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Tobacco and Products

Annual Report

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Report Highlights:

Excise tax increases and restrictions on cigarette advertising will lead to reduced cigarette consumption in Poland. Lower consumption and reduced cigarette exports to Russia are expected to result in lower tobacco imports. Expiration of obligations for cigarette manufacturers to purchase domestic tobacco should begin a trend toward decreased tobacco production in Poland.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
Annual Report
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EXECUTIVE SUMMARY	1
TOBACCO	2
Production	2
Consumption	2
Stocks	2
Trade	2
Tariff changes and non-tariff barriers	3
Marketing	3
CIGARETTES	4
Production	4
Production policy	4
Consumption	6
Trade	6
Tariffs and non-tariff barriers	7
Marketing	8
Tobacco, Unmfg., Total - PSD	9
Tobacco Unmfg., Total - Import	10
Tobacco, Unmfg., Total - Export	11
Tobacco, Unmfg., Burley - PSD	12
Tobacco, Unmfg., Burley - Import	13
Tobacco, Unmfg., Burley - Export	14
Tobacco, Unmfg., Flue Cured - PSD	15
Tobacco, Unmfg., Flue Cured - Import	16
Tobacco, Unmfg., Flue Cured - Export	17
Tobacco, Unmfg., Dark Fire Cured - PSD	18
Tobacco, Unmfg., Dark Fire Cured - Import	19
Tobacco, Unmfg., Dark Fire Cured - Export	20
Tobacco, Unmfg., Light Air Cured - PSD	21
Tobacco, Unmfg., Light Air Cured - Import	22
Tobacco, Unmfg., Light Air Cured - Export	23
Tobacco, Unmfg., Dark Air & Sun Cured - PSD	24
Tobacco, Unmfg., Dark Air & Sun Cured - Import	25
Tobacco, Unmfg., Dark Air & Sun Cured - Export	26
Tobacco, Unmfg., Oriental - PSD	27
Tobacco, Unmfg., Oriental - Import	28
Tobacco, Unmfg., Oriental - Export	29
Tobacco, Mfg., Cigarettes - PSD	30
Tobacco, Mfg., Cigarettes - Import	31
Tobacco, Mfg., Cigarettes - Export	32

EXECUTIVE SUMMARY

Since the end of 1999, all cigarette manufacturing plants in Poland have been privately owned or controlled. The plants which were privatized earliest have completed their five year obligation under their privatization agreements to maintain 40 percent domestic tobacco content within their domestic brand cigarettes. Tobacco area is expected to decrease slightly reflecting indications from some tobacco processors that they intend to contract for less domestic tobacco in 2000. Larger area decreases may be in store within the next few years. However, efforts to protect domestic production by raising import taxes which surfaced in late 1999 could resurface again given the relatively well organized efforts of the tobacco producers association.

The predicted decline in tobacco area will be tempered to some extent by Polish farmers efforts to switch from dark to the preferred light tobacco varieties used to produce Western brand cigarettes. The efforts to switch to light tobacco varieties have been supported with technical assistance from some cigarette manufacturers. Increasing Polish production of Western brand cigarettes has led to a decline in cigarette imports from 549 million pieces in CY 1998 to 450 million pieces in CY 1999. Cigarette imports are expected to remain at 450 million pieces in CY 2000.

Cigarette exports leapt from 4.6 billion pieces in 1998 (an unusually low figure caused by collapse of the Russian market) to 26.3 billion pieces in first nine months of 1999 including 22 billion pieces exported to Russia. Cigarette exports are expected to decrease from 26.3 billion pieces in 1999 to 24 billion pieces in 2000 as producers gradually shift production toward Western brands for the domestic and Western European markets.

Poland's restrictions on cigarette advertising and sharp excise tax increases on cigarettes are expected to result in a decrease in cigarette consumption from 68.7 billion pieces in 1998 to 68.5 billion pieces in 2000. Reduced export quantities and, to a lesser extent, lower domestic consumption are expected to result in a decrease in domestic cigarette production from 94.6 billion pieces in 1999 to 92 billion pieces in 2000. Reflecting the decrease in cigarette production expected to occur in 2000, imports of raw tobacco are expected to decrease from 50,000 tons in 1999 to 41,000 tons in 2000.

TOBACCO

Production

Tobacco area in 2000 is expected to decrease slightly from 1999 levels reflecting indications that some tobacco manufacturers intend to contract for less tobacco. The tobacco leaf harvest in 2000 is expected to amount to 37,800 as it did in 1999 in anticipation of slightly higher yields. While the 1999 crop was slightly larger than 1998, poor weather quality was worse.

Polish tobacco production still consists primarily of traditional varieties of dark tobacco. However, farmers continue to shift toward lighter varieties. In the southern part of Poland, one of the largest tobacco growing regions in the country, most farmers have already changed to these new varieties. This shift may accelerate as obligations for cigarette producers to use a set portion of domestic tobacco in their manufacturing process expire. According to privatization agreements, tobacco companies are required to purchase minimum quantities of domestically-produced tobacco (40 percent of processed tobacco has to be local one), usually for a period of 5 years. Some of these contracted periods ended in 1999.

Tobacco is grown in Poland by around 50 thousand farmers on the total area of slightly more than 21,000 hectares. The average size of a typical tobacco farm is approximately 0.4 hectares. The largest tobacco growing areas are located in the south near Zamosc (5,000 hectares), Kielce (4,000 hectares) and Krakow (3,000 hectares). The dominant variety grown in these regions is Virginia tobacco. Near Augustow (north-west of Poland), Brazilian varieties have been replaced by Virginia, Burley, Skroniowski strong and Kentucky varieties. The average area of tobacco plantations in the northwestern region is growing and could reach 0.5 hectares in 2000, compared with 0.3 hectares in 1997.

Consumption

Total leaf utilization in 2000 is expected to contract to 1998 levels reflecting expectations of reduced cigarette exports to Russia and lower domestic consumption.

Stocks

There were no data on stocks for unmanufactured light air cured tobacco in the past. Actually stocks are privatized and no information is available. In 1999 tobacco importers were afraid that the government would increase tariff on an unmanufactured tobacco. They were trying to import as much as possible of tobacco before. Unfortunately the processors cannot consume all imported quantities. As a result, the importers stockpiled tobacco for the first time.

Trade

Imports of raw tobacco in the first nine months of 1999 reached 48,825 metric tons exceeding total imports in 1998 (45,720 metric tons). Only imports of Burley were lower than in the previous year. Companies appear to have imported "extra" tobacco in 1999 and stockpiled it out of concern that the Polish government would raise tobacco

tariffs in 2000 from 30 percent up to 180 percent. After strong pressure from both foreign and domestic interests including Polish tobacco farmers, the Polish government decided to leave tobacco import tariffs unchanged in 2000.

Tobacco imports in 2000 are expected to decline to 41,000 tons from 50,000 tons in 1999. The decrease in tobacco imports stems from lower expected cigarette production and exports. Also, cigarette manufacturers will use stocks acquired in 1999. Traditionally, imports consist primarily of light tobacco varieties. The main suppliers of unmanufactured tobacco to Poland are Zimbabwe, the United States, Brazil, Malawi and Turkey. It is estimated that in 2000 exports will be slightly higher because for the first time not all locally produced tobacco will be sold to tobacco processors. The biggest importers of Polish tobacco are Russia, Kazakhstan, Ukraine and Lithuania.

Tariff changes and non-tariff barriers

Tariffs for unmanufactured tobacco have been largely unchanged since 1993 when a minimum tariff of 1.13 ECU per kilogram was introduced in addition to the basic ad valorem tariff. Tobacco is one of the few agricultural commodities which has tariffs which are the same for all suppliers regardless of whether they are in least developed, developing, or developed countries. All exporting countries face the same tariff treatment for entry into Poland. The following tariff schedule is applicable to unmanufactured tobacco in CY 2000:

Item	Description	Import duty (percent)
2401	Unmanufactured tobacco; Tobacco refuse (except partly stemmed Oriental)	30, minimum EUR 1.13 /kg
2401.20.60	- partly stemmed, Oriental	30, minimum EUR 0.75/kg

In CY 2000, Poland will again maintain applied tariffs as noted in the preceding table which are much lower than WTO bound rates. According to bilateral agreements, tariff rate quotas in CY 2000 are available for 700 tons of non-processed tobacco imported from Hungary, 200 tons from Bulgaria and 2000 tons from Turkey with in-quota rates of 15 percent, minimum EUR 0.565 per kilogram.

In April 2000, the Polish Customs office abandoned their plan to retroactively reclassify imports of some classes of tobacco into a higher tariff category based on a ruling made by the World Customs Organization (WCO) decision. The reclassification would have impacted imports going back to 1995 and potentially could have resulted in additional import taxes of PLN 721.8 million (around U\$ 400 million). WCO decided that mixtures of unmanufactured tobacco leaves should be classified as unmanufactured tobacco and the lower tariff should remain in effect.

Marketing

Polish tobacco is produced on private farms and sold to tobacco processing plants primarily on a contractual basis. Processing companies operate independently in all areas including foreign trade.

CIGARETTES

Production

Poland primary tobacco product is cigarettes with 94.6 billion pieces produced in 1999 down from 96.5 billion pieces produced in 1998. Other tobacco products, like pipe tobacco, cigars and snuff, account for less than 0.1 percent of consumption and are mainly imported. The production and sale of snuff is prohibited.

Cigarettes are produced in 11 plants owned by 7 independently-managed companies. Since early 1998, all manufacturing plants are owned or controlled by private investors. According to privatization agreements, the companies are required to invest in modernization of the industry, which they have successfully accomplished. To respond to a growing demand for light cigarettes with low tar and nicotine content, cigarette manufacturers have introduced modern production lines and provided technical assistance to farmers in switching to new tobacco varieties.

Ninety-nine percent of cigarettes available on the Polish market are produced in Poland. Sixty-five percent of all cigarettes on sale are traditional Polish brands in which a large part of the tobacco is Polish.

Smuggling of cigarettes reportedly increased in 1999 which may be partly reflected in official statistics indicating that legal sales of cigarettes decreased by 6.1 percent relative to 1998.

One development stemming from privatization is that employment in tobacco processing companies dropped by 11 percent from 12,000 people in December 1998 to 10,000 people in December 1999. An additional 10 percent of tobacco industry employees are expected to be laid off in 2000.

Local cigarette producers' position on the market:

	1998	1999
	%	%
Philip Morris	34	31.9
Reemtsma	24.4	22.6
Seita	15.5	13.4
BAT	11.5	10.3
House of Prince	8.7	14.1
others	6.09	7.7

Production policy

Poland's excise tax accounts for around 41 percent of cigarette prices but is still lower than the 57 percent required by the European Union. The excise tax on cigarettes increased by 27 percent in 1999. An additional 28 percent increase is planned for 2000. In 2001 a 30 percent increase is planned. Excise taxes on cigarettes differ based on the type of cigarette. Four separate categories of cigarettes have been established for excise tax purposes.

The categories and excise taxes are:

CN Code	Description	Excise tax in PLN per 1000 pcs and/or in percent applicable in the period of:		
		Jan 1 - May 31, 2000	June 1 - Sept 30, 2000	Oct 1 - Dec 31, 2000
2402.20	Tobacco products:			
	long Western types cigarettes produced locally and all imported cigarettes	107.10	PLN 37.50 + 25 % of retail price	PLN 42.00 + 25 % of retail price
	local brand long cigarettes	91.70		
	local brand short cigarettes	72.20		
	local brand non-filter cigarettes	70.10		
2552.30	locally produced and imported cigars	107.10	124.70	
2402.10	other tobacco products	60 %		
2403.10.10.0	imported smoking tobacco, whether or not containing tobacco substitutes in any proportion, in packaging smaller than 500 g	150 %		

A new excise tax system will be introduced as of June 1, 2000. It will consist of a per unit tax fixed for each trimester and equal for all cigarettes and an additional tax of 25 percent of the sales value in 2000. The 25 percent tax will be applied to a maximum retail price which must be printed on the cigarette packaging. In addition, the excise tax on any cigarettes sold cannot be lower than 90 percent of the excise tax for the most popular cigarettes sold in the previous year. In cases where no retail price is shown on the package, excise taxes of 70 percent and 230 percent will be applied to locally produced cigarettes and imported cigarettes, respectively. The requirement that retail prices must be printed on the package will be in force after June 1, 2001.

The new excise tax system is expected to generate over PLN 7.9 billion (\$ 2 billion) in tax revenues from cigarette production in 2000. In 1998, tax revenue from tobacco products was PLN 5.3 (\$ 1.5 billion) with PLN 6.3 billion (\$ 1.7 billion) estimated in 1999. The income from VAT and excise tax from the tobacco industry represents 6 percent of the government's budget.

In 1998 new norms for harmful substance content in tobacco products were introduced with 15 mg of tar and 1.5 mg of nicotine allowable in cigarettes. After 2003 these norms are to be reduced respectively to 12 mg of tar and 1.2 mg of nicotine.

Consumption

There are about 10 million smokers in Poland of which 45 percent are adult men and 22 percent are adult women. Per capita consumption is 2,500 cigarettes per year. Legal sales of cigarettes dropped by 6.1 percent in 1999 compared to 1998 levels. However, actual sales of cigarettes may not have decreased as much since smuggling reported increased sharply. Tobacco companies claim that the decrease in official sales and increases in smuggling resulted from the frequent increases in excise taxes and limits on advertisement adopted in 1999 by the Polish parliament.

As a result of an annually anti-smoking campaign, over 2 million Poles are estimated to have given up smoking since 1995. At the same time, the amount spent by the health service on illnesses caused by tobacco-smoking has risen. According to the Central Statistical Office, tobacco products account for about 2 percent of the typical Polish household budgets rivaling expenditure on alcohol (1.1 percent). The percentage of income spent on tobacco products has risen from 1.9 percent in 1997. The average monthly expenditure per capita on tobacco products was PLN 10.21 (\$ 2.96) in 1998 and increased to PLN 11.24 (\$ 3.21) within first nine months of 1999. Increased expenditures reflect the fact that prices of tobacco products rose 16.4 percent in 1999 while prices of other products increased only by 8.7 percent in average.

Trade

Cigarette imports continue to decline due to increasing domestic production of Western brands in Poland. Official statistics on total imports and exports of cigarettes in 1999 are not yet available. However 364 million pcs were imported in the first nine months compared to 549 million pieces in CY 1998. Cigarette producers mentioned smuggling among the threats for their sales. Penalties are high for smugglers or those who sell cigarettes without excise tax labels, but there is a very poor control. In 1998 there were 3,429 cases opened against smugglers with the value of goods confiscated estimated at PLN 8,090,364 (\$ 2.3 million). In 1999 there were 4,678 cases opened and goods confiscated were valued at PLN 10,696,278 (\$ 2.9 million). These figures include all products classified under CN heading 2402.

Polish exports of cigarettes represented 4.6 billion pieces in 1998. During the first nine months of 1999 cigarette exports leapt to the unprecedented level of 26.3 billion pieces of which 22 billion pieces were exported to Russia. Total cigarette exports in 1999 are expected to reach 32 billion pieces and are expected to increase to 35 billion pieces in 2000. The largest importers of Polish cigarettes in 1998 were Belgium and Slovenia, and in 1999 - Russia, Ukraine and Switzerland.

Tariffs and non-tariff barriers

For CY 2000 tariffs and tariff rate quotas were established at the levels listed below.

CN Code	Description	Quota and Import Duty	Above quota tariffs
2402	Cigars and cigarettes:		
2402.10	Cigars	2.5 tons at 55 %	173 %, not less than EUR 19/1000 pcs
2402.20.10-90	Cigarettes	75 tons at 90 %, min EUR 9/1000 pcs	173 %, not less than EUR 19/1000 pcs
2402.90	Other	2.5 tons at 90 %	173 %, not less than EUR 19/1000 pcs
2403	Other mnfctrd, homogenized and reconstituted tobacco:	1,300 tons	
2403.10	pipe tobacco	120 %	230 %
2403.91	homogenized or reconstituted tobacco	55 %, min EUR 1.13/kg	230 %
2403.99.10	chewing and snuff tobacco	65 %	230 %
2403.99.90	other	55 %, min EUR 1.13/kg	230 %

The following quotas and tariff rates were established for 2000 with the Czech and Slovak Republics:

CN Code	Description	Quota and Import Duty
2402	Cigars, cigarettes and other manufactured, homogenized and reconstituted tobacco:	50 tons for each country
2402.10	Cigars	27.5 %
2402.20.10-90	Cigarettes	45 %, not less than EUR 4.5/1000 pcs
2402.90	Other	45 %
2403.10	pipe tobacco	60 %
2403.91	homogenized or reconstituted tobacco	27.5 %, not less than EUR 0.565/kg
2403.99.10	chewing and snuff tobacco	32.5 %

2403.99.90	other	27.5 %, not less than EUR 0.565/kg
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Marketing

According to an amended act on health prevention against the results of tobacco smoking adopted in November 1999, tobacco companies must removal all advertising with their logos from news-paper kiosks, shops, cafeterias, restaurants, pubs and other public places. Additionally, all outdoor tobacco promotion or promotions through sponsorship is prohibited. Cigarettes cannot be sold in schools, health care institutions and sports halls. Advertisement in print media will be prohibited in 2002. Health warnings must cover one-third of all labels or advertisements for tobacco products. As might be expected, consumption is not very dependent on price fluctuations.

Tobacco, Unmfg., Total - PSD

PSD Table						
Country	Poland					
Commodity	Tobacco, Unmfg., Total				(HA)(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Planted	19675	19675	19800	20868	0	20300
Beginning Stocks	9049	9049	10979	9899	9679	12699
Farm Sales Weight Prod	43000	42300	43000	42000	0	38000
Dry Weight Production	38700	38000	38700	37800	0	34200
U.S. Leaf Imports	7230	7299	7500	5000	0	4000
Other Foreign Imports	37000	38421	38000	45000	0	37000
TOTAL Imports	44230	45720	45500	50000	0	41000
TOTAL SUPPLY	91979	92769	95179	97699	9679	87899
Exports	4000	4571	5000	5000	0	5000
Dom. Leaf Consumption	33000	33000	35000	32000	0	30000
U.S. Leaf Dom. Consum.	7000	7299	7500	5000	0	4000
Other Foreign Consump.	37000	38000	38000	43000	0	40000
TOTAL Dom. Consumption	77000	78299	80500	80000	0	74000
TOTAL Disappearance	81000	82870	85500	85000	0	79000
Ending Stocks	10979	9899	9679	12699	0	8899
TOTAL DISTRIBUTION	91979	92769	95179	97699	0	87899

Tobacco Unmfg., Total - Import

Import Trade Matrix			
Country	Poland		
Commodity	Tobacco, Unmfg., Total		
Time period	Jan-Dec	Units:	MT
Imports for:	1998		1999
U.S.	7299	U.S.	4730
Others		Others	
Zimbabwe	7935	Zimbabwe	9935
Brazil	6665	Brazil	7534
Malawi	3586	Malawi	4505
Turkey	3388	Turkey	3764
Italy	2673	Italy	2964
Greece	2442	India	2582
China	1630	Greece	2316
Germany	1403	China	1366
France	618	Argentina	826
Total for Others	30340		35792
Others not Listed	8081		8303
Grand Total	45720		48825

1999 data refers to first three quarters only.

Tobacco, Unmfg., Total - Export

Export Trade Matrix			
Country	Poland		
Commodity	Tobacco, Unmfg., Total		
Time period	Jan-Dec	Units:	MT
Exports for:	1998		1999
U.S.	378	U.S.	
Others		Others	
Russia	1169	Kazakhstan	900
Kazakhstan	938	Ukraine	717
Ukraine	656	Lithuania	691
Lithuania	518	Fance	650
Belgium	350	Russia	400
Switzerland	332	Holland	140
Germany	152	Germany	114
Total for Others	4115		3612
Others not Listed	78		101
Grand Total	4571		3713

1999 data refers to first three quarters only.

Tobacco, Unmfg., Burley - PSD

PSD Table						
Country	Poland					
Commodity	Tobacco, Unmfg., Burley				(HA)(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Planted	5400	5300	5300	5400	0	5300
Beginning Stocks	3782	3774	5015	4919	5115	5769
Farm Sales Weight Prod	14000	13000	13000	13000	0	12000
Dry Weight Production	12600	11700	11700	11700	0	10800
U.S. Leaf Imports	50	24	25	28	0	25
Other Foreign Imports	2500	4992	4200	5000	0	4000
TOTAL Imports	2550	5016	4225	5028	0	4025
TOTAL SUPPLY	18932	20490	20940	21647	5115	20594
Exports	1000	47	600	50	0	60
Dom. Leaf Consumption	10000	11000	11000	11000	0	10000
U.S. Leaf Dom. Consum.	50	24	25	28	0	25
Other Foreign Consump.	2867	4500	4200	4800	0	4000
TOTAL Dom. Consumption	12917	15524	15225	15828	0	14025
TOTAL Disappearance	13917	15571	15825	15878	0	14085
Ending Stocks	5015	4919	5115	5769	0	6509
TOTAL DISTRIBUTION	18932	20490	20940	21647	0	20594

Tobacco, Unmfg., Burley - Import

Import Trade Matrix			
Country	Poland		
Commodity	Tobacco, Unmfg., Burley		
Time period	Jan-Dec	Units:	MT
Imports for:	1998		1999
U.S.	24	U.S.	14
Others		Others	
Malawi	2171	Malawi	994
Germany	720	Germany	621
Brazil	424	Italy	171
Italy	421	Venezuela	138
Argentina	345	Phillipines	131
Venezuela	265	Brazil	130
Zimbabwe	146		
Denmark	127		
Sri Lanka	18		
Total for Others	4637		2185
Others not Listed	355		205
Grand Total	5016		2404

1999 data refers to first three quarters only.

Tobacco, Unmfg., Burley - Export

Export Trade Matrix			
Country	Poland		
Commodity	Tobacco, Unmfg., Burley		
Time period	Jan-Dec	Units:	MT
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
Russia	37	Kazakhstan	0.9
Germany	8	Switzerland	0.4
Total for Others	45		1.3
Others not Listed	2		
Grand Total	47		1.3

1999 data refers to first three quarters only.

Tobacco, Unmfg., Flue Cured - PSD

PSD Table						
Country	Poland					
Commodity	Tobacco,Un mfg.,Flue Cured				(HA)(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Planted	12700	12700	12800	12800	0	12600
Beginning Stocks	2415	1809	4615	3398	4215	4217
Farm Sales Weight Prod	28000	25000	27000	27000	0	25000
Dry Weight Production	25200	22500	24300	24300	0	22500
U.S. Leaf Imports	3000	4732	5000	4000	0	4000
Other Foreign Imports	8000	13965	14000	19026	0	12500
TOTAL Imports	11000	18697	19000	23026	0	16500
TOTAL SUPPLY	38615	43006	47915	50724	4215	43217
Exports	4000	2876	3700	2507	0	3000
Dom. Leaf Consumption	19000	19000	22000	21000	0	20000
U.S. Leaf Dom. Consum.	3000	4732	5000	4000	0	4000
Other Foreign Consump.	8000	13000	13000	19000	0	12500
TOTAL Dom. Consumption	30000	36732	40000	44000	0	36500
TOTAL Disappearance	34000	39608	43700	46507	0	39500
Ending Stocks	4615	3398	4215	4217	0	3717
TOTAL DISTRIBUTION	38615	43006	47915	50724	0	43217

Tobacco, Unmfg., Flue Cured - Import

Import Trade Matrix			
Country	Poland		
Commodity	Tobacco,Unmfg.,Flue Cured		
Time period	Jan-Dec	Units:	MT
Imports for:	1998		1999
U.S.	4732	U.S.	3859
Others		Others	
Zimbabwe	6000	Zimbabwe	8315
Brazil	4071	Brazil	5442
France	553	India	1698
Malawi	510	Italy	629
India	467	Argentina	452
Greece	461	Greece	403
Italy	348	France	308
Tanzania	284	Tanzania	224
Zambia	260	Zambia	221
Bulgaria	49	Phillipines	158
Total for Others	13003		17850
Others not Listed	962		876
Grand Total	18697		22585

1999 data refers to first three quarters only.

Tobacco, Unmfg., Flue Cured - Export

Export Trade Matrix			
Country	Poland		
Commodity	Tobacco,Unmfg.,Flue Cured		
Time period	Jan-Dec	Units:	MT
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
Kazakhstan	896	Kazakhstan	756
Lithuania	516	Ukraine	575
Belgium	350	Lithuania	440
Russia	284	Russia	232
Switzerland	216	Czech Rep.	64
Ukraine	153		
Germany	29		
Total for Others	2444		2067
Others not Listed	432		140
Grand Total	2876		2207

1999 data refers to first three quarters only.

Tobacco, Unmfg., Dark Fire Cured - PSD

PSD Table						
Country	Poland					
Commodity	Unmfg., Dark Fire Cured				(HA)(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Planted	900	1100	1000	1000	0	1000
Beginning Stocks	2358	2281	2358	2279	2158	2179
Farm Sales Weight Prod	2500	2800	2500	2500	0	2500
Dry Weight Production	2250	2520	2250	2250	0	2250
U.S. Leaf Imports	25	0	0	0	0	0
Other Foreign Imports	700	664	1200	900	0	700
TOTAL Imports	725	664	1200	900	0	700
TOTAL SUPPLY	5333	5465	5808	5429	2158	5129
Exports	0	2	200	100	0	200
Dom. Leaf Consumption	2250	2520	2250	2250	0	2000
U.S. Leaf Dom. Consum.	25	0	0	0	0	0
Other Foreign Consump.	700	664	1200	900	0	700
TOTAL Dom. Consumption	2975	3184	3450	3150	0	2700
TOTAL Disappearance	2975	3186	3650	3250	0	2900
Ending Stocks	2358	2279	2158	2179	0	2229
TOTAL DISTRIBUTION	5333	5465	5808	5429	0	5129

Tobacco, Unmfg., Dark Fire Cured - Import

Import Trade Matrix			
Country	Poland		
Commodity	Unmfg., Dark Fire Cured		
Time period	Jan-Dec	Units:	MT
Imports for:	1998		1999
U.S.		U.S.	
Others		Others	
Tanzania	401	Tanzania	478
Kiribati	96	India	205
Kenia	74	Indonesia	60
India	30	Italy	58
Indonesia	20	Malawi	38
Malawi	19	Zimbabwe	22
Greece	5	Brazil	18
Sweden			
Total for Others	645		879
Others not Listed	19		2
Grand Total	664		881

1999 data refers to first three quarters only.

Tobacco, Unmfg., Dark Fire Cured - Export

Export Trade Matrix			
Country	Poland		
Commodity	Unmfg., Dark Fire Cured		
Time period	Jan-Dec	Units:	MT
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
UK	2	Ukraine	63
Total for Others	2		63
Others not Listed			1
Grand Total	2		64

1999 data refers to first three quarters only.

Tobacco, Unmfg., Light Air Cured - PSD

PSD Table						
Country	Poland					
Commodity	Unmfg., Light Air Cured				(HA)(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Planted	0	0	0	0	0	0
Beginning Stocks	0	0	0	0	0	1182
Farm Sales Weight Prod	0	0	0	0	0	0
Dry Weight Production	0	0	0	0	0	0
U.S. Leaf Imports	1500	14	25	267	0	150
Other Foreign Imports	3200	2844	4000	7845	0	4000
TOTAL Imports	4700	2858	4025	8112	0	4150
TOTAL SUPPLY	4700	2858	4025	8112	0	5332
Exports	100	315	250	200	0	300
Dom. Leaf Consumption	0	0	0	0	0	882
U.S. Leaf Dom. Consum.	1500	14	25	230	0	150
Other Foreign Consump.	3100	2529	3750	6500	0	4000
TOTAL Dom. Consumption	4600	2543	3775	6730	0	5032
TOTAL Disappearance	4700	2858	4025	6930	0	5332
Ending Stocks	0	0		1182	0	0
TOTAL DISTRIBUTION	4700	2858	4025	8112	0	5332

There were no data on stocks for unmanufactured light air cured tobacco in the past. Actually stocks are privatized and no information is available. In 1999 tobacco importers were afraid that the government would increase tariff on an unmanufactured tobacco. They were trying to import as much as possible of tobacco before. Unfortunately the processors cannot consume all imported quantities. As a result, the importers stockpiled tobacco for the first time.

Tobacco, Unmfg., Light Air Cured - Import

Import Trade Matrix			
Country	Poland		
Commodity	Unmfg., Light Air Cured		
Time period	Jan-Dec	Units:	MT
Imports for:	1998		1999
U.S.	14	U.S.	267
Others		Others	
Malawi	994	Malawi	3908
Germany	986	Brazil	1422
Italy	171	Italy	590
Wenezuela	138	India	449
Phillipines	131	Thailand	306
Brazil	130	Phillipines	286
Indonesia	60	France	258
India	24	Argentina	235
		Indonesia	173
Total for Others	2634		7627
Others not Listed	210		218
Grand Total	2858		8112

1999 data refers to first three quarters only.

Tobacco, Unmfg., Light Air Cured - Export

Export Trade Matrix			
Country	Poland		
Commodity	Unmfg., Light Air Cured		
Time period	Jan-Dec	Units:	MT
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
Russia	245	Russia	68
Ukraine	60	Lithuania	66
Germany	8	Germany	4
Total for Others	313		138
Others not Listed	2		
Grand Total	315		138

1999 data refers to first three quarters only.

Tobacco, Unmfg., Dark Air & Sun Cured - PSD

PSD Table						
Country	Poland					
Commodity	Unmfg.,Dark Air & Sun Cured				(HA)(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Planted	100	120	110	110	0	100
Beginning Stocks	222	191	182	227	142	137
Farm Sales Weight Prod	200	300	250	250	0	200
Dry Weight Production	180	297	248	248	0	180
U.S. Leaf Imports	0	0	0	0	0	0
Other Foreign Imports	100	92	150	447	0	100
TOTAL Imports	100	92	150	447	0	100
TOTAL SUPPLY	502	580	580	922	142	417
Exports	20	11	40	90	0	50
Dom. Leaf Consumption	200	250	248	248	0	180
U.S. Leaf Dom. Consum.	0	0	0	0	0	0
Other Foreign Consump.	100	92	150	447	0	100
TOTAL Dom. Consumption	300	342	398	695	0	280
TOTAL Disappearance	320	353	438	785	0	330
Ending Stocks	182	227	142	137	0	87
TOTAL DISTRIBUTION	502	580	580	922	0	417

Tobacco, Unmfg., Dark Air & Sun Cured - Import

Import Trade Matrix			
Country	Poland		
Commodity	Unmfg.,Dark Air & Sun Cured		
Time period	Jan-Dec	Units:	MT
Imports for:	1998		1999
U.S.		U.S.	
Others		Others	
India	76	India	206
Belgium	8	Indonesia	128
Indonesia	8	Italy	45
		Cuba	25
		Argentina	19
		Brazil	10
		Ecuador	4
		Dominican Rep.	3
		Peru	2
Total for Others	92		442
Others not Listed			5
Grand Total	92		447

1999 data refers to first three quarters only.

Tobacco, Unmfg., Dark Air & Sun Cured - Export

Export Trade Matrix			
Country	Poland		
Commodity	Unmfg.,Dark Air & Sun Cured		
Time period	Jan-Dec	Units:	MT
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
Ukraine	11	Ukraine	79
Total for Others	11		79
Others not Listed			
Grand Total	11		79

1999 data refers to first three quarters only.

Tobacco, Unmfg., Oriental - PSD

PSD Table						
Country	Poland					
Commodity	Tobacco, Unmfg., Oriental				(HA)(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Planted	0	0	0	0	0	0
Beginning Stocks	1450	1451	1400	1438	1350	1818
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	5000	3264	5000	7400	0	3500
TOTAL Imports	5000	3264	5000	7400	0	3500
TOTAL SUPPLY	6450	4715	6400	8838	1350	5318
Exports	50	13	50	20	0	50
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	0	0	0	0	0	0
Other Foreign Consump.	5000	3264	5000	7000	0	3500
TOTAL Dom. Consumption	5000	3264	5000	7000	0	3500
TOTAL Disappearance	5050	3277	5050	7020	0	3550
Ending Stocks	1400	1438	1350	1818	0	1768
TOTAL DISTRIBUTION	6450	4715	6400	8838	0	5318

Tobacco, Unmfg., Oriental - Import

Import Trade Matrix			
Country	Poland		
Commodity	Tobacco, Unmfg., Oriental		
Time period	Jan-Dec	Units:	MT
Imports for:	1998		1999
U.S.		U.S.	
Others		Others	
Turkey	1522	Turkey	3752
Greece	941	Greece	2203
Macedonia	177	Bulgaria	468
Albania	70	Italy	346
Italy	59	Macedonia	167
Total for Others	2769		6936
Others not Listed	495		295
Grand Total	3264		7231

1999 data refers to first three quarters only.

Tobacco, Unmfg., Oriental - Export

Export Trade Matrix			
Country	Poland		
Commodity	Tobacco, Unmfg., Oriental		
Time period	Jan-Dec	Units:	MT
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
Germany	13		
Total for Others	13		0
Others not Listed			
Grand Total	13		0

1999 data refers to first three quarters only.

Tobacco, Mfg., Cigarettes - PSD

PSD Table						
Country	Poland					
Commodity	Tobacco, Mfg., Cigarettes				(MIL PCS)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Filter Production	85000	86241	87000	86100	0	85000
Non-Filter Production	10000	10500	10500	8500	0	7000
TOTAL Production	95000	96741	97500	94600	0	92000
Imports	500	549	500	450	0	450
TOTAL SUPPLY	95500	97290	98000	95050	0	92450
Exports	2000	4633	5000	32000	0	35000
Domestic Consumption	93500	92657	93000	63050	0	57450
TOTAL DISTRIBUTION	95500	97290	98000	95050	0	92450

Tobacco, Mfg., Cigarettes - Import

Import Trade Matrix			
Country	Poland		
Commodity	Tobacco, Mfg., Cigarettes		
Time period	Jan-Dec	Units:	000 pcs
Imports for:	1998		1999
U.S.	134094	U.S.	92433
Others		Others	
Russia	5400	Switzerland	398
UK	265966	Germany	213485
Germany	142886	UK	56745
		Sweden	600
Total for Others	414252		271228
Others not Listed	294		
Grand Total	548640		363661

1999 data refers to first three quarters only.

Tobacco, Mfg., Cigarettes - Export

Export Trade Matrix			
Country	Poland		
Commodity	Tobacco, Mfg., Cigarettes		
Time period	Jan-Dec	Units:	000PCS
Exports for:	1998		1999
U.S.	11	U.S.	8
Others		Others	
Belgium	1927180	Russia	19932193
Slovenia	890000	Ukraine	2174313
Russia	490404	Switzerland	1566155
Cyprus	295441	Slovenia	950000
Latvia	195110	Belgium	796640
Turkey	187880	Latvia	474360
Ukraine	151636	Moldova	175436
Germany	132037		
Georgia	51672		
Finland	48300		
Total for Others	4369660		26069097
Others not Listed	263452		232585
Grand Total	4633123		26301690

1999 data refers to first three quarters only.