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Report Highlights: Despite world wide anti smoking efforts cigarette consumption in Germany is still increasing. Germany does not experience aggressive attacks on tobacco smoking. The United States exported 50,300 tons of raw tobacco at a value of US\$ 311 million to Germany in 1998. Total raw tobacco imports amounted to 239 thousand tons at a value of US\$ 923 million.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
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|--|---|
| Table | 1 |
| Executive Summary | 1 |
| Production | 1 |
| Production Table | 2 |
| Consumption | 2 |
| Trade | 3 |
| 1998 German Leaf Tobacco Trade by Type | 4 |
| Stocks | 4 |
| Marketing | 4 |
| Cigarettes | 5 |
| Cigars | 5 |
| Smoking Tobacco | 5 |
| Taxation | 5 |

Executive Summary

German tobacco production is forecast to increase to about 10,000 tons in 1999 due to an improved EU subsidy system for northern-EU tobacco growers. However, this tobacco is mainly used as filler tobacco. Total tobacco consumption is estimated at about 142 to 145 thousand tons annually of which about 40,000 tons are imported from the United States. German cigarette consumption has been steadily growing over the past six years. The success of big packs of cigarettes contributed to this development. German smokers are contributing DM 21.7 billion to the German national budget in the form of tobacco taxes. Anti-smoking campaigns in Germany are not as aggressive as in the United States. Actually, the climate between smokers and non-smokers is still very friendly and consensus oriented.

Production

Germany is only a small producer of tobacco. Its maximum production quota as permitted by the EU amounts to 11,625 tons dry weight. In recent years, German tobacco growers never filled this quota since EU production subsidies were regarded as insufficient. Also restructuring measures on Eastern German farms cut back tobacco production for several years. The 1998 reform of the EU tobacco regime resulted in an increase of EU tobacco subsidies particularly for growers in the northern part of the EU. Consequently, an increase in German tobacco area of 350 hectares, which makes up for 10 percent of total area, is recorded for 1998. In 1999 tobacco area is forecast to grow again by 130 hectares to about 4,000 hectares.

Production increase takes place exclusively in the Geudertheimer (a dark air cured cigar tobacco) and in flue cured Virginia varieties. Both tobacco types are in demand by the local cigarette and cigar industry. Most tobacco is grown under contract. Domestic tobacco growers are proud that none of their crop ends up in intervention storage. German grown tobacco is generally used as filler tobacco in cigarettes and cigars.

| | | | | | | |
|------------------|--------------|--|--|------------|--|--|
| Production Table | | | | | | |
| | | | | | | |
| | Area Planted | | | Production | | |

| | (Hectares) | | | Metric Tons | | |
|----------------------|------------|------|------|-------------|------|------|
| | 1997 | 1998 | 1999 | 1997 | 1998 | 1999 |
| Burley | 910 | 892 | 890 | 2480 | 2557 | 2500 |
| Dark Air & Sun Cured | 0 | 0 | 0 | 0 | 0 | 0 |
| Dark Air Cured | 1143 | 1307 | 1350 | 3177 | 3689 | 3790 |
| Dark Fire Cured | 0 | 0 | 0 | 0 | 0 | 0 |
| Flue Cured | 1448 | 1662 | 1750 | 2847 | 3308 | 3480 |
| Light Air Cured | 0 | 0 | 0 | 0 | 0 | 0 |
| Oriental | 0 | 0 | 0 | 0 | 0 | 0 |
| Tobacco, Unmfg. | 3501 | 3861 | 3990 | 8504 | 9554 | 9770 |

Consumption

In Germany, annual raw tobacco consumption is estimated at 142 to 145 thousand tons of which roughly 40,000 tons are U.S. tobaccos. Sources for these estimates are official customs and taxation statistics. Industry statistics are not available. The vast majority of about 130 to 135 thousand tons of raw tobacco is consumed by the cigarette industry which also consumes nearly all of the imported U.S. tobacco, amounting to 43,628 tons in 1998. However, a small portion of imported U.S. tobacco may be re-exported to the Netherlands for production of fine-cut smoking tobacco.

German cigarette smokers are generally taste-sensitive smokers preferring high quality American-blend type cigarettes. This requires a blend of about 20 percent of U.S. flue cured and burley tobaccos. Generic or trade chain cigarette brands reportedly contain less high-priced American tobacco.

Trade

Arrivals of leaf tobacco in Germany are recorded at 222,600 tons in 1998 which is exactly the same volume as in 1997. Number one supplier for Germany is the United States, closely followed by Brazil and to a much lesser extent Zimbabwe and Malawi. Supply patterns actually do not change much with respect to the major supplying countries. Arrivals from India, China and Thailand had been somewhat higher in 1997 for the production of export cigarettes mainly to FSU countries. In 1998 these low price origins were replaced by increased arrivals of Turkish oriental tobacco.

Since leaf tobacco management is now centralized in regional leaf tobacco departments and storage is done in centralized customs-sealed leaf storage facilities, large portions of German imports are destined for re-export. Primary destinations are the Netherlands, Poland, Ukraine, Czech Republic, Romania and Russia. Western tobacco companies have been actively installing production facilities in Eastern European countries during the 1990's. It seems that these facilities are now entering into full operation. Part of the required leaf is supplied from German based storage.

| 1998 German Leaf Tobacco Trade by Type | | | | |
|--|---------|-----------|------------|----------|
| | | | | |
| Import Summary | Total | | U.S. Share | |
| | MT | DM 1,000 | MT | DM 1,000 |
| Flue Cured, Virgin | 65,582 | 641,846 | 24,722 | 318,969 |
| Burley | 42,511 | 393,353 | 12,283 | 185,119 |
| Maryland | 658 | 10,055 | 658 | 10,055 |
| Kentucky Fired Cured | 413 | 2,424 | 42 | 460 |
| Oth. Fire Cured | 2,554 | 46,171 | 0 | 0 |
| Light Air Cured | 12,000 | 86,902 | 20 | 153 |
| Oriental | 31,174 | 257,770 | 0 | 0 |
| Dark Air Cured | 2,074 | 15,329 | 2 | 219 |
| Oth. Flue Cured | 25,556 | 18,884 | 2 | 15 |
| Other Tobacco | 1,569 | 44,554 | 8 | 143 |
| Stems and Scraps | 38,500 | 41,927 | 5,891 | 6,537 |
| HTL | 16,228 | 65,279 | 6,683 | 25,676 |
| Total | 238,819 | 1,624,494 | 50,311 | 547,346 |
| | | | | |
| | | | | |
| Export Summary | Total | | U.S. Share | |
| | MT | DM 1,000 | MT | DM 1,000 |
| Flue Cured, Virgin | 18,850 | 164,288 | 0 | 0 |
| Burley | 9,149 | 71,315 | 753 | 11,378 |
| Maryland | 68 | 696 | 0 | 0 |
| Kentucky Fired Cured | 625 | 3,154 | 0 | 0 |
| Oth. Fire Cured | 1,142 | 24,303 | 0 | 0 |
| Light Air Cured | 3,812 | 30,188 | 0 | 0 |
| Oriental | 4,824 | 39,106 | 276 | 2,853 |
| Dark Air Cured | 1,876 | 800 | 971 | 3,636 |
| Oth. Flue Cured | 6,758 | 48,026 | 0 | 0 |
| Other Tobacco | 21,685 | 17,829 | 4 | 28 |
| Stems and Scraps | 14,666 | 19,037 | 158 | 115 |
| HTL | 3,203 | 14,723 | 4 | 194 |
| Total | 86,658 | 433,465 | 2,166 | 18,204 |

Source: German Federal Statistics Office

Stocks

The German tobacco processing industry does not provide any data or information about raw tobacco storage. Total leaf supplies are estimated at 12 to 15 months needs for high value tobacco types.

Marketing

German tobacco buyers are for many years already complaining about the auction marketing system for leaf tobacco in the United States. They claim that it is too labor intensive. It requires a big group of leaf buyers traveling from one auction to the other. Complaints are also frequently heard about lack of cleanliness of auction floors. Reports that the U.S. cigarette industry intends to start contract production of tobacco were eagerly followed by German tobacco buyers, claiming that they also would be interested in production contracts.

Cigarettes

In 1998, German cigarette production dropped marginally by 0.3 percent to 181 billion. At the same time imports increased by 2.3 billion. Exports according to official statistics went up by 14.5 billion. Internal statistics record export sales increases of only three billion.

Domestic consumption is recorded according to the taxation statistics at 138.4 billion, an increase of 0.5 percent. The German cigarette industry is confident that cigarette consumption will continue its path of growth on the domestic market experienced over the past six years. During the same period, the German population also grew by about two million as result of immigration mainly from Eastern Europe and the states of the former Soviet Union. However, per capita cigarette consumption is also growing by about 0.5 percent per year. Consequently total tax revenues from tobacco product sales went up by 2.8 percent to DM 21.6 billion in 1998.

Due to a relatively high unemployment rate of about ten percent and a not very optimistic outlook for economic growth for 1999 consumers have become more price sensitive. Sales of trade chain brands increased their market share to 6.4 percent compared to 5.4 percent in 1997. Since many smokers are one-pack-per-day smokers the industry increased their sales efforts for big packs containing 24 to 27 cigarettes. Cigarettes in big packs are also up to three percent cheaper than normal packs containing 18 to 20 cigarettes. The market share of this packaging segment reached 11.6 percent in 1998. It is forecast to grow further in 1999 and may impact on total cigarette consumption.

Anti-smoking campaigns in Germany are not as aggressive as in the United States. Actually, the climate between smokers and non-smokers is still very friendly and consensus oriented. An all-party-coalition in the German Bundestag (Lower House) failed twice during recent years to institute a non-smoker-protection law. Instead the German government filed a legal complaint at the European Court in Luxemburg against the European advertising ban for tobacco products. A court decision is expected for the year 2000. So far the German cigarette industry has been successful in developing private self-limitation arrangements with the Federal Ministry of Health. The industry committed itself to not installing vending machines in the neighborhood of schools and youth centers.

Cigars

Parallel to the positive trend in cigarette consumption also consumption of cigars recovered. In particular small cigars and cigarillos are favored by new cigar smokers. This product has lost its grandfather image. Cigars and cigarillos are viewed as luxury items and frequently featured in advertisements to imply upper crust lifestyle. Of special interest are products from the Caribbean region.

Two years ago, the German cigarette industry developed a new cigarillo product made mainly of burley and flue cured tobaccos. Target group for this product are smokers of low price cigarettes and tobacco sticks. However, this unusual product has not been very successful although it is taxed as cigars which is well below cigarettes.

Smoking Tobacco

Consumption of smoking tobacco for individual cigarette production is slowly shrinking. Only very price sensitive smokers and some special small consumer groups stick to the product.

Pipe tobacco production and consumption is also shrinking. A reversal of this trend is not detectable.

Taxation

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

Cigarettes

DM 9.20 per 100 cigarettes
plus a proportional tax portion calculated as 21.96 percent of the retail sales price.
Minimum tobacco tax on cigarettes amounts to DM 11.00 per 100 cigarettes.
This does not include VAT.

Cigars and cigarillos

Only a proportional tax of 5 percent of the retail price
Minimum tax of DM 2.60 per 100 cigars/cigarillos

Smoking tobacco

Fine-cut tobacco
DM 30.21 per kilogram
Plus 18.12 percent of retail price
Pipe tobacco
DM 21.00 per kilogram
Plus 13.5 percent of retail price

Tobacco Rolls

DM 96.65 per kilogram
Plus 26.65 percent of retail price

As the German federal budget is strongly in the deficit, and as Federal Finance Minister Eichel recently announced that all budgets have to be cut back by 7.4 percent in 2000, it would not come as a surprise if VAT may be increased soon and also tobacco taxes may have to experience a moderate increase next year.

| | | | | | | |
|------------------------|-----------------|---------|--------|---------|------|---------|
| PSD Table | | | | | | |
| Country: | Germany | | | | | |
| Commodity: | Tobacco, Unmfg. | | | | | |
| | | 1997 | | 1998 | | 1999 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 01/1997 | | 01/1998 | | 01/1999 |
| Area Planted | 3380 | 3501 | 3500 | 3861 | 0 | 3990 |
| Beginning Stocks | 15242 | 4845 | 4845 | 4044 | 8533 | 9178 |
| Farm Sales Weight Prod | 8314 | 8504 | 8100 | 9554 | 0 | 9770 |
| Dry Weight Production | 6953 | 7233 | 6788 | 8120 | 0 | 8320 |
| U.S. Leaf Imports | 39864 | 39563 | 40000 | 43628 | 0 | 40000 |
| Other Foreign Imports | 195991 | 182605 | 210000 | 178963 | 0 | 180000 |
| TOTAL Imports | 235855 | 222168 | 250000 | 222591 | 0 | 220000 |
| TOTAL SUPPLY | 258050 | 234246 | 261633 | 234755 | 8533 | 237498 |
| Exports | 72848 | 85317 | 75000 | 82926 | 0 | 80000 |
| Dom. Leaf Consumption | 3600 | 4400 | 3600 | 5400 | 0 | 5000 |
| U.S. Leaf Dom. Consum. | 34757 | 35485 | 34500 | 32251 | 0 | 32000 |
| Other Foreign Consump. | 142000 | 105000 | 140000 | 105000 | 0 | 105000 |
| TOTAL Dom. Consumption | 180357 | 144885 | 178100 | 142651 | 0 | 142000 |
| TOTAL Disappearance | 253205 | 230202 | 253100 | 225577 | 0 | 222000 |
| Ending Stocks | 4845 | 4044 | 8533 | 9178 | 8533 | 15498 |
| TOTAL DISTRIBUTION | 258050 | 234246 | 261633 | 234755 | 8533 | 237498 |

| | | | | | | |
|------------------------|--------|-------|-------|-------|------|-------|
| Production Table | | | | | | |
| Country: | | | | | | |
| Commodity: | Burley | | | | | |
| | | 1997 | | 1998 | | 1999 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | | | | | |
| Area Planted | 983 | 910 | 915 | 892 | 0 | 890 |
| Beginning Stocks | 12002 | 10566 | 10566 | 10500 | 8200 | 9803 |
| Farm Sales Weight Prod | 2673 | 2480 | 2450 | 2557 | 0 | 2500 |
| Dry Weight Production | 2219 | 2158 | 2034 | 2225 | 0 | 2180 |
| U.S. Leaf Imports | 13124 | 13403 | 13000 | 12283 | 0 | 12500 |
| Other Foreign Imports | 24083 | 21277 | 24000 | 30228 | 0 | 30000 |
| TOTAL Imports | 37207 | 34680 | 37000 | 42511 | 0 | 42500 |
| TOTAL SUPPLY | 51428 | 47404 | 49600 | 55236 | 8200 | 54483 |
| Exports | 8064 | 8255 | 8000 | 9149 | 0 | 9200 |
| Dom. Leaf Consumption | 1400 | 1500 | 1400 | 1600 | 0 | 1600 |
| U.S. Leaf Dom. Consum. | 12406 | 11212 | 12000 | 9908 | 0 | 10000 |
| Other Foreign Consump. | 18992 | 15937 | 20000 | 24776 | 0 | 24000 |
| TOTAL Dom. Consumption | 32798 | 28649 | 33400 | 36284 | 0 | 35600 |
| TOTAL Disappearance | 40862 | 36904 | 41400 | 45433 | 0 | 44800 |
| Ending Stocks | 10566 | 10500 | 8200 | 9803 | 8200 | 9683 |
| TOTAL DISTRIBUTION | 51428 | 47404 | 49600 | 55236 | 8200 | 54483 |

| | | | | | | |
|------------------------|----------------|------|-----|------|-----|------|
| Production Table | | | | | | |
| Country: | | | | | | |
| Commodity: | Dark Air Cured | | | | | |
| | | 1997 | | 1998 | | 1999 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | | | | | |
| Area Planted | 0 | 1143 | 0 | 1307 | 0 | 1350 |
| Beginning Stocks | 0 | 0 | 0 | 5 | 0 | 25 |
| Farm Sales Weight Prod | 0 | 3177 | 0 | 3689 | 0 | 3790 |
| Dry Weight Production | 0 | 2542 | 0 | 2951 | 0 | 3040 |
| U.S. Leaf Imports | 0 | 6 | 0 | 2 | 0 | 0 |
| Other Foreign Imports | 0 | 1641 | 0 | 2072 | 0 | 2000 |
| TOTAL Imports | 0 | 1647 | 0 | 2074 | 0 | 2000 |
| TOTAL SUPPLY | 0 | 4189 | 0 | 5030 | 0 | 5065 |
| Exports | 0 | 1666 | 0 | 1876 | 0 | 1800 |
| Dom. Leaf Consumption | 0 | 1100 | 0 | 1800 | 0 | 1800 |
| U.S. Leaf Dom. Consum. | 0 | 0 | 0 | 0 | 0 | 0 |
| Other Foreign Consump. | 0 | 1418 | 0 | 1329 | 0 | 1300 |
| TOTAL Dom. Consumption | 0 | 2518 | 0 | 3129 | 0 | 3100 |
| TOTAL Disappearance | 0 | 4184 | 0 | 5005 | 0 | 4900 |
| Ending Stocks | 0 | 5 | 0 | 25 | 0 | 165 |
| TOTAL DISTRIBUTION | 0 | 4189 | 0 | 5030 | 0 | 5065 |

| | | | | | | |
|------------------------|-----------------|------|-----|------|-----|------|
| Production Table | | | | | | |
| Country: | | | | | | |
| Commodity: | Dark Fire Cured | | | | | |
| | | 1997 | | 1998 | | 1999 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | | | | | |
| Area Planted | 0 | 0 | 0 | 0 | 0 | 0 |
| Beginning Stocks | 0 | 2000 | 0 | 719 | 0 | 576 |
| Farm Sales Weight Prod | 0 | 0 | 0 | 0 | 0 | 0 |
| Dry Weight Production | 0 | 0 | 0 | 0 | 0 | 0 |
| U.S. Leaf Imports | 0 | 55 | 0 | 41 | 0 | 45 |
| Other Foreign Imports | 0 | 3149 | 0 | 2926 | 0 | 3000 |
| TOTAL Imports | 0 | 3204 | 0 | 2967 | 0 | 3045 |
| TOTAL SUPPLY | 0 | 5204 | 0 | 3686 | 0 | 3621 |
| Exports | 0 | 3061 | 0 | 1766 | 0 | 1800 |
| Dom. Leaf Consumption | 0 | 0 | 0 | 0 | 0 | 0 |
| U.S. Leaf Dom. Consum. | 0 | 42 | 0 | 52 | 0 | 50 |
| Other Foreign Consump. | 0 | 1382 | 0 | 1292 | 0 | 1300 |
| TOTAL Dom. Consumption | 0 | 1424 | 0 | 1344 | 0 | 1350 |
| TOTAL Disappearance | 0 | 4485 | 0 | 3110 | 0 | 3150 |
| Ending Stocks | 0 | 719 | 0 | 576 | 0 | 471 |
| TOTAL DISTRIBUTION | 0 | 5204 | 0 | 3686 | 0 | 3621 |

| | | | | | | |
|------------------------|------------|--------|-------|-------|-------|-------|
| Production Table | | | | | | |
| Country: | | | | | | |
| Commodity: | Flue Cured | | | | | |
| | | 1997 | | 1998 | | 1999 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | | | | | |
| Area Planted | 1282 | 1448 | 1445 | 1662 | 0 | 1750 |
| Beginning Stocks | 6903 | 0 | 11492 | 2852 | 11306 | 671 |
| Farm Sales Weight Prod | 2475 | 2847 | 2600 | 3308 | 0 | 3480 |
| Dry Weight Production | 2203 | 2534 | 2314 | 2944 | 0 | 3100 |
| U.S. Leaf Imports | 21449 | 22192 | 22000 | 24726 | 0 | 24000 |
| Other Foreign Imports | 64115 | 84572 | 60000 | 66411 | 0 | 66000 |
| TOTAL Imports | 85564 | 106764 | 82000 | 91137 | 0 | 90000 |
| TOTAL SUPPLY | 94670 | 109298 | 95806 | 96933 | 11306 | 93771 |
| Exports | 21984 | 27698 | 22000 | 25609 | 0 | 25000 |
| Dom. Leaf Consumption | 1500 | 1800 | 1500 | 2000 | 0 | 1600 |
| U.S. Leaf Dom. Consum. | 19337 | 19219 | 19000 | 17403 | 0 | 17000 |
| Other Foreign Consump. | 40357 | 57729 | 42000 | 51250 | 0 | 50000 |
| TOTAL Dom. Consumption | 61194 | 78748 | 62500 | 70653 | 0 | 68600 |
| TOTAL Disappearance | 83178 | 106446 | 84500 | 96262 | 0 | 93600 |
| Ending Stocks | 11492 | 2852 | 11306 | 671 | 11306 | 171 |
| TOTAL DISTRIBUTION | 94670 | 109298 | 95806 | 96933 | 11306 | 93771 |

| | | | | | | |
|------------------------|-----------------|-------|-------|-------|------|-------|
| Production Table | | | | | | |
| Country: | | | | | | |
| Commodity: | Light Air Cured | | | | | |
| | | 1997 | | 1998 | | 1999 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | | | | | |
| Area Planted | 0 | 0 | 0 | 0 | 0 | 0 |
| Beginning Stocks | 7630 | 4692 | 4692 | 984 | 2392 | 292 |
| Farm Sales Weight Prod | 0 | 0 | 0 | 0 | 0 | 0 |
| Dry Weight Production | 0 | 0 | 0 | 0 | 0 | 0 |
| U.S. Leaf Imports | 908 | 641 | 1000 | 658 | 0 | 650 |
| Other Foreign Imports | 13454 | 19063 | 13500 | 12000 | 0 | 13000 |
| TOTAL Imports | 14362 | 19704 | 14500 | 12658 | 0 | 13650 |
| TOTAL SUPPLY | 21992 | 24396 | 19192 | 13642 | 2392 | 13942 |
| Exports | 2708 | 4293 | 3000 | 3880 | 0 | 3900 |
| Dom. Leaf Consumption | 0 | 0 | 0 | 0 | 0 | 0 |
| U.S. Leaf Dom. Consum. | 726 | 682 | 800 | 593 | 0 | 600 |
| Other Foreign Consump. | 13866 | 18437 | 13000 | 8877 | 0 | 8900 |
| TOTAL Dom. Consumption | 14592 | 19119 | 13800 | 9470 | 0 | 9500 |
| TOTAL Disappearance | 17300 | 23412 | 16800 | 13350 | 0 | 13400 |
| Ending Stocks | 4692 | 984 | 2392 | 292 | 2392 | 542 |
| TOTAL DISTRIBUTION | 21992 | 24396 | 19192 | 13642 | 2392 | 13942 |

| | | | | | | |
|------------------------|----------|-------|-------|-------|-------|-------|
| Production Table | | | | | | |
| Country: | | | | | | |
| Commodity: | Oriental | | | | | |
| | | 1997 | | 1998 | | 1999 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | | | | | |
| Area Planted | 0 | 0 | 0 | 0 | 0 | 0 |
| Beginning Stocks | 1040 | 7021 | 7021 | 3197 | 12721 | 7704 |
| 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 | 30281 | 18401 | 30000 | 31174 | 0 | 20000 |
| TOTAL Imports | 30281 | 18401 | 30000 | 31174 | 0 | 20000 |
| TOTAL SUPPLY | 31321 | 25422 | 37021 | 34371 | 12721 | 27704 |
| Exports | 3300 | 4146 | 3300 | 4824 | 0 | 4500 |
| Dom. Leaf Consumption | 0 | 0 | 0 | 0 | 0 | 0 |
| U.S. Leaf Dom. Consum. | 0 | 0 | 0 | 0 | 0 | 0 |
| Other Foreign Consump. | 21000 | 18079 | 21000 | 21843 | 0 | 20000 |
| TOTAL Dom. Consumption | 21000 | 18079 | 21000 | 21843 | 0 | 20000 |
| TOTAL Disappearance | 24300 | 22225 | 24300 | 26667 | 0 | 24500 |
| Ending Stocks | 7021 | 3197 | 12721 | 7704 | 12721 | 3204 |
| TOTAL DISTRIBUTION | 31321 | 25422 | 37021 | 34371 | 12721 | 27704 |

| | | | |
|---------------------|------------|-----------|-------|
| Import Trade Matrix | | | |
| Country: | | Units: | |
| Commodity: | Unman. Tob | | |
| Time period: | Cal. Year | | |
| Imports for | 1997 | | 1998 |
| U.S. | 39563 | U.S. | 43628 |
| Others | | Others | |
| Brazil | 38088 | Brazil | 42978 |
| Zimbabwe | 26002 | Zimbabwe | 22967 |
| Malawi | 21933 | Malawi | 20274 |
| Turkey | 8212 | Turkey | 18503 |
| Italy | 11763 | Italy | 12781 |
| India | 11150 | India | 6215 |
| Argentina | 6520 | Argentina | 7052 |
| France | 4795 | France | 4149 |

| | | | |
|-------------------|--------|-----------|--------|
| PR China | 6297 | Thailand | 2408 |
| Indonesia | 2738 | Indonesia | 2575 |
| Total for Others | 137498 | | 139902 |
| Others not listed | 45108 | | 39061 |
| Grand Total | 222169 | | 222591 |

| Export Trade Matrix | | | |
|---------------------|-------------|-------------|-------|
| Country: | | Units: | |
| Commodity: | Unman. Tob. | | |
| Time period: | Cal. Year | | |
| Exports for | 1997 | | 1998 |
| U.S. | 1342 | U.S. | 2347 |
| Others | | Others | |
| Netherlands | 32393 | Netherlands | 30534 |
| France | 2705 | France | 2772 |
| Poland | 11508 | Poland | 12418 |
| Czech Rep | 7796 | Czech Rep | 4264 |
| Ukraine | 4768 | Ukraine | 6099 |
| Romania | 2905 | Romania | 5124 |
| Switzerland | 4322 | Switzerland | 4001 |
| Greece | 1405 | Russia | 4340 |
| Portugal | 1844 | Spain | 2830 |
| Spain | 1899 | Greece | 1578 |
| Total for Others | 71545 | | 73960 |
| Others not listed | 12430 | | 6619 |
| Grand Total | 85317 | | 82926 |

| | | | | | | |
|-----------------------|---------------------------|---------|--------|---------|-----|---------|
| PSD Table | | | | | | |
| Country: | Germany | | | | | |
| Commodity: | Tobacco, Mfg., Cigarettes | | | | | |
| | | 1997 | | 1998 | | 1999 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 01/1997 | | 01/1998 | | 01/1999 |
| Filter Production | 212600 | 176800 | 213200 | 176500 | 0 | 175800 |
| Non-Filter Production | 5200 | 4800 | 4800 | 4500 | 0 | 4200 |
| TOTAL Production | 217800 | 181600 | 218000 | 181000 | 0 | 180000 |
| Imports | 15295 | 25350 | 15300 | 27646 | 0 | 27000 |
| TOTAL SUPPLY | 233095 | 206950 | 233300 | 208646 | 0 | 207000 |
| Exports | 81600 | 63164 | 82000 | 77657 | 0 | 70000 |
| Domestic Consumption | 151495 | 143786 | 151300 | 130989 | 0 | 137000 |
| TOTAL DISTRIBUTION | 233095 | 206950 | 233300 | 208646 | 0 | 207000 |

| | | | |
|---------------------|------------|---------------|---------|
| Import Trade Matrix | | | |
| Country: | | Units: | mln pcs |
| Commodity: | Cigarettes | | |
| Time period: | cal year | | |
| Imports for | 1997 | | 1998 |
| U.S. | 108 | U.S. | 78 |
| Others | | Others | |
| Netherlands | 11230 | Netherlands | 10456 |
| France | 3591 | France | 4353 |
| Bel/Lux | 3739 | Bel/Lux | 4492 |
| Great Britain | 1427 | Great Britain | 1542 |
| Denmark | 1805 | Denmark | 1846 |
| Austria | 3256 | Austria | 4790 |
| | | | |
| | | | |
| | | | |
| | | | |
| Total for Others | 25048 | | 27479 |
| Others not listed | 194 | | 89 |
| Grand Total | 25350 | | 27646 |

| Export Trade Matrix | | | |
|---------------------|------------|---------------|----------------|
| Country: | | Units: | million pieces |
| Commodity: | Cigarettes | | |
| Time period: | cal year | | |
| Exports for | 1997 | | 1998 |
| U.S. | 77 | U.S. | 125 |
| Others | | Others | |
| France | 9260 | France | 9451 |
| Italy | 7517 | Italy | 7472 |
| Great Britain | 6485 | Great Britain | 7172 |
| Russia | 6783 | Russia | 4443 |
| Netherlands | 4230 | Netherlands | 4713 |
| Greece | 4025 | Greece | 4427 |
| Albania | 2602 | Singapore | 1365 |
| Bel/Lux | 2351 | Bel/Lux | 2357 |
| Taiwan | 2301 | Taiwan | 3428 |
| Portugal | 1916 | Spain | 5962 |
| Total for Others | 47470 | | 50790 |
| Others not listed | 15617 | | 26742 |
| Grand Total | 63164 | | 77657 |

| | | | | | | |
|----------------------|-----------------------------|---------|---------|---------|-----|---------|
| PSD Table | | | | | | |
| Country: | Germany | | | | | |
| Commodity: | Mfg.,Cigar,Cheroot,Cigarell | | | | | |
| | | 1997 | | 1998 | | 1999 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 01/1997 | | 01/1998 | | 01/1999 |
| Production | 1364000 | 1491000 | 1350000 | 1947000 | 0 | 2100000 |
| Imports | 322300 | 378466 | 320000 | 370411 | 0 | 370000 |
| TOTAL SUPPLY | 1686300 | 1869466 | 1670000 | 2317411 | 0 | 2470000 |
| Exports | 217300 | 235276 | 220000 | 245402 | 0 | 250000 |
| Domestic Consumption | 1469000 | 1634190 | 1450000 | 2072009 | 0 | 2220000 |
| TOTAL DISTRIBUTION | 1686300 | 1869466 | 1670000 | 2317411 | 0 | 2470000 |

| | | | |
|---------------------|-------------------|-------------|----------|
| Import Trade Matrix | | | |
| Country: | | Units: | 1000 pcs |
| Commodity: | Cigars/Cigarillos | | |
| Time period: | cal year | | |
| Imports for | 1997 | | 1998 |
| U.S. | 917 | U.S. | 2096 |
| Others | | Others | |
| Netherlands | 175384 | Netherlands | 180509 |
| Denmark | 55192 | Denmark | 49588 |
| Switzerland | 28534 | Switzerland | 5757 |
| Dominic Rep | 9256 | Dominic Rep | 10970 |
| Bel/Lux | 11259 | Bel/Lux | 12295 |
| Ireland | 6352 | Ireland | 9474 |
| Indonesia | 4198 | Slovakia | 19151 |
| Cuba | 4310 | Cuba | 5445 |
| Honduras | 3856 | Honduras | 2453 |
| Spain | 2596 | Spain | 5816 |
| Total for Others | 300937 | | 301458 |
| Others not listed | 8696 | | 6080 |
| Grand Total | 310550 | | 309634 |

| | | | |
|---------------------|-------------------|---------------|----------|
| Export Trade Matrix | | | |
| Country: | | Units: | 1000 pcs |
| Commodity: | Cigars/Cigarillos | | |
| Time period: | cal year | | |
| Exports for | 1997 | | 1998 |
| U.S. | 30885 | U.S. | 22662 |
| Others | | Others | |
| France | 62285 | France | 57544 |
| Great Britain | 12401 | Great Britain | 8019 |
| Netherlands | 21575 | Netherlands | 22195 |
| Bel/Lux | 12050 | Bel/Lux | 12725 |
| Greece | 12926 | Greece | 16153 |
| Austria | 12872 | Austria | 17957 |
| Spain | 10428 | Spain | 12680 |
| Switzerland | 8745 | Switzerland | 10426 |
| Italy | 7333 | Italy | 10631 |
| Czech Rep | 5437 | Czech Rep | 5974 |
| Total for Others | 166052 | | 174304 |
| Others not listed | 38339 | | 48436 |
| Grand Total | 235276 | | 245402 |

| | | | | | | |
|----------------------|-----------------------|---------|-------|---------|-----|---------|
| PSD Table | | | | | | |
| Country: | Germany | | | | | |
| Commodity: | Mfg., Smoking and Cut | | | | | |
| | | 1997 | | 1998 | | 1999 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 01/1997 | | 01/1998 | | 01/1999 |
| Pipe Production | 560 | 563 | 540 | 637 | 0 | 650 |
| Cigarette Production | 11200 | 16600 | 11000 | 14400 | 0 | 14350 |
| TOTAL Production | 11760 | 17163 | 11540 | 15037 | 0 | 15000 |
| Imports | 10530 | 10926 | 10000 | 12533 | 0 | 12500 |
| TOTAL SUPPLY | 22290 | 28089 | 21540 | 27570 | 0 | 27500 |
| Exports | 11666 | 15394 | 11500 | 14420 | 0 | 15000 |
| Domestic Consumption | 10624 | 12695 | 10040 | 13150 | 0 | 12500 |
| TOTAL DISTRIBUTION | 22290 | 28089 | 21540 | 27570 | 0 | 27500 |

| | | | |
|---------------------|-----------------------|---------------|-------------|
| Import Trade Matrix | | | |
| Country: | | Units: | metric tons |
| Commodity: | Mfg., Smoking and Cut | | |
| Time period: | cal year | | |
| Imports for | 1997 | | 1998 |
| U.S. | 156 | U.S. | 75 |
| Others | | Others | |
| Netherlands | 5847 | Netherlands | 6390 |
| Bel/Lux | 2657 | Bel/Lux | 3171 |
| Ireland | 1058 | Ireland | 1125 |
| Denmark | 753 | Denmark | 641 |
| Great Britain | 170 | Great Britain | 181 |
| France | 204 | Slovenia | 447 |
| | | France | 211 |
| | | Spain | 131 |
| | | | |
| | | | |
| Total for Others | 10689 | | 12297 |
| Others not listed | 81 | | 161 |
| Grand Total | 10926 | | 12533 |

| | | | |
|---------------------|-----------------------|------------|-------------|
| Export Trade Matrix | | | |
| Country: | | Units: | metric tons |
| Commodity: | Mfg., Smoking and Cut | | |
| Time period: | cal year | | |
| Exports for | 1997 | | 1998 |
| U.S. | 25 | U.S. | 2 |
| Others | | Others | |
| Russia | 4587 | Russia | 5172 |
| Kazakhstan | 4669 | Kazakhstan | 1599 |
| Romania | 1100 | Romania | 2252 |
| Andorra | 1014 | Andorra | 376 |
| Iran | 600 | Slovenia | 380 |
| Jordan | 638 | Cambodia | 322 |
| Cambodia | 468 | Czech Rep | 2310 |
| Bel/Lux | 493 | Czech Rep | 513 |
| Czech Rep | 219 | | |
| | | | |
| Total for Others | 13788 | | 12924 |
| Others not listed | 1581 | | 1494 |
| Grand Total | 15394 | | 14420 |

| | | | | | | |
|----------------------|----------------------|---------|--------|---------|-----|---------|
| PSD Table | | | | | | |
| Country: | Germany | | | | | |
| Commodity: | Tobacco, Mfg., Snuff | | | | | |
| | | 1997 | | 1998 | | 1999 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 01/1997 | | 01/1998 | | 01/1999 |
| Production | 260000 | 250000 | 250000 | 240000 | 0 | 230000 |
| Imports | 45000 | 31887 | 50000 | 10890 | 0 | 10000 |
| TOTAL SUPPLY | 305000 | 281887 | 300000 | 250890 | 0 | 240000 |
| Exports | 49000 | 67916 | 50000 | 60777 | 0 | 60000 |
| Domestic Consumption | 256000 | 213971 | 250000 | 190113 | 0 | 180000 |
| TOTAL DISTRIBUTION | 305000 | 281887 | 300000 | 250890 | 0 | 240000 |

| | | | |
|---------------------|-----------------|---------------|----------|
| Import Trade Matrix | | | |
| Country: | | Units: | kilogram |
| Commodity: | Tob. Mfg, Snuff | | |
| Time period: | cal year | | |
| Imports for | 1997 | | 1998 |
| U.S. | 162 | U.S. | 194 |
| Others | | Others | |
| Netherlands | 1555 | Netherlands | 9667 |
| Great Britain | 29741 | Great Britain | 838 |
| India | 324 | India | 190 |
| | | | |
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| | | | |
| Total for Others | 31620 | | 10695 |
| Others not listed | 105 | | 1 |
| Grand Total | 31887 | | 10890 |

| | | | |
|---------------------|------------------|---------------|----------|
| Export Trade Matrix | | | |
| Country: | | Units: | kilogram |
| Commodity: | Tob., Mfg, Snuff | | |
| Time period: | cal year | | |
| Exports for | 1997 | | 1998 |
| U.S. | 1278 | U.S. | 904 |
| Others | | Others | |
| France | 23637 | France | 22902 |
| Bel/Lux | 690 | Bel/Lux | 590 |
| Italy | 6810 | Italy | 5345 |
| Great Britain | 8897 | Great Britain | 1333 |
| Austria | 11002 | Austria | 8022 |
| Switzerland | 5355 | Switzerland | 5186 |
| Czech Rep | 7330 | Czech Rep | 7754 |
| Thailand | 802 | Spain | 1560 |
| Hungary | 448 | Netherlands | 5907 |
| | | | |
| Total for Others | 64971 | | 58599 |
| Others not listed | 1667 | | 1274 |
| Grand Total | 67916 | | 60777 |