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Report Highlights:

Poland's tobacco sector is in a state of transition as Poland prepares for EU accession which its government hopes to achieve by January 2004. It appears that Poland's post-accession tobacco production quota will likely be 36,000 tons. Meanwhile, tobacco production declined for the third consecutive year in MY 2001/02 largely due to poor weather conditions. The general trend in declining planted area is expected to continue as demand decreases due to anti-smoking campaigns and likely much higher post-accession tobacco product taxes. Approximately 45 percent of all adult males and 22 percent of females in Poland smoke. Tobacco imports and cigarette exports increased in 2001 while cigarette smuggling appears to have risen.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
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Table of Content:

EXECUTIVE SUMMARY	1
TOBACCO	2
Production	2
Consumption	2
Stocks	3
Trade	3
Tariff changes and non-tariff barriers	3
Policy - EU Accession	4
Marketing	4
CIGARETTES	4
Production	4
Production policy	5
Consumption	6
Trade	6
Tariffs and non-tariff barriers	7
Marketing	8
Tobacco Unmfg. - PSD Table	9
Tobacco Unmfg - Exports	10
Tobacco Unmfg - Imports	11
Tobacco Unmfg., Burley - PSD Table	12
Tobacco, Unmfg., Burley - Exports	13
Tobacco, Unmfg., Burley - Imports	14
Tobacco Unmfg.,Dark Fire Cured - PSD Table	15
Tobacco Unmfg.,Dark Fire Cured - Exports	16
Tobacco Unmfg., Dark Fire Cured - Imports	17
Tobacco Unmfg., Dark Air & Sun Cured - PSD Table	18
Tobacco Unmfg., Dark Air & Sun Cured - Exports	19
Tobacco Unmfg., Dark Air & Sun Cured - Imports	20
Tobacco,Unmfg.,Flue Cured - PSD Table	21
Tobacco,Unmfg.,Flue Cured - Exports	22
Tobacco,Unmfg.,Flue Cured - Imports	23
Tobacco Unmfg., Light Air Cured - PSD Table	24
Tobacco Unmfg., Light Air Cured - Exports	25
Tobacco Unmfg., Light Air Cured - Imports	26
Tobacco Unmfg., Oriental - PSD Table	27
Tobacco Unmfg., Oriental - Exports	28
Tobacco Unmfg., Oriental - Imports	29
Tobacco, Mfg., Cigarettes - PSD Table	30
Tobacco, Mfg., Cigarettes - Exports	31
Tobacco, Mfg., Cigarettes - Imports	32

EXECUTIVE SUMMARY

Tobacco production declined significantly in MY 2001/02 largely due to flood and hail damage with virtually one-third (10,000 tons) of the crop lost. The general downward trend in tobacco area planted is expected to continue in MY 2002/03 and beyond as demand decreases due to anti-smoking campaigns and likely much higher post-accession tobacco product taxes. The government instituted new tobacco production quotas for 2002 based on farmer's past production. They also plan to subsidize purchases of just under 27,000 tons of domestically grown tobacco by manufacturers. The government is also expected to support leaf exports.

Tobacco farmers continue to pressure the government to raise import duties from 30 to 105 percent on imported tobacco as a means to force cigarette manufacturers to use more domestic tobacco. However, manufacturers already have high stocks, about 30,000 tons, and assert that such duties would damage their business by cutting off non-locally produced leaf varieties that they need for blending with local tobacco.

Consumption appears to be declining as cigarette production declines. Nevertheless, approximately 45 percent of all adult males and 22 percent of females in Poland smoke.

In 2001, Poland produced 80.6 billion (74.4 billion were sold) cigarettes, 3 percent less than in the year before but 17.5 percent below 1995 production. Two producers closed their plants in 2001 while others reduced their work force. Both tobacco manufacturers and farmers are pressing the government to take stronger actions to prevent imports of illegal cigarettes. Cigarette imports have also declined as Western manufacturers have invested and produce within Poland. Few cigarettes are now legally imported with ninety-nine percent of legally sold cigarettes available on the Polish market being produced in Poland.

Tobacco imports and exports increased in 2001 while cigarette smuggling appears to have risen since June 2000 when Poland raised tobacco product taxes to rates higher than exist in some non-EU neighboring countries. As locally grown tobacco is used mainly as a filler, most of the tobacco used in manufacturing is imported. In 2001 imports were 20 percent higher than in 2000 totaling around 30,000 tons. Exports were 15 percent higher in 2001 than in 2000 and in the first nine months reached the amount of 5,295 tons.

Poland is still negotiating with the EU regarding direct farm payments and production quotas. Final agricultural chapter negotiations for EU accession are expected to occur between summer and December of 2002 if Poland's government is to succeed in its goal of achieving accession by January 2004. While Poland requested a tobacco production quota of 70,000 tons, it appears that Poland's post-accession tobacco production quota will likely be closer to the 36,000 tons proposed by the EU.

TOBACCO

Production

CY 2001 was the third consecutive year of declining tobacco area and production. Tobacco area decreased around 11 percent from 14,057 hectares in 2000 to 12,591 hectares in 2001. Specialists forecast that this declining trend in area planted will continue in 2002. The industry hopes that the Government of Poland (GOP) will take decisive actions to stem the tide of illegal imports of cigarettes and resolve the issue of subsidies to tobacco growers. Instead, the GOP, at the request of tobacco farmers, seriously considered but ultimately decided not to increase the import tax on unmanufactured tobacco from 30 up to 105 percent for 2002. Producers contend that this would only increase cigarette prices and the quantity of smuggled cigarettes. Farmers may again pressure the government to raise the duty on imported tobacco later in 2002. Meanwhile, about 30,000 tons of tobacco are currently stored in cigarette producer's warehouses.

Farmers of the Tobacco Farmers' Union expect the 2002 leaf harvest to exceed that of 2001. Last year's crop was around 20,000 tons due to unfavorable climate conditions - around 10,000 tons of tobacco were destroyed by floods and hail. They hope to harvest around 27,000 tons of tobacco in 2002 which is approximately the amount targeted for subsidies.

In 2002 all tobacco farmers have to apply for production quotas which will be set based on quantities of tobacco sold by the farmer over the last three years. Starting in 2002, tobacco growers will not be provided any financial support from the government. The GOP will decrease the amount of subsidized tobacco from 27,500 tons to 26,700 tons for 2002 paying subsidies to manufacturers purchasing domestic tobacco. The government subsidizes each purchased kilogram of tobacco by PLN 2.3 (\$ 0.58). In MY 2001/2002, the GOP spent over PLN 60 million (US\$15 million) on subsidies. This amount will be similar in MY 2002/2003.

The government's imposed five year period requiring privatized tobacco companies to purchase 40 percent of domestically-produced tobacco ended in 2001. However, to help local farmers, cigarette manufacturers promised to mostly purchase local production. According to their calculations, they could purchase 16,000 tons of tobacco without subsidies or almost 24,000 with subsidies even though there are still around 30,000 tons stocked in their warehouses.

Tobacco is grown in Poland by approximately 20,000 farmers. Over the last two years approximately 10,000 farmers stopped producing tobacco, because they could not meet tobacco industry requirements - too small farms and crops. The average size of a typical tobacco farm is approximately 0.63 hectares. The largest tobacco growing areas are located in the south near Zamosc, Kielce, Krakow and Augustow up north. The dominant varieties are Virginia (around 55-60 percent), Burley (around 30 percent) and dark tobacco like Skroniowski and Kentucky (10 percent).

Consumption

Domestic tobacco production covers about 50 percent of industry demand. Virginia and Burley are purchased by tobacco plants and used as a filler for branded cigarettes. The remaining 50 percent of raw material is imported. These are mainly aromatic, oriental varieties which cannot be grown in Poland due primarily to unfavorable climatic conditions

and susceptibility to diseases.

In 2001, tobacco producers purchased 26,550 tons of local tobacco, only one percent less than in 2000. This was a result of GOP subsidies introduced last year. Subsidies will also be paid in MY 2002/2003, but not to farmers as was expected, but rather to buyers. The amount allowed to receive subsidies in 2002 was set at 26,700 tons, although processors said they do not need such a big amount of tobacco. Some companies announced that they do not intend to purchase any local tobacco this year, because their stocks are big enough to cover their tobacco needs for the next two years.

Stocks

According to cigarette manufacturers in Poland, there are around 30,000 tons of unmanufactured tobacco stocks.

Trade

After a decrease in tobacco imports in 2000, imports in Jan-Sept 2001 were 20 percent higher compared to the same time the year before. It is expected that 2001 imports will reach 30,000 tons (final data are not yet available). Imports from the U.S. account for approximately eight percent of total imports at 2,500 tons in 2001, similar to the 2,422 tons imported in 2000.

It is expected that in 2002, imports will remain at about the same level as in 2001. Traditionally, most imports consist mainly of light tobacco varieties and some oriental types of tobacco. The main suppliers of unmanufactured tobacco to Poland are Brazil, Zimbabwe, Turkey, Malawi, Italy, and the United States.

Exports were 15 percent higher in 2001 than in 2000 and in the first nine months reached the amount of 5,295 tons. Tobacco sector experts predict that the GOP will attempt to considerably increase exports of unmanufactured tobacco (through creation of producers groups and subsidization of farmers). This is expected to help farmers more than actual subsidies paid to processors purchasing domestic tobacco. FAS Warsaw estimates that exports could increase up to 6,000-7,000 tons next year. The biggest importers of Polish tobacco in 2001 were Lithuania, Russia, Ukraine, Kazakstan and France.

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 the same tariffs for virtually all suppliers. The following tariff schedule is applicable to unmanufactured tobacco in CY 2002:

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
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Although the GOP is seriously considering increasing tobacco import taxes from 30 percent up to 105 percent (within its WTO bound rate), the above applied tariffs will be maintained in 2002. Based on bilateral trade agreements, tariff rate quotas in CY 2002 are available for:

Hungary	2401.10	Tobacco, non-processed	15 % min. EUR 0.565/kg	700 tons
Bulgaria	2401.10	Tobacco, non-processed	15 % min. EUR 0.565/kg	200 tons
Turkey	2401.10	Tobacco, non-processed	15 % min. EUR 0.565/kg	2000 tons

Policy - EU Accession

During EU membership negotiations, Poland requested a 70,000 ton tobacco production quota. The EU is ready to accept 36,000 tons, and it seems this figure is likely to be agreed to by both sides. Since each kilogram of tobacco produced in the EU is subsidized by Euro 3 (compared to PLN 2.3 = Euro 0.64), Polish farmers see big prospects for future tobacco production. It is very likely that the EU will grant Poland a transition period for the introduction of EU standards on cigarettes, including excise taxes, until January 1, 2009. It is expected that the price of cigarettes produced in Poland will double, mainly due to higher EU excise taxes. Also, following EU accession, local import duties on raw tobacco and tobacco products will decrease considerably to EU external rates. Current Polish tariffs are much higher, even under preferential tariff rate quotas.

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

Over the last few years, the situation in the tobacco sector has declined. This is primarily a result of an increasing non-smoking campaign and illegal cigarette imports. Due to these factors, the production of cigarettes is declining. In 2001, Poland produced 80.6 billion (74.4 billion sold) cigarettes, 3 percent less compared to 83.3 billion pieces (73 billion sold) in 2000 and down significantly from a peak of 101 billion in 1995. Other tobacco products, pipe tobacco or cigars, account for less than 0.1 percent of consumption and are mainly imported.

Cigarettes are produced in nine plants (two processors closed in 2001) owned by independently-managed companies (mainly foreign). According to privatization agreements, the companies were required to modernize. To respond to a growing demand for light cigarettes with low tar and nicotine content, cigarette manufacturers introduced modern production lines. In 1999, light cigarettes represented 38 percent of sales but 50 percent in 2002. In addition, using

special tobacco funds (cigarette manufacturers have to transfer 0.6 percent of the purchased tobacco value to these funds), they provided technical assistance for farmers switching to new tobacco varieties.

Ninety-nine percent of cigarettes available on the Polish market are produced in Poland, although an unknown quantity of smuggled cigarettes also exist. There are 320 cigarette brands, of which one-third are made only from local tobacco. The other two-thirds are still produced from, at least, 40 percent local tobacco. Only one cigarette producer, a government owned factory in Lublin, is using 90 percent local varieties of tobacco for its production.

Local cigarette producers' position on the market:

	1999	2000	2001
	%	%	%
Philip Morris	31.9	33.3	36.5
Reemtsma	22.6	19.29	18.5
BAT	10.3	14.57	14.5
House of Prince	14.1	13.36	12
Altadis (former Seita)	13.4	10.35	11.5
others	7.7	7.87	7
Imports	1	1	1

Source: National Tobacco Industry Association

Since January 1, 2001, cigarette manufacturers are required to obtain production permits rather than licenses from the Ministry of Agriculture. Manufactures are also required to pay tobacco growers for purchased tobacco within 30 days or they can lose their production permit for one year or longer.

Production policy

In June 2000, a new excise tax system on cigarettes was introduced. There is a per unit tax fixed for each quarter and equal for all brands of cigarettes, domestic or imported. There is an additional tax of 25 percent of the sales value. The 25 percent tax is applied to a maximum retail price which must be printed on cigarette packaging. In addition, the excise tax cannot be lower than 90 percent of the excise tax for the most popular cigarettes sold during the previous year. In cases where no retail price is shown on the package, excise taxes of 70 apply to locally produced cigarettes and 230 percent to imported cigarettes. Most brands already have the price on their package. The categories and excise taxes are:

CN Code	Description	Excise tax in PLN per 1000 pcs and/or in percent:
	Tobacco products:	
2402.2	cigarettes	PLN 52.00 + 25 % of retail price

2402.1	cigars, cigarillos from tobacco or tobacco substitute	PLN 123.00
2402.1	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 %

The excise tax system generated PLN 7.655 billion (\$2 billion) in tax revenues from cigarette production in 2001, which is similar to that planned in the 2002 budget to be used for public security or education and health expenditures.

Since November 15, 2001, the content of tar in cigarettes sold in Poland cannot be higher than 12 mg and nicotine 1.2 mg. Stronger cigarettes are prohibited, although unknown amounts are reportedly smuggled into Poland.

Consumption

Among Poland's nearly 38 million people, there are about 10 million who smoke. Approximately 45 percent of adult men and 22 percent of women smoke. Per capita consumption is 2,500 cigarettes per year. Legal sales of cigarettes in 2001 were 74.4 billion, slightly higher than 73.1 billion sold in 2000. Around 20 percent of cigarettes sold in the market (around 14 billion) are thought to be smuggled. Due to lower taxes in neighboring countries, smuggled cigarettes are 50 percent cheaper in Poland. It is estimated that 15 billion cigarettes were sold illegally on the Polish market last year. Farmers and tobacco manufacturers are urging government authorities to take measures to stop smuggling. After Poland joins the EU, the official consumption of cigarettes could considerably decrease due to much higher taxes. Consequently, smuggled cigarette sales will likely continue if not increase. As a result of anti-smoking campaigns, over 2 million Poles are estimated to have given up smoking within the last ten years. At the same time, the amount spent by the government health service on smoking related illnesses has risen.

Trade

Official cigarette imports continue to decline due to increasing domestic production of Western brands in Poland. In the first three quarters of 2001, only 17 million pieces were imported compared to 104 million in all of 2000. Only 1,000 cigarettes were imported from the U.S. in the first nine months of 2001, while imports in 2000 reached 83.7 million pieces.

Polish exports of cigarettes increased in 2001. During the first nine months they reached 5.5 billion pieces compared to 4.7 billion pieces during the same period in 2000. Tobacco farmers hope that cigarette exports will increase in 2002, so that their production will be fully utilized. The largest importers of Polish cigarettes in 2001 were Slovenia, Djibouti, Ghana and Latvia. Exports to the United States were recorded at 18,000 pieces through the first nine months of 2001.

Tariffs and non-tariff barriers

For CY 2002 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
2402.9	Other	2.5 tons at 90 %	173 %, not less than EUR 19/1000 pcs
2403	Other mfd, homogenized and reconstituted tobacco:	300 tons at:	
2403.10, 2403.90	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 2002 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

Marketing

Based on a November 1999 amended health act, tobacco companies were required to remove all advertising from newspaper kiosks, shops, cafeterias, restaurants, pubs and other public places. Additionally, all outdoor tobacco promotion or promotions through sponsorship are prohibited. Cigarettes cannot be sold in schools, health care institutions and sports facilities. Since January 2002, all forms of tobacco product advertisement were prohibited in Poland. Only direct marketing and Internet advertising is permitted. Health warnings must cover one-third of all labels on advertisements for tobacco products and must be clearly legible.

Tobacco Unmfg. - PSD Table

PSD Table						
Country	Poland					
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	20300	14057	0	12600	0	11000
Beginning Stocks	12699	23033	8899	18516	0	30000
Farm Sales Weight Prod	38000	30000	0	22200	0	30000
Dry Weight Production	34200	27000	0	20000	0	26350
U.S. Leaf Imports	4000	2422	0	2500	0	2500
Other Foreign Imports	37000	21451	0	28000	0	28000
TOTAL Imports	41000	23873	0	30500	0	30500
TOTAL SUPPLY	87899	73906	8899	69016	0	86850
Exports	5000	4468	0	5400	0	6000
Dom. Leaf Consumption	30000	27000	0	14000	0	24300
U.S. Leaf Dom. Consum.	4000	2422	0	2500	0	2500
Other Foreign Consump.	40000	21500	0	17116	0	24050
TOTAL Dom. Consumption	74000	50922	0	33616	0	50850
TOTAL Disappearance	79000	55390	0	39016	0	56850
Ending Stocks	8899	18516	0	30000	0	30000
TOTAL DISTRIBUTION	87899	73906	0	69016	0	86850

Tobacco Unmfg - Exports

Export Trade Matrix			
Country	Poland		
Commodity	Tobacco, Unmfg., Total		
Time period	Jan-Dec	Units:	000 MT
Exports for:	2000		2001
U.S.		U.S.	
Others		Others	
Kazachstan	1,185	Lithuania	1,911
Ukraine	1,133	Russia	1225
France	614	Ukraine	815
Germany	460	Kazakhstan	495
Lithuania	92	France	281
Romania	18	Germany	223
Switzerland	5	Italy	208
		Romania	11
Total for Others	3507		5169
Others not Listed	961		126
Grand Total	4468		5295

Note: 2001 trade data covers first 9 months period only.

Tobacco Unmfg - Imports

Import Trade Matrix			
Country	Poland		
Commodity	Tobacco, Unmfg., Total		
Time period	Jan-Dec	Units:	000 MT
Imports for:	2000		2001
U.S.	2422	U.S.	1720
Others		Others	
Brazil	4555	Italy	2196
Zimbabwe	3452	Brazil	8654
Spain	2230	Zimbabwe	3098
Turkey	2127	Turkey	2261
India	1423	Malawi	2147
Malawi	1024	India	1361
Greece	962	China	1194
China	540	Greece	982
		France	558
Total for Others	16313		22451
Others not Listed	5138		3536
Grand Total	23873		27707

Note: 2001 trade data covers first 9 months period only.

Tobacco Unmfg., Burley - PSD Table

PSD Table						
Country	Poland					
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	5300	5000	0	5000	0	5500
Beginning Stocks	5769	6267	6509	6443	6509	6551
Farm Sales Weight Prod	12000	12900	0	12900	0	13000
Dry Weight Production	10800	11600	0	11600	0	11700
U.S. Leaf Imports	25	886	0	776	0	800
Other Foreign Imports	4000	3117	0	6018	0	4000
TOTAL Imports	4025	4003	0	6794	0	4800
TOTAL SUPPLY	20594	21870	6509	24837	6509	23051
Exports	60	41	0	10	0	20
Dom. Leaf Consumption	10000	11500	0	11500	0	12000
U.S. Leaf Dom. Consum.	25	886	0	776	0	800
Other Foreign Consump.	4000	3000	0	6000	0	4000
TOTAL Dom. Consumption	14025	15386	0	18276	0	16800
TOTAL Disappearance	14085	15427	0	18286	0	16820
Ending Stocks	6509	6443	6509	6551	0	6231
TOTAL DISTRIBUTION	20594	21870	6509	24837	0	23051

Tobacco, Unmfg., Burley - Exports

Export Trade Matrix			
Country	Poland		
Commodity	Tobacco, Unmfg., Burley		
Time period	Jan-Dec	Units:	000MT
Exports for:	2000		2001
U.S.		U.S.	
Others		Others	
Lithuania	35	Lithuania	1
Switzerland	5		
Total for Others	40		1
Others not Listed	1		
Grand Total	41		1

Note: 2001 trade data covers first 9 months period only.

Tobacco, Unmfg., Burley - Imports

Import Trade Matrix			
Country	Poland		
Commodity	Tobacco, Unmfg., Burley		
Time period	Jan-Dec	Units:	000 mt
Imports for:	2000		2001
U.S.	886	U.S.	776
Others		Others	
Malawi	967	Malawi	2051
Brazil	636	Brazil	1780
Thailand	376	Italy	678
India	233	Thailand	568
Phillipines	220	France	213
Italy	215	China	191
France	162	Zambia	49
		Argentina	38
Total for Others	2809		5568
Others not Listed	308		450
Grand Total	4003		6794

Note: 2001 trade data covers first 9 months period only.

Tobacco Unmfg.,Dark Fire Cured - PSD Table

PSD Table						
Country	Poland					
Commodity	Unmfg., Dark Fire 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	1000	1000	0	900	0	800
Beginning Stocks	2179	2708	2229	2950	0	2950
Farm Sales Weight Prod	2500	2500	0	2300	0	2300
Dry Weight Production	2250	2250	0	2000	0	2000
U.S. Leaf Imports	0	2	0	2	0	2
Other Foreign Imports	700	329	0	320	0	300
TOTAL Imports	700	331	0	322	0	302
TOTAL SUPPLY	5129	5289	2229	5272	0	5252
Exports	200	8	0	0	0	5
Dom. Leaf Consumption	2000	2000	0	2000	0	2000
U.S. Leaf Dom. Consum.	0	2	0	2	0	2
Other Foreign Consump.	700	329	0	320	0	300
TOTAL Dom. Consumption	2700	2331	0	2322	0	2302
TOTAL Disappearance	2900	2339	0	2322	0	2307
Ending Stocks	2229	2950	0	2950	0	2945
TOTAL DISTRIBUTION	5129	5289	0	5272	0	5252

Tobacco Unmfg.,Dark Fire Cured - Exports

Export Trade Matrix			
Country	Poland		
Commodity	Unmfg., Dark Fire Cured		
Time period	Jan-Dec	Units:	000 MT
Exports for:	2000		2001
U.S.		U.S.	
Others		Others	
Germany	8		0
Total for Others	8		0
Others not Listed			
Grand Total	8		0

Note: 2001 trade data covers first 9 months period only.

Tobacco Unmfg., Dark Fire Cured - Imports

Import Trade Matrix			
Country	Poland		
Commodity	Unmfg., Dark Fire Cured		
Time period	Jan-Dec	Units:	000 MT
Imports for:	2000		2001
U.S.	2	U.S.	
Others		Others	
Tanzania	262	Tanzania	218
India	22	Italy	59
Indonesia	18	Uganda	22
Uganda	13	Indonesia	13
Mexico	11	Mexico	4
		India	1
Total for Others	326		317
Others not Listed	3		2
Grand Total	331		319

Note: 2001 trade data covers first 9 months period only.

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

PSD Table						
Country	Poland					
Commodity	UnmfgDark Air & Sun 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	100	100	0	80	0	70
Beginning Stocks	137	4210	87	3971	0	3971
Farm Sales Weight Prod	200	200	0	390	0	300
Dry Weight Production	180	180	0	350	0	270
U.S. Leaf Imports	0	0	0	0	0	0
Other Foreign Imports	100	545	0	490	0	500
TOTAL Imports	100	545	0	490	0	500
TOTAL SUPPLY	417	4935	87	4811	0	4741
Exports	50	239	0	0	0	100
Dom. Leaf Consumption	180	180	0	350	0	270
U.S. Leaf Dom. Consum.	0	0	0	0	0	0
Other Foreign Consump.	100	545	0	490	0	500
TOTAL Dom. Consumption	280	725	0	840	0	770
TOTAL Disappearance	330	964	0	840	0	870
Ending Stocks	87	3971	0	3971	0	3871
TOTAL DISTRIBUTION	417	4935	0	4811	0	4741

Tobacco Unmfg., Dark Air & Sun Cured - Imports

Import Trade Matrix			
Country	Poland		
Commodity	Unmfg.,Dark Air Cured,Cigar		
Time period	Jan-Dec	Units:	000 MT
Imports for:	2000		2001
U.S.		U.S.	
Others		Others	
India	231	India	362
Indonesia	166	Indonesia	65
Italy	50	Tanzania	33
Tunesia	40	Italy	22
Cuba	33	Columbia	5
China	17	Cuba	3
Total for Others	537		490
Others not Listed	8		
Grand Total	545		490

Note: 2001 trade data covers first 9 months period only.

Tobacco,Unmfg.,Flue Cured - PSD Table

PSD Table						
Country	Poland					
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	12600	12600	0	12000	0	12000
Beginning Stocks	4217	6241	3717	4342	0	4090
Farm Sales Weight Prod	25000	25000	0	10000	0	15000
Dry Weight Production	22500	22500	0	9000	0	13500
U.S. Leaf Imports	4000	830	0	667	0	800
Other Foreign Imports	12500	8217	0	10640	0	8000
TOTAL Imports	16500	9047	0	11307	0	8800
TOTAL SUPPLY	43217	37788	3717	24649	0	26390
Exports	3000	3399	0	3892	0	4000
Dom. Leaf Consumption	20000	21000	0	7000	0	12000
U.S. Leaf Dom. Consum.	4000	830	0	667	0	800
Other Foreign Consump.	12500	8217	0	9000	0	7000
TOTAL Dom. Consumption	36500	30047	0	16667	0	19800
TOTAL Disappearance	39500	33446	0	20559	0	23800
Ending Stocks	3717	4342	0	4090	0	2590
TOTAL DISTRIBUTION	43217	37788	0	24649	0	26390

Tobacco,Unmfg.,Flue Cured - Exports

Export Trade Matrix			
Country	Poland		
Commodity	Tobacco,Unmfg.,Flue Cured		
Time period	Jan-Dec	Units:	000 MT
Exports for:	2000		2001
U.S.		U.S.	
Others		Others	
Kazakhstan	1163	Russia	1153
Russia	963	Lithuania	1078
Ukraine	875	Ukraine	810
France	258	Kazakhstan	495
Germany	66	Italy	208
Lithuania	56	Romania	107
		Germany	40
Total for Others	3381		3891
Others not Listed	17		1
Grand Total	3398		3892

Note: 2001 trade data covers first 9 months period only.

Tobacco,Unmfg.,Flue Cured - Imports

Import Trade Matrix			
Country	Poland		
Commodity	Tobacco,Unmfg.,Flue Cured		
Time period	Jan-Dec	Units:	000 MT
Imports for:	2000		2001
U.S.	829	U.S.	667
Others		Others	
Brazil	2912	Brazil	5461
Zimbabwe	2563	Zimbabwe	2661
India	844	India	769
France	281	France	316
Italy	259	Argentina	266
Spain	258	Italy	263
Argentina	238	China	256
Phillipines	221	Pakistan	147
Zambia	134	Zambia	94
Syria	8	Malawi	69
Total for Others	7718		10302
Others not Listed	499		338
Grand Total	9046		11307

Note: 2001 trade data covers first 9 months period only.

Tobacco Unmfg., Light Air Cured - PSD Table

PSD Table						
Country	Poland					
Commodity	Unmfg., Light Air 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	0	7000	0	7000	0	0
Beginning Stocks	1182	6780	0	7773	0	7763
Farm Sales Weight Prod	0	15000	0	10500	0	15000
Dry Weight Production	0	13500	0	9450	0	13500
U.S. Leaf Imports	150	886	0	800	0	800
Other Foreign Imports	4000	3330	0	6150	0	5000
TOTAL Imports	4150	4216	0	6950	0	5800
TOTAL SUPPLY	5332	24496	0	24173	0	27063
Exports	300	43	0	10	0	50
Dom. Leaf Consumption	882	12500	0	9450	0	12500
U.S. Leaf Dom. Consum.	150	880	0	800	0	800
Other Foreign Consump.	4000	3300	0	6150	0	5000
TOTAL Dom. Consumption	5032	16680	0	16400	0	18300
TOTAL Disappearance	5332	16723	0	16410	0	18350
Ending Stocks	0	7773	0	7763	0	8713
TOTAL DISTRIBUTION	5332	24496	0	24173	0	27063

Tobacco Unmfg., Light Air Cured - Exports

Export Trade Matrix			
Country	Poland		
Commodity	Unmfg., Light Air Cured		
Time period	Jan-Dec	Units:	000 MT
Exports for:	2000		2001
U.S.		U.S.	
Others		Others	
Lithuania	35	Lithuania	1
Switzerland	5		
Germany	2		
Total for Others	42		1
Others not Listed	1		
Grand Total	43		1

Note: 2001 trade data covers first 9 months period only.

Tobacco Unmfg., Light Air Cured - Imports

Import Trade Matrix			
Country	Poland		
Commodity	Unmfg., Light Air Cured		
Time period	Jan-Dec	Units:	000 MT
Imports for:	2000		2001
U.S.	886	U.S.	776
Others		Others	
Malawi	967	Malawi	2051
Brazil	658	Brazil	1789
Thailand	376	Italy	678
India	325	Thailand	568
Phillipines	220	India	229
Italy	215	France	213
France	162	China	191
		Indonesia	127
Total for Others	2923		5846
Others not Listed	407		312
Grand Total	4216		6934

Note: 2001 trade data covers first 9 months period only.

Tobacco Unmfg., Oriental - PSD Table

PSD Table						
Country	Poland					
Commodity	Tobacco, Unmfg., Oriental				(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	0	0	0	0	0	0
Beginning Stocks	1818	2421	1768	2277	0	2977
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	3500	3895	0	4500	0	4000
TOTAL Imports	3500	3895	0	4500	0	4000
TOTAL SUPPLY	5318	6316	1768	6777	0	6977
Exports	50	239	0	0	0	200
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	0	0	0	0	0	0
Other Foreign Consump.	3500	3800	0	3800	0	4000
TOTAL Dom. Consumption	3500	3800	0	3800	0	4000
TOTAL Disappearance	3550	4039	0	3800	0	4200
Ending Stocks	1768	2277	0	2977	0	2777
TOTAL DISTRIBUTION	5318	6316	0	6777	0	6977

Tobacco Unmfg., Oriental - Exports

Export Trade Matrix			
Country	Poland		
Commodity	Tobacco, Unmfg., Oriental		
Time period	Jan-Dec	Units:	000 MT
Exports for:	2000		2001
U.S.		U.S.	
Others		Others	
Ukraine	239		
Total for Others	239		0
Others not Listed			
Grand Total	239		0

Note: 2001 trade data covers first 9 months period only.

Tobacco Unmfg., Oriental - Imports

Import Trade Matrix			
Country	Poland		
Commodity	Tobacco, Unmfg., Oriental		
Time period	Jan-Dec	Units:	000 MT
Imports for:	2000		2001
U.S.		U.S.	
Others		Others	
Turkey	2061	Turkey	2221
Greece	928	Greece	932
Bulgaria	307	Bulgaria	282
Italy	223	China	252
Macedonia	124	Italy	225
China	93	Lebanon	102
		Macedonia	57
		Moldova	28
Total for Others	3736		4099
Others not Listed	159		71
Grand Total	3895		4170

Note: 2001 trade data covers first 9 months period only.

Tobacco, Mfg., Cigarettes - PSD Table

PSD Table						
Country	Poland					
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	85000	77900		72540	0	73000
Non-Filter Production	7000	5540		4030	0	3500
TOTAL Production	92000	83440	0	76570	0	76500
Imports	450	104		30	0	50
TOTAL SUPPLY	92450	83544	0	76600	0	76550
Exports	5500	7716		6500	0	6500
Domestic Consumption	86950	75828		70100	0	70050
TOTAL DISTRIBUTION	92450	83544	0	76600	0	76550

Tobacco, Mfg., Cigarettes - Exports

Export Trade Matrix			
Country	Poland		
Commodity	Tobacco, Mfg., Cigarettes		
Time period	Jan-Dec	Units:	MLN PCS
Exports for:	2000		2001
U.S.		U.S.	
Others		Others	
Slovenia	2411	Belgium	1447
Belgium	1077	Slovenia	800
Moldova	999	Djibuti	706
Latvia	781	Ghana	454
Russia	453	Latvia	452
Ghana	395	Cyprus	300
Djibuti	339	Mauretania	294
Mauretania	319	UAE	228
France	197	Yougoslavia	186
Panama	164	Germany	171
Total for Others	7135		5038
Others not Listed	581		499
Grand Total	7716		5537

Note: 2001 trade data covers first 9 months period only.

Tobacco, Mfg., Cigarettes - Imports

Import Trade Matrix			
Country	Poland		
Commodity	Tobacco, Mfg., Cigarettes		
Time period	Jan-Dec	Units:	MLN PCS
Imports for:	2000		2001
U.S.	15	U.S.	
Others		Others	
Germany	3	Germany	11
Czech Rep.	3	UK	5
Total for Others	6		16
Others not Listed	83		1
Grand Total	104		17

Note: 2001 trade data covers first 9 months period only.