



Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Scheduled Report - public distribution

Date: 7/29/1999

GAIN Report #NL9052

Netherlands

Tobacco

Annual Tobacco Report

1999

Approved by:

Phil Letarte

U.S. Embassy

Drafted by:

Tatiana van der Harst

Report Highlights:

- The Dutch cigarette industry is the largest in Europe, but production and consumption are not increasing.
 - With total production of over 1.8 billion cigars, senioritas and cigarillos, the Netherlands is the second largest cigar manufacturer in the world.
 - The U.S. remains the most important supplier of flue-cured and dark fire-cured tobacco to Dutch tobacco products producers.
-

Includes PSD changes: Yes
Includes Trade Matrix: YesW
Annual Report
The Hague [NL1], NL

Table of Contents

Executive Summary	1
Production - Cigarettes	2
- Cigars	2
- Smoking and Cut Tobacco	3
Macro-Economic Importance of the Tobacco Industry in the Netherlands	3
Consumption * - Cigarettes & Smoking and Cut tobacco	4
- Cigars	6
Trade - Cigarettes	7
- Cigars	7
- Smoking and Cut Tobacco	9
- Homogenized Sheet	9
Factors Affecting U.S. Trade	9
Prices - Cigarettes	11
Distribution - Cigarettes	12
- Smoking and Cut Tobacco	12
- Cigars	13
- Quality, Safety and Health Regulations	14
Marketing	14
Statistical Tables (PSD & Trade Matrices)	15

Executive Summary

After a decline in 1996 and a 7.9 percent increase in 1997, domestic sales and production of cigarettes stabilized in 1998.

Total Dutch imports of raw tobacco decreased to 84,813 metric tons in 1998, down 19 percent from 1997. The decrease is primarily attributable to the use of last year's stocks .

Dutch production of smoking and cut tobacco was stable at 29 billion kilos. Export markets continue to be of major importance for both products. Almost 99 percent of Dutch cigarette production is exported to the European Union, mostly to France and Italy, whereas almost 50 percent of the smoking and cut tobacco is exported. Major markets for the latter are Switzerland, France and Belgium.

In 1998, the United States remained the largest single supplier of flue-cured tobacco to the Netherlands with a 35.6 percent share of the market, up from 25.4 percent in 1997. Brazil and Zimbabwe follow, with Brazil's market share at 27.4 percent and Zimbabwe's at 14.8 percent.

NOTE: due to the elimination of EU intra-border controls, intra-EU trade statistics are no longer gathered through customs declarations. The Dutch Central Bureau of Statistics (CBS) now depends on direct reports from importers and exporters on intra-EU movement of goods. Companies with a relative small trade volume have been exempted from this trade reporting requirement. However the response of importers and exporters has been such, that intra-EU trade statistics are not complete. Therefore, figures used are mainly based upon available trade statistics, speculations and assumptions made by the trade and Office of AgAffairs estimates.

Production - Cigarettes

c *Production is steady*

Total Dutch cigarette production was stable at 116,263 million pieces in 1998 (compared to 116,255 million in 1997). The two largest cigarette manufacturers in the Netherlands are Rothmans Manufacturing (Holland) B.V. and Philip Morris Holland B.V.

Production of the cut tobacco industry (roll-your-own, pipe- and chewing tobacco) stabilized in 1998. Total production volume in 1998 totaled 29,000 million kilos (compared to 28,072 million kilos in 1997). In the Netherlands, Imperial Tobacco Nederland/Van Nelle Tabaksmaatschappij B.V., Koninklijke Theodorus Niemeyer B.V., Tabaksfabriek Heupink & Reinders B.V., Biggelaar Tabak b.v. and Tabakskerverij J.B.G. Bloemen B.V. account for the total production of the different cut tobacco products.

The names and contact information for the four major Dutch cigarette manufacturers follow:

B.A.T. Nederland b.v.

Deccaweg 26
1042 AD Amsterdam
Tel. 31-20-587.12.22
Fax. 31-20-611.77.23

R.J Reynolds Tobacco b.v.

Vreelandseweg 46
1216 CH Hilversum
Tel. 31-35-622.28.88

Philip Morris

Marconilaan 20
4622 RD Bergen op Zoom
Tel. 31-164-295.000

Rothmans Nederland b.v.

de Boeelaan 32
1083 HJ Amsterdam
Tel. 31-20-541.68.11
Fax. 31-20-646.29.15

Reemtsma Nederland b.v.

Comeniuslaan 10
1412 GP Naarden
Tel. 31-35-694.97.66

- Cigars

A substantial part of the Dutch cigar production takes place by affiliates located just across the Belgium border or in Ireland and even in Sri Lanka. In most cases, semi-manufactured cigars are made in the "foreign" affiliates and subsequently "exported" to the Netherlands and finished in this country. The Dutch Central Bureau of Statistics considers both cigars that have been entirely produced in the Netherlands and those that have been semi-processed at a foreign affiliate as domestic production.

The Netherlands: Cigar Production (million pieces)			
	1995	1996	1997
cigars, senioritas,cigarillos	1,759	1,776	1,889

Source: NVS, & Central Bureau for Statistics (no 1998 figures available yet)

With a total production of almost 1,900 million cigars, senioritas and cigarillos each year, Holland is the second largest cigar manufacturer in the world!

- Smoking and Cut Tobacco

After decreases in 1995 and 1996, production stabilized in 1998 with the Dutch cut tobacco industry producing 29.0 million kilos of product. The competitiveness and strength of the Dutch roll-your-own tobacco industry has a direct bearing on the importation of U.S. dark fire cured tobacco which is an indispensable ingredient for this product.

The names of the four producers of roll-your-own and pipe tobacco in the Netherlands follow.

Tabakskerverij J.B.G. Bloemen B.V.

De Mors 120
7631 AK Ootmarsum
Tel. 31-541-291218

Tabaksfabriek Heupink & Reinders b.v.

De Mors 84
7631 AK Ootmarsum
Tel. 31-541-291285

Imperial Tobacco Nederland/Van Nelle Tabak Nederland

Tabaksmaatschappij B.V.
Van Nelleweg 1
Tel. 31-10-4464444

Koninklijke Theodorus Niemeyer b.v.

Theodorus Niemeyerstraat 1
9726 BB Groningen
Tel. 31-50-3664911

The Netherlands is by far the largest producer of roll-your-own tobacco in Europe although it is also produced in other European countries such as the U.K., Germany, Norway, Denmark and France.

Macro-Economic Importance of the Tobacco Industry in the Netherlands

The tobacco industry contributes to the Dutch economy in terms of employment, tax yield and trade. According to research completed in 1997, 25,000 people are employed in the tobacco industry. The Dutch Government receives yearly more than 2 billion Euro from taxes and excise taxes. By contrast, the tobacco industry in the 15 member states of the EU employed an equivalent of one percent of total employment in the EU. Indirectly, 20,000 work in distribution, wholesale, retail and advertising. Tobacco companies have a remarkably long "lifetime" of, on average, 156 years. The regular lifetime of a company in the Netherlands is 12.5 years.

Consumption * - Cigarettes & Smoking and Cut tobacco

National Consumption

C Minimal decline in cigarette sales

C Sales of cut tobacco stable

After a increase of 7.9 percent in 1997, sales dropped by 1 percent in 1998. In pieces, sales decreased from 16.640 million in 1997, to 16.623 billion in 1998. On a value basis however there was an increase of 5 percent compared to last year.

On a volume basis, sales of cut tobacco increased by 2 percent to 14.4 million kilos. However, on a value basis, sales were up 7 percent.

The Dutch Cigarette Manufacturers Association publishes the following figures on smoking habits of the Dutch people in the age category 18-65 years. This category consists of about 11 million men and women. In 1998, 37.1 percent (36.6 percent in 1997) of the adult population smoked, which is approximately 4.08 million persons.

Smoking Demographics			
	1996	1997	1998
Non-smokers	63.0%	63.4%	62.9
Smokers	37.0%	36.6%	37.1
<u>Smokers smoke:</u>			
- Cigarettes	36.8%	34.7%	36.3%
- Roll-your-own	23.2%	23.9%	23.9%
- Cigarettes and r-y-o	31.4%	32.8%	31.2%
- Other	8.6%	8.6%	9.6%
Smoking Men:	53.2%	53.5%	53.4%
Smoking Women:	46.8%	46.5%	46.6%

Source: Association of the Cigarette Industry

*) The PS&D consumption figure is the residual of production plus imports minus exports. However, the Dutch Cigarette Manufacturers Association uses tax seal figures to compute "true" consumption figures and makes adjustments for the so-called anticipation purchases and border sales. Anticipation purchases occur when a price increase is announced. Border sales are purchases of cigarettes in the Netherlands by visiting Germans or Belgians who come to the Netherlands to buy Dutch cigarettes which are less expensive than those sold in their own country.

The Most Popular Cigarette Brands by Sales:			
	1996	1997	1998
1. Marlboro	20.4%	21.4%	21.9%
2. Camel filter	9.0%	8.3%	8.4%
3. Marlboro lights	6.7%	7.7%	8.5%
4. Barclay	6.1%	5.9%	6.0%
5. Peter Stuyvesant	5.9%	5.6%	5.3%
6. Caballero filter	5.4%	5.5%	5.7%
7. Caballero plain	5.1%	4.6%	4.2%
8. Pall Mall Export filter	3.6%	3.4%	3.3%
9. Gladstone Mild	2.6%	2.3%	2.2%
10. Camel Mild	2.0%	2.0%	2.2%

Source: Association of the Cigarette Industry

- Cigars

Over the past several years, the market share of the cigarillo has grown while the market share of the larger cigars such as the senioritas has declined.

Total of Male Cigar-Smokers in 1997 (smoking >1 cigar/day)	
Age	Number of smokers
20-24	25,000
25-34	70,000
35-44	85,000
45-54	85,000
55-64	50,000
>65	60,000

Notable consumption trends include a decline in the number of older people that smoke the bigger cigars, and a tendency on the part of younger people to smoke cigarillos. Many smokers turned in their cigarettes for small cigars, believing cigars to be less damaging to their health.

Consumption of Cigars and Cigarillos in the Netherlands (1995-1998)				
Year	# Pieces (Millions)	Value (mill.Dutch guilders)	Per Capita Pieces	Value in Dfl.
1995	455	244.8	29	15.79
1996	425	236.7	27	15.28
1997	442	260.8	28	16.75
1998	470	279.0	30	17.82

Source: Dutch Association of Cigar Manufacturers

Trade - Cigarettes

C *Decreased Exports of Cigarettes, Cigars and Cut Tobacco*

After years of increased exports, there was a slight decrease in 1998.

The Netherlands exported 110.5 billion pieces in 1998 (compared to 115 billion in 1997). This represents an decrease of approximately 4%.. In value there was an increase due to higher prices. The position of the Netherlands being the largest exporter of cigarettes in Europe was maintained..

Of the total production, over 99 percent (which is an increase of 9 percent) was exported to countries of the European Union, of which Italy and France are the most important countries for the export of cigarettes.

Year	Total exports (million pieces)	% of domestic production
1994	84,952	90.8
1995	92,914	88.4
1996	103,473	92.0
1997	115,215	90.0
1998	110,527	99.0

Source: *Sichting Sigaretten Industrie*

Note: these figures are different than the figures from CBS, which are used in the PS&D tables

- Cigars

Dutch imports from other EU Member States(excluding unfinished products from Belgium and Ireland) were of minor importance in 1998, except for imports from Germany and the United Kingdom.(these companies are often Dutch affiliates)

Some 30 million cigars and cigarillos were imported from Germany, and about 12.4 million pieces from the United Kingdom. Furthermore, approximately 17 million cigars were imported from the Dominican Republic.

IMPORTS	Number of pieces (x1,000)
Country	1998
France	16,901
Germany	30,025
United Kingdom	12,373
Denmark	9,556
Other EU Countries	586
<i>TOTAL European Union</i>	69,441
U.S.A.	4,243
Honduras	5,132
Dominican Republic	17,346
Indonesia	1,631
Other Countries	336
TOTAL	98,142

Source: NVS, they do not include unfinished product from the BLEU

EXPORT	Number of pieces (x1,000)
Country	1998
France	619,554
BLEU	572,037
Germany	206,214
Italy	76,889
United Kingdom	221,211
Other	251,012
<i>TOTAL European Union</i>	1,949,915
Norway	13,284
Switzerland	18,118
United States	31,787
Canada	9,233
Other	129,695
GRAND TOTAL	2,183,819

Source: NVS

In 1998, more than 2.1 billion cigars and cigarillos were exported to over 100 countries. The major destinations for Dutch exports were located within the EU; some 89% of total Dutch exports went to countries within the European Union. The leading export destinations were, in order of importance: France, BLEU, the United Kingdom, and Germany.

- Smoking and Cut Tobacco

Exports of smoking and cut tobacco decreased slightly in 1998 by 55,000 kilos. Total exports amounted to 14,3 million kilos in 1998 as compared to 14,8 kilos in 1997. (Source: *Sichting Sigaretten Industrie*)

The Netherlands shag tobacco industry is working very hard to develop export markets as they believe it is the only possibility to expand production. Surrounding countries such as Germany and Belgium are important customers of the Dutch roll-your-own tobacco industry, whereas the French market is slowly developing an interest as well. Of the total production, over 50 percent is exported.

- Homogenized Sheet

The bulk of homogenized sheet tobacco imports come from the U.S. and is used as a filler in the cigarette industry and cigar binder. These imports from the U.S. are reportedly only for the Philip Morris plant in the Netherlands. Although official production figures are not available, reliable sources mention an annual production of 500 to 600 MT.

Factors Affecting U.S. Trade

U.S. tobacco remains the preferred tobacco for Dutch tobacco product manufacturers, especially if it is price competitive. The U.S. flue-cured tobacco is needed for flavor. The dark fire-cured tobacco from Kentucky is considered almost indispensable for making the roll-your-own or shag tobacco which is very popular in the Netherlands. This is particularly true in times when the economy is in a recession.

The U.S. market share as a percentage of total imports increased from 21.5 percent in 1997 to 28.1 percent in 1998. An increase in cigarette production in the Netherlands will likely result in increased imports of U.S. flue-cured tobacco. However, for burley tobacco, imports from the United States will be driven by the "just in time" buying policy of the cigarette manufacturers. The companies will continue to allow the leaf dealers to hold the tobacco in their U.S. inventories until it is absolutely necessary.

Imports & Exports of Total Unmanufactured Tobacco
(Metric Tons/Values in 1,000 Guilders)

Imports	1996		1997		1998	
	VOLUME	VALUE	VOLUME	VALUE	VOLUME	VALUE
Flue Cured	49,267	389,279	47,879	482,057	32,893	479,565
Burley	14,676	163,897	15,560	168,643	16,998	200,118
Dark Air	5,365	39,199	3,121	30,391	2,533	25,099
Oriental	12,023	81,089	18,567	160,589	13,496	141,426
Dark Fire	11,799	78,415	10,449	86,951	7,615	66,700
Grand Total	93,130	751,879	95,576	928,631	73,535	912,908

Exports	VOLUME	VALUE	VOLUME	VALUE	VOLUME	VALUE
Flue Cured	6,223	42,034	5,326	47,478	3,000	30,469
Burley	981	4,945	1,571	10,984	745	6,312
Dark Air	3,614	33,773	2,685	28,600	1,512	14,418
Oriental	308	2,733	1,224	11,929	1,231	14,837
Dark Fire	379	14,016	322	20,322	445	40,873
Grand Total	11,505	97,501	11,128	119,313	6,933	106,909

Source: Central Bureau for Statistics

Prices - Cigarettes

The price of one pack of 25 cigarettes is as follows:

As of:	Dutch guilder	US\$1.00=Dutch guilder
Jul 1, 1992	5.10	1.76
Jan 1, 1993	5.50	1.86
Oct 1, 1994	5.65	1.70
Oct 1, 1995	5.75	1.60
April 1, 1997	6.15	1.90
April 1, 1998	6.45	2.07
Jan 1, 1999	6.70	1.88

The EU excise tax on cigarettes was "harmonized" in 1993 at a minimum of 57 percent of the retail price. The Netherlands implemented the EU excise tax directive in that same year. However, as different EU countries have different retail prices, excise taxes are in reality far from harmonized. This is especially the case in northern EU countries which have much higher cigarette prices than the southern "monopoly" countries. For instance, cigarette prices in Denmark are five times as high as those in Spain. The southern European countries do not want to increase their prices as they are afraid of competition of the more popular cigarettes (mostly American blends) from the northern EU countries. As there is now one open EU market, the northern countries fear the influx of the less expensive southern EU cigarettes in their markets.

Prices of Cigarettes as of Jan. 1, 1999 (Prices for 25 Piece Package)		
	Guilders	Percent
Retail price	6.70	100.00
of which:		
Excise tax	3.82	57.00
Value Added Tax	1.00	14.9
Cost and margins	1.88	28.1

- Distribution - Cigarettes

Type of outlet - cigarettes	1998
Tobacco specialty shops	20.1%
Supermarkets	30.5%
Petrol stations	14.0%
Restaurants & café's	21.0%
Other	14.4%

- Smoking and Cut Tobacco

The table below shows price changes for a 50 gram pouch of shag tobacco in the most popular price bracket:

As of:	Dutch guilder	US\$1.00=Dutch guilder
Jul 1, 1992	5.60	1.76
Jan 1, 1993	5.60	1.86
Oct 1, 1994	5.75	1.70
Dec 31, 1995	5.90	1.60
April 1, 1997	6.30	1.90
April 1, 1998	6.60	2.07
Jan 1, 1999	6.85	1.88

Taxes on shag tobacco 50 gram pouch are as follows : (Jan. 1, 1999)		
	Guilders	Percent
Retail price	6.85	100.0
of which:		
Excise tax	3.22	46.9
Value Added Tax	1.02	14.9

Cost and margins	2.61	38.2
------------------	------	------

- Distribution - Cut Tobacco

Type of outlet - cut tobacco	1996	1997	1998
Tobacco specialty shops	44.3%	44.7%	44.2%
Supermarkets	22.6%	22.2%	18.9%
Petrol stations	12.0%	12.9%	13.4%
Restaurants & caf�es	11.2%	9.4%	10.5%
Other	9.9%	10.8%	13.0%

When comparing the distribution of roll-your-own with cigarettes, shag tobacco is sold less often at cafes than cigarettes. The main reason for this is the availability of cigarettes in restaurants and cafes.

- Cigars

Cigars and cigarillos are sold in many different sorts of outlets. The following table shows the marketshare of these outlets in 1997. (1998 not available yet)

Type of outlet - cigars	1996	1997
Tobacco specialty shops	49%	50%
Supermarkets	14%	14%
Petrol stations	18%	18%
Restaurants & caf�es	5%	3%
Other	14%	15%

- Quality, Safety and Health Regulations

Anti-smoking regulations require health warnings to cover 15 percent of billboards and posters while warnings in print media must cover 10 percent. No advertising on billboards is allowed, except on the two Dutch racetracks. Television advertising is also not allowed. Advertisements cannot link smoking with sports; youth or health care. People under 25 are not allowed to appear in ads. No advertising is permitted in the neighborhood of health care centers and schools. Cigarette advertising in cinemas has not been allowed since January 1996. Free sampling of cigarettes is banned. Restrictions on smoking in specific public places are currently in effect. Health warnings, along with tar and nicotine levels are required on cigarette packages. There are no labeling requirements for cigars nor is there a tar and nicotine figure requirement for shag tobacco.

A smoking ban exists for government-subsidized cultural institutes. In addition to the smoking ban, more stringent regulations are also planned for cigarette advertising. In addition, the cabinet is investigating whether cigarette prices can be increased. These plans have sparked angry reactions from the tobacco industry which claims that more and more restrictions are being imposed every year.

Marketing

MARKET DEVELOPMENT OPPORTUNITIES

Because of the EU's 1993 legislation for maximum levels of tar/nicotine (to be effective in 1998), there may be a minor shift to lighter tobaccos. Appropriate machinery and specific filters have been designed to adapt to new legislation related to tar/nicotine requirements.

Statistical Tables (PSD & Trade Matrices)

PS&D Tables - Trade Matrices

- Tobacco, Unmfg.

PSD Table						
Country	Netherlands					
Commodity	Tobacco, Unmfg., Total				(HA)(MT)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Area Planted	0	0	0	0	0	0
Beginning Stocks	32,939	32,939	36,827	36,827	43,327	28,364
Farm Sales Weight Prod	0	0	0	0	0	0
Dry Weight Production	0	0	0	0	0	0
U.S. Leaf Imports	22,649	22,649	25,000	23,819	24,000	0
Other Foreign Imports	82,709	82,709	83,000	60,994	70,000	0
TOTAL Imports	105,358	105,358	108,000	84,813	94,000	0
TOTAL SUPPLY	138,297	138,297	144,827	121,640	137,327	28,364
Exports	9,470	9,470	9,500	10,276	9,500	0
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	25,000	25,000	24,000	23,000	24,000	0
Other Foreign Consump.	67,000	67,000	68,000	60,000	65,000	0
TOTAL Dom. Consumption	92,000	92,000	92,000	83,000	89,000	0
TOTAL Disappearance	101,470	101,470	101,500	93,276	98,500	0
Ending Stocks	36,827	36,827	43,327	28,364	38,827	0
TOTAL DISTRIBUTION	138,297	138,297	144,827	121,640	137,327	0

Import Trade Matrix			
Country	Netherlands		
Commodity	Tobacco, Unmfg., Total		
Time period	Jan-Dec.	Units:	Metric Tons
Imports for:	1997		1998
U.S.	22,649	U.S.	23,819
Others		Others	
Malawi	14,788	Malawi	4,186
Zimbabwe	11,543	Zimbabwe	8,131
Turkey	12,157	Turkey	6,351
BLEU	4,472	BLEU	854
Brazil	9,795	Brazil	13,144
		Italy	3,524
		Greece	4,339
Total for Others	52,755		40,529
Others not Listed	35,732		20,465
Grand Total	111,136		84,813

Export Trade Matrix			
Country	Netherlands		
Commodity	Tobacco, Unmfg., Total		
Time period	Jan-Dec.	Units:	Metric Tons
Exports for:	1997		1998
U.S.	229	U.S.	9
Others		Others	
BLEU	5,894	BLEU	5,037
Italy	671	Italy	352
Ireland	1,458	Ireland	1,306
Hungary	645	Greece	3,152
Total for Others	8,668		9,847
Others not Listed	2,365		420
Grand Total	11,262		10,276

- Flue Cured

PSD Table						
Country	Netherlands					
Commodity	Tobacco,Unmfg.,Flue Cured				(HA)(MT)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Area Planted	0	0	0	0	0	0
Beginning Stocks	11,008	11,008	2,346	2,346	2,000	239
Farm Sales Weight Prod	0	0	0	0	0	0
Dry Weight Production	0	0	0	0	0	0
U.S. Leaf Imports	11,949	11,949	12,000	11,729	11,500	0
Other Foreign Imports	35,069	35,069	38,000	21,164	21,000	0
TOTAL Imports	47,018	47,018	50,000	32,893	32,500	0
TOTAL SUPPLY	58,026	58,026	52,346	35,239	34,500	239
Exports	4,430	4,430	5,000	3,000	2,750	0
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	12,250	12,250	9,346	9,000	9,000	0
Other Foreign Consump.	39,000	39,000	36,000	23,000	22,000	0
TOTAL Dom. Consumption	51,250	51,250	45,346	32,000	31,000	0
TOTAL Disappearance	55,680	55,680	50,346	35,000	33,750	0
Ending Stocks	2,346	2,346	2,000	239	750	0
TOTAL DISTRIBUTION	58,026	58,026	52,346	35,239	34,500	0

Import Trade Matrix			
Country	Netherlands		
Commodity	Tobacco,Unmfg.,Flue Cured		
Time period	Jan-Dec	Units:	MT
Imports for:	1997		1998
U.S.	11,949	U.S.	11,729
Others		Others	
EU	5,967	EU	3,668
Zimbabwe	10,961	Zimbabwe	4,877
Brazil	8,185	Brazil	9,045
Malawi	1,164	Malawi	1,195
India	1,452	India	192
		Tanzania	1,238
Total for Others	27,729		20,215
Others not Listed	7,340		949
Grand Total	47,018		32,893

Export Trade Matrix			
Country	Netherlands		
Commodity	Tobacco,Unmfg.,Flue Cured		
Time period	Jan-Dec	Units:	MT
Exports for:	1997		1998
U.S.	0	U.S.	0
Others		Others	
BLEU	2,222	BLEU	1,864
Ireland	1,390	Ireland	1,127
Hungary	295	United Kingdom	6
Ukraine	197		
Total for Others	4,104		2,997
Others not Listed	326		3
Grand Total	4,430		3,000

- Burley

PSD Table						
Country	Netherlands					
Commodity	Tobacco, Unmfg., Burley				(HA)(MT)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Area Planted	0	0	0	0	0	0
Beginning Stocks	7,179	7,179	4,418	4,418	2,384	4,000
Farm Sales Weight Prod	0	0	0	0	0	0
Dry Weight Production	0	0	0	0	0	0
U.S. Leaf Imports	7,866	7,866	8,000	7,949	8,000	0
Other Foreign Imports	7,694	7,694	7,500	9,049	9,500	0
TOTAL Imports	15,560	15,560	15,500	16,998	17,500	0
TOTAL SUPPLY	22,739	22,739	19,918	21,416	19,884	4,000
Exports	1,571	1,571	1,750	745	800	0
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	6,250	6,250	6,000	6,250	6,250	0
Other Foreign Consump.	10,500	10,500	9,784	10,421	10,000	0
TOTAL Dom. Consumption	16,750	16,750	15,784	16,671	16,250	0
TOTAL Disappearance	18,321	18,321	17,534	17,416	17,050	0
Ending Stocks	4,418	4,418	2,384	4,000	3,500	0
TOTAL DISTRIBUTION	22,739	22,739	19,918	21,416	20,550	0

Import Trade Matrix			
Country	Netherlands		
Commodity	Tobacco, Unmfg., Burley		
Time period	Jan-Dec	Units:	MT
Imports for:	1997		1998
U.S.	7,866	U.S.	7,949
Others		Others	
BLEU	1,460	BLEU	63
Italy	450	Italy	1,027
Germany	1,965	Germany	1,605
Brazil	852	Brazil	2,542
		Malawi	1,151
Total for Others	4,727		6,388
Others not Listed	2,967		2,661
Grand Total	15,560		16,998

Export Trade Matrix			
Country	Netherlands		
Commodity	Tobacco, Unmfg., Burley		
Time period	Jan-Dec	Units:	MT
Exports for:	1997		1998
U.S.	0	U.S.	0
Others		Others	
BLEU	762	BLEU	606
Hungary	304	Hungary	44
Russia	138	Portugal	25
Total for Others	1,204		675
Others not Listed	367		70
Grand Total	1,571		745

- Oriental

PSD Table						
Country	Netherlands					
Commodity	Tobacco, Unmfg., Oriental				(HA)(MT)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997.		01/1998		01/1999
Area Planted	0	0	0	0	0	0
Beginning Stocks	9,876	9,876	9,986	10,219	12,586	7,484
Farm Sales Weight Prod	0	0	0	0	0	0
Dry Weight Production	0	0	0	0	0	0
U.S. Leaf Imports	0	0	0	0	0	0
Other Foreign Imports	18,567	18,567	19,000	13,496	14,000	0
TOTAL Imports	18,567	18,567	19,000	13,496	14,000	0
TOTAL SUPPLY	28,443	28,443	28,986	23,715	26,586	7,484
Exports	1,224	1,224	1,400	1,231	1,250	0
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	0	0	0	0	0	0
Other Foreign Consump.	17,000	17,000	15,000	15,000	14,000	0
TOTAL Dom. Consumption	17,000	17,000	15,000	15,000	14,000	0
TOTAL Disappearance	18,224	18,224	16,400	16,231	15,250	0
Ending Stocks	10,219	10,219	12,586	7,484	11,336	0
TOTAL DISTRIBUTION	28,443	28,443	28,986	23,715	26,586	0

Import Trade Matrix			
Country	Netherlands		
Commodity	Tobacco, Unmfg., Oriental		
Time period	Jan-Dec	Units:	MT
Imports for:	1997		1998
U.S.	0	U.S.	0
Others		Others	
Greece	2304	Greece	4261
Turkey	12148	Turkey	5736
Germany	1426	Germany	1092
Total for Others	15878		11089
Others not Listed	2689		2407
Grand Total	18567		13496

Export Trade Matrix			
Country	Netherlands		
Commodity	Tobacco, Unmfg., Oriental		
Time period	Jan-Dec	Units:	MT
Exports for:	1997		1998
U.S.	10	U.S.	9
Others		Others	
BLEU	748	BLEU	811
Italy	413	Italy	205
		Tjech. Rep.	142
Total for Others	1,161		1,158
Others not Listed	53		64
Grand Total	1,224		1,231

- Dark Air /Sun Cured

PSD Table						
Country	Netherlands					
Commodity	Unmfg.,Dark Air & Sun Cured				(HA)(MT)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Area Planted	0	0	0	0	0	0
Beginning Stocks	5,750	5,750	4,432	4,432	4,154	4,433
Farm Sales Weight Prod	0	0	0	0	0	0
Dry Weight Production	0	0	0	0	0	0
U.S. Leaf Imports	11	11	10	36	40	0
Other Foreign Imports	2,260	2,260	2,500	2,497	2,500	0
TOTAL Imports	2,271	2,271	2,510	2,533	2,540	0
TOTAL SUPPLY	8,021	8,021	6,942	6,965	6,694	4,433
Exports	1,789	1,789	1,900	1,512	1,600	0
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	0	0	0	20	20	0
Other Foreign Consump.	1,800	1,800	888	1,000	1,250	0
TOTAL Dom. Consumption	1,800	1,800	888	1,020	1,270	0
TOTAL Disappearance	3,589	3,589	2,788	2,532	2,870	0
Ending Stocks	4,432	4,432	4,154	4,433	3,824	0
TOTAL DISTRIBUTION	8,021	8,021	6,942	6,965	6,694	0

Import Trade Matrix			
Country	Netherlands		
Commodity	Unmfg.,Dark Air & Sun Cured		
Time period	Jan-Dec	Units:	MT
Imports for:	1997		1998
U.S.	11	U.S.	36
Others		Others	
BLEU	175	BLEU	205
Brazil	711	Brazil	906
Indonesia	263	Indonesia	187
India	354	India	176
		Sri-Lanka	334
Total for Others	1,503		1,808
Others not Listed	757		689
Grand Total	2,271		2,533

Export Trade Matrix			
Country	Netherlands		
Commodity	Unmfg.,Dark Air & Sun Cured		
Time period	Jan-Dec	Units:	MT
Exports for:	1997		1998
U.S.	0	U.S.	0
Others		Others	
BLEU	1,733	BLEU	1,436
Dom. Rep	20	Dom. Rep	25
		Switzerland	13
Total for Others	1,753		1,474
Others not Listed	36		38
Grand Total	1,789		1,512

- Dark Fire Cured

PSD Table						
Country	Netherlands					
Commodity	Unmfg., Dark Fire Cured				(HA)(MT)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Area Planted	0	0	0	0	0	0
Beginning Stocks	11,861	11,861	10,488	10,488	10,200	8,658
Farm Sales Weight Prod	0	0	0	0	0	0
Dry Weight Production	0	0	0	0	0	0
U.S. Leaf Imports	2,411	2,411	2,600	1,167	1,500	0
Other Foreign Imports	8,038	8,038	8,500	6,448	7,000	0
TOTAL Imports	10,449	10,449	11,100	7,615	8,500	0
TOTAL SUPPLY	22,310	22,310	21,588	18,103	18,700	8,658
Exports	322	322	350	445	425	0
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	2,750	2,750	2,350	1,000	1,000	0
Other Foreign Consump.	8,750	8,750	8,688	8,000	7,750	0
TOTAL Dom. Consumption	11,500	11,500	11,038	9,000	8,750	0
TOTAL Disappearance	11,822	11,822	11,388	9,445	9,175	0
Ending Stocks	10,488	10,488	10,200	8,658	9,525	0
TOTAL DISTRIBUTION	22,310	22,310	21,588	18,103	18,700	0

Import Trade Matrix			
Country	Netherlands		
Commodity	Unmfg., Dark Fire Cured		
Time period	Jan-Dec	Units:	
Imports for:	1997		1998
U.S.	2,411	U.S.	1,167
Others		Others	
EU	1,975	EU	1,213
Tanzania	1,482	Tanzania	844
Indonesia	1,945	Indonesia	2,155
Malawi	1,388	Malawi	957
Total for Others	6,790		5,169
Others not Listed	1,248		1,279
Grand Total	10,449.00		7,615

Export Trade Matrix			
Country	Netherlands		
Commodity	Unmfg., Dark Fire Cured		
Time period	Jan-Dec	Units:	MT
Exports for:	1997		1998
U.S.	1	U.S.	0
Others		Others	
BLEU	220	BLEU	319
Ireland	65	Ireland	58
Sri Lanka	20	Switzerland	51
Total for Others	305		428
Others not Listed	16		17
Grand Total	322		445

- Cigarettes

PSD Table						
Country	Netherlands					
Commodity	Tobacco, Mfg., Cigarettes				(MIL PCS)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Filter Production	99,825	99,825	100,000	99,850	100,000	0
Non-Filter Production	16,400	16,430	16,000	16,413	16,250	0
TOTAL Production	116,225	116,255	116,000	116,263	116,250	0
Imports	18,418	18,418	19,000	17,583	18,000	0
TOTAL SUPPLY	134,643	134,673	135,000	133,846	134,250	0
Exports	118,003	118,003	118,500	103,722	105,000	0
Domestic Consumption	16,640	16,670	16,500	30,124	29,250	0
TOTAL DISTRIBUTION	134,643	134,673	135,000	133,846	134,250	0

Import Trade Matrix			
Country	Netherlands		
Commodity	Tobacco, Mfg., Cigarettes		
Time period	Jan-Dec.	Units:	million pieces
Imports for:	1997		1998
U.S.	1	U.S.	2
Others		Others	
BLEU	6,668	BLEU	5,601
Germany	4,383	Germany	4,155
U.K.	5,739	U.K.	6,977
Ireland	638	Ireland	225
France	544	France	448
Denmark	183	Denmark	38
South Africa	251		
Total for Others	18,406		17,444
Others not Listed	11		137
Grand Total	18,418		17,583

Export Trade Matrix			
Country	Netherlands		
Commodity	Tobacco, Mfg., Cigarettes		
Time period	Jan-Dec.	Units:	million pieces
Exports for:	1997		1998
U.S.	36	U.S.	37
Others		Others	
France	40,660	France	35,318
Italy	29,251	Italy	32,022
Germany	13,302	Germany	9,593
BLEU	6,696	BLEU	8,577
Greece	5,667	Greece	5,005
Spain	6,451	Spain	5,820
Sweden	1,403	Sweden	1,518
U.K.	1,324	U.K.	895
Switzerland	398	Switzerland	414
Total for Others	105,152		99,162
Others not Listed	5,975		4,523
Grand Total	111,163		103,722

- Cigar, Cheroot, Cigarello

PSD Table						
Country	Netherlands					
Commodity	Mfg.,Cigar,Cheroot,Cigarell				(1000 PCS)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Production	1,803,000	1,929,170	1,804,000	2,555,677	2,300,000	0
Imports	45,000	48,469	45,000	98,142	100,000	0
TOTAL SUPPLY	1,848,000	1,977,639	1,849,000	2,653,819	2,400,000	0
Exports	1,550,000	1,535,639	1,560,000	2,183,819	2,075,000	0
Domestic Consumption	298,000	442,000	289,000	470,000	325,000	0
TOTAL DISTRIBUTION	1,848,000	1,977,639	1,849,000	2,653,819	2,400,000	0

Import Trade Matrix			
Country	Netherlands		
Commodity	Mfg.,Cigar,Cheroot,Cigarell		
Time period	Jan-Dec.	Units:	Mill.Pieces
Imports for:	1997		1998
U.S.	4	U.S.	4
Others		Others	
BLEU	3,443	BLEU	1,584
Ireland	202	Ireland	55
Germany	56	Germany	30
Dom.Rep.	53	Dom.Rep.	17
		France	16
		Denmark	10
Total for Others	3,754		1,712
Others not Listed	43		22
Grand Total	3,801		1,738

Export Trade Matrix			
Country	Netherlands		
Commodity	Mfg.,Cigar,Cheroot,Cigarell		
Time period	Jan- Dec.	Units:	mill. pieces
Exports for:	1997		1998
U.S.	56	U.S.	29
Others		Others	
France	832	France	619
BLEU	886	BLEU	572
Germany	302	Germany	206
U.K.	250	U.K.	221
Italy	90	Italy	77
Ireland	65	Ireland	33
Spain	98	Spain	67
Swizerland	42	Swizerland	23
Norway	28	Norway	13
Greece	30	Greece	26
Total for Others	2,623		1,857
Others not Listed	225		297
Grand Total	2,904		2,183

- Smoking and Cut

PSD Table						
Country	Netherlands					
Commodity	Mfg., Smoking and Cut				(MT)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Pipe Production	0	700	0	900	950	0
Cigarette Production	0	27,272	0	29,000	29,500	0
TOTAL Production	0	27,972	0	29,900	30,450	0
Imports	0	1,573	0	790	1,000	0
TOTAL SUPPLY	0	29,545	0	30,690	31,450	0
Exports	0	12,035	0	17,225	15,500	0
Domestic Consumption	0	17,510	0	13,465	15,950	0
TOTAL DISTRIBUTION	0	29,545	0	30,690	31,450	0

Import Trade Matrix			
Country	Netherlands		
Commodity	Mfg., Smoking and Cut		
Time period	Jan-Dec.	Units:	Metric Tons
Imports for:	1997		1998
U.S.		U.S.	
Others		Others	
BLEU	127	BLEU	57
U.K.	989	U.K.	501
Ireland	223	Germany	109
		Ireland	31
Total for Others	1,339		698
Others not Listed	234		92
Grand Total	1,573		790

Export Trade Matrix			
Country	Netherlands		
Commodity	Mfg., Smoking and Cut		
Time period	Jan-Dec.	Units:	Metric Tons
Exports for:	1997		1998
U.S.	217	U.S.	98
Others		Others	
BLEU	3,432	BLEU	2,741
France	2,192	France	1,903
U.K.	1,291	U.K.	1,109
Switzerland	1,958	Switzerland	268
		Portugal	2,087
		Secret	7,293
Total for Others	8,873		15,401
Others not Listed	2,945		1,726
Grand Total	12,035		17,225

- Homogenized Sheet

PSD Table						
Country	Netherlands					
Commodity	Mfg., Homogenized Sheet				(MT)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Production	0	16,704	0	17,821	17,500	0
TOTAL SUPPLY	0	16,704	0	17,821	17,500	0
Exports	0	1,377	0	2,278	2,000	0
Domestic Consumption	0	15,327	0	15,543	15,500	0
TOTAL DISTRIBUTION	0	16,704	0	17,821	17,500	0

Import Trade Matrix			
Country	Netherlands		
Commodity	Mfg., Homogenized Sheet		
Time period	Jan-Dec.	Units:	Metric Tons
Imports for:	1997		1998
U.S.	12,999	U.S.	12,140
Others		Others	
Germany	2,109	Germany	2,421
BLEU	44	BLEU	701
France	420	France	689
U.K.	447	U.K.	657
		Spain	11
Total for Others	3,020		4,479
Others not Listed	85		602
Grand Total	16,104		17,221

Export Trade Matrix			
Country	Netherlands		
Commodity	Mfg., Homogenized Sheet		
Time period	Jan-Dec.	Units:	Metric Tons
Exports for:	1997		1998
U.S.	0	U.S.	0
Others		Others	
Russia	149	Russia	758
Hungary	333	Hungary	326
BLEU	198	BLEU	144
Italy	2	Italy	486
Germany	119	Germany	124
Switzerland	138		
U.K.	109		
Total for Others	1,048		1,838
Others not Listed	329		440
Grand Total	1,377		2,278