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Approved by:

Richard Petges

U.S. Embassy

Prepared by:

Dietmar Achilles

Report Highlights:

German Tobacco consumption is estimated at about 178,000 tons in 2001 of which about 23 pct were of U.S. origin. Cigarette production reached a new record of 213 billion cigarettes. The increase of three pct was mainly for export markets in other EU countries. However, also domestic tobacco consumption still continues to grow despite increased taxes and increased sales prices.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
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Executive Summary

In 2001, German tobacco growers harvested 11,105 tons green weight tobacco which is 0.5 pct less than in 2000. About 43 pct of the production is Virginia flue cured tobacco. Since the revision of the EU tobacco regime, German growers have gradually increased their flue cured area at the expense of dark air cured and burley tobacco. Aside from higher EU production premiums, flue cured tobacco is also less labor intensive than the two other varieties grown in Germany. Total tobacco production value amounted to Euro 43.1 million in 2001.

Cigarette production reached a new high of 213.8 billion versus 206.8 billion in 2000. Exports of cigarettes reached a new high of 105.8 billion versus 90.7 billion in 2000. Prime countries of destination are Spain, Italy and France.

Domestic consumption of cigarettes is estimated at 175.1 billion, an increase of about 200 million over 2000. German taxation statistics report a 2.1 percent increase in taxed cigarettes, to 142.5 billion pieces. Also the taxed consumption of other tobacco products went up by ten pct to 17,100 tons, mainly fine-cut for roll-your-own cigarettes and tobacco rolls. After many years of reductions in pipe tobacco consumption, this market segment recovered slightly by plus 1.7 pct to 925 tons. Reports for the first quarter of 2002 indicate that domestic consumption of cigarettes as well as production for exports continued to rise slowly.

Total raw tobacco consumption is estimated at 178,000 tons, of which 41,000 tons were U.S. tobaccos. U.S. tobacco sales to Germany in 2001 totaled Euro 289 million (US\$259 million) versus Euro 317 million in 2000. Domestic tobacco buyers intend to lower their flue cured purchases in 2002 because of high U.S. prices. U.S. flue cured will be substituted most likely by Brazilian tobacco.

Note: in recent years the US\$/Euro exchange rate has been as follows:

1999: \$1 = Euro 0.9380	2001: \$1 = Euro 1.1160
2000: \$1 = Euro 1.0827	2002: \$1 = Euro

Production

German raw tobacco production is estimated at 10,864 tons green weight in 2001, a reduction of 2.7 percent from 2000. Crop quality was satisfactory to good. Total production area in 2002 is forecast to rise by one percent to 4,665 hectares. German tobacco growers reduced their production area for dark-air cured Geudertheimer and for Burley tobacco, but increased planting area of lower yielding but less labor intensive flue cured Virgin tobacco. Based on EU regulation 2848/98, the EU harvest of green tobacco is recalculated on the base of harmonized moisture levels of 22 pct for Burley, 26 pct for Geudertheimer dark air cured, and 16 pct Virginia flue cured tobacco. Production data used in this report is based on the EU harmonized moisture levels.

EU support payments for tobacco production in Germany amount to Euro per kilogram green tobacco:

Virgin	1.52397
Burley	1.21904
Geudertheimer	1.22.

Tobacco growers in the northern part of Europe receive an additional premium to compensate them for less favorable growing conditions, Euro per kilogram:

Virgin	0.28141
Burley	0.4511
Geudertheimer	0.28141

High production premiums for Virgin tobacco explain the production shifts away from lesser supported varieties such as

Burley and Geudertheimer. About 75 pct of returns from tobacco production come from EU budgets and only roughly 25 pct are generated from product sales. Actual German production of Virgin tobaccos well exceeds its maximum allowed quota of 3000 tons green weight established by the EU. However, the EU tobacco regime provides that in such cases production of other varieties must underfill their quota at the respective level. Additionally, EU regs require that such quota shifts have to be cost neutral to the EU budget. Total premium volume is fixed by the base quota distribution as laid down in EU 2848/98.

Table 1: Tobacco Production in Germany								
	Area Planted				Production			
	Hectares				Metric tons			
	1999	2000	2001	2002	1999	2000	2001	2002
Virgin	2,109	2,196	2,318	2460	4,345	4,607	4,760	5040
Burley	964	968	937	870	2,747	2,702	2,620	2440
Geudertheimer	1,473	1,413	1,369	1335	4,163	3,860	3,725	3670
Total	4,546	4,577	4,623	4,665	11,254	11,169	11,105	11,150
	Average Price				Total Returns			
	Euro per MT				1,000 Euro			
	1999	2000	2001	2002	1999	2000	2001	2002
Virgin	4,191	4,170	4,320		18,209	18,777	19,858	
Burley	4,333	4,264	4,330		11,901	11,385	10,768	
Geudertheimer	3,560	3,553	3,570		14,819	13,237	12,426	
Total	3,992	3,932	3,963		44,930	43,399	43,052	
Source: German Tobacco Growers Association								

Consumption

German raw tobacco consumption including homogenized sheet tobacco in 2001 is roughly calculated at 178,000 MT, of which the cigarette industry consumes about 150,000 MT (the tobacco use per cigarette is calculated at 0.7grams). To meet the low maximum levels of nicotine and tar, as regulated by the EU, cigarette manufacturers are technically inflating the size of the cut tobacco so that less tobacco is needed for the manufacture of cigarettes. Tobacco consumption for fine-cut, tobacco rolls and pipe tobacco is estimated at about 25,000 MT annually. Cigar and cigarillo industries consume about 2.0 to 2.5 thousand tons. All these numbers are more guesses than estimates since the industry does not report any raw tobacco input information.

Cigarettes

According to official statistics German cigarette production continued to grow by three percent to 214 billion cigarettes in CY 2001. The production increase was mainly induced by increased export demand to the Spanish and Italian markets. However, German taxation statistics indicate that domestic demand also grew about six percent. Private industry research estimates a total cigarette consumption of 175.1 billion in CY 2001 which is an increase of one percent over CY 2000. This number includes an estimated 13 billion legally and illegally imported cigarettes, which are not officially recorded.

The estimated total CY 2001 consumption further breaks down into 16.4 billion roll-your-own cigarettes (plus 5.5%), 1.4 billion cigarillo sticks (a high cigarette tax avoidance product with a plus of 13.2%), 3.3 billion fine-cut rolls (another tax avoidance tobacco product with a plus of 13%) and 141 billion regular cigarettes. Since the tax advantage for fine-cut rolls was cancelled at the end of 2001, this product will no longer be produced in Germany.

Problematic for the German cigarette market is the growing price sensitivity of German consumers, compounded by the improved quality of private label products. The market share of private labels increased by a steep 40 percent to 19.6 billion, which is 13.9 percent of total cigarette sales. During the first quarter of 2002 the private label market share continued its growth path to 15.6 percent. In particular, food discounters gained additional market shares. The price advantage of private labels over branded products ranges between 25 and 30 percent. While in previous years mainly lower income customers purchased private label, in 2001 more affluent people also switched over to low-price generic products.

The growth of private labels had been mainly at the disadvantage of cigarette sales through vending machines which exclusively offer branded products. Since vending machines only accept coins, prices always had been in full DM. The price step from DM 5.00 to DM 6.00 per pack of cigarettes in 2000 seemed to be too much for many smokers, so they switched over to lower priced generic cigarettes. With the increase of the price for machine packs the number of cigarettes per pack was also increased. In fact the price increase per cigarette had been marginal.

Since many smokers are one-pack-a-day smokers the industry began to offer big packs of 25 or more cigarettes in the early 90s. This trick or strategy turned out to be very successful. The market share of these big packs has grown steadily to 19.1 percent in 2001. Actually, the price per cigarettes in big packs are not necessarily lower than regular packs with 20 cigarettes or machine packs. In many cases the machine packs offer the lowest prices.

The long lasting growth of the light cigarette market share came to a halt in 2001. In particular, demand for ultra-light cigarettes shrank from 5.6 to 5.2 percent. Slight growth is reported for the full flavor segment. Per capita consumption of cigarettes is still trending upward despite rising cigarette prices. For 2001, the German statistics office reports a per capita cigarette consumption of 1,733 cigarettes versus 1,699 in 2000. Calculated on the base of consumption per potential smoker at an age of 15 years and more, data for 1999 indicate a level of 2,101 cigarettes. Also, per capita consumption of cigarillos and fine-cut tobacco is still rising. Only consumption of pipe tobacco continues to trend downward. Alarming reports say that the starting age of smokers has fallen to a young 12.5 years. Also, the share of young girls who smoke has increased. On the other side, the estimated total number of smokers has shrunk to 16.6 million in 2000, versus 17.8 million in 1997. About 39 percent of males smoke, while only 31 percent of the female population smokes.

Table 2: Trends in the German Cigarette Market - % Market Shares					
	1997	1998	1999	2000	2001
Big Packs	10.2	11.6	13.4	16.2	19.1
Quality/Price Segments					
Premium Price Brands	0.1	0.1	0.1	0.1	0.1
Most Favored High Price Segment	53.1	52.1	50.2	47.5	44.7
Medium Price Segment	23.5	23.5	23.9	23.8	23.3
Upper Low Price Segment	7.6	7.9	8.3	9.2	8.6
Low Price Segment	15.7	16.4	17.5	19.4	23.3
Type of Cigarettes					
Non-Filter	3.4	3.2	3.0	2.8	2.6
Light Cigarettes	28.2	29.5	30.9	32.0	31.8
Full Flavor	68.4	67.2	66.1	65.2	65.6

In 2001, about 37 percent of the cigarettes were sold through food retail stores. Sales through vending machines declined to 24 percent. Vending machine sales are foreseen to drop further since the national government and also the European parliament intend to implement regulations prohibiting sales to people below 16 years of age. Such a regulation would require a customer identification system to access vending machines. Money cards which contain age information could be a possibility.

Anti-Smoking Efforts

In cooperation with the cigarette industry the German Ministry of Health has implemented a list of voluntary soft-pressure anti-smoking rules which include

- no tobacco product advertisement in the immediate neighborhood of schools
- no free cigarette samples
- no cigarette commercials in movie theaters before 18.00h
- no health related advertisement
- no advertisements directed to juveniles
- no use of advertisement material which is common in the world of juveniles
- no advertisement with prominent people and competitive athletes
- no advertisement in competition sports

no advertisements in youth print media, sports arenas, public transportation and airplanes
restricted use of the terms mild and light
no illuminated advertisement

The cigarette industry agreed to sponsor public education programs about the risk of smoking to the tune of Euro 11.8 million. In the next legislation period it is likely that a rule will be implemented which prohibits the sale of cigarettes to youths less than 16 years of age. It will also prohibit tobacco smoking in public areas by anyone younger than 16 years. The result will be that the number of outdoor vending machines will be significantly reduced because of expected immense cost to prevent illegal cigarette purchases by youths under 16. The group of parliamentarians from all parties calling for rules and laws restricting tobacco smoking has been increasing in recent years, and is likely to be a majority after the federal elections in September 2002. With respect to the European Commission's intention to generally prohibit tobacco advertisements, Germany continues to oppose such efforts since it claims that health protection falls under member state authority and is therefore not subject to EU regulations.

Since April 2002, German fine-cut tobacco companies started to label nicotine and condensates level on fine-cut tobacco packages. Previously, only cigarette manufacturers were required to do this. The industry will use a matrix of condensate and nicotine values, differentiating between thin and thick roll-your-own cigarettes and for use of different types of wrapping papers.

Taxation

All tobacco products are subject to a 16 percent value added tax (VAT) in addition to product specific tobacco taxes.

Cigarettes

Euro 5.59 per 100 cigarettes
Plus a proportional tax portion calculated as 23.31 percent of the retail sales price
This does not include 16% VAT.

Cigars and cigarillos

Euro 1.30 per 100 cigars and cigarillos
Plus a proportional tax of one percent of the retail price
(excl. VAT)

Smoking tobacco

Fine-cut tobacco
Euro 19.15 per kilogram
Plus 17.02 percent of retail price
Minimum Euro 31.00 per kilogram (excl. VAT)

Pipe tobacco

Euro 10.70 per kilogram
Plus 13,5 percent of retail price
(excl. VAT)

Fine-cut tobacco rolls

Since January 1, 2002, rolls are subject to the normal cigarette tax.

Tax revenues in 2001 amounted to Euro 12.07 billion which was an increase of 6.0 percent. Tobacco taxes are the fourth single most important revenue source for the federal budget, following income tax, VAT and gasoline tax.

To cover the increased budget cost to fight international terrorism, the German government increased the cigarette tax in two steps, one percent each, effective January 1, 2002 and January 1, 2003. This is expected to result in additional revenue of Euro 1.4 billion in 2002. However, the downside of the increased tax burden on cigarettes is the rising attraction to smuggle untaxed cigarettes into Germany. So far, smugglers have concentrated their efforts on the British market, where the tax burden is the highest in Europe.

		1997	1998	1999	2000	2001
Volume of Taxed/Consumed Tobacco Products						
Cigars/Rillos	mill pcs	1,592	1,992	2,289	2,557	2,511
Cigarettes	mill pcs	137,677	138,388	145,265	139,625	142,546
Fine-cut	tons	11,656	12,150	12,682	12,758	13,803
Pipe Tobacco	tons	1,039	1,003	983	909	925
Tobacco Rolls	tons	2,477	2,602	1,314	1,853	2,469
Total Returns by Product						
Cigars/Rillos	mill Euro	343	406	917	507	499
Cigarettes	mill Euro	17,665	18,327	19,579	19,176	19,861
Fine-cut	mill Euro	682	718	743	741	810
Pipe Tobacco	mill Euro	99	97	98	92	95
Tobacco Rolls	mill Euro	322	345	180	249	329
Total	mill Euro	19,111	19,893	21,517	20,765	21,595
Tax Returns						
Cigars/Rillos	mill Euro	29	32	35	39	38
Cigarettes	mill Euro	10,223	10,494	11,155	10,836	11,437
Fine-cut	mill Euro	304	318	331	331	367
Pipe Tobacco	mill Euro	25	24	24	22	23
Tobacco Rolls	mill Euro	209	220	113	158	210
Total	mill Euro	10,790	11,088	11,658	11,386	12,074
Average Retail Prices						
Cigars/Rillos	Euro/piece	0.2153	0.2040	0.2050	0.1983	0.1988
Cigarettes	Euro/piece	0.1300	0.1324	0.1350	0.1373	0.1393

Fine-cut	Euro/kg	58.51	59.05	58.59	58.08	58.71
Pipe Tobacco	Euro/kg	95.37	97.04	99.34	101.47	102.32
Tobacco Rolls	Euro/kg	130.09	132.53	137.13	134.23	133.50
Average Tax						
Cigars/Rillos	Euro/piece	0.0183	0.0158	0.0153	0.0153	0.0153
Cigarettes	Euro/piece	0.0742	0.0757	0.0768	0.0776	0.0802
Fine-cut	Euro/kg	26.05	26.13	26.08	25.97	26.57
Pipe Tobacco	Euro/kg	23.78	23.93	24.13	24.43	24.55
Tobacco Rolls	Euro/kg	84.10	84.72	85.95	85.19	84.99
Source: FedMinFinance						

Trade

In CY 2001, arrivals of leaf tobacco in Germany amounted to 247,066 MT valued at Euro 980.5 million. Arrivals from the United States amounted to 41,900 tons at a total value of Euro 566 million which is 17 percent of total volume but 30 percent of total import value. These trade numbers include trade in homogenized sheet tobacco. Tobacco supplier number one is Brazil, shipping 44,433 tons in CY 2001

For CY 2002 and 2003, German raw tobacco buyers indicate that their purchases of flue cured tobacco from the United States will shrink by about 4,000 tons. Increased purchases from Brazil are likely to compensate for U.S. flue cured tobacco. Tobacco buyers expect that Brazilian flue cured production will expand to fill the growing demand from European and other international customers.

Table 4: German Leaf Tobacco Trade by Type - CY 2000				
Import Summary	Total		U.S. Share	
	MT	DM 1,000	MT	DM 1,000
Flue Cured, Virgin	78,148	754,050	21,110	334,082
Burley	41,663	425,203	12,420	222,135
Maryland	668	12,187	570	10,728
Kentucky Fired Cured	56	701	25	508
Oth. Fire Cured	1,596	25,854	2	28
Oth. Light Air Cured	21,080	15,356	198	2,226
Oriental	28,792	266,686	0	0
Dark Air Cured	1,317	10,308	0	4
Oth. Flue Cured	32,524	194,875	1	18
Other Tobacco	2,901	70,803	1,027	14,132
Stems and Scraps	37,352	48,499	6,514	8,654
HTL	16,980	73,661	6,123	27,579
Total	263,077	1,898,183	47,990	620,094
Export Summary				
Flue Cured, Virgin	23,864	192,735	0	0
Burley	9,135	67,336	0	0
Maryland	12	179	0	0
Kentucky Fire Cured	55	286	0	0
Oth. Fire Cured	763	23,046	4	75
Oth. Light Air Cured	10,091	84,066	0	0
Oriental	8,296	68,948	0	0
Dark Air Cured	1,853	7,596	1,064	4,243
Oth. Flue Cured	6,826	38,271	0	0
Other Tobacco	9,179	105,155	0	0
Stems and Scraps	14,441	24,468	337	410
HTL	7,195	33,563	27	590
Total	91,710	645,649	1,432	5,318

Table 5: German Leaf Tobacco Trade by Type - CY 2001						
Import Summary	Total			U.S. Share		
	MT	DM 1,000	Euro 1,000	MT	DM 1,000	Euro 1,000
Flue Cured, Virgin	82,408	832,032	425,411	19,835	338,582	173,114
Burley	41,993	366,011	187,138	7,137	134,898	68,972
Maryland	659	11,631	5,947	659	11,631	5,947
Kentucky Fired Cured	28	138	71	5	28	14
Oth. Fire Cured	981	16,564	8,469	1	43	22
Oth. Light Air Cured	13,333	15,356	7,851	0	0	0
Oriental	26,888	263,460	134,705	0	0	0
Dark Air Cured	1,229	11,063	5,656	0	14	7
Oth. Flue Cured	25,286	171,545	87,710	0	0	0
Other Tobacco	5,146	105,464	53,923	3,342	43,173	22,074
Stems and Scraps	30,107	40,488	20,701	4,625	9,523	4,869
HTL	19,008	83,996	42,946	6,296	27,949	14,290
Total	247,066	1,917,748	980,529	41,900	565,841	289,310
Export Summary						
Flue Cured, Virgin	18,842	153,885	78,680	0	0	0
Burley	6,253	43,232	22,104	0	0	0
Maryland	74	314	161	0	0	0
Oth. Fire Cured	693	18,412	9,414	0	0	0
Oth. Light Air Cured	13,593	106,135	54,266	0	0	0
Oriental	9,811	79,716	40,758	0	0	0
Dark Air Cured	1,638	7,701	3,937	734	2,706	1,384
Oth. Flue Cured	26,698	195,567	99,992	11	97	50
Other Tobacco	6,084	73,621	37,642	0	0	0
Stems and Scraps	13,076	21,918	11,206	436	942	482
HTL	5,830	27,703	14,164	30	732	374
Total	102,592	728,204	372,325	1,211	4,477	2,289

Marketing

German industry contacts welcomed the changes in the U.S. tobacco marketing system. They make direct use or indirectly through their purchasing agents production contracts with farmers. They are confident that the new system will have a positive effect on product quality. However, modern curing systems of flue cured tobacco are viewed with skepticism because they tend to increase sucrose levels beyond desired levels. A major issue of complaint is the still existing quota system which out-prices U.S. flue cured tobacco. Demand for U.S. burley is still strong because of its superior quality characteristics. Since maximum tar and nicotine levels have been continuously lowered in the EU U.S. it seems only burley tobacco provides sufficient flavor for tasty cigarettes.

Statistical Section

Table 6: PS+D Table , Total Unmanufactured Tobacco

PSD Table						
Country	Germany					
Commodity	Tobacco, Unmfg., Total				(HA)(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Area Planted	4577	4577	4575	4623	0	4665
Beginning Stocks	35174	28639	31776	34241	27972	10217
Farm Sales Weight Prod	11169	11169	11105	10864	0	11150
Dry Weight Production	9539	9539	9496	9293	0	9544
U.S. Leaf Imports	47990	47990	46000	41900	0	37000
Other Foreign Imports	215087	215087	217000	205166	0	220000
TOTAL Imports	263077	263077	263000	247066	0	257000
TOTAL SUPPLY	307790	301255	304272	290600	27972	276761
Exports	91710	91710	92000	102592	0	85000
Dom. Leaf Consumption	6750	6750	6800	6800	0	7000
U.S. Leaf Dom. Consum.	36554	36554	36000	40991	0	39000
Other Foreign Consump.	141000	132000	141500	130000	0	134000
TOTAL Dom. Consumption	184304	175304	184300	177791	0	180000
TOTAL Disappearance	276014	267014	276300	280383	0	265000
Ending Stocks	31776	34241	27972	10217	0	11761
TOTAL DISTRIBUTION	307790	301255	304272	290600	0	276761

Table 7: Total Unmanufactured Tobacco - Imports

Import Trade Matrix			
Country	Germany		
Commodity	Tobacco, Unmfg., Total		
Time period	Cal. Year	Units:	MT
Imports for:	2000		2001
U.S.	41867	U.S.	35604
Others		Others	
Brasil	44849	Brasil	44433
Zimbabwe	23559	Zimbabwe	26383
Malawi	17313	Malawi	21485
Italy	18340	Italy	15277
Turkey	15551	Turkey	13236
France	6075	France	5259
Indonesia	4722	Indonesia	2071
Argentina	10058	Argentina	8676
Greece	8906	Greece	13524
India	8999	India	6445
Total for Others	158372		156789
Others not Listed	45858		54673
Grand Total	246097		247066

Table 8: Total Unmanufactured Tobacco - Exports

Export Trade Matrix			
Country	Germany		
Commodity	Tobacco, Unmfg., Total		
Time period	Cal. Year	Units:	MT
Exports for:	2000		2001
U.S.	1405	U.S.	1181
Others		Others	
Netherlands	21460	Netherlands	15108
France	4228	France	4369
Romania	10978	Romania	6741
Russia	13393	Russia	14845
Switzerland	5089	Switzerland	4269
Ukraine	8033	Ukraine	6737
Turkey	3741	Great Britain	2737
Uzbekistan	1623	Uzbekistan	1825
Greece	1679	Belgium	2499
Spain	2113	Poland	2035
Total for Others	72337		61165
Others not Listed	10773		34416
Grand Total	84515		96762

Table 9: PS+D Table Flue Cured Tobacco

PSD Table						
Country	Germany					
Commodity	Tobacco,Unmfg.,Flue Cured				(HA)(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Area Planted	2196	2196	2270	2318	0	2460
Beginning Stocks	20971	20971	12195	12195	7331	10510
Farm Sales Weight Prod	4607	4607	4760	4713	0	5040
Dry Weight Production	4100	4100	4236	4195	0	4486
U.S. Leaf Imports	21110	21110	22000	19835	0	18000
Other Foreign Imports	57038	57038	60000	62573	0	67000
TOTAL Imports	78148	78148	82000	82408	0	85000
TOTAL SUPPLY	103219	103219	98431	98798	7331	99996
Exports	23864	23864	25000	18842	0	19000
Dom. Leaf Consumption	3400	3400	3600	3600	0	4000
U.S. Leaf Dom. Consum.	19211	19211	19500	19082	0	18500
Other Foreign Consump.	44549	44549	43000	46764	0	48000
TOTAL Dom. Consumption	67160	67160	66100	69446	0	70500
TOTAL Disappearance	91024	91024	91100	88288	0	89500
Ending Stocks	12195	12195	7331	10510	0	10496
TOTAL DISTRIBUTION	103219	103219	98431	98798	0	99996

Table 10: Flue Cured Tobacco - Imports

Import Trade Matrix			
Country	Germany		
Commodity	Tobacco,Unmfg.,Flue Cured		
Time period	Cal.Year	Units:	MT
Imports for:	2000		2001
U.S.	21110	U.S.	19835
Others		Others	
Zimbabwe	12914	Zimbabwe	15934
Brasil	28013	Brasil	30785
Malawi	1876	Malawi	1605
Canada	1068	Canada	1404
Tansania	4836	Tansania	4380
Italy	1875	Italy	2961
France	2925	France	2670
Spain	1364	Spain	1482
Uganda	688	Uganda	741
Total for Others	55559		61962
Others not Listed	1480		611
Grand Total	78149		82408

Table 11: Flue Cured Tobacco - Exports

Export Trade Matrix			
Country	Germany		
Commodity	Tobacco,Unmfg.,Flue Cured		
Time period	Cal.Year	Units:	MT
Exports for:	2000		2001
U.S.	0	U.S.	0
Others		Others	
Netherlands	9607	Netherlands	6513
Romania	4446	Romania	1139
Russia	2768	Russia	3475
Ukraine	1370	Ukraine	1273
Turkey	1159	Poland	559
Belgium	1073	Belgium	1520
Great Britain	639	Great Britain	921
Egypt	436	Egypt	752
Slovenia	361	Czech Rep	442
Slovakia	411	Switzerland	311
Total for Others	22270		16905
Others not Listed	1594		1937
Grand Total	23864		18842

Table 12: PS+D Table Burley Tobacco

PSD Table						
Country	Germany					
Commodity	Tobacco, Unmfg., Burley				(HA)(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Area Planted	960	960	940	937	0	870
Beginning Stocks	7437	7437	5603	6895	5282	6000
Farm Sales Weight Prod	2720	2702	2620	2534	0	2440
Dry Weight Production	2366	2351	2279	2204	0	2123
U.S. Leaf Imports	12500	12420	12500	16796	0	15000
Other Foreign Imports	35000	29243	30000	25197	0	27000
TOTAL Imports	47500	41663	42500	41993	0	42000
TOTAL SUPPLY	57303	51451	50382	51092	5282	50123
Exports	8000	9135	9000	6253	0	6000
Dom. Leaf Consumption	1700	1650	1600	1600	0	1600
U.S. Leaf Dom. Consum.	10000	11176	11500	11347	0	11300
Other Foreign Consump.	32000	22595	23000	25892	0	26000
TOTAL Dom. Consumption	43700	35421	36100	38839	0	38900
TOTAL Disappearance	51700	44556	45100	45092	0	44900
Ending Stocks	5603	6895	5282	6000	0	5223
TOTAL DISTRIBUTION	57303	51451	50382	51092	0	50123

Table 13: Burley Tobacco - Imports

Import Trade Matrix			
Country	Germany		
Commodity	Tobacco, Unmfg., Total		
Time period	Cal. Year	Units:	MT
Imports for:	2000		2001
U.S.	41867	U.S.	35604
Others		Others	
Brasil	44849	Brasil	44433
Zimbabwe	23559	Zimbabwe	26383
Malawi	17313	Malawi	21485
Italy	18340	Italy	15277
Turkey	15551	Turkey	13236
France	6075	France	5259
Indonesia	4722	Indonesia	2071
Argentina	10058	Argentina	8676
Greece	8906	Greece	13524
India	8999	India	6445
Total for Others	158372		156789
Others not Listed	45858		54673
Grand Total	246097		247066

Table 14: Burley Tobacco - Exports

Export Trade Matrix			
Country	Germany		
Commodity	Tobacco, Unmfg., Burley		
Time period	Cal. Year	Units:	MT
Exports for:	2000		2001
U.S.	0	U.S.	0
Others		Others	
Netherlands	4734	Netherlands	3680
Italy	300	Italy	586
Romania	2373	Romania	660
Poland	234	Poland	261
Ukraine	241	Ukraine	163
Russia	216	Russia	171
Turkey	245	Great Britain	64
Total for Others	8343		5585
Others not Listed	792		669
Grand Total	9135		6254

Table 15: PS+D Table Cigarettes

PSD Table						
Country	Germany					
Commodity	Tobacco, Mfg., Cigarettes			(MIL PCS)		
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Filter Production	203160	203160	204000	210293	0	215000
Non-Filter Production	3610	3610	3200	3500	0	3400
TOTAL Production	206770	206770	207200	213793	0	218400
Imports	33604	34438	33000	40528	0	40000
TOTAL SUPPLY	240374	241208	240200	254321	0	258400
Exports	90637	90654	91000	105808	0	110000
Domestic Consumption	149737	150554	149200	148513	0	148400
TOTAL DISTRIBUTION	240374	241208	240200	254321	0	258400

Table 16: Cigarettes - Imports

Import Trade Matrix			
Country	Germany		
Commodity	Tobacco, Mfg., Cigarettes		
Time period	CY	Units:	Mill PCS
Imports for:	2000		2001
U.S.	50	U.S.	60
Others		Others	
Netherlands	9658	Netherlands	8291
Austria	6768	Austria	8666
France	4398	France	5027
Luxemburg	5461	Luxemburg	6838
Belgium	2974	Belgium	6099
Great Britain	1508	Great Britain	2742
Denmark	1803	Denmark	1799
Portugal	929	Portugal	724
Total for Others	33499		40186
Others not Listed	889		282
Grand Total	34438		40528

Table 17: Cigarettes - Exports

Export Trade Matrix			
Country	Germany		
Commodity	Tobacco, Mfg., Cigarettes		
Time period	CY	Units:	Mill. Pcs.
Exports for:	2000		2001
U.S.	78	U.S.	57
Others		Others	
Spain	18124	Spain	31708
Italy	11522	Italy	17136
Taiwan	4841	Taiwan	5008
France	13996	France	10150
Belgium	4703	Belgium	5719
Great Britain	7015	Great Britain	7036
Netherlands	3247	Netherlands	4342
Greece	3209	Greece	4342
Czech Rep.	2258	Czech Rep.	2136
Japan	1919	Japan	2274
Total for Others	70834		89851
Others not Listed	19742		15900
Grand Total	90654		105808