

ASTANA, KAZAKHSTAN
SEPTEMBER 27-28, 2018



**KAZAKH
DURUM
DAYS**

INTERNATIONAL CONFERENCE

ORGANIZER:



**KAZAKH
GRAIN UNION**

CO-ORGANIZER:



**NATIONAL CHAMBER OF
ENTREPRENEURS OF KAZAKHSTAN**

PARTNER:

syngenta
Kazakhstan

SPONSORS:

 **ATAMEKEN
AGRO**



Caring about quality
Baltic Control[®]
Baltic Control Kazakhstan



FERGUS
Kazakhstan



The 2nd Kazakh Durum Days

Conference was attended

by **104** participants

from **9** countries

and **64** companies

Radisson
HOTEL, ASTANA

Venue of the Conference

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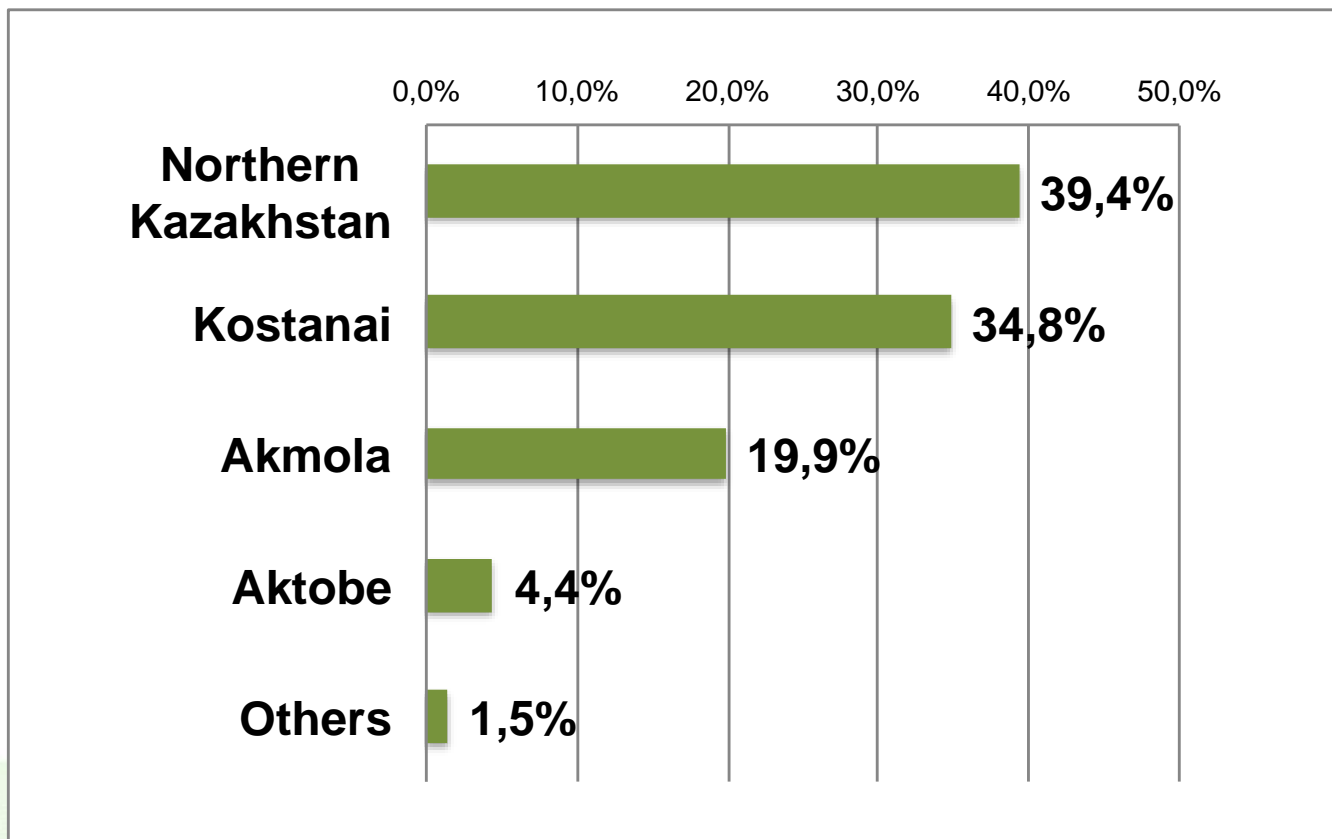
General overview of Durum Wheat Market in Kazakhstan

*by Mr. **Shokan Badykhan**,
Executive Director of
Kazakh Grain Union*



Keys production regions of Kazakhstan

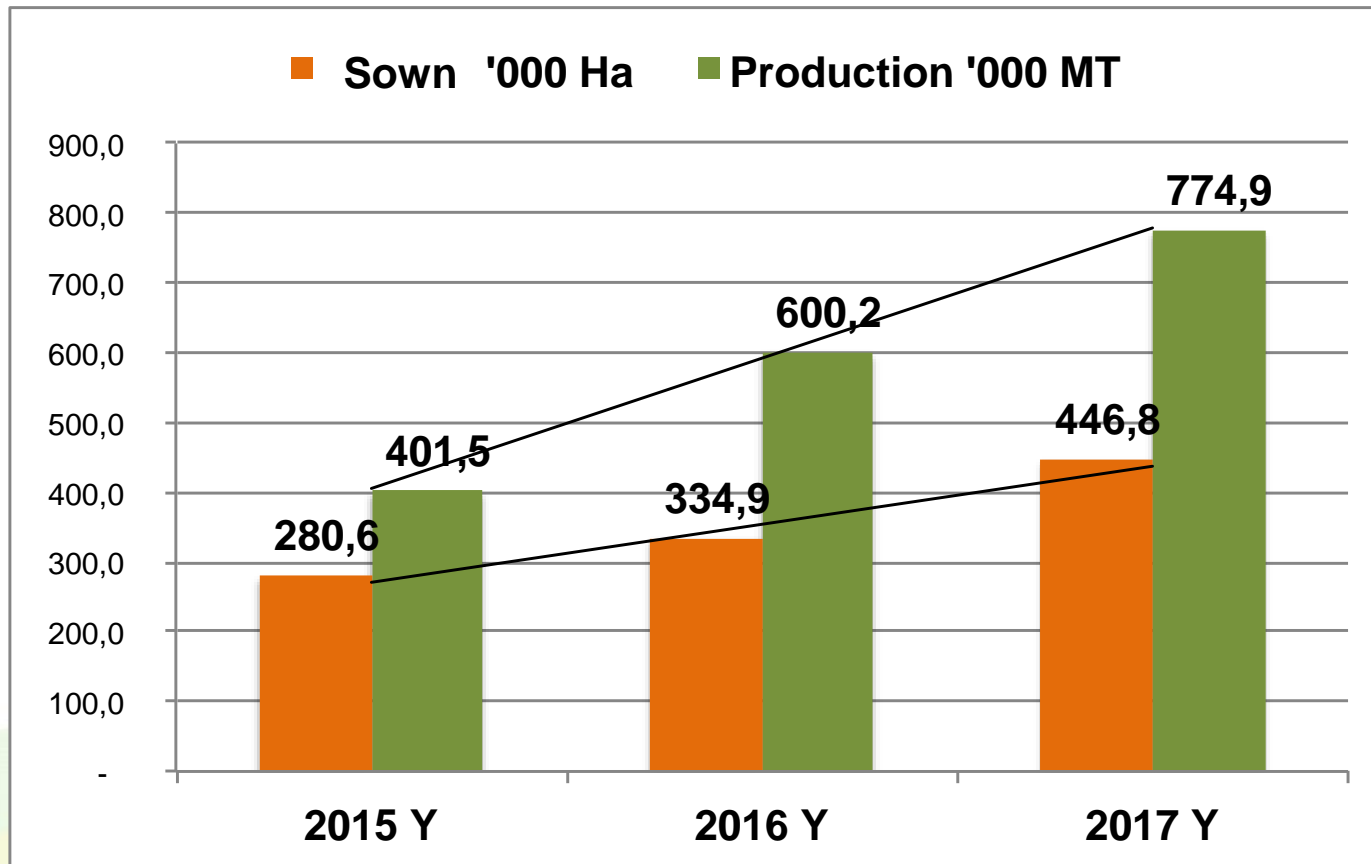
94,1 % of Durum wheat is produced in 3 regions.



** The data of national statistics of Kazakhstan*

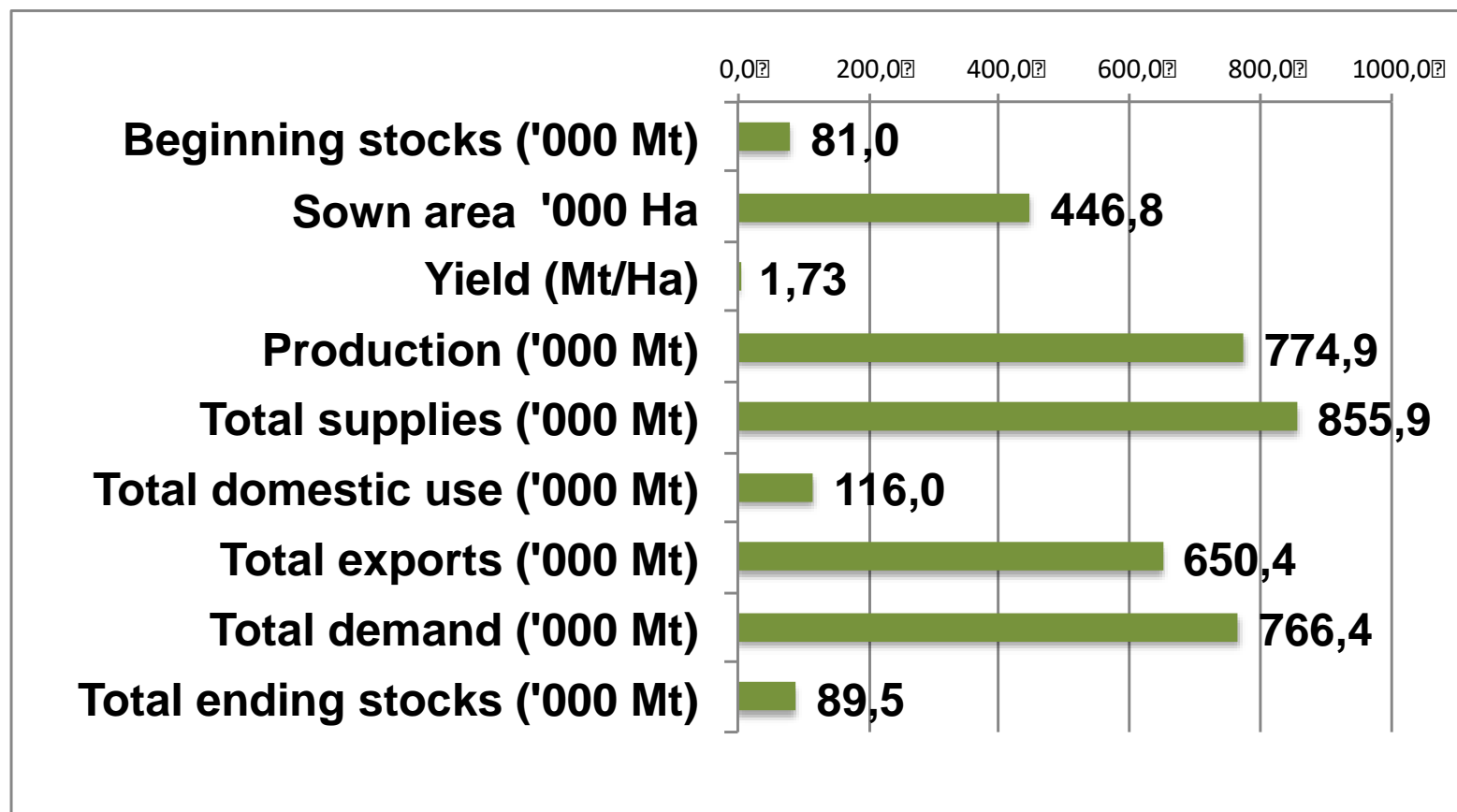
Production. 2015-2017

During the last 3 years the volume of Durum wheat **production** has increased from **401 477** Mt to **774 873** Mt, **yield** – from 1,43 to 1,73 Mt/Ha (+ 21%) .



* The data of national statistics of Kazakhstan

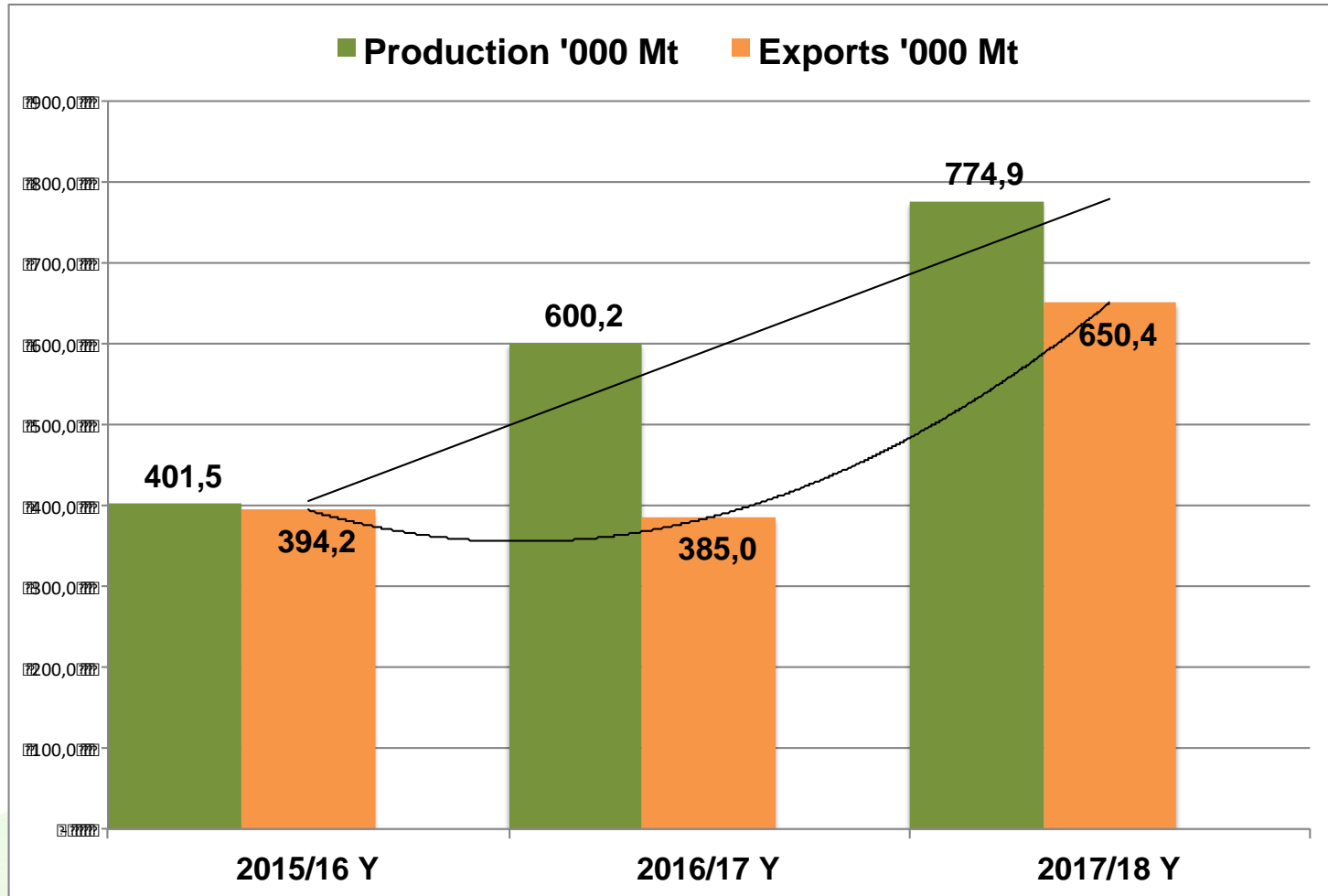
Balance 2017/18 MY



* The data of national statistics of Kazakhstan and Kazakh Grain Union

The ending stocks are similar to the long-term average.

Production & Exports



* The data of national statistics of Kazakhstan

Exports ('000 MT). 2017/18 MY

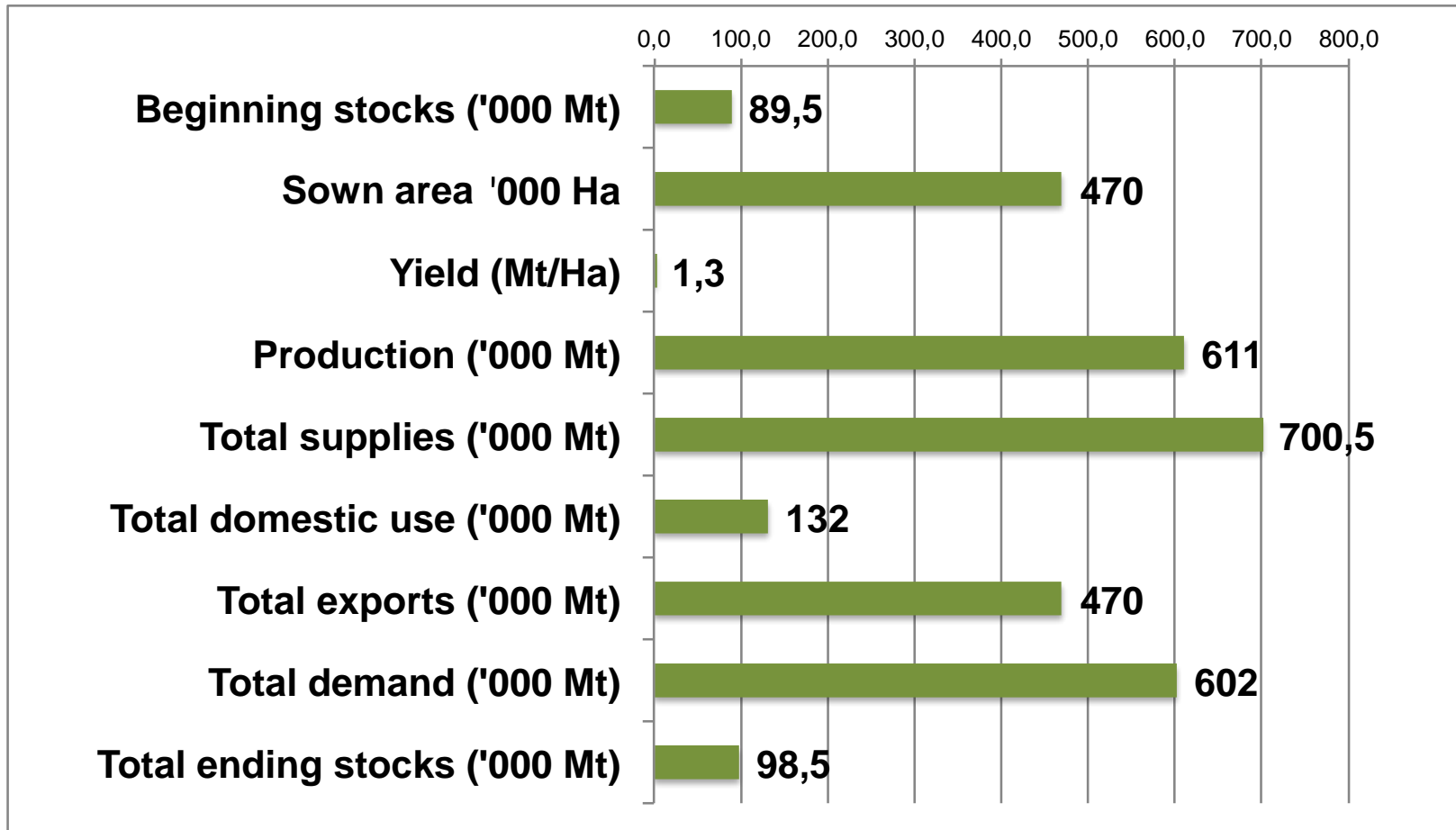
The exports to **ITALY** increased by 71% compared to 2016/17.
In TUNISIA was exported 28 977 MT (more than 1,5 times).

Total	650,4	100,0%
ITALY	336,2	51,7%
TURKEY	161,3	24,8%
RUSSIA	91,6	14,1%
OTHER COUNTRIES (11)	61,3	9,4%

** The data of customs statistics of Kazakhstan*

Exports to 14 countries.

Balance 2018/19 MY. Forecast



* The data of Kazakh Grain Union

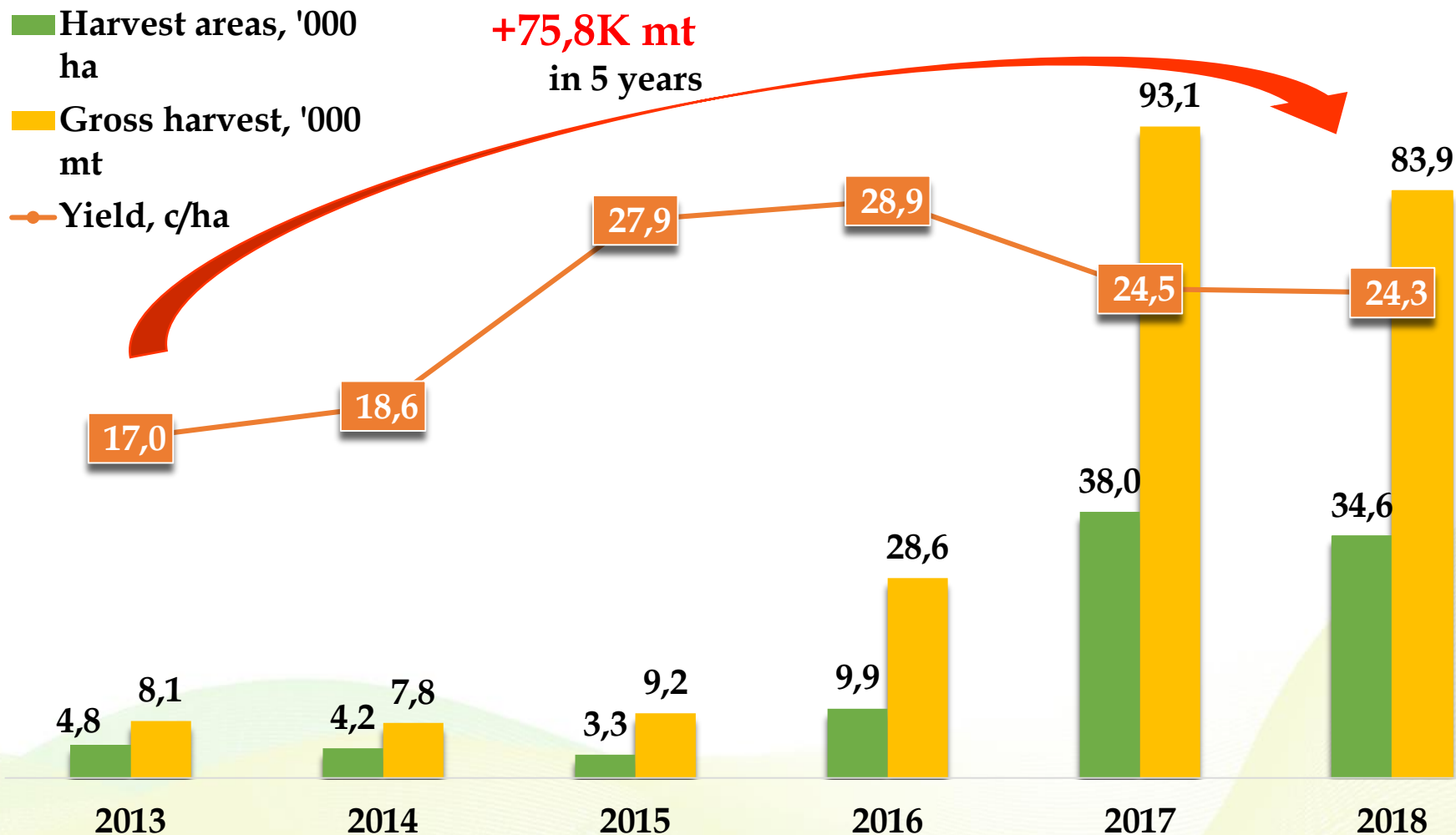
Durum Wheat production

(the case of Atameken-Agro JSC)

*by Mr. **Kintal Islamov**,
Chairman of the Board of
Atameken-Agro JSC*



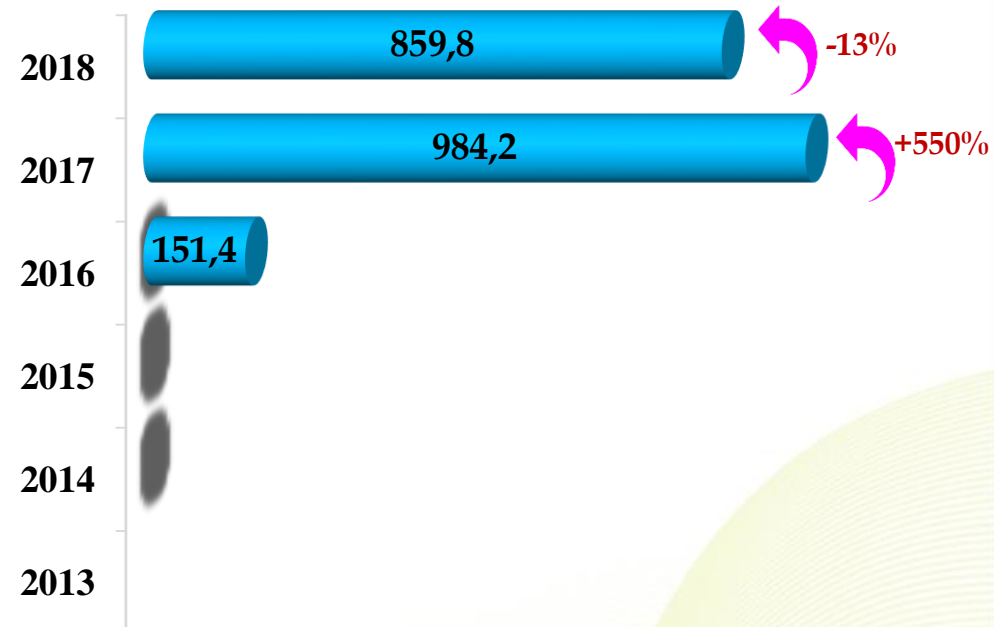
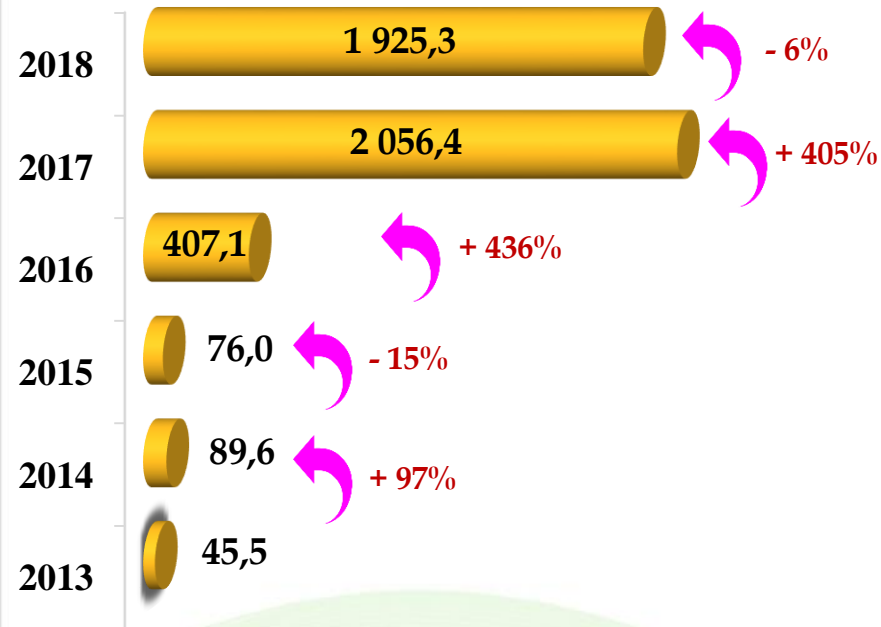
Durum Wheat gross harvest & yield in Atameken-Agro JSC



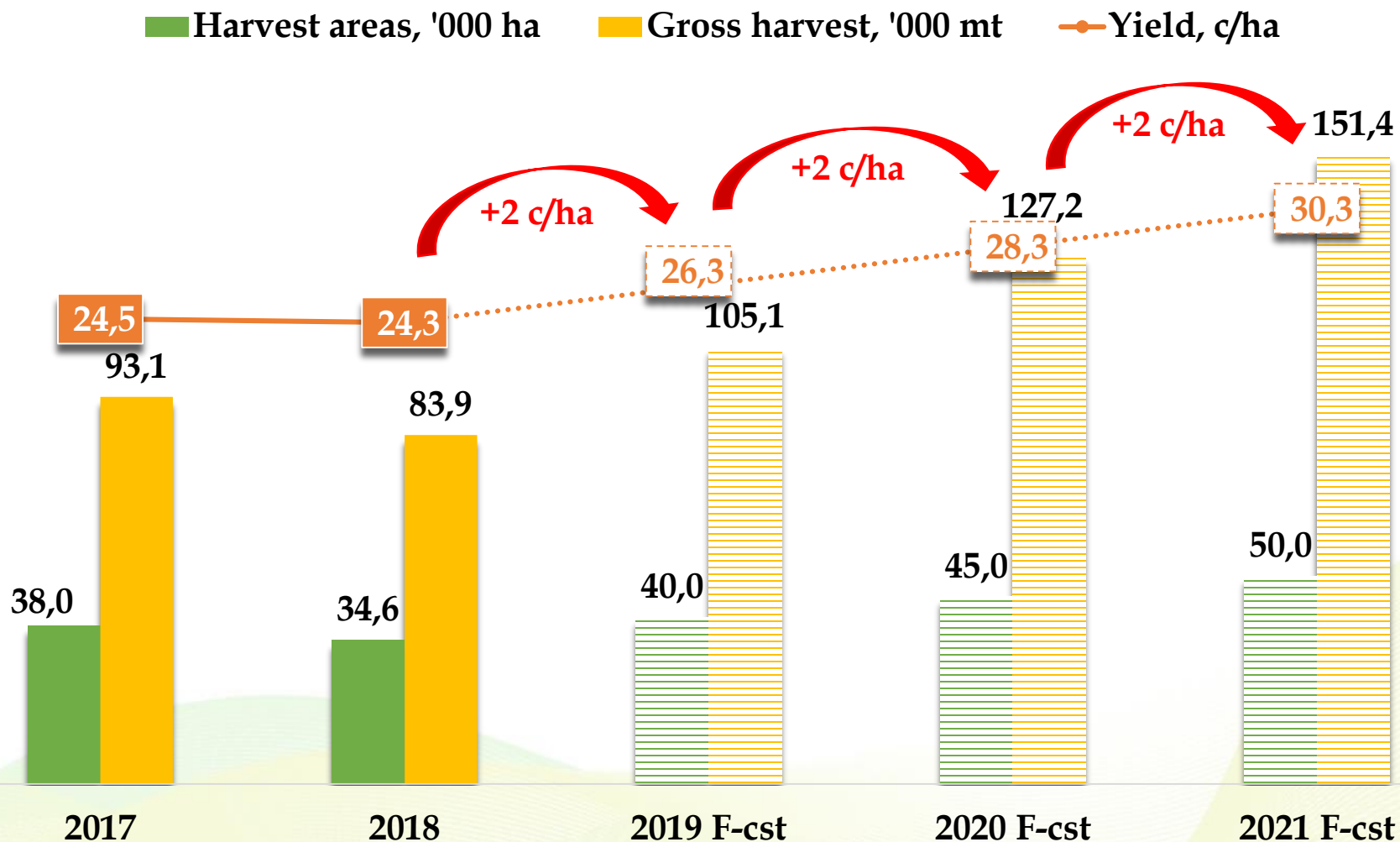
Dynamics of expenses for Durum Wheat crop protection means (CPM) & fertilizers in Atameken-Agro JSC ('000 USD)

CPM

Fertilizers



Actual & forecasted Durum Wheat production in Atameken-Agro JSC



Kazakh Durum Wheat quality evaluation

*by Mrs. **Svetlana Dashkevich**,
Head of the laboratory of
Barayev Research and Production
Centre for Grain Farming*



The quality of Spring Durum Wheat varieties, on the average of 2012-2017

Variety	Thousand-kernel weight, g.	Test weight, g/l	General vitreousness, %	Protein, (Nx5,7) %	Wet gluten %	FDM index	Carotinoid concentration, mg/100 g
ALTYN DALA	47,9	832	80	13,87	27,7	84	0,394
BEZENCHUKSKAYA 139	42,3	814	75	14,44	31,8	86	0,387
DAMSINSKAYA 90	46,0	811	77	14,53	33,9	85	0,367
DAMSINSKAYA ANNIVERSARY	41,6	811	80	15,30	31,0	77	0,371
DAMSINSKAYA AMBER	46,5	815	75	15,01	32,3	82	0,382
SIBERIA PEARL	42,0	818	78	14,14	30,1	86	0,491
KORONA	41,0	813	73	14,70	29,7	74	0,411
LAVINA	41,3	823	85	14,86	32,4	76	0,363
OMSK KORUNDUM	44,1	820	80	14,06	30,0	88	0,484
AVERAGE	43,6	817	78	14,54	31,0	82	0,405
MIN-MAX	41,0-47,9	811-832	75-85	13,87-15,30	27,7-33,9	76-88	0,363-0,491

Commercial and technical specifications of pasta, made from Spring Durum Wheat varieties *(data of 2012-2017)*

Variety	Dry pasta color, point	Fractural strength, g (point)	Cooking quality by volume, point	Cooking quality by weight, point	Cooked pasta color, point	General rating of pasta, point
ALTYN DALA	4,4	665(3,0)	2	5	4,6	3,8
BEZENCHUKSKAYA 139	3,8	677(3,0)	3	5	4,0	3,8
DAMSINSKAYA 90	3,9	709(3,8)	4	5	4,0	4,1
DAMSINSKAYA ANNIVERSARY	4,4	683(3,5)	3	5	4,5	4,1
DAMSINSKAYA AMBER	3,9	695(3,5)	4	5	4,0	4,1
SIBERIA PEARL	4,3	735(4,0)	2	5	4,4	3,9
KORONA	4,2	776(4,0)	3	5	4,3	4,1
LAVINA	4,0	722(4,0)	4	5	4,2	4,2
OMSK KORUNDUM	4,2	799(4,0)	3	5	4,3	4,1
AVERAGE	3,8-4,4	3,0-4,0	2,0-4,0	5	4,0-4,6	3,8-4,2
MIN-MAX	4,1	3,6	3,1	5	4,2	4,0

The quality of the best Spring Durum Wheat varieties of Italian selection on the average of 2012-2017

Variety	Thousand-kernel weight, g.	Test weight, g/l	General vitreousness, %	Protein, (Nx5,7) %	Wet gluten %	FDM index	Carotinoid concentration, mg/100 g
DAMSINSKAYA 90 STANDARD	45,3	795	72	14,61	33,1	81	0,356
LEVANTE	41,7	784	67	15,92	35,8	82	0,501
GREKALLE	38,0	722	71	15,67	36,8	89	0,461
KYLE	44,2	810	75	16,40	39,6	94	0,476
CANDURA	40,0	789	69	16,36	35,0	79	0,506

Variety	Dry pasta color, point	Fractural strength, g (point)	Cooking quality by volume, point	Cooking quality by weight, point	Cooked pasta color, point	General rating of pasta, point
DAMSINSKAYA 90 STANDARD	4,0	(865)5,0	4,0	5,0	4,0	4,3
LEVANTE	4,9	(863)5,0	4,0	5,0	5,0	4,7
GREKALLE	4,6	(802)4,0	3,0	5,0	4,7	4,3
KYLE	4,5	(879)4,6	4,0	5,0	4,6	4,5
CANDURA	4,0	(838)5,0	4,0	5,0	4,3	4,4

Technical Specifications for Kazakh Durum Wheat

*by Mr. **Daulet Zhampeiis**,
Deputy Director General of
Baltic Control Kazakhstan LLP*



Technical Specifications for Kazakh Durum Wheat

NAME OF THE PARAMETER	METHODS	LIMITS BY GRADES			
		KSD* №1	KSD* №2	KSD* №3	KSD* №4
TEST WEIGHT, kg/hl, not less than	ISO 7971:1986	78	76	74	71
MOISTURE, %, not more than	ISO 712:2006	14,0	14,0	14,0	14,0
PROTEIN, %, not less than	ISO 20483:2013	14,5	13,5	12,5	10,0
VITREOUSNESS, %, not less than	ICC 129	70,0	60,0	55,0	50,0
FALLING NUMBER, s, not less than	ISO 3093:2009	250	200	200	150
WET GLUTEN, %, not less than	ISO 21415-2	28,0	26,0	23,0	18,0
SOFT GRAIN ADMIXTURE, %, not more than	ISO 11051:1994	3,0	4,0	5,0	7,0
FOREIGN MATTER, %, not more than (total)	ISO 11051:1994	2,0	2,0	2,0	2,0
Foreign matter fractions should not exceed ISO 11051:1994					
GRAIN ADMIXTURE, %, not more than (total)	ISO 11051:1994	5,0	6,0	6,0	6,0
Grain admixture fractions should not exceed ISO 11051:1994					

* KSD – Kazakh Spring Durum

Additional quality methods

NAME OF THE PARAMETER	METHODS
YELLOWNESS INDEX	Chroma meter CR-410
GLUTEN INDEX	Glutomatic Gluten Index - Brabender
KERNELS WITH BLACKPOINT	ISO 11051:1994



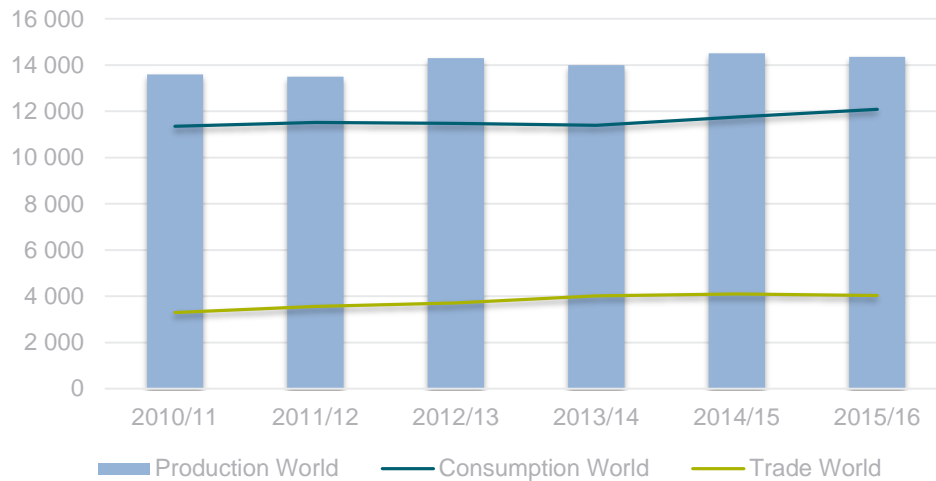
Durum Wheat & Pasta: GLOBAL MARKET TRENDS AND SYNGENTA ROLE

*by Mr. **Andrea Canzano**,
Key Account Manager,
Pasta Downstream Solution,
Syngenta Italy*

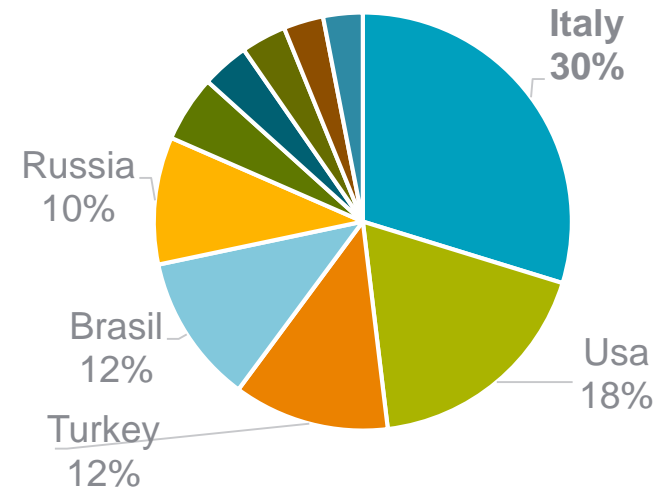


Pasta market and trends

World Production, Consumption and Trade
(1,000 t)



World pasta production (tons)



- Global durum pasta production 14 milion tons-stable mature market
- First 10 countries represent 70% global production
- Italy main pasta producer ; $\frac{1}{4}$ of pasta dishes eaten in the world is made with Italian pasta; BUT huge deficit in production (30-40% covered by import)
- Italy mature market-export playing a key role (Italy+Turkey representing 75% of total world export market)

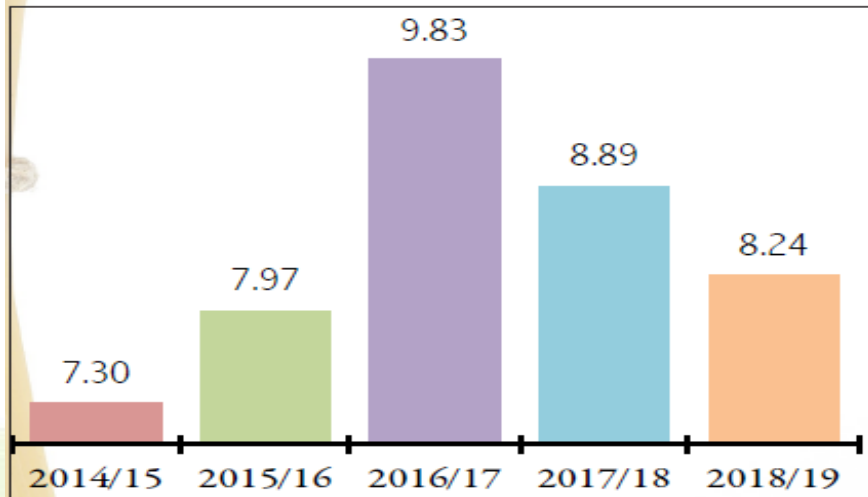
Durum Wheat market and trends

Supply balance WORLD

	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19
Beginning Stocks (1.000 t)	6,400	7,300	6,500	9,200	9,900	9,500
Production (1.000 t)	38,900	34,500	39,100	40,200	37,000	37,600
Imports (1.000 t)	8,200	9,300	8,600	8,700	8,600	8,700
Consumption (1.000 t)	38,000	35,200	36,800	39,600	37,300	37,700
Exports (1.000 t)	8,200	9,300	8,600	8,700	8,600	8,700
Ending Stocks (1.000 t)	7,300	6,500	8,700	9,900	9,500	9,500
Disappearances (1.000 t)	46,200	44,500	45,400	48,300	45,900	46,400
End.Stocks/Consumption (%)	19.21%	18.47%	23.64%	25.00%	25.47%	25.20%

- Supply tighter than expected due to cut in Canada production
- Good quality stocks available
- Pricing potential to increase

GRAPHIC 1: EU28 DURUM WHEAT PRODUCTION (Mt)



FR: Production and quality down in South while Atlantic coast /Poitou-Charentes, better yield; % of damaged grains is lower

IT: 3,9 Mt – huge variations in quality –good proteins/low specific weight/high defects

IB: 1.2 Mt – reasonable grain quality but low protein content (11-11,5% protein)

GR: huge variations-decent quality

Durum Wheat Import trends in UE

kt	15/16	16/17	17/18	18/19
Canada	1546	977	561	980
USA	438	203	170	320
Australia	101	141	210	150
Mexico	164	71	0	0
Kazakhstan	101	165	273	191
Others	154	139	192	43
Total	2504	1696	1406	1684

Key Driving factors:

- Higher request for Quality in UE/IT
- Label declaration of origin and subsidies as opportunity for Italian filiera
- Glyphosate-free request in Italy pushing US/Mexico/Australia/Kazakhstan

Kazakhstan can play a crucial role in the Global Durum wheat market scenario if Kazakh supply chain can reinforce its strengths:

- Right quantity and quality at the right prices
- Homogeneous batches
- Continuous availability of raw material for export & logistics

Pasta making is an art supported by science

Pasta makers needs



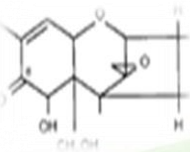
Pasta



Consistency
Fluency
Resistance to overcooking



Appearance (yellow;
black points)



Safety (mycotoxins;
Heavy metals; residues)



Technical parameters



Durum Wheat

	Genetics	Agronomy
Protein %	40%	60%
Protein quality	80%	20%
Gluten Index	80%	20%
Semolina colour	80%	20%
Black point	30%	70%
Vitroucity	40%	60%
Mycotoxin (DON)	60%	40%
Heavy Metals	40%	60%

Syngenta plays a key role in addressing all these needs

Syngenta varieties portfolio



Syngenta acquisition of the biggest Durum Wheat breeder In the World-Produttori Sementi Bologna-to leverage Full Durum Wheat portfolio Worldwide

Syngenta variety portfolio



Odisseo

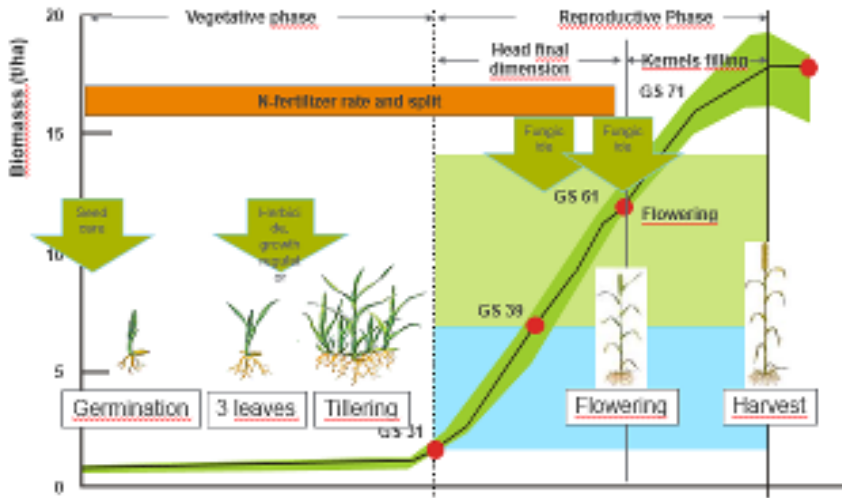
- Medium-maturity, suitable for all areas
- High yield potential combined with good quality
- Excellent tillering ability and high ear fertility
- Good tolerance to Fusarium head blight and Septoria



Obelix

- Tolerant to Fusarium head blight
- Good lodging resistance
- Yielding and medium-sized

Syngenta Protocol & Services

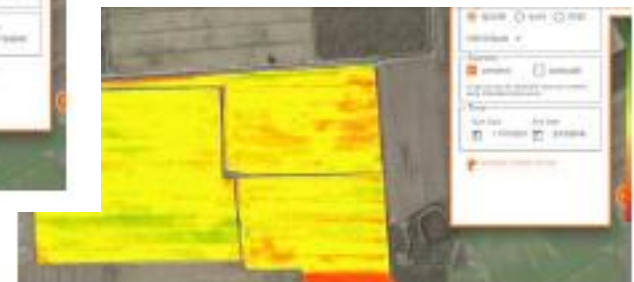
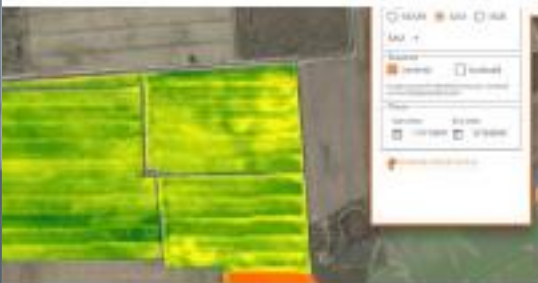


Variety genetic potential

adapted to variety profile, geography, agronomic practice, site yield potential

- Cultural practices
- Seedcare and CP Program
- Fertilizer regime

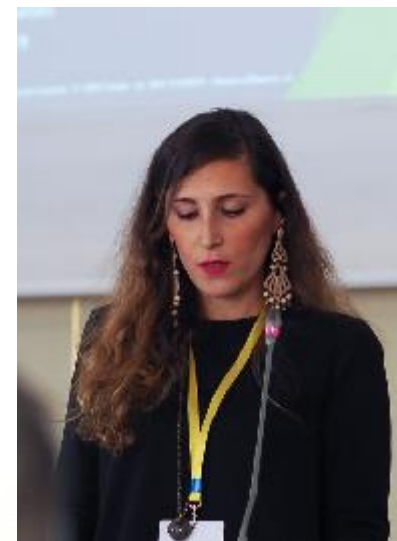
Deliver yield and quality according to Pasta & Food Partners specifications: Consistent, predictable, profitable



Targeted cultivation protocol to leverage at maximum level genetic potential, together with modern tool to monitor crops

ITALIAN DURUM MARKET: opportunities and challenges for Kazakh exports

*by Mrs. Marilena Balletta,
Chief trader of Luigi Fornara
Agricommodities Brokers SA*



Italian Imports of Durum from EU-28

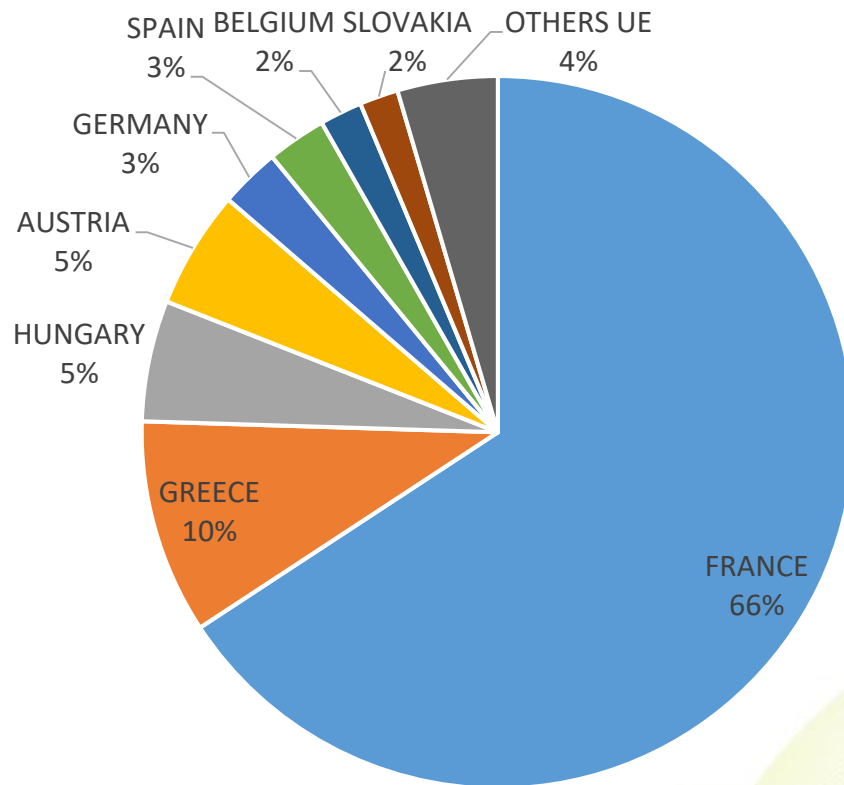
01/07/2017 - 30/06/2018

FRANCE
GREECE
HUNGARY
AUSTRIA
GERMANY
SPAIN
BELGIUM
SLOVAKIA
OTHERS UE

MT
469'091
69'410
39'175
38'161
19'537
19'201
13'753
12'536
32'461

TOT. 713'325

2016/2017 697'195

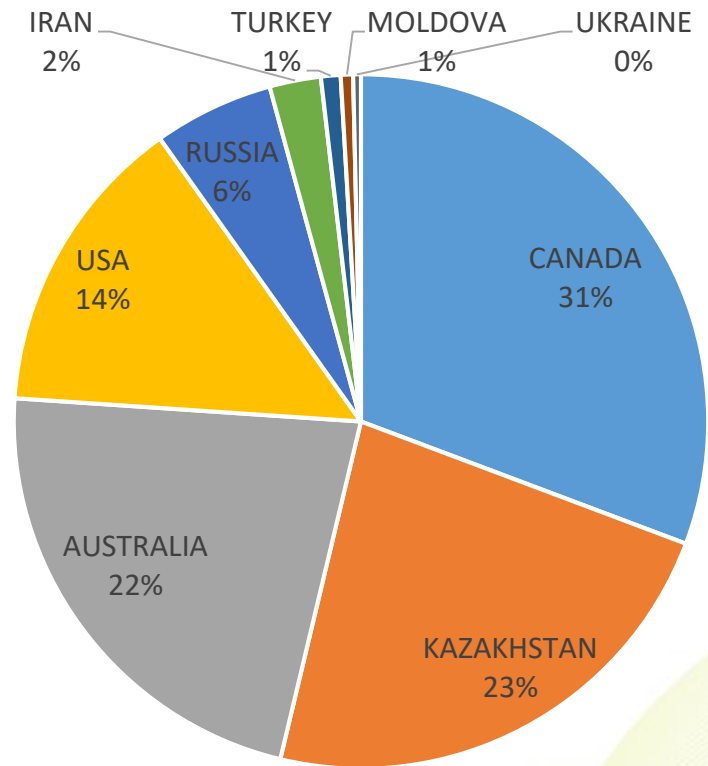


FRANCE GREECE HUNGARY AUSTRIA GERMANY
SPAIN BELGIUM SLOVAKIA OTHERS UE

Italian Imports of Durum from 3rd countries

01/07/2017 - 30/06/2018

	MT
CANADA	370'403
KAZAKHSTAN	277'391
AUSTRALIA	269'270
USA	169'962
RUSSIA	67'429
IRAN	28'818
TURKEY	11'000
MOLDOVA	6'915
UKRAINE	4'354
TOT.	1'205'542
2016/2017	1'429'265



TOP 5 IMPORT ORIGINS

Origin	MY 2017/18		MY / MY	MY 2016/17		MY / MY	MY 2015/16	
	MT	Share		MT	Share		MT	Share
FRANCE	469 091	30,10%	↑ 68,31%	278 704	18,20%	↑ 138,44%	116 885	6,09%
CANADA	370 402	23,80%	↓ -51,24%	759 575	49,60%	↓ -36,81%	1 202 043	62,61%
KAZAKHSTAN	277 392	17,80%	↑ 84,51%	150 337	9,80%	↑ 82,48%	82 384	4,29%
AUSTRALIA	269 270	17,30%	↑ 91,44%	140 652	9,20%	↑ 39,88%	100 553	5,24%
USA	169 961	10,90%	↓ -16,34%	203 165	13,30%	↓ -51,39%	417 920	21,77%

Source: DG TAXUD

- Kazakhstan: strong increase over the last three marketing years
- Canada: suffered from a strong decrease of market share (due to: vomis and glyphosate issues, and labelling mainly)
- France: EU origin, no customs clearing, cheap exportable low quality
- Australia: not only high grades, but lower grades with high pro imported, too

DESIRED/REQUIRED QUALITY PARAMETERS for imported goods to Italy

- Test weight: min 78 kg/hl
- Moisture: max 14% (better if lower)
- Protein: EVERYTHING HAS A PRICE (from 10.5 to 16%)
- Glassiness/vitreous/HVK: same as above (from 30% upwards)
- Broken: 5-6% max
- GMF (sprouted/mottled/fusarium): 4-5% max
- Soft wheat: max 3-4% (if >, at discount)
- Foreign matters: 2% max

-
- Falling number: min 220 sec

OF COURSE GOODS TO BE COMPLIANT WITH EU RULES,
including but not limited to Vomitoxins (DON max 1750 ppb),
Glyphosate (max 10 mg/kg), etc.

Importers'/End users' perspectives: STRENGTHS OF KAZAKH DURUM

- Adequate protein
- Very low gmf (no prob with black tips)
- Very low ashes (= easier to blend with high ashes origins, and economic advantage – no adjustment in the milling process needed, by keeping a full body semolina, instead of cutting off the offal from the “tail of the mill”)
- Low-to-zero don/vomi
- Lack of use of Glyphosate
- Size of vessels
- PRICE

ASHES ON DURUM (function of crop year)	
Kaz/Russ	1.55-1.60 (crop 2017)
Cwad	1.95 (crop 2017)
French	1.90 (crop 2017)
Australian	1.80 (crop 2018)
Italian	1.80-1.90 (crop 2018)

Importers'/End users' perspectives: WEAKNESSES OF KAZAKH DURUM

- Poor gluten (expressed as GLUTEN INDEX)
- Low color (Minolta b) – even though progress has been made
- When used for remilled semolina production (= baking purposes) P/L is extremely low (<0.20 vs. cwad 0.70, italian durum, 0.45-0.50, french 0.35, adr 0.90)



- Used in blends (in order to decrease impact of quality deficiencies, as above)
- Generally 20-30%

TRENDS AND PERSPECTIVES FOR KAZAKH EXPORTERS

OPPORTUNITIES:	CHALLENGES:
Temporary decrease in cwad mkt share	Logistics
Low quality of Greek/Spanish/French – partially	Quality (breeding programmes)
Australian crop 2018-2019 expected to be smaller than 2017-2018	

FORECAST ON THE VOLUME OF IMPORTS FOR THE CAMPAIGN 2018/19

(MT)	MY 2018/2019 (01/07/2018 – 23/09/2018)	MY 2017/2018 (01/07/2017 – 24/09/2017)	DIFFERENCE
EU	133.461	465.227	-331.766
ITALY	119.665	340.636	-220.971

TOP IMPORT ORIGINS into EU (update of 24 Sept.2018)

GRANO DURO	2018/19	2017/18	
Totale	133.461	465.227	-331.766
Canada	62.088	218.092	-156.004
Kazakhstan	37.613	35.740	1.873
Russia	22.286	17.686	4.600
Turchia	7.839	10	7.829
Stati Uniti	3.190		3.190

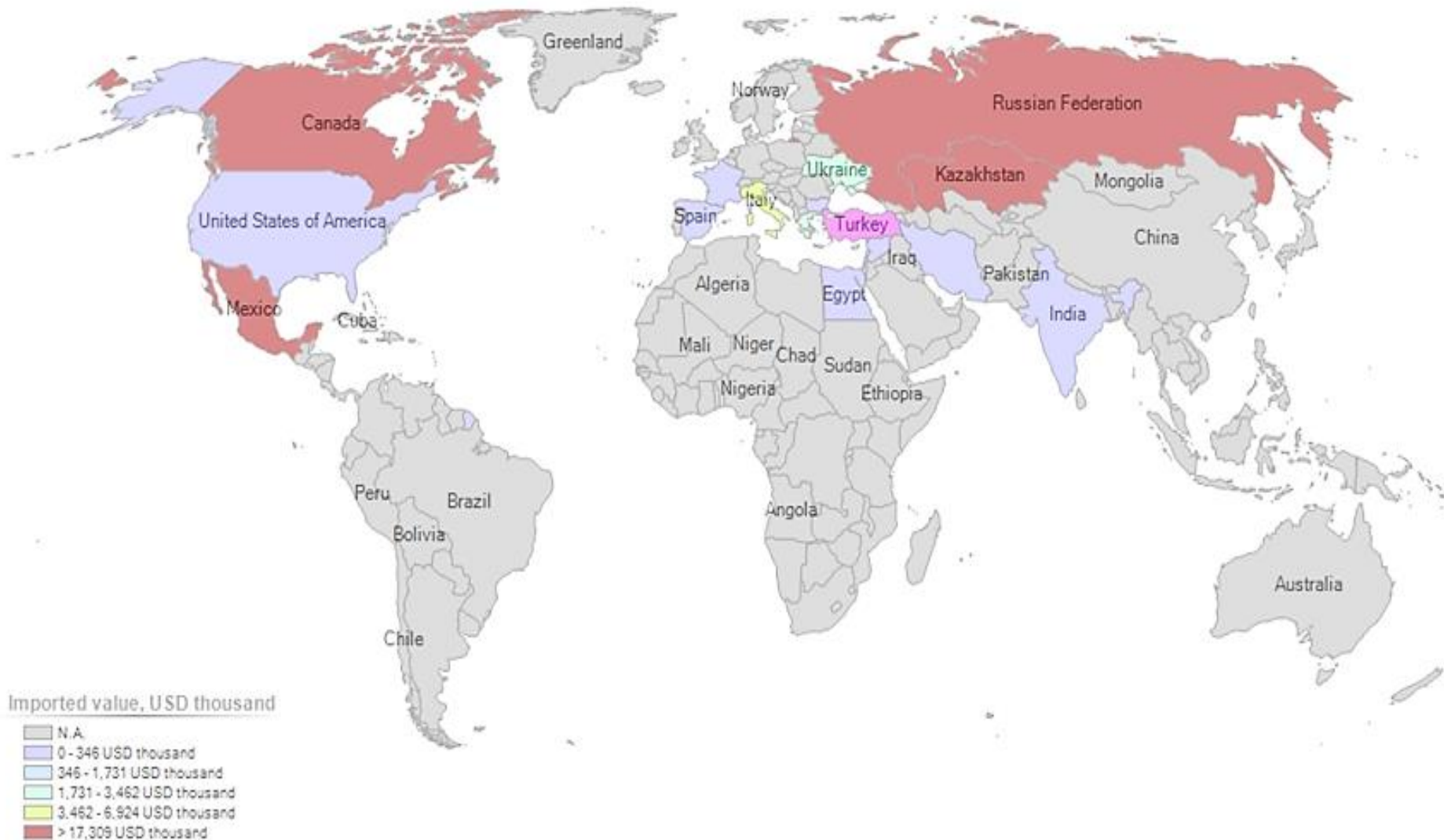
- 2017-2018, record year for kazakh exports;
- Hard to repeat such export numbers, unless goods at discount: price always rules;
- Unless French sellers were able to market the hipro/low vitr/high gmf in volume at competitive levels (difficult => high feed wheat prices).

Dynamics of TURKISH PASTA INDUSTRY & Global Durum Market

*by Mr. **Abdülkadir Külahçiođlu**,
President of the Turkish Pasta
Manufacturers Association*

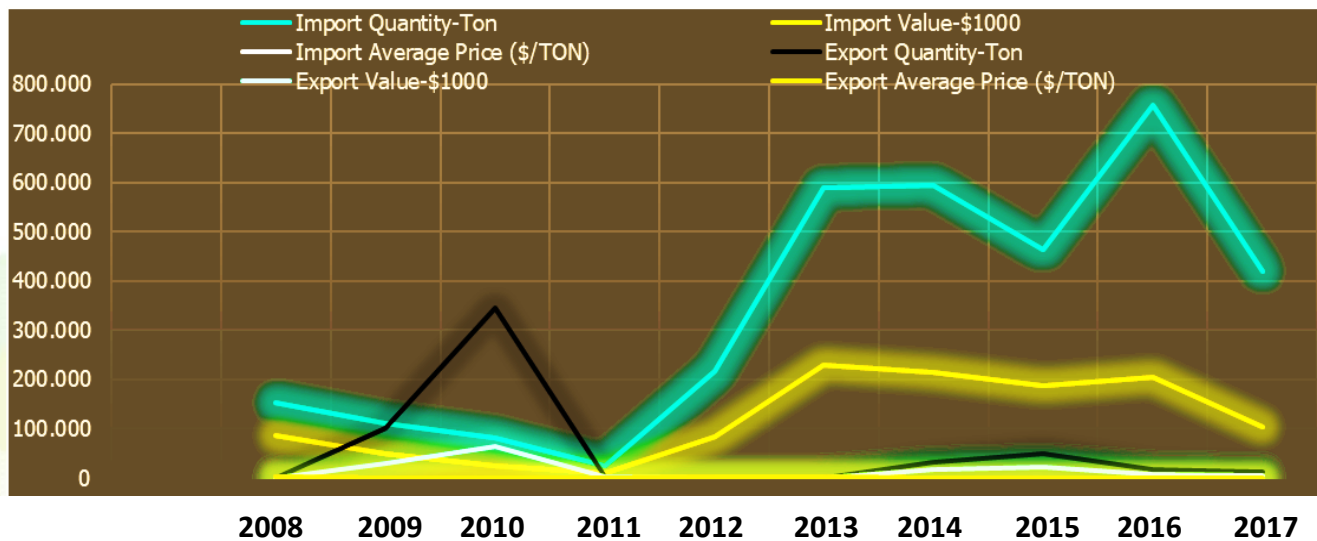


Global Map of Turkey's Main Durum Wheat Suppliers in 2017



Turkish durum wheat imports & exports

Year	IMPORT			EXPORT		
	Quantity-Ton	Value-\$1000	Average Price (\$/TON)	Quantity-Ton	Value-\$1000	Average Price (\$/TON)
2008	151.554	85.555	565	2	2	848
2009	111.342	48.694	437	100.335	28.573	285
2010	80.632	25.373	315	345.345	63.085	183
2011	24.440	9.465	387	1.883	814	432
2012	217.583	83.425	383	43	32	748
2013	588.539	228.563	388	135	102	755
2014	592.852	214.257	361	32.134	17.522	545
2015	463.989	187.016	403	48.077	22.487	468
2016	756.361	203.583	269	16.982	6.060	357
2017	419.094	103.681	247	10.845	4.274	394



Cyclical Conditions affecting Turkish Durum Market

- Turkish durum wheat imports figures are closely linked to our pasta production in general exports in particular
- Turkish pasta exports this year has witnessed a 19,5% increase over the previous year
- Last year (2017) Turkey has imported 419.000 tons of durum wheat
- However, we are expecting a slightly different trade dynamics due to some cyclical factors
- Taking into account the domestic production & recent exchange rates fluctuations, at the end of this year we expect imports of about 450.000 tons
- In terms of quality of domestic harvest, it does not seem for any differences to exist between the crop quality of the current and the past season

Price & Quality Forecast for Durum Market Parameters

- As you might have also noticed, we have recently faced an exchange rate fluctuations which also touched upon our durum markets
- In line with recent exchange rate hikes, Turkish domestic durum wheat prices remained below current international prices
- Therefore, this recent depreciation has affected the balance between domestic and international price/production equilibrium
- Our expectation for durum import price is around CIF \$230 per ton for the delivery at Mersin and Iskenderun ports

Expected Volume of Imports & special quality requirements in the coming season

- As it is well known, the quality of semolina, degree of vitreousness, level of protein and hectoliter are the main parameters or determinants of pasta quality
- We desire to see around 80% vitreousness, 12% or above protein ratio. In addition, we give utmost importance to the protein quality.
- More importantly, for measuring protein quality we see the gluten index as the main yardstick.
- 77 hectoliter or above is quite satisfactory level for us. For the manufacturing process, 78-79 hectoliter and above is even much better
- If the wheat is around 75 or 73 hectoliter, it goes below our criteria and it is considered as a low quality product

Quality requirements & Kazakh Wheat

- Kazakh wheat has a high protein value albeit with a relatively thick peel
- Indeed, we don't prefer thick peeled wheat, since as an input, it does drastically reduce overall/annual productivity
- Thick peel necessitates a process separation of the wheat bran which causes significant productivity losses as well
- Damaged kernel is another problematic issue for us
- It is either transformed into starch or it creates problems and constraints in production process
- Therefore, we want to see a quite low or a minimum level of damaged kernel for our purchases

Major Issues for the future prospects of Kazakh-Turkish Trade

- The logistics and transportation seems to be a major area for an enhanced trade between our regions
- The Baku-Tibilisi-Kars rail line which is considered as an 'iron silk road' made it possible for a faster and low cost transportation for Turkish-Kazakh products
- Through this new channel, exporting both wheat and other commercial products from Kazakhstan to Turkey and Europe has become now faster and cheaper

Logistics: Strengths & Weaknesses. How to develop a more efficient strategy?

- It is a well known fact that, in line with the increasing share in the global GDP, Kazakhstan has also made substantial investments to its logistic and transport
- We believe we can further improve our logistics infrastructure for a higher trade volume
- Currently, insufficient amount of containers and the need for a change at Turkish border are the main problems for transporting wheat from Kazakhstan to Turkey
- It is critical for our sector to transport products directly to Gaziantep and Mersin without a transfer or a change
- We are open to further talks and elaborations of logistics & other issues to reduce time & transaction costs in our current trade



**KAZAKH
DURUM
DAYS**



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**KAZAKH
DURUM
DAYS**



**PHOTO
REPORT**


ASTANA, KAZAKHSTAN
SEPTEMBER 27-28, 2018

KAZAKH DURING DAYS

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