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Breaking News World Rye and Oat Market

# World Durum Wheat Market and Turkey

**Durum wheat which is the main raw material of the pasta production industry and used in the bulgur production at the same time has become a more significant cereal product in the world market together with the increase in the demand for pasta. European countries, especially Italy that comes to mind when the subject is pasta, are placed on the top in the production of durum wheat which is estimated to be 35,4 million in 2012/13 season.**

Durum wheat which is also called as tritium and heavily used in the production of pasta and bulgur is a different type than the bread wheat and generally characterized with solid grain structure, amber grain color and yellow semolina when grinded. The main reason that the durum wheat is not preferred in bread production but used in the pasta industry is that although it has the same contents with bread wheat in terms of protein and gluten, this gluten type does not have sufficient elastic strength.

Today, pasta which is ranked after bread in terms of consumption rate and the importance in nutrition among the industrial products made of wheat is defined as an important source of food as the complex carbohydrates in its structure can quickly convert into energy by degrading and it is very rich in mineral and vitamins.

As the pasta production technology has a similar structure with the bread production technology and pasta has a long physical life under suitable packaging and storage conditions, consumption of wheat in form of pasta has been increasing recently all around the world when compared to consumption in the form of bread.

Therefore, demand for the durum wheat and the importance of durum wheat in the world market are also increasing. In addition to this, it seems that the demand for durum wheat will further increase with the start of recognition of the durum wheat, homeland of which is Turkey, in the world market.

WORLD DURUM WHEAT PRODUCTION
AND CONSUMPTION
It is estimated that the cultivation area of durum wheat in the world is nearly 17.5 hectares. The biggest durum wheat producer in the world is EU (27) and the cultivation area is approximately 3 million hectares. Among the EU (27) countries, Italy makes half

of the production.
It is estimated that the production of pasta wheat in EU (27) in 2012/13 season was 8 million ton and the total production in the world was 34,5 ton. According to the data of 2010, EU is followed by Canada, Turkey, USA and Mexico in durum wheat production.

It is estimated that in 2012/13 season, world durum wheat production is 35,4 million tons and the consumption is 35,6 million tons. 8 million tons of this production is realized by EU countries. Canada with 4,6 million tons, Turkey and Syria with 5.3 million tons (total production of these two countries), U.S. and Mexico with 2,2 million tons follow EU countries. Total durum wheat production of North African countries is 4,6 million tons.

The durum wheat production in Canada, U.S. and EU as large producers increased 9,6% in 2012/13 season compared to the previous season. The increase rate only in Canada was 9,2%.

It is estimated by the projections for 2013/14 season that the world production will decrease to 35,1 million tons and the consumption will be around 35,8 million tons. It is estimated that the production in Canada and U.S. as large producers will decrease 3,3% in 2013/14 season compared to the 2012/13 season.

A decrease also for Turkey and Mexico is projected. According to that; EU countries will realize 8,1 million tons of durum wheat, Canada will 4,5 million tons, Turkey and Syria will totally 4,1 million tons, U.S. and Mexico will 1,5 million tons in 2013/14 season.

World durum wheat consumption is in direct proportion to pasta consumption. World pasta consumption and thus the demand for pasta increase rapidly. Properties such as having high nutritious value, being sold for a cheap price, being easily stored and prepared, the modern technology used in its production, being available easily, the feature of increasable in nutritional value and taste with additional sauces are the main reasons of the increase. Since it can be prepared with many different ingredients, it is accepted by different societies with different food cultures. Each of these societies can cook pasta according to their own unique taste.

The increase of pasta production, which was 9.3 million tons in 2001, to 10 million 446 thousand tons in 2003 and approximately 13.5 million tons in 2013 is the most important indicator of the demand increase in pasta throughout the world.

When the data of IPO on 2013 is reviewed; the country with highest pasta consumption per capita in the world is Italy with 26 kilograms just like in 2010. Venezuela with 13.2 kilograms, Tunisia with 11.9 kilograms, Greece with 10.6 kilograms, Switzerland with 9.2 kilograms and Sweden with 9 kilograms follow Italy that ranks first in consumption just like in production. When 2010 per capita consumption amounts of these countries are reviewed; it is seen that the highest increase is realized in Venezuela (Venezuela with 12 kilograms, Tunisia with 11.7 kilograms, Greece with 10.4 kilograms, Switzerland with 9.7 kilograms and USA with 9 kilograms followed Italy in 2010).

Turkey's pasta consumption per person is 6.6 kilograms (6 kg in 2010). The reasons behind this insufficient rise in pasta consumption of Turkish can be counted as undeveloped sauce quality, lack of knowledge about pasta cooking methods, that variety in production just began, and unawareness about the nutritious value of pasta.

Also; when we consider the fact that traditionally homemade noodle in Turkey is not recorded, it can be easily concluded that pasta consumption per person is much higher than this figure in the records.

WORLD DURUM WHEAT TRADE

World durum wheat trade, which was 7,6 million tons in 2009/10 season, decreased to 7,5 million tons in 2011/12 season. It is estimated that durum wheat trade declined to 7,1 million tons in 2012/13 season by decreasing 400 thousand tons compared to the previous season. It is projected that it will remain at 7,1 million tons in 2013/14 season.

The most important durum wheat importers are Algeria and EU (27). Nearly 50% of durum wheat import is performed by these countries. It is estimated that the import of Algeria in 2010/11 season decreased by 550,000 ton because of high yield when compared to the previous year and reached to 1 million ton and the import of EU (27) reached to 2.2 million ton by increasing in 2010/11 season.

Major durum wheat exporter countries in the world are Canada, EU (27) and USA. Canada has a share of more than 50% in the world durum wheat export. These three countries are followed by Mexico and Australia.

## DURUM WHEAT PRODUCTION IN TURKEY

According to the data of Turkish Statistical Institute, cultivation area of durum wheat in Turkey is nearly 13 million decares. In Turkey where the average yield per decare was 255 kg in 2006-2011 seasons, durum wheat amount produced in 2012 was 3 million 300 thousand tons. This amount shows that the production in the previous year, which was 3 million 850 thousand tons, decreased by 550 thousand tons in 2012.

Production rate in 2011 also represents the highest durum wheat production rate in the last 6 years. Durum wheat production is sufficient in Turkey; on the other hand problems faced in the quality sometimes make it compulsory to import from other countries.

## PASTA INDUSTRY IN TURKEY

The foundations of the pasta industry that is one of the leading sectors of Turkish food industry, were laid in first period of the Republic in Turkey. The industrialization of production of pasta, which was consumed only as homemade “noodle” previously, took place back in 1922. While pasta was continued to be produced in small facilities until 1950s, large plants were only began to be established in these years. After 1960s, the number of pasta plants in Turkey and production capacity tripled. In 1970s, the small facilities left their places to large capacity plants using advanced technologies.

The installed capacity of Turkey which was 33 thousand tons/year in 1962 increased to 100 thousand tons/year in 1970s with the establishment of large plants, to 250 thousand tons/year in 1980 and to 530 thousand tons/year in 1993 with the increase in the installed capacities of old plants besides the establishment of the new ones.

In Turkey, the production and the quality of pasta improved, the market began to compete with international markets and the number of plants increased to 26. The daily capacity of Nuh, one of these plants, is around 680 tons. And while the daily capacities of Durum (Arbel), Besler and Barilla are over 300 tons each; the daily capacities of Tat, Piyale, Doga, Kombassan, Selva and Mutlu are over 200 tons each.

With the adoption of export-oriented industrialization strategy at the beginning of 1990s, a recovery had been observed in the pasta export of Turkey along with the synchronous growth in the domestic demand. Thus the large plants in Turkey began to increase their capacities. As a result, the total installed capacity reached the level 710 thousand tons/year in 1997 that Turkey achieved the highest level of pasta export. And as of 2010, Turkey is one of the largest pasta producer countries of the world with its installed capacity over 1 million 300 tons. However this capacity is estimated to increase up to 1 million 700 tons especially with the plant and technology investments of the companies in the recent years.

Durum wheat, which is the raw material of pasta, is produced in Southeastern Anatolia, Central Anatolia and Western Anatolia. Thus the plants producing pasta in Turkey are generally located in these regions.

While Southeastern Region takes the first place with 35 percent with the highest contribution from Gaziantep, this region is followed by Central Anatolia (40%) with the highest contribution from Ankara and Western Europe (25%) with the highest contribution from Izmir. 7 large companies, each with 170 tons/day installed capacity, supply more than half of the sector's total capacity.

Today, there are 22 factories in the Turkish pasta industry including large integrated facilities that can compete with the technologically developed countries by directing a significant part of their production to export, besides facilities that operate to fulfill regional demand.

All pasta factories in Turkey produce the semolina required for their production in their own facilities. However, this is a system not widely seen among European and American producers, and it provides advantages such as low cost, standardization, research and development and high quality to Turkish producers.

FOREIGN TRADE OF DURUM WHEAT IN TURKEY

Pasta wheat import and export data of Turkey from 2000 to 2010 are given in the following table. Accordingly, the highest pasta wheat import was in 2008 with 151,554 ton and in 2010 it became to 80,628 with a decrease by 46%. Pasta wheat export was highest in 2000 with 817,610 ton and it became 348,372 ton in 2010 with a decrease of nearly 57%.

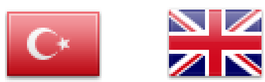
As the production costs are high, the possibility of Turkey to compete with world prices in wheat export is very low. For this reason, instead of in the form of raw material, the wheat is processed and exported as flour, pasta, bulgur, biscuit and other products. In this context, it is better to look at the pasta export of Turkey rather than wheat export rates.

According to the data of Turkish Statistical Institute, Turkey exported 160,000 ton pasta (67,230,000 Dollar) in 2006; 177,000 ton (204,242,000 Dollar) in 2007; 172,000 ton (170,656,000 Dollar) in 2008 and 213,000 ton (149,429,000 Dollar) in 2009. Pasta export rate in 2010 is 297,000 ton. The return of this amount is 185,964,000 Dollar.

Turkey is ranked among the first 5 countries in the world pasta export with these rates.




## DİL SEÇİN



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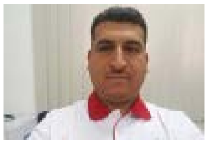

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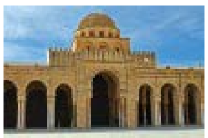

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