2022 | 100 | 100 | 136 | | | | | | | | | | 335 |

EXPORT VALUE COMPARISON (MILLION\$)



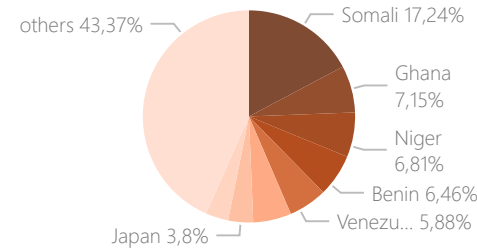
| Year | Jan. | Feb. | Mar. | Apr. | May. | Jun. | Jul. | Aug. | Sep. | Oct. | Nov. | Dec. | Total |
|------|------|------|------|------|------|------|------|------|------|------|------|------|-------|
| 2021 | \$46 | \$51 | \$62 | \$61 | \$69 | \$64 | \$65 | \$73 | \$70 | \$68 | \$74 | \$74 | \$776 |
| 2022 | \$65 | \$66 | \$90 | | | | | | | | | | \$220 |

EXPORT UNIT PRICE COMPARISON (\$)

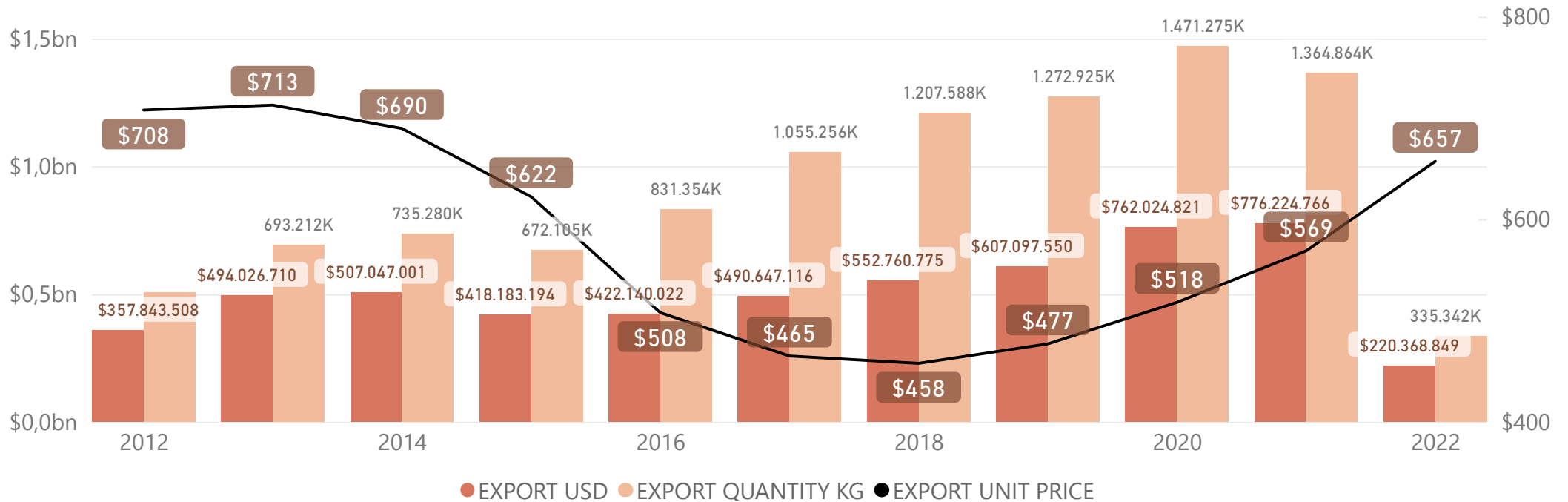


| Year | Jan. | Feb. | Mar. | Apr. | May. | Jun. | Jul. | Aug. | Sep. | Oct. | Nov. | Dec. | Avg. |
|------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| 2021 | \$530 | \$537 | \$548 | \$570 | \$537 | \$569 | \$559 | \$556 | \$567 | \$590 | \$602 | \$648 | \$569 |
| 2022 | \$649 | \$663 | \$659 | | | | | | | | | | \$657 |

TOP 8 COUNTRIES ACCORDING TO TOTAL EXPORT QUANTITY IN 2022



| Country | Quantity (1000 Tons) | Value (MillionDollar) | Unit Price (\$) |
|-----------|----------------------|-----------------------|-----------------|
| Somali | 58 | \$34 | \$592 |
| Ghana | 24 | \$16 | \$648 |
| Niger | 23 | \$15 | \$656 |
| Benin | 22 | \$12 | \$563 |
| Venezuela | 20 | \$12 | \$619 |
| Togo | 20 | \$12 | \$601 |
| Japan | 13 | \$10 | \$810 |
| Senegal | 12 | \$7 | \$603 |



When the pasta export is examined by years, it is seen that the export has increased continuously except 2015. However, as of 2014, with the gradual decrease in the unit export price, although more exports were made, no income was obtained there. While the lowest average unit export price was realized with 458 dollars / ton in 2018, the unit export price increased with the increase in wheat costs after this year and was realized at the level of \$657/ton as of March 2022.

MARCH 2022

| IMPORT QUANTITY (KG) -%100 | IMPORT VALUE (USD) -%100 | UNIT PRICE (USD/TON) %15,6 |
|---|--|--|
| MARCH 2022 109.041 MARCH 2021 99.049.609 | MARCH 2022 \$45.366 MARCH 2021 \$35.643.795 | MARCH 2022 \$416 MARCH 2021 \$360 |

* Comparisons were made with the same month of the previous year. It is prepared on the basis of TURKSTAT Special Trade System data.

JANUARY - MARCH 2022

| IMPORT QUANTITY (KG) -%96 | IMPORT VALUE (USD) -%95 | UNIT PRICE (USD/TON) %24,9 |
|--|---|--|
| 2022 TOTAL 7.211.991 2021 TOTAL 179.441.259 | 2022 TOTAL \$3.161.327 2021 TOTAL \$62.983.784 | 2022 TOTAL \$438 2021 TOTAL \$351 |

* Comparisons were made with the same period of the previous year. It is prepared on the basis of TURKSTAT Special Trade System data.

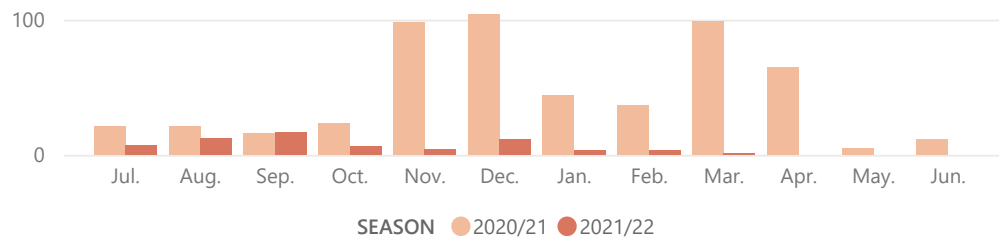
DURUM WHEAT IMPORT CHANGES IN 2020/21 - 2021/22 SEASON (JULY - MARCH)

| Import Quantity (KG) | Import Value (\$) | Import Unit Price (\$/TON) |
|---|--|--|
| 65.775.400 Import Quantity 2021/22 | \$28.313.757 Import Value 2021/22 | \$430 Import Unit Price 2021/22 |
| 463.043.627 Import Quantity 2020/21 | \$150.144.371 Import Value 2020/21 | \$324 Import Unit Price 2020/21 |
| -%85,8 Import Quantity Change % | -%81,1 Import Value Change % | %32,8 Import Unit Price Change % |

DURUM WHEAT IMPORTS ACCORDING TO THE SEASONS

| SEASON | Import Quantity (1000Ton) | Import Value (Million\$) | Import Unit Price (\$/Ton) |
|---------|---------------------------|--------------------------|----------------------------|
| 2016/17 | 617 | \$156 | \$252 |
| 2017/18 | 609 | \$154 | \$254 |
| 2018/19 | 550 | \$150 | \$273 |
| 2019/20 | 1.864 | \$547 | \$293 |
| 2020/21 | 544 | \$179 | \$330 |
| 2021/22 | 66 | \$28 | \$430 |

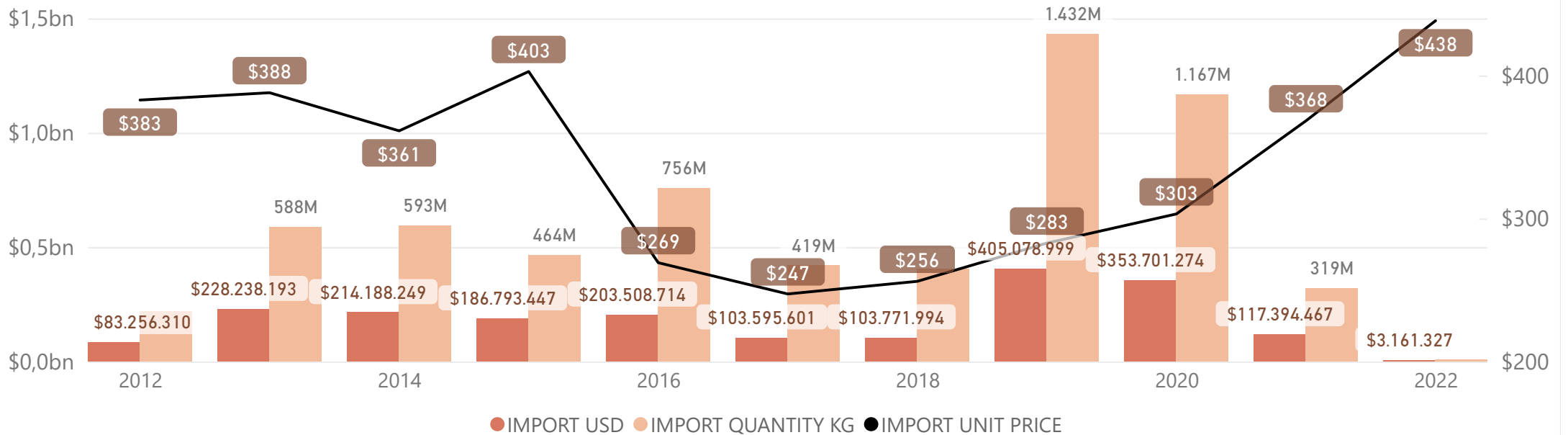
DURUM WHEAT IMPORT QUANTITY SEASONAL COMPARISON (1000TON)



| Season/Mon. | Jul. | Aug. | Sep. | Oct. | Nov. | Dec. | Jan. | Feb. | Mar. | Apr. | May. | Jun. | Total |
|-------------|------|------|------|------|------|------|------|------|------|------|------|------|------------|
| 2020/21 | 21 | 21 | 16 | 24 | 98 | 104 | 44 | 36 | 99 | 64 | 5 | 12 | 544 |
| 2021/22 | 7 | 13 | 17 | 6 | 4 | 11 | 4 | 3 | 0 | | | | 66 |

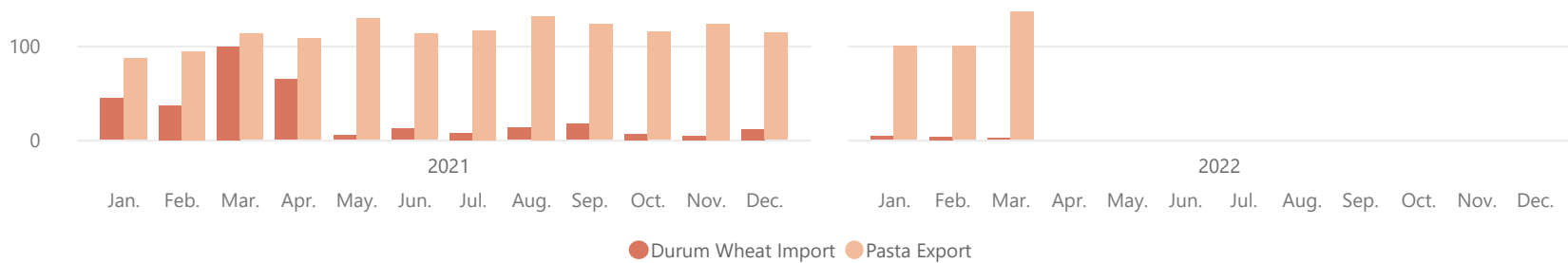
DURUM WHEAT IMPORT INWARD PROCESSING REGIME (IPR) ACCORDING TO THE SEASONS

| SEASON | IPR Import Quantity (1000Ton) | IPR Import Value (Million\$) | IPR Import Unit Price (\$/Ton) |
|---------|-------------------------------|------------------------------|--------------------------------|
| 2016/17 | 617 | \$156 | \$252 |
| 2017/18 | 606 | \$154 | \$254 |
| 2018/19 | 550 | \$150 | \$273 |
| 2019/20 | 1.466 | \$420 | \$287 |
| 2020/21 | 425 | \$141 | \$331 |
| 2021/22 | 66 | \$28 | \$430 |

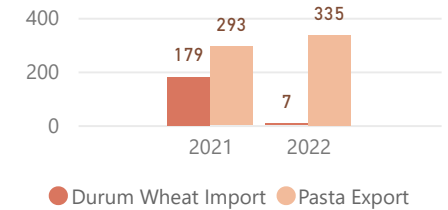


When the durum wheat import is examined in the 10-year period covering the years 2012-2022, it is seen that the years 2019 and 2020 stand out in terms of both quantity and average unit import price. Although the import unit price, which was around 400 dollars / ton in 2012-2015, decreased rapidly after 2015, it followed an increasing trend after 2018 and was realized at the level of \$438/ton as of March 2022.

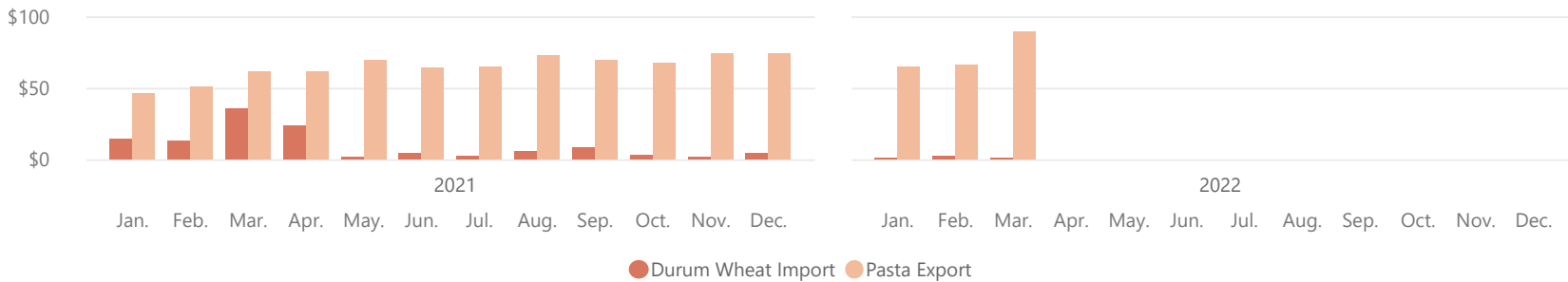
QUANTITY COMPARISON OF DURUM WHEAT IMPORT AND PASTA EXPORT (1000TONS)



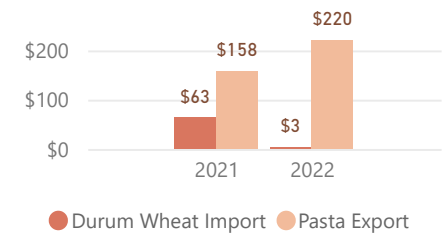
JANUARY - MARCH TOTAL QUANTITY COMPARISON (1000TON)



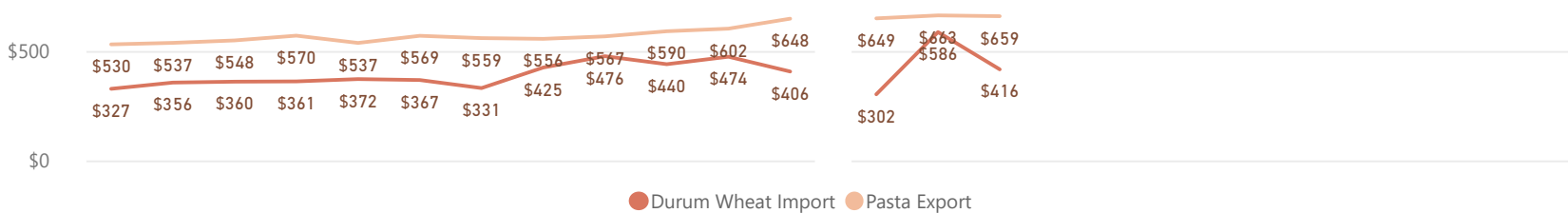
VALUE COMPARISON OF DURUM WHEAT IMPORT AND PASTA EXPORT (MILLION\$)



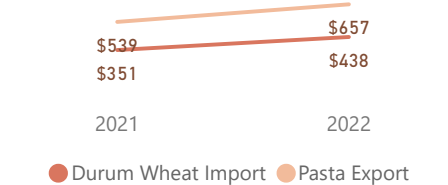
JANUARY - MARCH TOTAL VALUE COMPARISON (MILLION\$)

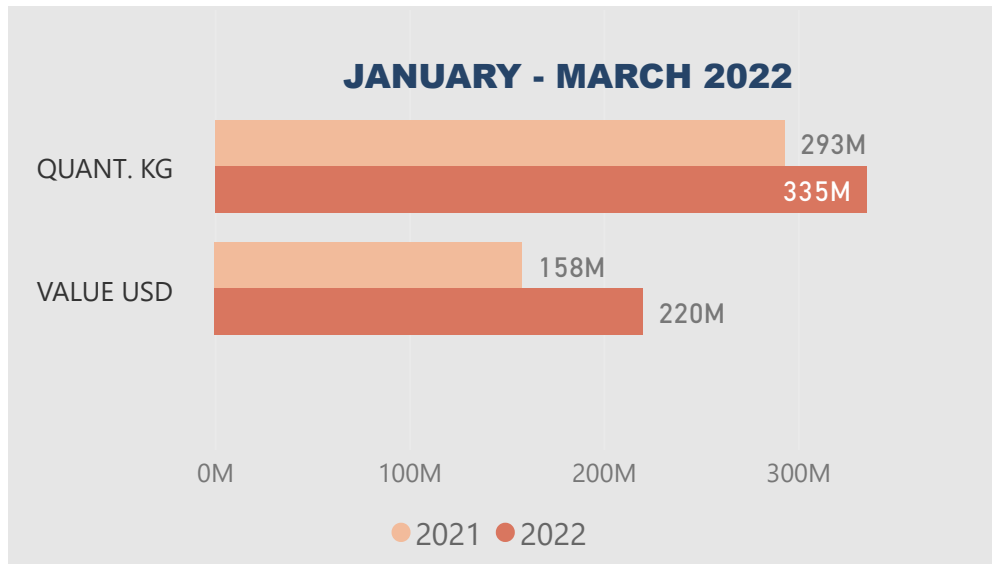


UNIT PRICE COMPARISON OF DURUM WHEAT IMPORT AND PASTA EXPORT (\$/TON)

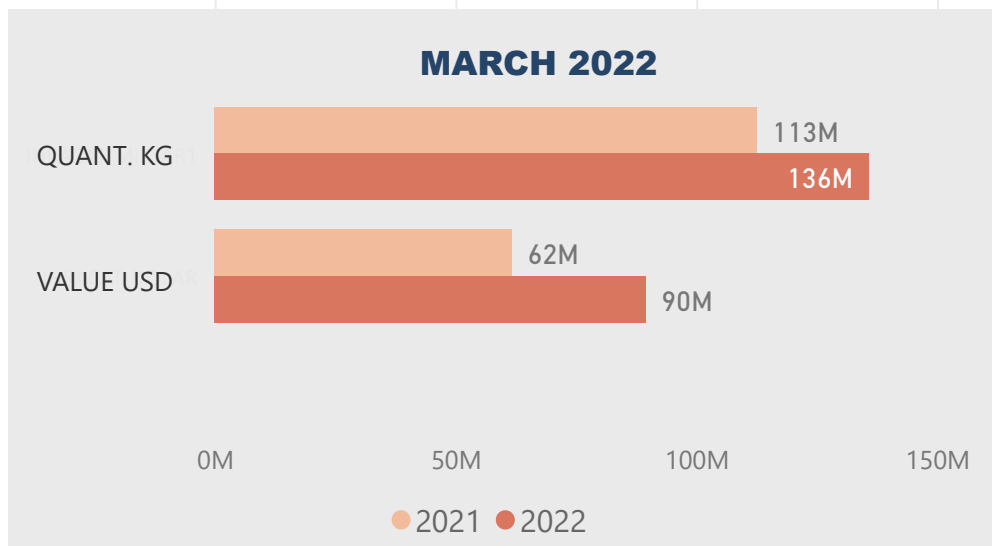


JANUARY - MARCH AVERAGE UNIT PRICE COMPARISON (\$/TON)





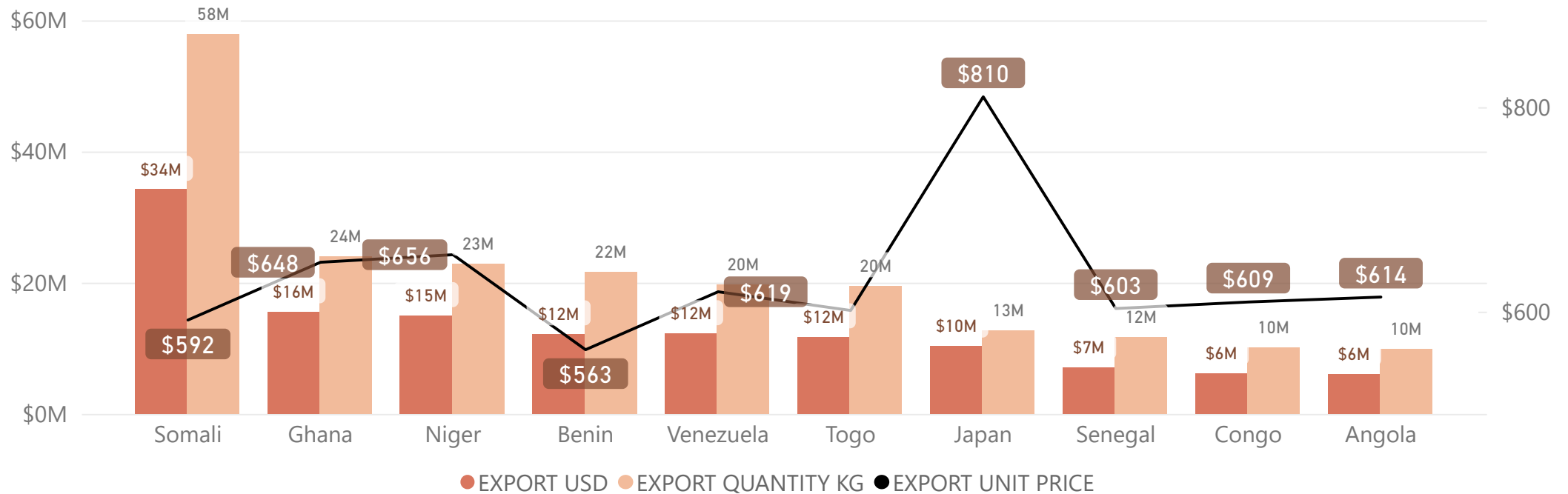
In March 2022 compared to March 2021, Pasta Exports increased 20.65% and reached to 135.82 thousand tons, in quantity; increased 45.01% and reached to \$89.51 million in value.



Between January - March 2022, compared to same period of the previous year, pasta exports increased 14.40% and reached to 335.34 thousand tons, in quantity; increased 39.37% and reached to \$220.37 million in value.

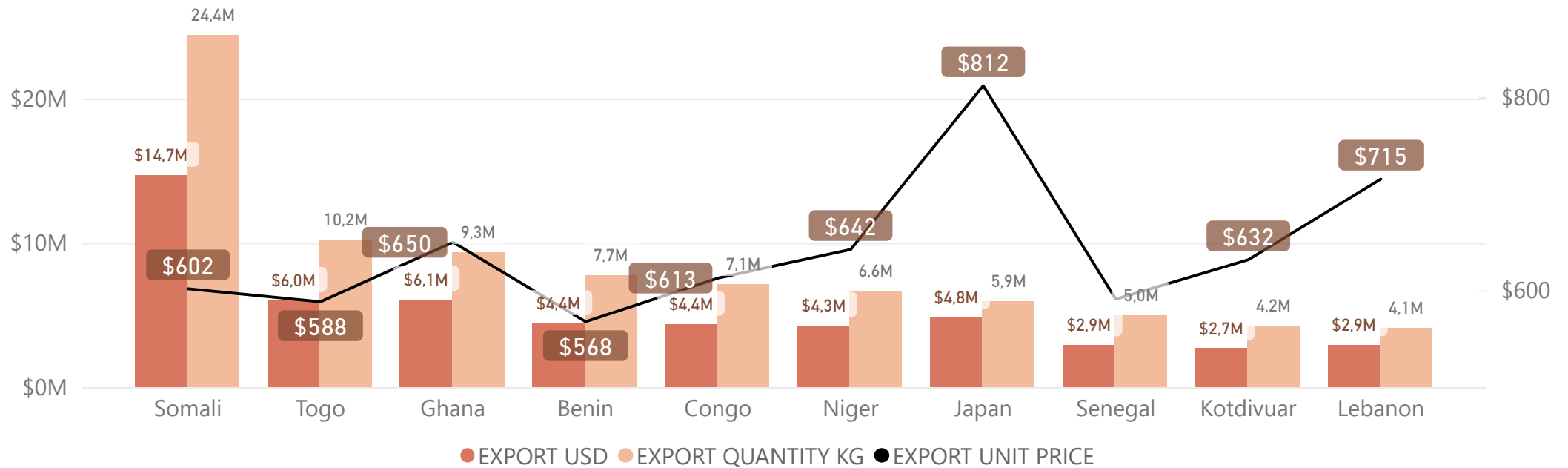
Average unit price per ton was \$548 in March 2021. It increased 20.19% and reached to \$659 in March 2022.

Compared to same period of the previous year, between January and March 2022, average price per ton increased 21.83% and reached to \$657/ton.



Between January and March 2022, biggest exports was made to Somali with 58 thousand tons, followed by Ghana and Niger. In terms of value, biggest importer is Somali with \$34 million, followed by Ghana and Niger, respectively.

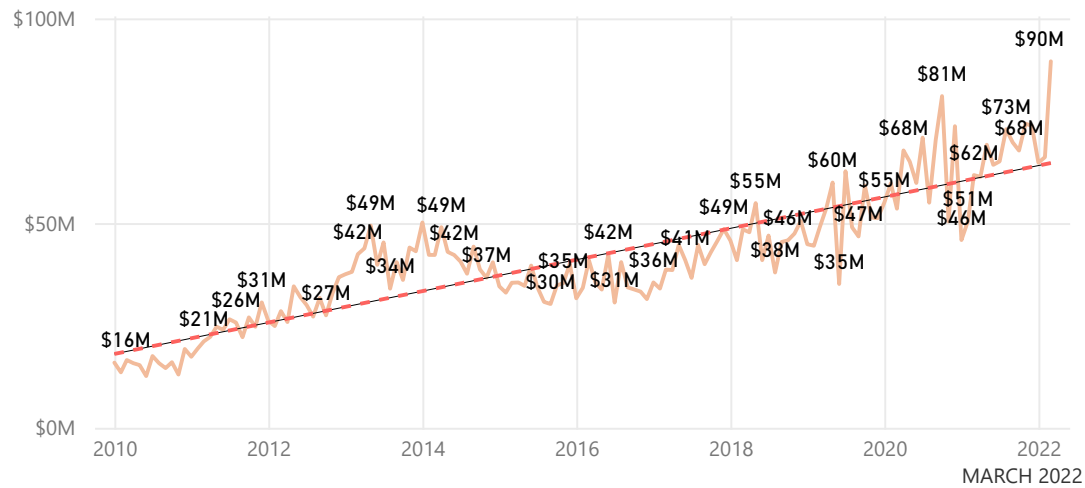
On the basis of unit price amongst top 10 countries we export to in 2022, Japan ranked first with \$810/ton. Benin was on the last place with \$563/ton.



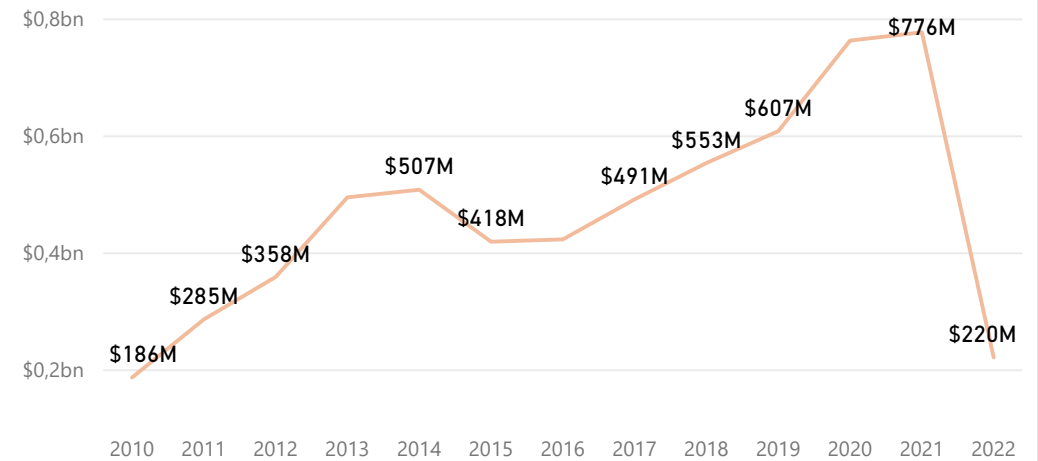
In March 2022, biggest exports, in terms of quantity was made to Somali with 24 thousand tons, followed by Togo and Ghana.

In March 2022, among the top 10 countries we export to on the basis of unit price, Japan ranked 1st with \$812/ton, followed by Lebanon (\$715/ton) and Ghana (\$650/ton) respectively. Benin had the lowest price with \$568/ton.

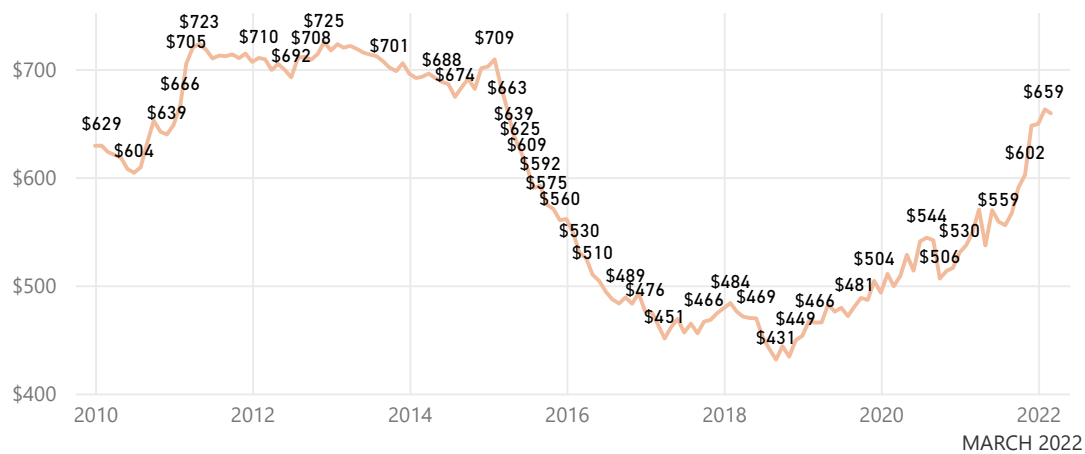
MONTHLY EXPORT VALUE (USD)



YEARLY EXPORT VALUE (USD)



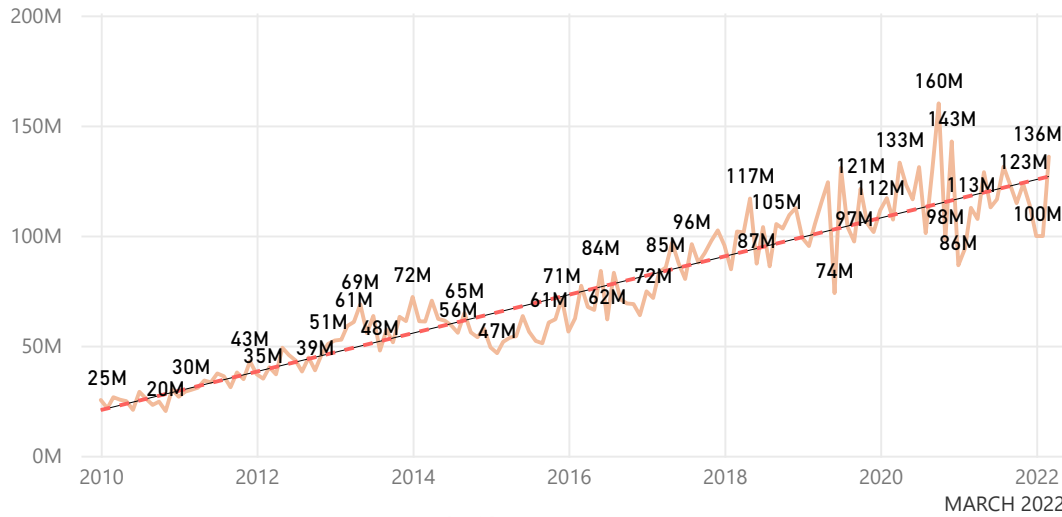
MONTHLY EXPORT UNIT PRICE (USD/TON)



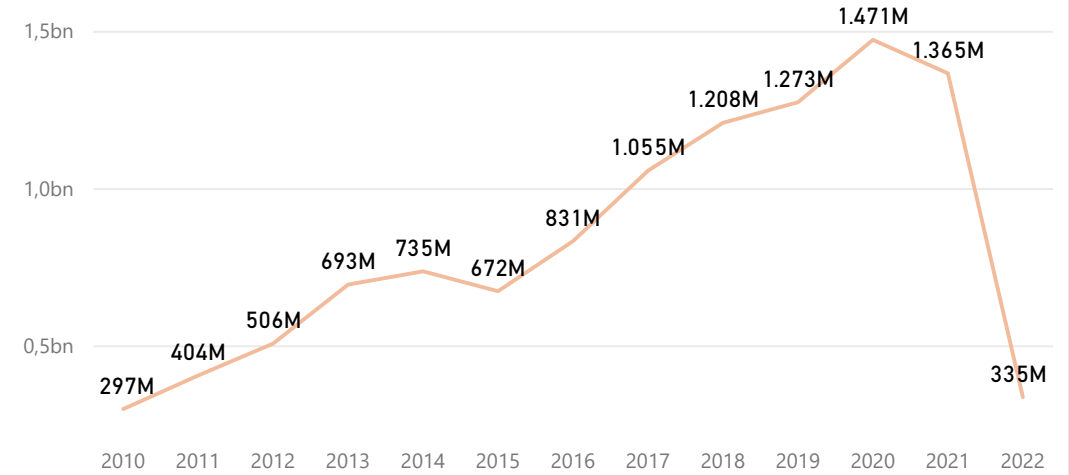
When the pasta export is analyzed by years, it is seen that the increasing trend continues. In 2021, it reached its highest level with \$ 776 million.

It is seen that the unit export price has increased to the levels of 2015 with **659 dollars / ton** achieved in March 2022.

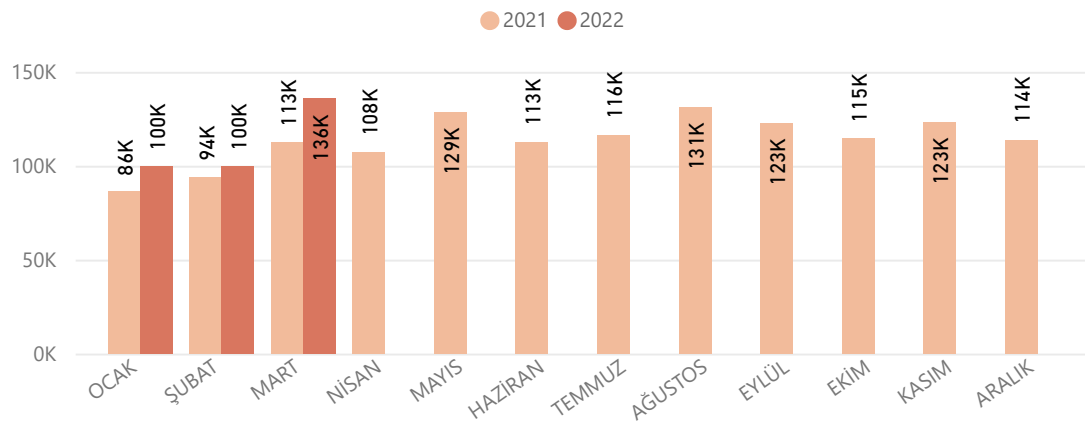
MONTHLY EXPORT QUANTITY (KG)



YEARLY EXPORT QUANTITY (KG)



LAST 2 YEAR EXPORT QUANTITY (KG)

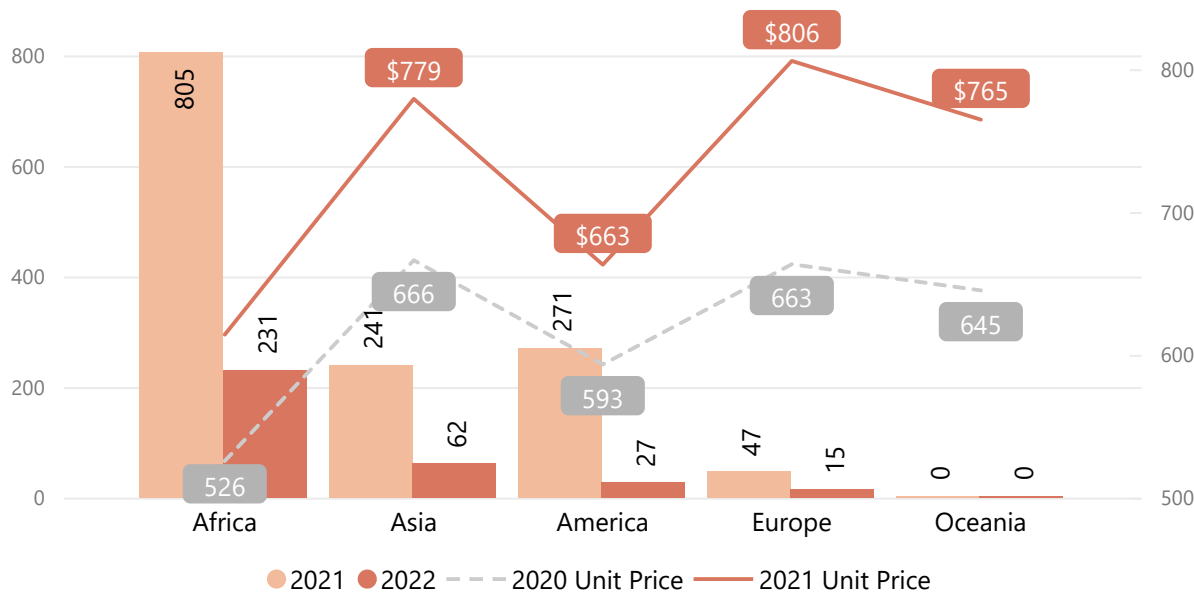


When the pasta export is analyzed on a monthly basis, it is seen that the increasing trend continues here as well, but it is seen that the export amount has decreased in recent months compared to previous years. The highest monthly value achieved so far was 135.82 thousand tons in March 2022, while the export of 86 thousand tons in January 2021 was the lowest monthly value achieved in recent years.

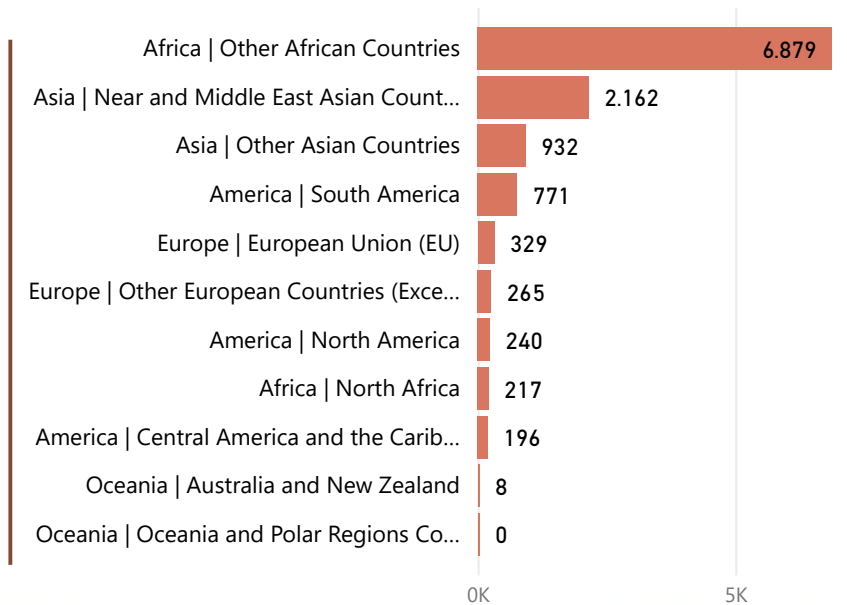
| AFRICA | | AMERICA | | ASIA | | EUROPE | |
|---------------|----------------------|---------------|----------------------|---------------|----------------------|---------------|----------------------|
| 231.091 | \$614 | 27.256 | \$663 | 62.258 | \$779 | 14.568 | \$806 |
| Ton This Year | Unit Price This Year | Ton This Year | Unit Price This Year | Ton This Year | Unit Price This Year | Ton This Year | Unit Price This Year |
| 185.951 | \$490 | 38.251 | \$598 | 55.012 | \$641 | 13.372 | \$635 |
| Ton SPLY | Unit Price SPLY | Ton SPLY | Unit Price SPLY | Ton SPLY | Unit Price SPLY | Ton SPLY | Unit Price SPLY |
| %24,28 | %25,2 | -%28,74 | %11,0 | %13,17 | %21,6 | %8,94 | %27,0 |
| Ton % Change | Unit Price % Change | Ton % Change | Unit Price % Change | Ton % Change | Unit Price % Change | Ton % Change | Unit Price % Change |

• SPLY : Same Period Last Year

Comparison of Export Quantity (1000Ton) and Export Unit Price (\$/Ton) in 2021 and 2022



Export Quantity in 2022 on the Basis of Sub-Group (1000Ton)



| 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 | 10 | \$4 | 17.496.895 | \$6.587.676 | -%100,0 | -%100,0 |
| 100119000000 Durum wheat (durum wheat); EXCEPT those of seed | 10 | \$4 | 17.496.895 | \$6.587.676 | -%100,0 | -%100,0 |
| 190211 | 438.565 | \$498.858 | 6.393 | \$8.175 | %6760,1 | %6002,2 |
| 190211000011 Pasta; unbaked, containing only eggs and durum wheat (durum wheat) flour and semolina | 135.150 | \$143.546 | 2.586 | \$4.143 | %5126,2 | %3364,8 |
| 190211000019 Pasta; not cooked, containing eggs but containing only durum wheat (durum wheat) flour and semolina EXCEPT | 303.415 | \$355.312 | 3.807 | \$4.032 | %7869,9 | %8712,3 |
| 190219 | 317.098.668 | \$202.019.831 | 281.043.498 | \$149.731.334 | %12,8 | %34,9 |
| 190219100019 Other pasta; unbaked, not containing eggs and common wheat flour or semolina (not stuffed) | 75.157.605 | \$54.704.490 | 124.984.015 | \$73.652.119 | -%39,9 | -%25,7 |
| 190219900011 Pasta with vegetables; unbaked, not containing eggs but containing bread wheat flour or semolina (unfilled) | 0 | \$0 | 52.530 | \$82.526 | -%100,0 | -%100,0 |
| 190219900012 Plain pasta; unbaked, not containing eggs but containing bread wheat flour or semolina (unfilled) | 239.916.912 | \$146.232.815 | 155.387.370 | \$75.684.465 | %54,4 | %93,2 |
| 190219900019 Other pasta; unbaked, not containing eggs but containing bread wheat flour or semolina (unfilled) | 2.024.151 | \$1.082.526 | 619.583 | \$312.224 | %226,7 | %246,7 |
| 190220 | 220.156 | \$393.934 | 30.060 | \$159.143 | %632,4 | %147,5 |
| 190220100000 Pasta (stuffed); containing more than 20% by weight of fish, molluscs, crustaceans and other aquatic invertebrates | | | 0 | \$0 | | |
| 190220301000 Pasta (stuffed, containing more than 20% by weight of meat and meat offal (including any fat) | 21.361 | \$54.069 | 115 | \$615 | %18474,8 | %8691,7 |
| 190220309000 Pasta (stuffed, containing more than 20% by weight of sausages and the like (including any fat) | 25.116 | \$36.944 | 32 | \$181 | %78387,5 | %20311,0 |
| 190220910000 Other stuffed, cooked pastas | 25.217 | \$48.228 | 29.179 | \$156.368 | -%13,6 | -%69,2 |
| 190220990000 Other stuffed pastas | 148.462 | \$254.693 | 734 | \$1.979 | %20126,4 | %12769,8 |
| 190230 | 16.812.339 | \$16.870.755 | 11.043.370 | \$7.554.644 | %52,2 | %123,3 |
| 190230100000 Dried pastas | 10.452.686 | \$13.052.486 | 2.860.115 | \$3.242.933 | %265,5 | %302,5 |
| 190230900000 Other pastas | 6.359.653 | \$3.818.269 | 8.183.255 | \$4.311.711 | -%22,3 | -%11,4 |
| 190240 | 772.219 | \$585.471 | 1.009.244 | \$664.109 | -%23,5 | -%11,8 |
| 190240100000 Couscous; unprepared ones | 172.150 | \$132.073 | 92.900 | \$62.745 | %85,3 | %110,5 |
| 190240900000 Couscous; EXCEPT those that are not prepared | 600.069 | \$453.398 | 916.344 | \$601.364 | -%34,5 | -%24,6 |
| Total | 335.341.957 | \$220.368.853 | 310.629.460 | \$164.705.081 | %8,0 | %33,8 |

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

WORLD PASTA (1902)
EXPORT IN 2020 (USD)

11.821.111

WORLD PASTA (1902)
EXPORT IN 2020 (TON)

7.966.487

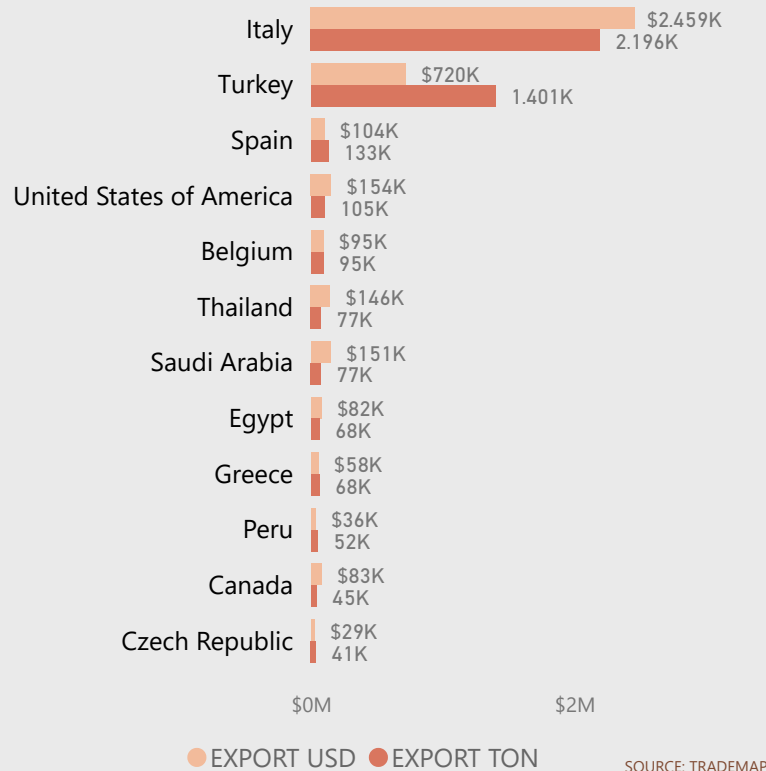
WORLD PASTA (1902.19)
EXPORT IN 2020 (USD)

5.021.939

WORLD PASTA (1902.19)
EXPORT IN 2020 (TON)

5.062.280

WORLD PASTA EXPORTER IN 2020 (1902.19 GTIP)



EXPORT UNIT PRICES OF COUNTRIES OVER 20K TONS EXPORT QUANT. (\$/TON)

| COUNTRY | EXPORT TON | EXPORT SHARE | UNIT PRICE (\$/TON) |
|--------------------|------------|--------------|---------------------|
| Italy | 2.196.375 | %43,4 | \$1.120 |
| Turkey | 1.400.714 | %27,7 | \$514 |
| Spain | 133.221 | %2,6 | \$780 |
| Belgium | 95.397 | %1,9 | \$992 |
| Saudi Arabia | 77.048 | %1,5 | \$1.964 |
| Egypt | 68.040 | %1,3 | \$1.201 |
| Greece | 67.580 | %1,3 | \$857 |
| Peru | 52.239 | %1,0 | \$698 |
| Czech Republic | 40.967 | %0,8 | \$707 |
| Latvia | 33.449 | %0,7 | \$660 |
| Russian Federation | 32.139 | %0,6 | \$692 |
| Guatemala | 27.214 | %0,5 | \$875 |
| Brazil | 24.562 | %0,5 | \$701 |
| Argentina | 21.936 | %0,4 | \$538 |
| Poland | 21.587 | %0,4 | \$1.181 |

* Noodle etc. exporters excluded.

SOURCE: TRADEMAP

According to Trademap data, in 2020, Turkey ranked in 2nd place after Italy in 1902.19 GTIP pasta exports, with 27,7% (2018-%28,1) market share. But, among the countries exporting more than 20 thousand tons, ranked last with an export value of \$514/ton.

WORLD PASTA (1902)
IMPORT IN 2020 (USD)

11.299.195

WORLD PASTA (1902)
IMPORT IN 2020 (TON)

7.883.648

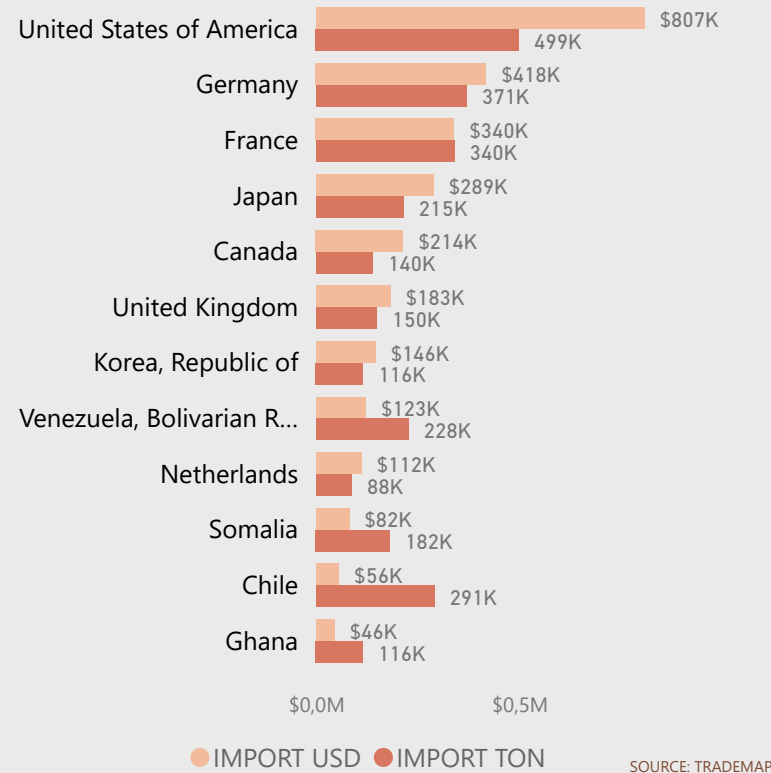
WORLD PASTA (1902.19)
IMPORT IN 2020 (USD)

5.197.873

WORLD PASTA (1902.19)
IMPORT IN 2020 (TON)

5.027.644

WORLD PASTA IMPORTS IN 2020 (1902.19 HS CODE)



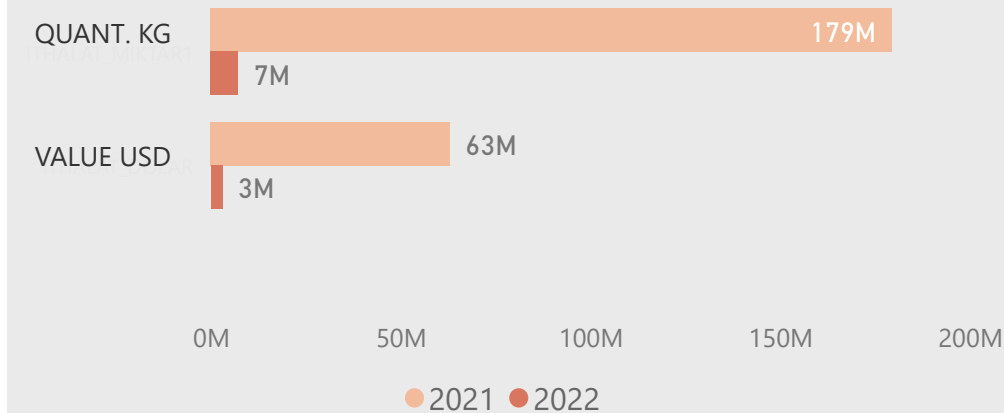
UNIT IMPORT PRICE OF COUNTRIES OVER 65K IMPORT QUANT. (\$/TON)

| COUNTRY | IMPORT TON | IMPORT SHARE | UNIT PRICE (\$/TON) |
|-----------------------------------|------------|--------------|---------------------|
| United States of America | 498.913 | %9,9 | \$1.618 |
| Germany | 370.546 | %7,4 | \$1.129 |
| France | 340.416 | %6,8 | \$998 |
| Chile | 291.014 | %5,8 | \$193 |
| Venezuela, Bolivarian Republic of | 227.719 | %4,5 | \$539 |
| Japan | 215.333 | %4,3 | \$1.342 |
| Somalia | 182.008 | %3,6 | \$451 |
| United Kingdom | 149.530 | %3,0 | \$1.227 |
| Canada | 139.658 | %2,8 | \$1.535 |
| Korea, Republic of | 115.994 | %2,3 | \$1.259 |
| Ghana | 115.592 | %2,3 | \$394 |
| Netherlands | 88.385 | %1,8 | \$1.267 |
| Saudi Arabia | 76.006 | %1,5 | \$998 |
| Belgium | 74.048 | %1,5 | \$1.311 |
| Iraq | 70.731 | %1,4 | \$1.179 |
| Togo | 69.358 | %1,4 | \$446 |
| Angola | 67.857 | %1,3 | \$466 |

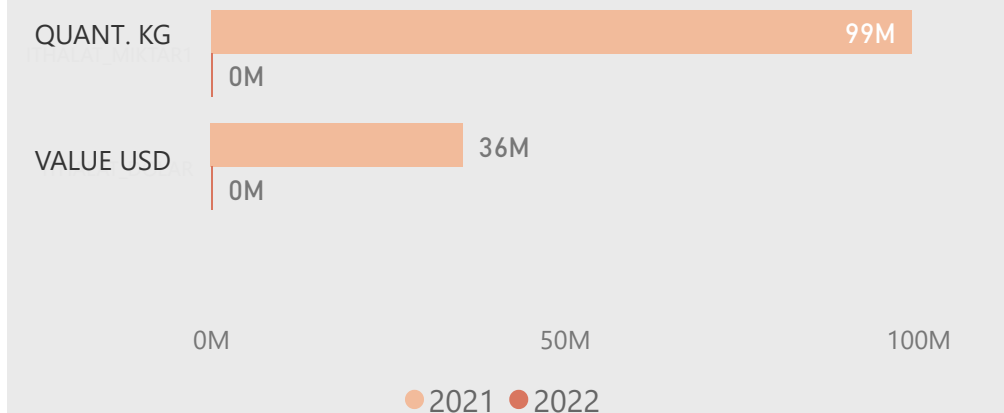
SOURCE: TRADEMAP

According to Trademap data, in 2020, USA ranked first with 9.9% share in 1902.19 GTIP pasta imports. Germany (370K tons) and France (340K tons) followed USA, respectively. Venezuela, which Turkey exported 220K tons of pasta in 2020, is the fifth largest importer country.

JANUARY - MARCH 2022



MARCH 2022

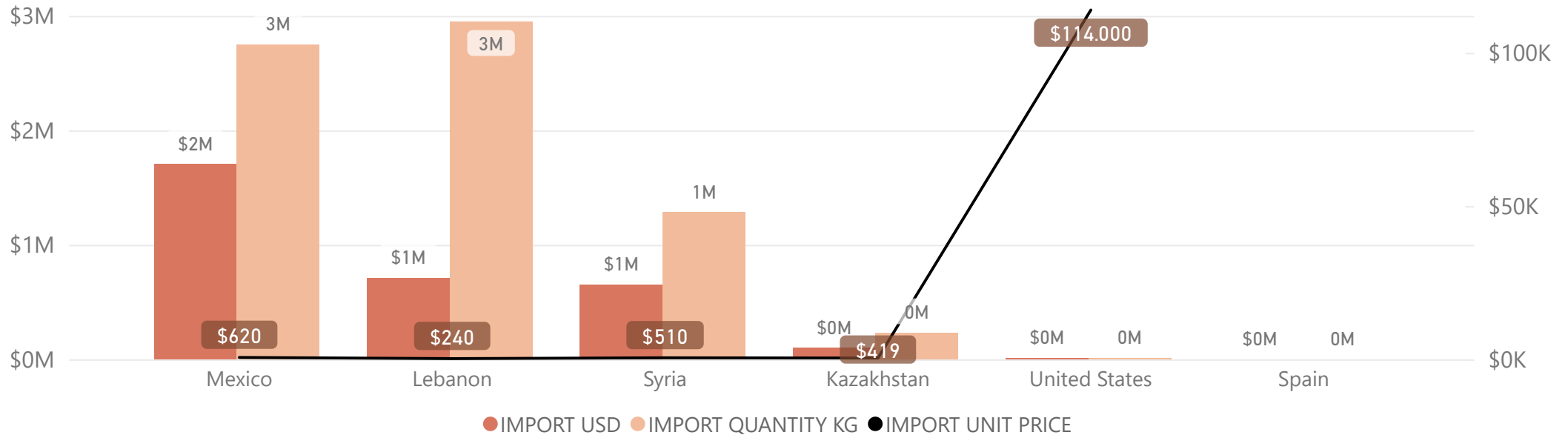


In March 2022 compared to March 2021, durum wheat imports decreased -99.89% and fell to 109.041 tons, in quantity; decreased -99.87% and fell to \$45 thousand in value.

Between January - March 2022, compared to same period of the previous year, durum wheat imports decreased -95.98% and fell to 7.21 thousand tons, in quantity; decreased -94.98% and fell to \$3.16 million in value.

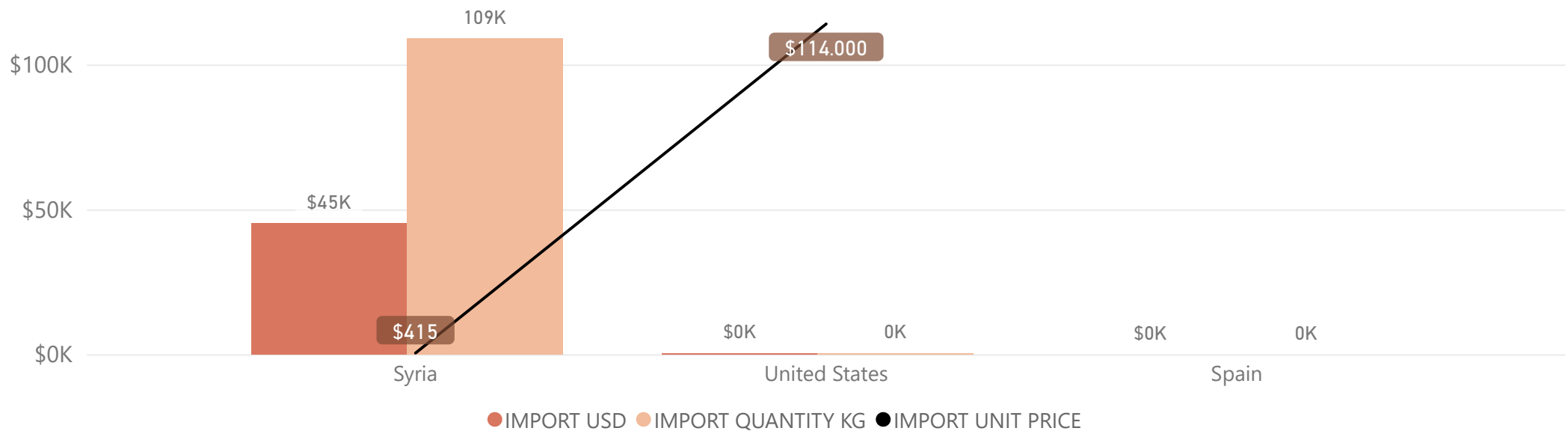
Average unit price per ton was \$360 in March 2021. It increased 15.61% and reached to \$416 in March 2022.

Compared to same period of the previous year, between January and March 2022, average price per ton increased 24.88% and reached to \$438/ton.



Between January and March 2022, biggest importer of durum wheat was Lebanon with 3 thousand tons (\$2 million), followed by Mexico and Syria.

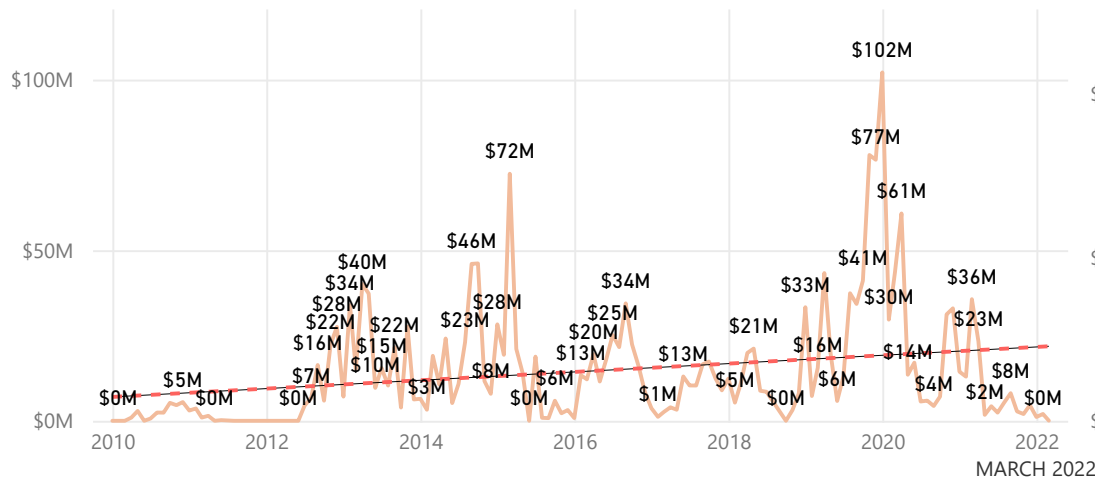
Average unit price of durum wheat imported by Lebanon was \$240/ton. Lowest price belonged to Lebanon with \$240/ton, while the highest unit price belongs to United States with \$114000/ton.



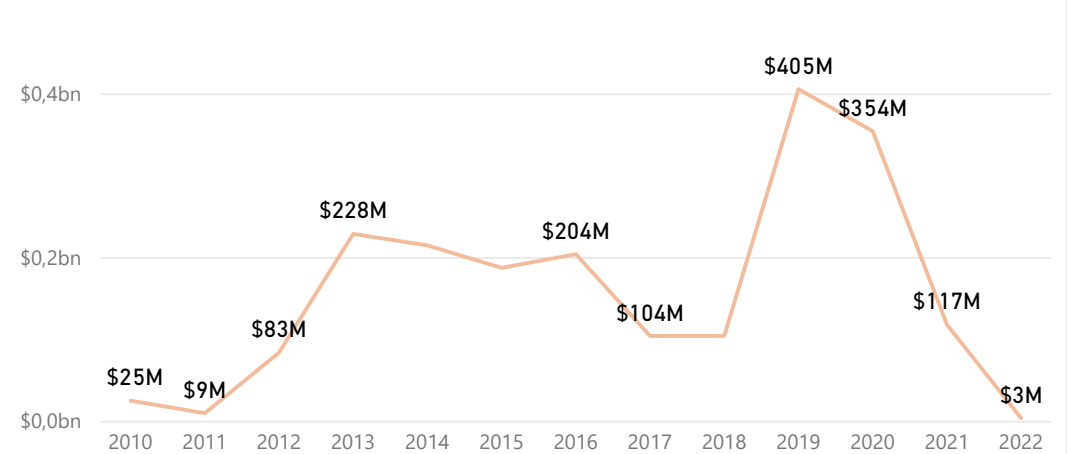
In March 2022, where durum wheat was imported was the biggest country Syria. Syria imported 109.04 tons of durum wheat (\$45 thousand), with \$415/ton average unit price.

In March 2022, countries that imported durum wheat were Syria, United States, respectively.

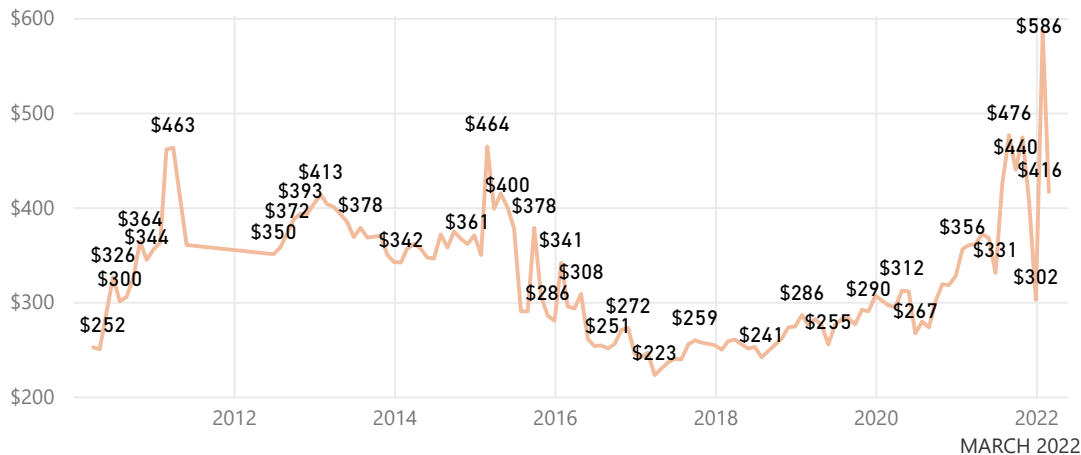
MONTHLY IMPORT VALUE (USD)



YEARLY IMPORT VALUE (USD)



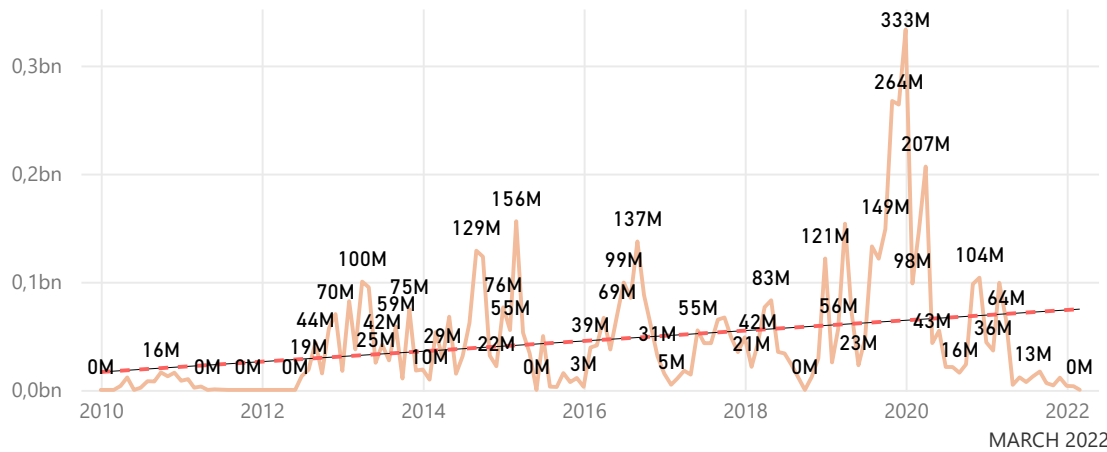
MONTHLY IMPORT UNIT PRICE (USD/TON)



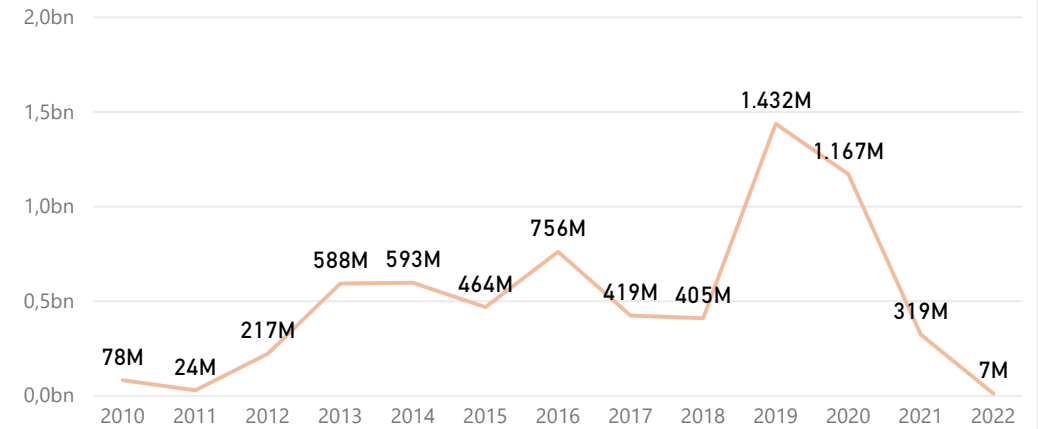
When the monthly import values of durum wheat are analyzed, it is seen that the increasing trend continues. The highest value obtained in imports of durum wheat, in which the years 2019 and 2020 stand out, was realized in January 2020 with 102 million dollars.

When analyzed on unit price basis, it is seen that the price of **586 dollars / ton** realized in February 2022 is the highest value achieved until this time. It was realized with a price of **416 dollars/ton** in March 2022.

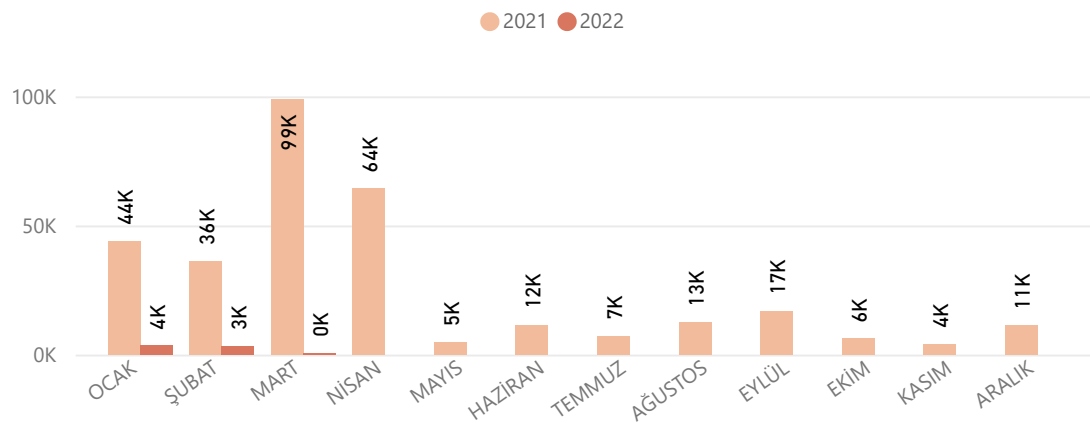
MONTHLY IMPORT QUANTITY (KG)



YEARLY IMPORT QUANTITY (KG)



LAST 2 YEAR IMPORT QUANTITY (KG)



When the monthly durum wheat imports are analyzed by years, it is seen that the imports decreased in 2021 and 2022 after the record imports made in 2019 and 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 | 7.211.991 | \$3.161.327 | 179.441.259 | \$62.983.784 | -%96,0 | -%95,0 |
| 100119000000 Durum wheat (durum wheat); EXCEPT those of seed | 7.211.991 | \$3.161.327 | 179.441.259 | \$62.983.784 | -%96,0 | -%95,0 |
| 190219 | 667.272 | \$1.274.105 | 677.531 | \$1.186.242 | -%1,5 | %7,4 |
| 190219100019 Other pasta; unbaked, not containing eggs and common wheat flour or semolina (not stuffed) | 578.805 | \$1.103.530 | 510.955 | \$1.016.404 | %13,3 | %8,6 |
| 190219900012 Plain pasta; unbaked, not containing eggs but containing bread wheat flour or semolina (unfilled) | 48.198 | \$107.604 | 46.627 | \$88.398 | %3,4 | %21,7 |
| 190219900019 Other pasta; unbaked, not containing eggs but containing bread wheat flour or semolina (unfilled) | 39.661 | \$48.104 | 119.689 | \$74.422 | -%66,9 | -%35,4 |
| 190219900011 Pasta with vegetables; unbaked, not containing eggs but containing bread wheat flour or semolina (unfilled) | 608 | \$14.867 | 260 | \$7.018 | %133,8 | %111,8 |
| 190230 | 209.642 | \$433.146 | 156.921 | \$255.667 | %33,6 | %69,4 |
| 190230100000 Dried pastas | 197.136 | \$388.719 | 145.879 | \$233.917 | %35,1 | %66,2 |
| 190230900000 Other pastas | 12.506 | \$44.427 | 11.042 | \$21.750 | %13,3 | %104,3 |
| 190211 | 193.008 | \$458.929 | 134.710 | \$235.177 | %43,3 | %95,1 |
| 190211000019 Pasta; not cooked, containing eggs but containing only durum wheat (durum wheat) flour and semolina EXCEPT | 126.144 | \$263.800 | 94.989 | \$128.972 | %32,8 | %104,5 |
| 190211000011 Pasta; unbaked, containing only eggs and durum wheat (durum wheat) flour and semolina | 66.864 | \$195.129 | 39.721 | \$106.205 | %68,3 | %83,7 |
| 190220 | 19.115 | \$103.470 | 51.206 | \$202.331 | -%62,7 | -%48,9 |
| 190220990000 Other stuffed pastas | 19.115 | \$103.470 | 51.206 | \$202.331 | -%62,7 | -%48,9 |
| 190240 | 1 | \$107 | 0 | \$0 | | |
| 190240100000 Couscous; unprepared ones | 1 | \$107 | 0 | \$0 | | |
| Total | 8.301.029 | \$5.431.084 | 180.461.627 | \$64.863.201 | -%95,4 | -%91,6 |

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

3.150.000

TON PRODUCTION

157.638

KG/DECARE (YIELD)

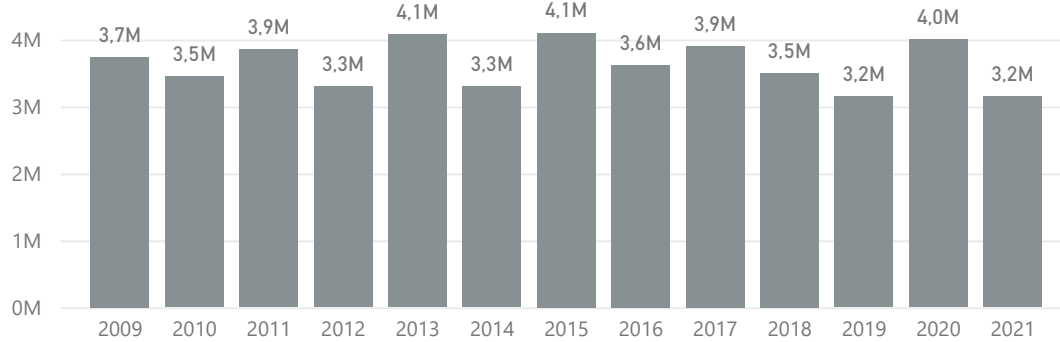
12.013.688

DECARE HARVEST AREA

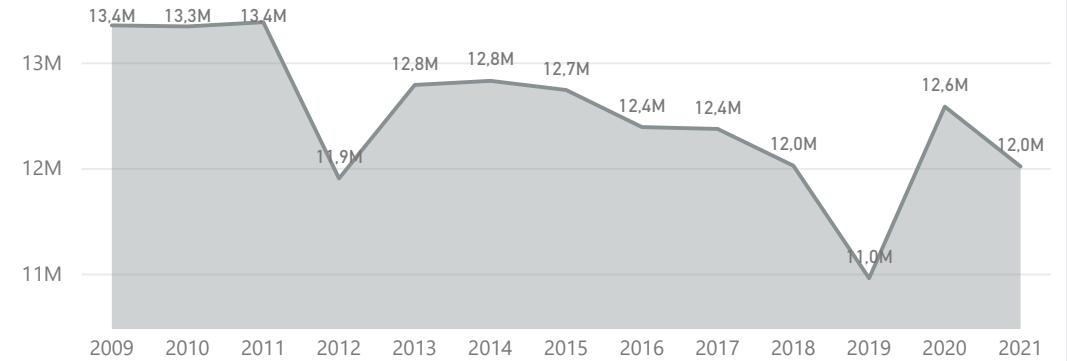
%17,81

RATIO PER TOTAL WHEAT

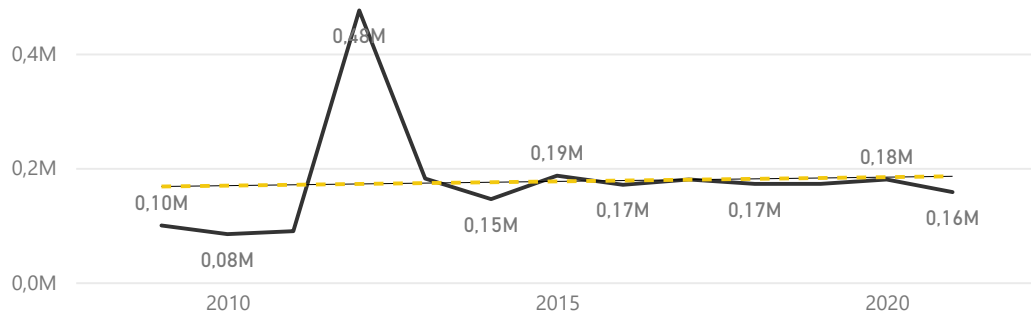
DURUM WHEAT PRODUCTION PER YEAR



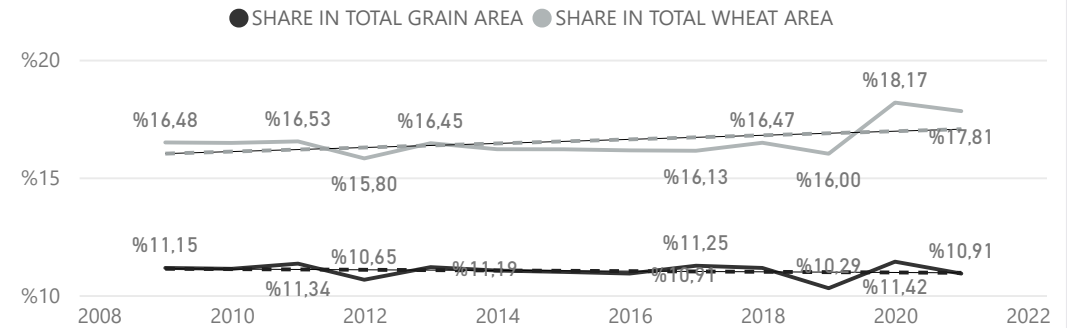
DURUM WHEAT HARVEST AREA PER YER (DECARE)



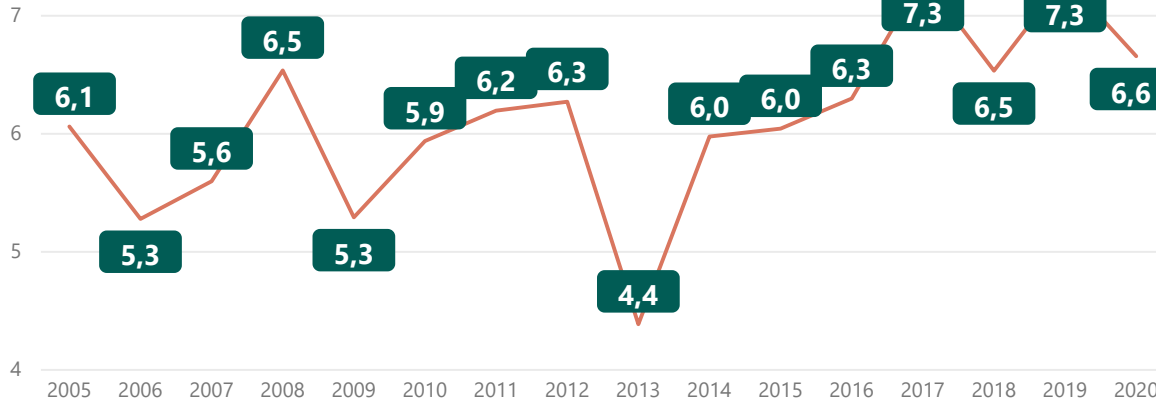
DURUM WHEAT YIELD PER YEAR (KG/DECARE)



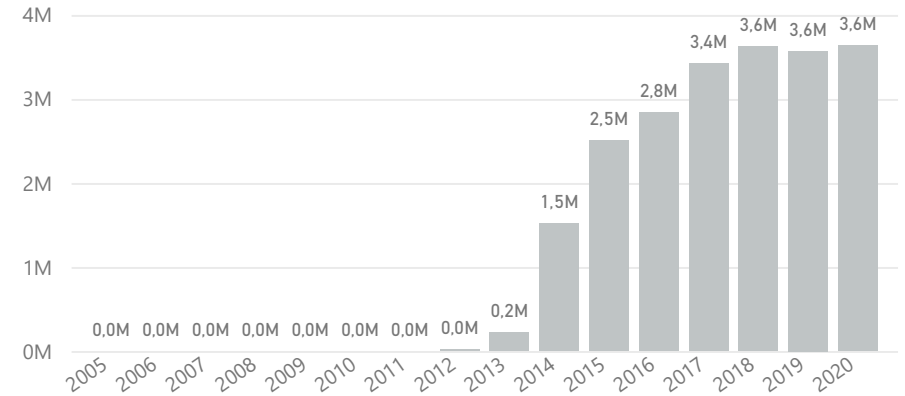
RATIO OF DURUM WHEAT HARVEST AREA



PASTA CONSUMPTION PER CAPITA (Kg/Per)

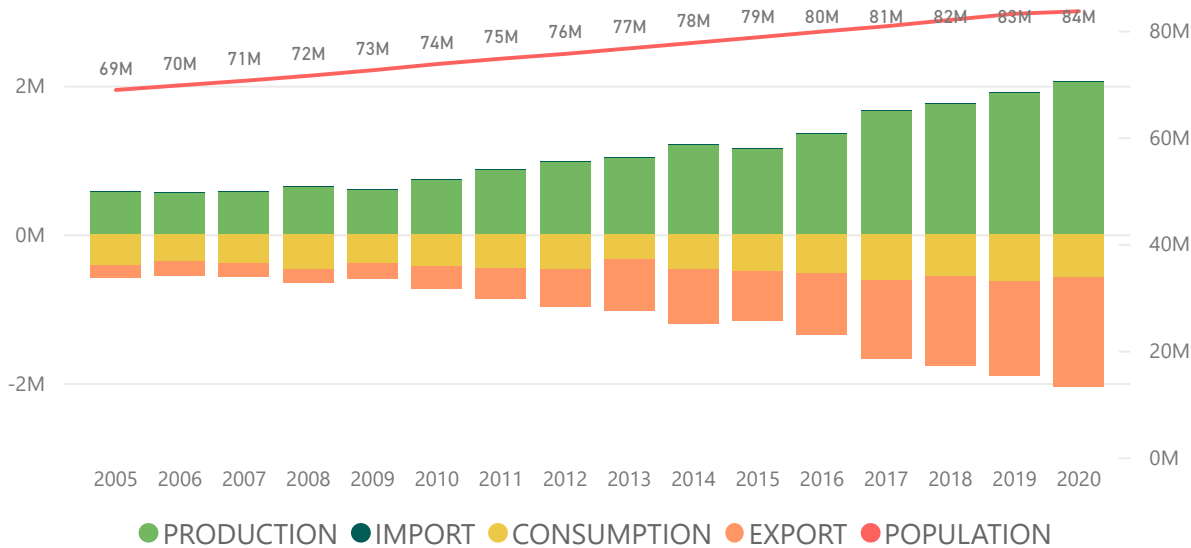


REFUGEE NUMBERS PER YEAR



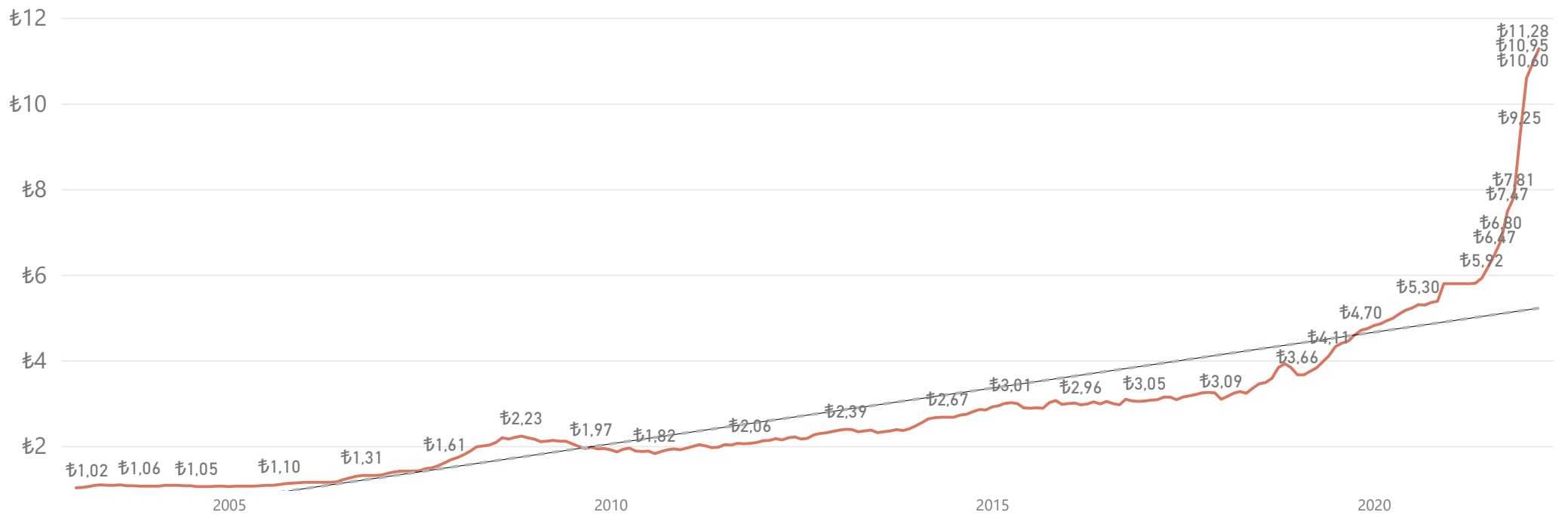
* Calculations were made with population of Turkey and additional refugee numbers.

Source : Ministry of the interior and TÜİK



| Year | Product. (Ton) | Import (Ton) | Export (Ton) | Consumption (Ton) |
|------|----------------|--------------|--------------|-------------------|
| 2007 | 571.292 | 1.184 | 177.923 | 394.553 |
| 2008 | 640.985 | 1.521 | 175.597 | 466.909 |
| 2009 | 595.160 | 1.777 | 213.506 | 383.431 |
| 2010 | 732.411 | 2.078 | 297.280 | 437.209 |
| 2011 | 863.968 | 2.457 | 404.040 | 462.385 |
| 2012 | 976.644 | 2.702 | 505.559 | 473.787 |
| 2013 | 1.026.431 | 3.377 | 693.101 | 336.707 |
| 2014 | 1.202.516 | 5.310 | 735.021 | 472.805 |
| 2015 | 1.158.069 | 4.127 | 671.837 | 490.359 |
| 2016 | 1.347.649 | 3.384 | 831.123 | 519.910 |
| 2017 | 1.667.267 | 4.279 | 1.054.990 | 616.556 |
| 2018 | 1.762.492 | 3.636 | 1.207.296 | 558.832 |
| 2019 | 1.902.039 | 4.593 | 1.272.722 | 633.910 |
| 2020 | 2.047.014 | 4.023 | 1.470.842 | 580.195 |

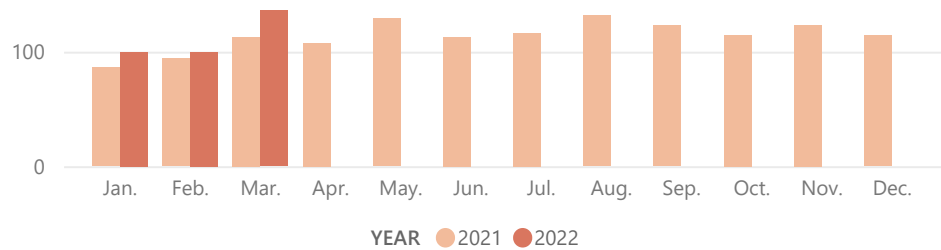
2022 march pasta market price: **₺11,28 TL/Kg**



* Consumer price index pasta price

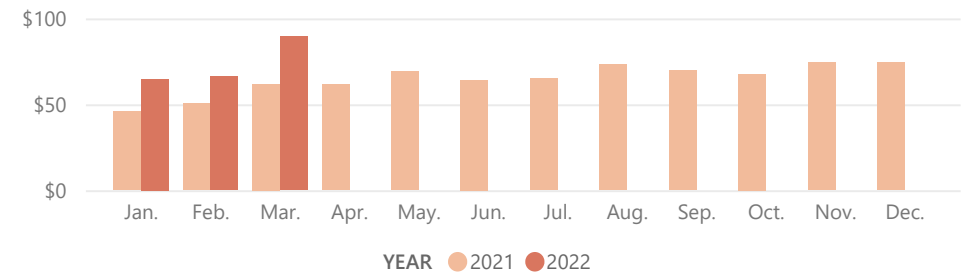
* Vat included market price

EXPORT QUANTITY COMPARISON (1000TONS)



| Year | Jan. | Feb. | Mar. | Apr. | May. | Jun. | Jul. | Aug. | Sep. | Oct. | Nov. | Dec. | Total |
|------|------|------|------|------|------|------|------|------|------|------|------|------|-------|
| 2021 | 86 | 94 | 113 | 108 | 129 | 113 | 116 | 131 | 123 | 115 | 123 | 114 | 1.366 |
| 2022 | 100 | 100 | 136 | | | | | | | | | | 335 |

EXPORT VALUE COMPARISON (MILLION\$)



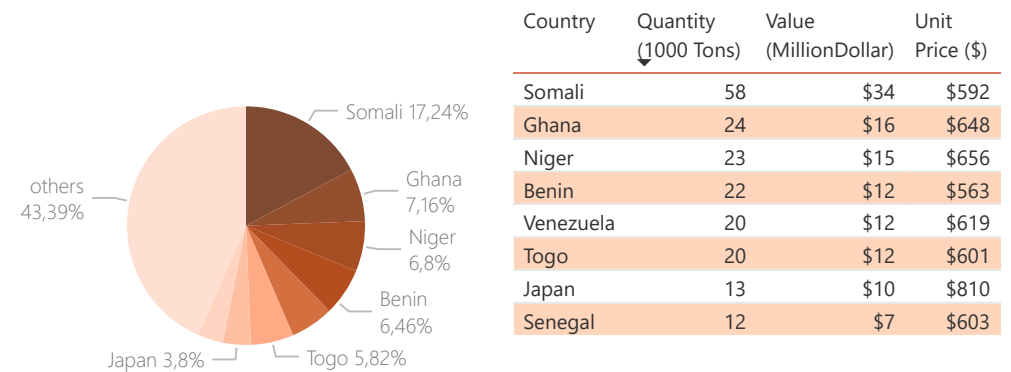
| Year | Jan. | Feb. | Mar. | Apr. | May. | Jun. | Jul. | Aug. | Sep. | Oct. | Nov. | Dec. | Total |
|------|------|------|------|------|------|------|------|------|------|------|------|------|-------|
| 2021 | \$46 | \$51 | \$62 | \$61 | \$69 | \$64 | \$65 | \$73 | \$70 | \$68 | \$74 | \$74 | \$777 |
| 2022 | \$65 | \$66 | \$90 | | | | | | | | | | \$221 |

EXPORT UNIT PRICE COMPARISON (\$)



| Year | Jan. | Feb. | Mar. | Apr. | May. | Jun. | Jul. | Aug. | Sep. | Oct. | Nov. | Dec. | Avg. |
|------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| 2021 | \$530 | \$538 | \$549 | \$571 | \$538 | \$570 | \$559 | \$556 | \$567 | \$590 | \$603 | \$649 | \$569 |
| 2022 | \$649 | \$663 | \$659 | | | | | | | | | | \$657 |

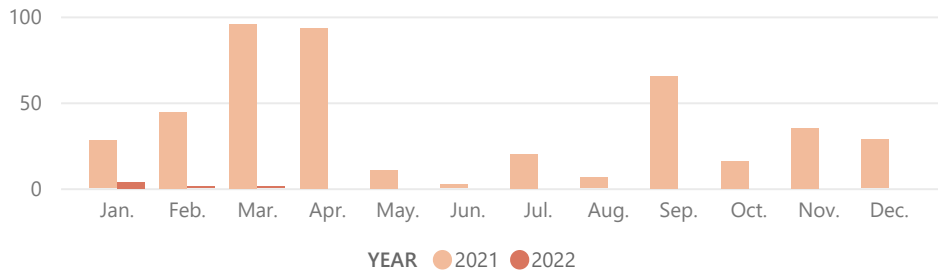
TOP 8 COUNTRIES ACCORDING TO TOTAL EXPORT QUANTITY IN 2022



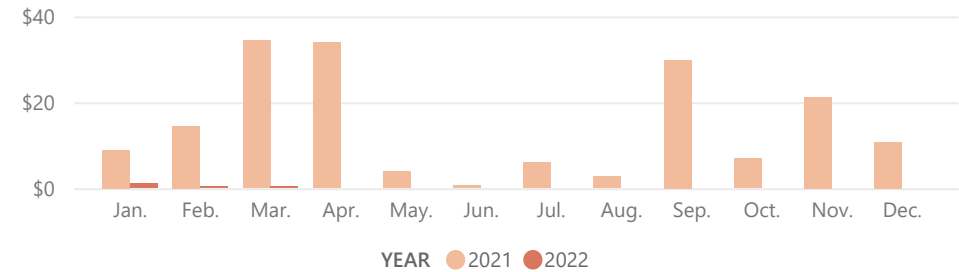
| HS CODE 6 - PRODUCT NAME | EXPORT QUANT. (KG) | EXPORT VALUE (USD) | PREV. YEAR EXPORT QUANT. (KG) | PREV. YEAR EXPORT VALUE (USD) | CHANGE % (KG) | CHANGE % (USD) |
|---|-----------------------|-----------------------|----------------------------------|----------------------------------|------------------|-------------------|
| 100119 | 22.347.113 | 18.145.046 | 27.533.813 | 12.073.847 | -%18,84 | %50,28 |
| 100119000000 Durum wheat (durum wheat); EXCEPT those of seed | 10 | 4 | 17.496.895 | 6.587.676 | -%100,00 | -%100,00 |
| 190211 | 258.427.099 | 158.283.183 | 71.233.971 | 41.590.800 | %262,79 | %280,57 |
| 190211000011 Pasta; unbaked, containing only eggs and durum wheat (durum wheat) flour and semolina | 135.150 | 143.546 | 2.586 | 4.143 | %5126,22 | %3364,78 |
| 190211000019 Pasta; not cooked, containing eggs but containing only durum wheat (durum wheat) flour and semolina EXCEPT | 307.519 | 360.483 | 4.266 | 4.361 | %7108,60 | %8166,06 |
| 190219 | 458.539.889 | 284.321.346 | 384.091.197 | 191.920.603 | %19,38 | %48,15 |
| 190219100019 Other pasta; unbaked, not containing eggs and common wheat flour or semolina (not stuffed) | 75.152.355 | 54.704.338 | 124.718.840 | 73.517.310 | -%39,74 | -%25,59 |
| 190219900011 Pasta with vegetables; unbaked, not containing eggs but containing bread wheat flour or semolina (unfilled) | 36 | 252 | 52.530 | 82.526 | -%99,93 | -%99,69 |
| 190219900012 Plain pasta; unbaked, not containing eggs but containing bread wheat flour or semolina (unfilled) | 239.918.945 | 146.233.899 | 155.365.190 | 75.673.709 | %54,42 | %93,24 |
| 190219900019 Other pasta; unbaked, not containing eggs but containing bread wheat flour or semolina (unfilled) | 2.024.210 | 1.082.905 | 619.615 | 312.365 | %226,69 | %246,68 |
| 190220 | 118.614.701 | 70.217.052 | 62.575.047 | 35.834.545 | %89,56 | %95,95 |
| 190220100000 Pasta (stuffed); containing more than 20% by weight of fish, molluscs, crustaceans and other aquatic invertebrates | | | 0 | 0 | | |
| 190220301000 Pasta (stuffed, containing more than 20% by weight of meat and meat offal (including any fat) | 21.361 | 54.069 | 115 | 615 | %18474,78 | %8691,71 |
| 190220309000 Pasta (stuffed, containing more than 20% by weight of sausages and the like (including any fat) | 25.116 | 36.944 | 92 | 307 | %27200,00 | %11933,88 |
| 190220910000 Other stuffed, cooked pastas | 25.217 | 48.228 | 29.179 | 156.368 | -%13,58 | -%69,16 |
| 190220990000 Other stuffed pastas | 148.847 | 259.198 | 736 | 1.989 | %20123,78 | %12931,57 |
| 190230 | 386.154.208 | 240.722.658 | 278.257.704 | 142.974.661 | %38,78 | %68,37 |
| 190230100000 Dried pastas | 10.510.797 | 13.124.650 | 2.911.136 | 3.332.844 | %261,05 | %293,80 |
| 190230900000 Other pastas | 6.375.869 | 3.835.027 | 8.152.448 | 4.311.495 | -%21,79 | -%11,05 |
| 190240 | 82.893.044 | 54.362.850 | 68.185.908 | 37.762.541 | %21,57 | %43,96 |
| 190240100000 Couscous; unprepared ones | 172.150 | 132.073 | 92.900 | 62.745 | %85,31 | %110,49 |
| 190240900000 Couscous; EXCEPT those that are not prepared | 600.069 | 453.398 | 916.344 | 601.364 | -%34,51 | -%24,61 |
| Total | 460.577.501 | 285.506.327 | 384.151.432 | 192.003.127 | %19,89 | %48,70 |

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

IMPORT QUANTITY COMPARISON (1000TONS)



IMPORT VALUE COMPARISON (MILLION\$)



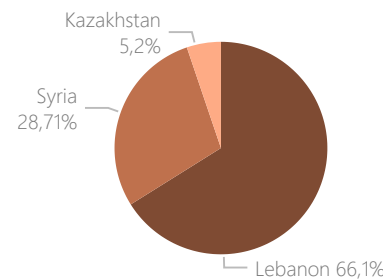
| Year | Jan. | Feb. | Mar. | Apr. | May. | Jun. | Jul. | Aug. | Sep. | Oct. | Nov. | Dec. | Total |
|------|------|------|------|------|------|------|------|------|------|------|------|------|-------|
| 2021 | 28 | 44 | 96 | 93 | 11 | 2 | 20 | 6 | 65 | 16 | 35 | 28 | 444 |
| 2022 | 4 | 1 | 0 | | | | | | | | | | 4 |

| Year | Jan. | Feb. | Mar. | Apr. | May. | Jun. | Jul. | Aug. | Sep. | Oct. | Nov. | Dec. | Total |
|------|------|------|------|------|------|------|------|------|------|------|------|------|-------|
| 2021 | \$9 | \$14 | \$34 | \$34 | \$4 | \$1 | \$6 | \$3 | \$30 | \$7 | \$21 | \$11 | \$174 |
| 2022 | \$1 | \$0 | \$0 | | | | | | | | | | \$1 |

IMPORT UNIT PRICE COMPARISON (\$)



TOP 8 COUNTRIES ACCORDING TO TOTAL IMPORT QUANTITY IN 2022



| Country | Quantity (1000 Tons) | Value (MillionDollar) | Unit Price (\$) |
|---------------|----------------------|-----------------------|-----------------|
| Lebanon | 3 | \$1 | \$240 |
| Syria | 1 | \$1 | \$510 |
| Kazakhstan | 0 | \$0 | \$419 |
| United States | 0 | \$0 | \$114.000 |
| Italy | 0 | \$0 | |
| Libya | 0 | \$0 | |
| Spain | 0 | \$0 | |

| 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 | 4.464.991 | 1.458.187 | 167.649.649 | 57.709.135 | -%97,34 | -%97,47 |
| 100119000000 Durum wheat (durum wheat); EXCEPT those of seed | 4.464.991 | 1.458.187 | 167.649.649 | 57.709.135 | -%97,34 | -%97,47 |
| 190211 | 153.185 | 348.370 | 101.821 | 183.648 | %50,45 | %89,69 |
| 190211000011 Pasta; unbaked, containing only eggs and durum wheat (durum wheat) flour and semolina | 28.192 | 81.623 | 32.681 | 91.439 | -%13,74 | -%10,74 |
| 190211000019 Pasta; not cooked, containing eggs but containing only durum wheat (durum wheat) flour and semolina EXCEPT | 124.993 | 266.747 | 69.052 | 92.013 | %81,01 | %189,90 |
| 190219 | 668.013 | 1.307.386 | 800.507 | 1.448.330 | -%16,55 | -%9,73 |
| 190219100019 Other pasta; unbaked, not containing eggs and common wheat flour or semolina (not stuffed) | 585.590 | 1.152.091 | 570.043 | 1.127.473 | %2,73 | %2,18 |
| 190219900011 Pasta with vegetables; unbaked, not containing eggs but containing bread wheat flour or semolina (unfilled) | 2.408 | 27.574 | 260 | 7.006 | %826,15 | %293,58 |
| 190219900012 Plain pasta; unbaked, not containing eggs but containing bread wheat flour or semolina (unfilled) | 22.410 | 47.239 | 46.539 | 82.298 | -%51,85 | -%42,60 |
| 190219900019 Other pasta; unbaked, not containing eggs but containing bread wheat flour or semolina (unfilled) | 42.154 | 48.940 | 181.384 | 223.250 | -%76,76 | -%78,08 |
| 190220 | 11.086 | 71.088 | 69.732 | 276.306 | -%84,10 | -%74,27 |
| 190220990000 Other stuffed pastas | 11.086 | 71.088 | 69.732 | 276.306 | -%84,10 | -%74,27 |
| 190230 | 213.080 | 349.104 | 151.362 | 270.735 | %40,78 | %28,95 |
| 190230100000 Dried pastas | 201.459 | 299.928 | 137.381 | 236.649 | %46,64 | %26,74 |
| 190230900000 Other pastas | 10.465 | 41.387 | 13.812 | 32.825 | -%24,23 | %26,08 |
| 190240 | 1 | 107 | 0 | 0 | | |
| 190240100000 Couscous; unprepared ones | 1 | 107 | 0 | 0 | | |
| Total | 5.633.922 | 3.615.374 | 168.824.573 | 59.919.324 | -%96,66 | -%93,97 |

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

| HS12 CODE | CATEGORY | CUSTOM NAME |
|--------------|-------------|--|
| 100119000000 | DURUM WHEAT | Durum wheat (durum wheat); EXCEPT those of seed |
| 190211000011 | PASTA | Pasta; unbaked, containing only eggs and durum wheat (durum wheat) flour and semolina |
| 190211000019 | PASTA | Pasta; not cooked, containing eggs but containing only durum wheat (durum wheat) flour and semolina EXCEPT |
| 190219100019 | PASTA | Other pasta; unbaked, not containing eggs and common wheat flour or semolina (not stuffed) |
| 190219900012 | PASTA | Plain pasta; unbaked, not containing eggs but containing bread wheat flour or semolina (unfilled) |
| 190219900019 | PASTA | Other pasta; unbaked, not containing eggs but containing bread wheat flour or semolina (unfilled) |
| 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 | Other stuffed, cooked pastas |
| 190220990000 | PASTA | Other stuffed pastas |
| 190230100000 | PASTA | Dried pastas |
| 190230900000 | PASTA | Other pastas |
| 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



www.musad.org.tr