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## Germany

### Tobacco and Products

#### Annual

#### 2000

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**Report Highlights: German cigarette production in 1999 went up by 12.5% to 205 billion pieces. The increase was mainly accounted for by stronger export markets. Domestic consumption also improved by 3.5 percent. Anti-smoking campaigns in Germany are not as vigorous as in the United States. 1999 U.S. sales of raw tobacco to Germany amounted to a total of \$343 million, compared to \$311 million in 1998.**

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Includes PSD changes: YesYes  
Includes Trade Matrix: YesYes  
Annual ReportAnnual Report  
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## Executive Summary

Despite ongoing German government and private organization efforts to reduce tobacco product consumption, German cigarette manufacturers increased their output by a surprising 12.5 percent in 1999. This represents a total production value of DM 7.87 billion (US\$ 3.66 bn), an increase of 15 percent over 1998. The number of people working in the cigarette industry dropped by 1.6 percent to 11,008 persons, mainly due to the merger of two manufacturers. The cigarette industry generated tax revenues of DM21.82 bn in 1999, an increase of 6.6 percent. The cigar and cigarillo industry kept their output stable at about 1.2 million cigars, incl. cigar-type cigarillos. The total production value amounted to about DM 500 million. The industry is concerned about EU initiatives to tighten criteria for health warnings on tobacco product packages. Also the intention to lower tar and nicotine content in cigarettes is viewed with great fear for the well-being of the industry.

As result of the increased cigarette output in 1999, consumption of raw tobacco consequently is estimated to have risen by 13 percent to 161,554 tons. The increase mainly occurred in the use of flue-cured tobacco. Imports of raw tobacco in 1999 totaled 277,446 MT, including homogenized leaf, of which 56,468 MT originated from the United States. This was the first year that Brazil surpassed the United States as the number one supplier of raw tobacco. However, by value the United States still remained by far the number one supplier for the German tobacco industry.

## Production

German raw tobacco production in 1999 is estimated at about 11,255 tons green weight, an increase of 18 percent over 1998. The increase is attributed to the impact of the 1998 reform of the EU tobacco market ordinance, which improved production premiums for tobacco varieties welcomed by the processing industry. Namely the area of Virginia flue cured tobacco was increased by 27 percent to 2,109 hectares. For 2000, German growers again increased Virginia area by about 70 hectares. Production area for the two other varieties, burley and Geudertheimer dark air-cured, are forecast to remain stable. With this increase in area, German tobacco production is rapidly nearing the maximum production threshold of 11,625 tons. Based on EU regulation 2848/98, the EU harvest of green tobacco is recalculated on the basis of harmonized moisture levels of 22 percent for burley, 26 percent for Geudertheimer dark air-cured, and 16 percent for Virginia flue-cured tobacco. German production data used in this report are based on the EU harmonized moisture levels.

If in 2000 German tobacco production might eventually exceed the maximum quota, the excessive production will have to be sold without premium payment to the free market, within and/or outside the EU. It is also possible that a maximum of ten percent of the quota can be forwarded to the following marketing year, a similar approach as applied in the EU sugar market ordinance.

Output quality in 1999 had been satisfactory to good. Total production returns for raw tobacco increased by 15 percent to DM 85.6 million, not including EU premium payments. EU tobacco production premiums received by German growers amounted to DM 54.8 million in 1998 and DM 51.5 million in 1997. Data for the 1999 harvest are not yet available but roughly forecast at about DM 60.0 million. German tobacco growers are very proud that they are producing all their tobacco under contract, and therefore they are not selling any tobacco into intervention storage. German tobacco is generally used as filler tobacco in cigarettes and cigars.



Production Table						
	Area Planted			Production		
	(HECTARES)			Metric Tons		
	1998	1999	2000	1998	1999	2000
Burley	892	964	960	2557	2746	2720
Dark Air & Sun Cured	0	0	0	0	0	0
Dark Air Cured	1307	1473	1470	3689	4163	4140
Dark Fire Cured	0	0	0	0	0	0
Flue Cured	1662	2109	2180	3308	4345	4450
Light Air Cured	0	0	0	0	0	0
Oriental	0	0	0	0	0	0
Tobacco, Unmfg.	3861	4546	4610	9554	11254	11310

## Consumption

Germany's annual tobacco consumption in 1999 is estimated at 161,554 MT, 13 percent more than in 1998. Flue-cured tobacco is the preferred type of tobacco by the cigarette and smoking tobacco industry. Customs statistics indicate that in 1999, about 83,844 MT of flue-cured tobacco have been processed, an increase of 19 percent. The use of burley tobacco also grew by 17 percent to 35,364 MT. About 25 percent of the consumed flue-cured and burley tobaccos are of U.S. origin. Oriental tobacco is the third most important type of tobacco in cigarette production, amounting to 24,983 MT in 1999, 14 percent more than in 1998. Since German cigarette smokers are generally very taste-sensitive, the industry processes a relatively high percentage of high-priced and high-quality American tobaccos. The normal blend of American-type cigarettes contains about 20 percent of American-origin tobaccos. Low-priced trade-chain brands naturally contain a much lower percentage of American tobacco.

## Trade

Arrivals of leaf tobacco in Germany in 1999 amounted to 260,500 tons at a total value of DM 2.01 bn, which is about 30 percent more in value than in 1998. The United States is for the first time only the number two supplier of raw tobacco to Germany. The leading supplier position based on volume was clearly taken over by Brazil. However, due to superior quality and higher prices for US tobaccos, the value of US shipments is still DM 6.7 million higher than those from Brazil. Argentina also noticeably improved its supplier position by nearly doubling its shipments to Germany.

More than one-third of German leaf tobacco imports were Virginia flue-cured tobaccos, of which 30 percent originated from the United States. Important competitors for flue-cured tobacco are Brazil and Zimbabwe. Major suppliers for the second most important variety, light air-cured burley are Malawi, the United States and Brazil. The reduction of tobacco production in the United States is viewed with some concern by German tobacco buyers since it might have the effect of further pushing up prices for high-quality tobaccos.

Concentration in the global tobacco processing industry resulted in centralized regional leaf tobacco departments and storage in western Europe. Large portions of German leaf imports are destined for re-export. Primary destinations are the Netherlands and Central and Eastern European countries (CEEC). Part of the required leaf in the relatively new cigarette production facilities in CEEC is supplied from German- based storage.

1999 German Leaf Tobacco Trade by Type				
Import Summary	Total		U.S. Share	
	MT	DM 1,000	MT	DM1,000
Flue Cured, Virgin	92,911	826,674	27,326	366,758
Burley	48,262	437,831	12,901	201,248
Maryland	1,001	16,314	970	15,898
Kentucky Fired Cured	778	5,320	26	318
Oth. Fire Cured	2,660	49,651	5	56
Light Air Cured	17,295	132,823	60	358
Oriental	32,096	302,540	0	0
Dark Air Cured	2,528	17,914	0	1
Oth. Flue Cured	19,557	121,619	363	1,916
Other Tobacco	1,590	46,833	8	174
Stems and Scraps	41,832	50,540	7,051	8,758
HTL	16,936	73,374	7,758	34,028
Total	277,446	2,081,433	56,468	629,513
Export Summary	Total		U.S. Share	
Flue Cured, Virgin	27,381	232,353	0	0
Burley	7,755	59,329	0	0
Maryland	12	216	0	0
Kentucky Fired Cured	970	5,002	0	0
Oth. Fire Cured	2,024	36,185	1	12
Light Air Cured	6,844	61,566	0	0
Oriental	5,508	45,566	248	968
Dark Air Cured	1,859	7,186	914	3,654
Oth. Flue Cured	4,756	32,753	0	0
Other Tobacco	13,134	131,100	0	0
Stems and Scraps	19,028	30,881	64	157
HTL	4,469	20,888	72	1,507
Total	93,740	663,025	1,299	6,298

Source: German Statistics Office, Wiesbaden - Generalhandel

## 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.

## Policy

Anti-smoking campaigns in Germany are not as vigorous as in the United States. The climate between smokers and non-smokers is actually relatively relaxed and consensus-oriented. In fact, the German government filed a legal complaint against the European advertising ban on tobacco products at the European Court in Luxembourg. A court decision is expected later this year. The Germans argue that the EU does not have any mandate to establish such a ban since this action conflicts with national sovereignty. So far the German cigarette industry has been successful in establishing private self-limitation arrangements with the Federal Ministry of Health.

The domestic tobacco industry is concerned about EU intentions to strengthen health protection requirements for tobacco products, such as lowering maximum tar and condensate levels to 10 milligrams, placing health warnings on the most prominent side of the package, and strengthening the wording of the warnings.

## Marketing

German tobacco buyers are concerned about the reduced acreage for U.S. raw tobacco production. In particular, in view of political quarrels in Africa, American tobacco remains of primary importance for the German cigarette industry. However, the most likely replacement for Zimbabwean flue-cured tobacco is Brazil, providing similar quality and lower prices than the United States.

## Cigarettes

Production of cigarettes in Germany has grown by 12.5 percent to 204.5 bn pieces in 1999. Most of the increase was for export markets. However, an additional five bn cigarettes were also purchased by domestic smokers. The domestic increase is mainly attributed to the millennium effect. Cigarette manufacturers had produced and delivered to the retail trade excess volume of normally required cigarettes in order to avoid any millennium bug interrupting the supply chain. Domestic sales statistics for the first four months of 2000 show that the excessive December production was balanced by lower deliveries to the trade during January through March.

Taxation statistics for calendar year 1999 report sales increases of five percent to 145 billion cigarettes. For 2000, total sales are forecast at 145 bn pieces, slightly below the 1999 level. Sales during the first three months of 2000 had been somewhat behind first quarter sales in 1999. Calculated per capita consumption of cigarettes in Germany has been steadily rising since 1993 to 1,770 cigarettes in 1999. A general reversal of this trend is currently not foreseen. The increase in cigarette consumption may be attributed to the immigration of about two million people during the most

recent ten years, namely from central European and FSU countries. A recent international study reveals that German smokers are getting younger. Many kids start smoking at the early age of 12.5 years. And the percentage of very young kids smoking is increasing.

A trend over the past several years is that smokers have become more price sensitive. The share of lower-priced trade chain brands has risen noticeably to an average 7.5 percent in 1999. In October 1999, the cigarette industry raised the prices for traditional brands by about three percent, a move which was not followed by trade chain brand suppliers. Consequently the price advantage of the lower-priced brands grew. The most popular brand sells at DM 5.45 per pack of 19 cigarettes, while many trade brands are offered at only DM 3.75 - a price advantage of more than 30 percent. To counter this negative trend for the big traditional cigarette makers, the industry during the recent years has developed a number of tobacco tax avoidance products, such as tobacco rolls which in the beginning used to be taxed like fine-cut smoking tobacco. In 1999, German smokers still consumed about three billion tobacco rolls, a reduction of 18 percent. Tax advantage for these rolls is to be phased out by the end of 2001. A more recent tax avoidance product are cigarillos made from cigarette tobaccos. Annual sales in 1999 reached a volume of about one billion cigarette-cigarillos, 25 percent more than in 1998.

When in October the industry increased its cigarette prices by three percent, they reduced the number of cigarettes per pack from 20 to 19. Since then the number of big packs containing 25 cigarettes went up by 15.3 percent. The success of the big packs during recent years may also be attributed to the increased per capita consumption, since many smokers are one-pack-per-day smokers. The increased per capita consumption might also be attributed to the success of light cigarettes of less than eight milligrams of tar and condensates. This market segment amounts already to 30.7 percent compared to 29.6 percent in 1998, a continuous growth over many years. Within that light segment, ultra-light cigarettes have a market share of 5.6 percent. These are cigarettes of less than four milligrams tar and condensates.

## **Cigars**

Cigars and cigarillos are increasingly in the favor of young smokers. In particular small cigars and cigarillos are favored by new cigar smokers, an increase in consumption of about eight percent. For spontaneous smokers the industry offers single cigars in metal tubes, a well-accepted convenience product. Of special interest are the products from the Caribbean region. Imports of cigars from the United States more than doubled in 1999 to a total value of US\$ 247,000.

Taxation statistics for cigars report a total consumption of 2.3 bn cigars for 1999. This includes about one billion cigarette-type cigars, up by about 200 million compared to 1998. Statistics for the first quarter of 2000 show that the consumption trend tends further upward, plus ten percent - mainly cigarette-type cigarillos.

## **Smoking Tobacco**

As the cigarette smoker becomes increasingly price-sensitive, sales of fine-cut tobaccos for roll-your-own cigarettes went up by 4.4 percent to 12,680 tons. The increase took place namely in the market segment of low-priced fine-cut brands. Pipe tobacco consumption is on a continuous downward trend, falling by two percent to 983 tons in 1999. First quarter 2000 data report a further reduction by ten percent.

## Taxation

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

### Cigarettes

DM 8.30 per 100 cigarettes

Plus a proportional tax portion calculated as 24.8 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 3.10 per 100 cigars/cigarillos (excl. VAT)

### Smoking tobacco

Fine-cut tobacco

DM 30.21 per kilogram

Plus 18.12 percent of retail price

Minimum DM 45.00 per kilogram (excl. VAT)

Pipe tobacco

DM 5.50 per kilogram

Plus 22 percent of retail price

Minimum DM 21.00 per kilogram (excl. VAT)

Tobacco Product Consumption and Taxes				
		1997	1998	1999
Volume of Taxed/Consumed Tobacco Products				
Cigars/Rillos	mill pcs	1,592	1,992	2,289
Cigarettes	mill pcs	137,677	138,388	145,265
Fine-cut	tons	11,656	12,150	12,682
Pipe Tobacco	tons	1,039	1,003	983
Tobacco Rolls	tons	2,477	2,602	1,314
Total Returns by Product				
Cigars/Rillos	mill DM	670	795	917
Cigarettes	mill DM	34,549	35,845	38,294
Fine-cut	mill DM	1,334	1,404	1,453
Pipe Tobacco	mill DM	194	190	191
Tobacco Rolls	mill DM	630	675	352
Total	mill DM	37,377	38,908	41,208
Tax Returns				
Cigars/Rillos	mill DM	57	63	69
Cigarettes	mill DM	19,995	20,525	21,817
Fine-cut	mill DM	594	621	647
Pipe Tobacco	mill DM	48	47	46
Tobacco Rolls	mill DM	408	431	221
Total	mill DM	21,102	21,687	22,799
Average Retail Prices				
Cigars/Rillos	DM/piece	0.4210	0.3990	0.4010
Cigarettes	DM/piece	0.2509	0.2590	0.2640
Fine-cut	DM/kg	114.44	115.50	114.60
Pipe Tobacco	DM/kg	186.52	189.80	194.30
Tobacco Rolls	DM/kg	254.43	259.20	268.20
Average Tax				
Cigars/Rillos	DM/piece	0.0357	0.0310	0.0300
Cigarettes	DM/piece	0.1452	0.1480	0.1500
Fine-cut	DM/kg	50.95	51.10	51.00
Pipe Tobacco	DM/kg	46.51	46.80	47.20

Tobacco Rolls	DM/kg	164.49	165.70	168.10
Source: FedMinFinance				

PSD Table						
Country	Germany					
Commodity	Tobacco, Unmfg., Total				(HA)(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Planted	3831	3861	3990	4546	0	4610
Beginning Stocks	10715	4044	11715	9178	15498	28198
Farm Sales Weight Prod	9200	9554	9770	11254	0	11310
Dry Weight Production	8000	8120	8320	9335	0	9639
U.S. Leaf Imports	40000	43628	37463	48710	0	46000
Other Foreign Imports	190000	178963	180000	211800	0	200000
TOTAL Imports	230000	222591	217463	260510	0	246000
TOTAL SUPPLY	248715	234755	237498	279023	15498	283837
Exports	80000	82926	80000	89271	0	90000
Dom. Leaf Consumption	4000	5400	5000	6200	0	6200
U.S. Leaf Dom. Consum.	35000	32251	32000	38354	0	35000
Other Foreign Consump.	118000	105000	105000	117000	0	120000
TOTAL Dom. Consumption	157000	142651	142000	161554	0	161200
TOTAL Disappearance	237000	225577	222000	250825	0	251200
Ending Stocks	11715	9178	15498	28198	0	32637
TOTAL DISTRIBUTION	248715	234755	237498	279023	0	283837

Import Trade Matrix			
Country	Germany		
Commodity	Tobacco, Unmfg., Total		
Time period	Cal. Year	Units:	Metric Tons
Imports for:	1998		1999
U.S.	43628	U.S.	48710
Others		Others	
Brazil	42978	Brazil	57060
Zimbabwe	22967	Zimbabwe	26757
Malawi	20274	Malawi	22680
Turkey	18503	Turkey	16014
Italy	12781	Italy	15666
India	6215	India	5828
Argentina	7052	Argentina	12872
France	4149	France	4758
Thailand	2408	Bulgaria	3465
Indonesia	2575	Indonesia	2865
Total for Others	139902		167965
Others not Listed	39061		43835
Grand Total	222591		260510

Export Trade Matrix			
Country	Germany		
Commodity	Tobacco, Unmfg., Total		
Time period	Cal. Year	Units:	metric tons
Exports for:	1998		1999
U.S.	2347	U.S.	1227
Others		Others	
Netherlands	30534	Netherlands	21446
France	2772	France	3553
Poland	12418	Poland	17090
Czech Rep	4264	Slovakia	1749
Ukraine	6099	Ukraine	6679
Romania	5124	Romania	5666
Switzerland	4001	Switzerland	4392
Russia	4340	Russia	7271
Spain	2830	Spain	2390
Greece	1578	Greece	1710
Total for Others	73960		71946
Others not Listed	6619		16099
Grand Total	82926		89272

PSD Table						
Country	Germany					
Commodity	Tobacco,Unmfg.,Flue Cured				(HA)(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Planted	1662	1662	1750	2109	0	2180
Beginning Stocks	2852	5000	671	2820	171	3173
Farm Sales Weight Prod	3308	3308	3480	4345	0	4450
Dry Weight Production	2944	2944	3100	3867	0	3961
U.S. Leaf Imports	24726	24726	24000	27689	0	25000
Other Foreign Imports	66411	66412	66000	84778	0	84000
TOTAL Imports	91137	91138	90000	112467	0	109000
TOTAL SUPPLY	96933	99082	93771	119154	171	116134
Exports	25609	25609	25000	32137	0	30000
Dom. Leaf Consumption	2000	2000	1600	2700	0	2800
U.S. Leaf Dom. Consum.	17403	17403	17000	20997	0	20000
Other Foreign Consump.	51250	51250	50000	60147	0	60000
TOTAL Dom. Consumption	70653	70653	68600	83844	0	82800
TOTAL Disappearance	96262	96262	93600	115981	0	112800
Ending Stocks	671	2820	171	3173	0	3334
TOTAL DISTRIBUTION	96933	99082	93771	119154	0	116134

Import Trade Matrix			
Country	Germany		
Commodity	Tobacco,Unmfg.,Flue Cured		
Time period	Cal. Year	Units:	Metric Tons
Imports for:	1998		1999
U.S.	24722	U.S.	26739
Others		Others	
Brazil	17329	Brazil	33977
Zimbabwe	11774	Zimbabwe	14645
Tanzania	3203	Tanzania	2899
India	2598	India	1613
Italy	889	Italy	3193
France	1249	France	2265
China	435	China	571
Malawi	1532	Malawi	380
Canada	424	Canada	1384
		Argentina	1484
Total for Others	39433		62411
Others not Listed	1427		3761
Grand Total	65582		92911

Export Trade Matrix			
Country	Germany		
Commodity	Tobacco,Unmfg.,Flue Cured		
Time period	Cal. Year	Units:	Metric Tons
Exports for:	1998		1999
U.S.	0	U.S.	0
Others		Others	
Netherlands	11890	Netherlands	11367
Poland	4379	Poland	8893
Russia	406	Russia	550
Bel/Lux	407	Belgium	1799
Spain	284	Ukraine	1130
Slovakia	150	Slovakia	524
		Egypt	590
		Great Britain	548
		Switzerland	302
Total for Others	17516		25703
Others not Listed	1334		1678
Grand Total	18850		27381

PSD Table						
Country	Germany					
Commodity	Tobacco, Unmfg., Burley				(HA)(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Planted	892	892	890	964	0	960
Beginning Stocks	10500	10500	9803	9803	9683	7437
Farm Sales Weight Prod	2557	2557	2500	2746	0	2720
Dry Weight Production	2225	2225	2180	2390	0	2366
U.S. Leaf Imports	12283	12283	12500	12898	0	12500
Other Foreign Imports	30228	30228	30000	35364	0	35000
TOTAL Imports	42511	42511	42500	48262	0	47500
TOTAL SUPPLY	55236	55236	54483	60455	9683	57303
Exports	9149	9149	9200	7755	0	8000
Dom. Leaf Consumption	1600	1600	1600	1700	0	1700
U.S. Leaf Dom. Consum.	9908	9908	10000	11446	0	10000
Other Foreign Consump.	24776	24776	24000	32117	0	32000
TOTAL Dom. Consumption	36284	36284	35600	45263	0	43700
TOTAL Disappearance	45433	45433	44800	53018	0	51700
Ending Stocks	9803	9803	9683	7437	0	5603
TOTAL DISTRIBUTION	55236	55236	54483	60455	0	57303

Import Trade Matrix			
Country	Germany		
Commodity	Tobacco, Unmfg., Burley		
Time period	Cal. Year	Units:	Metric Tons
Imports for:	1998		1999
U.S.	12283	U.S.	12901
Others		Others	
Malawi	12615	Malawi	14333
Brazil	6513	Brazil	8727
Italy	3681	Italy	6837
Guatemala	2545	Guatemala	1647
Uganda	1109	Uganda	634
India	380	Greece	131
France	1136	France	1605
Zimbabwe	770	Zimbabwe	423
PR China	311	PR China	44
Total for Others	29060		34381
Others not Listed	1168		980
Grand Total	42511		48262

Export Trade Matrix			
Country	Germany		
Commodity	Tobacco, Unmfg., Burley		
Time period	Cal. Year	Units:	Metric Tons
Exports for:	1998		1999
U.S.	812	U.S.	0
Others		Others	
Netherlands	5618	Netherlands	5155
Poland	1526	Poland	1037
France	329	France	323
Ukraine	291	Ukraine	329
Switzerland	83	Romania	269
Austria	156	Austria	256
Total for Others	8003		7369
Others not Listed	334		386
Grand Total	9149		7755

PSD Table						
Country	Germany					
Commodity	Tobacco, Unmfg., Oriental				(HA)(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Planted	0	0	0	0	0	0
Beginning Stocks	2775	3197	2775	7704	2775	9309
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	20000	31174	20000	32096	0	30000
TOTAL Imports	20000	31174	20000	32096	0	30000
TOTAL SUPPLY	22775	34371	22775	39800	2775	39309
Exports	4000	4824	4000	5508	0	5500
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	0	0	0	0	0	0
Other Foreign Consump.	16000	21843	16000	24983	0	24500
TOTAL Dom. Consumption	16000	21843	16000	24983	0	24500
TOTAL Disappearance	20000	26667	20000	30491	0	30000
Ending Stocks	2775	7704	2775	9309	0	9309
TOTAL DISTRIBUTION	22775	34371	22775	39800	0	39309

Import Trade Matrix			
Country	Germany		
Commodity	Tobacco, Unmfg., Oriental		
Time period	Cal. Year	Units:	Metric Tons
Imports for:	1998		1999
U.S.	0	U.S.	0
Others		Others	
Turkey	18244	Turkey	15758
Greece	9764	Greece	9867
Bulgaria	2178	Bulgaria	3465
Malawi	260	Malawi	670
Albania	279	Albania	203
Macedonia	168	Macedonia	1537
		Brazil	563
Total for Others	30893		32063
Others not Listed	281		33
Grand Total	31174		32096

Export Trade Matrix			
Country	Germany		
Commodity	Tobacco, Unmfg., Oriental		
Time period	Cal. Year	Units:	Metric Tons
Exports for:	1998		1999
U.S.	276	U.S.	248
Others		Others	
Netherlands	2756	Netherlands	2829
Ukraine	404	Ukraine	565
Russia	438	Switzerland	652
Poland	246	Poland	554
Lithuania	240	Romania	357
		Slovakia	111
Total for Others	4084		5068
Others not Listed	464		192
Grand Total	4824		5508

PSD Table						
Country	Germany					
Commodity	Unmfg.,Dark Air & Sun Cured				(HA)(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Planted	1140	1307	0	1473	0	1470
Beginning Stocks	0	0	0	20	0	886
Farm Sales Weight Prod	3050	3689	0	4163	0	4140
Dry Weight Production	0	2951	0	3330	0	3312
U.S. Leaf Imports	0	2	0	0	0	0
Other Foreign Imports	0	2072	0	2528	0	2200
TOTAL Imports	0	2074	0	2528	0	2200
TOTAL SUPPLY	0	5025	0	5878	0	6398
Exports	0	1876	0	1859	0	2000
Dom. Leaf Consumption	0	1800	0	1800	0	1800
U.S. Leaf Dom. Consum.	0	0	0	0	0	0
Other Foreign Consump.	0	1329	0	1333	0	1350
TOTAL Dom. Consumption	0	3129	0	3133	0	3150
TOTAL Disappearance	0	5005	0	4992	0	5150
Ending Stocks	0	20	0	886	0	1248
TOTAL DISTRIBUTION	0	5025	0	5878	0	6398

Import Trade Matrix			
Country	Germany		
Commodity	Unmfg.,Dark Air Cured,Cigar		
Time period	Cal. Year	Units:	Metric Tons
Imports for:	1998		1999
U.S.	2	U.S.	0
Others		Others	
Italy	264	Columbia	168
Cuba	478	Cuba	713
Dominican Rep	243	Dominican Rep	188
Brazil	655	Brazil	409
France	118	France	200
Paraguay	95	Paraguay	235
Indonesia	37	Indonesia	392
Total for Others	1890		2305
Others not Listed	219		223
Grand Total	2111		2528

Export Trade Matrix			
Country	Germany		
Commodity	Unmfg.,Dark Air Cured,Cigar		
Time period	Cal. Year	Units:	Metric Tons
Exports for:	1998		1999
U.S.	971	U.S.	914
Others		Others	
Switzerland	704	Switzerland	372
France	37	France	309
Netherlands	136	Netherlands	212
Total for Others	877		893
Others not Listed	28		52
Grand Total	1876		1859

PSD Table						
Country	Germany					
Commodity	Tobacco, Mfg., Cigarettes				(MIL PCS)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Filter Production	174000	177104	175800	200531	0	199200
Non-Filter Production	4000	4800	4200	4300	0	3800
TOTAL Production	178000	181904	180000	204831	0	203000
Imports	24500	28121	27000	26221	0	27000
TOTAL SUPPLY	202500	210025	207000	231052	0	230000
Exports	65000	69395	70000	85187	0	85000
Domestic Consumption	137500	140630	137000	145865	0	145000
TOTAL DISTRIBUTION	202500	210025	207000	231052	0	230000

Import Trade Matrix			
Country	Germany		
Commodity	Tobacco, Mfg., Cigarettes		
Time period	Cal Year	Units:	mln pieces
Imports for:	1998		1999
U.S.	79	U.S.	83
Others		Others	
Netherlands	10471	Netherlands	7239
France	4353	France	4650
Bel/Lux	4502	Bel/Lux	4639
Great Britain	1542	Great Britain	1564
Denmark	1872	Denmark	1724
Austria	5213	Austria	5574
		Portugal	24
Total for Others	27953		25414
Others not Listed	89		724
Grand Total	28121		26221

Export Trade Matrix			
Country	Germany		
Commodity	Tobacco, Mfg., Cigarettes		
Time period	Cal. Year	Units:	Mln Pieces
Exports for:	1998		1999
U.S.	125	U.S.	86
Others		Others	
France	9459	France	10869
Italy	7485	Italy	8087
Great Britain	7172	Great Britain	6641
Russia	4443	Russia	2705
Netherlands	4713	Netherlands	4663
Greece	4427	Greece	3624
Spain	5962	Spain	17274
Bel/Lux	2357	Bel/Lux	4623
Taiwan	3428	Taiwan	4323
Czech Rep	1352	Slovenia	2554
Total for Others	50798		65363
Others not Listed	18472		19738
Grand Total	69395		85187