



Foreign Agricultural Service

**GAIN Report**

Global Agriculture Information Network

Scheduled Report - public distribution

Date: 5/6/1999

GAIN Report #GR9009

**Greece**

**Tobacco**

**Annual Report**

**1999**

Prepared by:

**Clay Hamilton**

**U.S. Embassy**

Drafted by:

Stamatis Sekliziotis

---

**Report Highlights:**

**Total 1998 tobacco production is estimated to be 127,000 mt, slightly lower than 1997 levels. For 1999, production is expected to fall within the EU quota of 126,000 mt, due to increased GOG enforcement of the quotas. Exports for 1997 totaled 103,000 mt, valued at \$365 million, with most product going to the Germany (10,206 mt), Italy (9,250 mt) and the U.S. (9,477 mt). Exports for 1998 are estimated to be 98,000 mt, valued at \$350 million. Imports for 1997 and 1998 are estimated to be 17,000 mt, and 17,500 mt respectively with about one-third coming from the U.S. Imports of cigarettes have grown (10,600 mil pieces in 1998) as preferences have shifted to imported blends, mainly European brands. Exports are also increasing (16,500 mil pieces) as Greece expands its marketing in Eastern Europe.**

---

Includes PSD changes: Yes  
Includes Trade Matrix: Yes  
Annual Report  
Athens [GR1], GR

---

*GAIN Report #GR9009*

Executive Summary .....	<a href="#"><u>1</u></a>
.....	<a href="#"><u>1</u></a>
Production .....	<a href="#"><u>2</u></a>
General .....	<a href="#"><u>2</u></a>
.....	<a href="#"><u>2</u></a>
Greek Tobacco Quotas .....	<a href="#"><u>3</u></a>
Crop Area .....	<a href="#"><u>4</u></a>
Inputs .....	<a href="#"><u>4</u></a>
Yields .....	<a href="#"><u>4</u></a>
Crop Quality .....	<a href="#"><u>4</u></a>
Production Policy .....	<a href="#"><u>5</u></a>
.....	<a href="#"><u>5</u></a>
Production Table .....	<a href="#"><u>6</u></a>
Prices .....	<a href="#"><u>6</u></a>
Consumption .....	<a href="#"><u>8</u></a>
Trade .....	<a href="#"><u>9</u></a>
Stocks .....	<a href="#"><u>10</u></a>
Policy .....	<a href="#"><u>10</u></a>
Quality, Safety & Health .....	<a href="#"><u>10</u></a>
Marketing .....	<a href="#"><u>10</u></a>
Cigarretes .....	<a href="#"><u>11</u></a>
Production .....	<a href="#"><u>11</u></a>
General .....	<a href="#"><u>11</u></a>
Tobacco Unmufg., Total PS&D Table .....	<a href="#"><u>13</u></a>
Tobacco Unmfg., Total Export Trade Matrix .....	<a href="#"><u>14</u></a>
Tobacco Unmufg., Total Import Trade Matrix .....	<a href="#"><u>15</u></a>
Tobacco, Unmfg., Flue Cured PS&D Table .....	<a href="#"><u>16</u></a>
Tobacco, Unmfg., Burley PS&D Table .....	<a href="#"><u>17</u></a>
Tobacco Unmfg., Oriental PS&D Table .....	<a href="#"><u>18</u></a>
Tobacco, Mfg., Cigarettes PS&D Table .....	<a href="#"><u>19</u></a>
Tobacco, Mfg., Cigarettes Import Trade Matrix .....	<a href="#"><u>20</u></a>
Tobacco, Mfg., Cigarettes Export Trade Matrix .....	<a href="#"><u>21</u></a>

## **Executive Summary**

Total 1998 tobacco production is estimated to be 127,000 mt, slightly lower than 1997 levels. However, 1999 estimates are for production to fall to 126,000 mt, equal to the EU quota level of 126,000. Oriental production, the major part of Greek tobacco production, accounted for 84,100 mt in 1998. Planted acreage is gradually declining as the EU quotas are enforced more rigidly. For 1998, there were 67,230 ha of tobacco planted. Yields and quality were normal.

Domestic consumption fluctuates around 32,000 mt, depending on manufacturers' needs. Most of the 1998 crop was sold by the end of April 1999. Stocks are down significantly from previous years because of increased domestic consumption and the slow decrease in overall production. Exports for calendar year 1997 totaled 103,000 mt, valued at \$365 million. Most of these exports were destined for the U.S., Italy and Germany. Exports for 1998 are estimated to be 98,000 mt, valued at approximately \$350 million, which is slightly reduced from 1997. Imports for 1997 and 1998 are estimated to be 17,000 mt and 17,500 mt respectively. The United States accounts for about one-third of total imports.

Cigarette production in Greece fluctuates between 30,000-35,000 mln pieces and is not always in line with total consumption. Imports are growing as preferences shift toward imported blended cigarettes, which make up about one-quarter of the market. Total supply shows a slight upward trend with production of local blends being supplemented by imported blended cigarettes. Greek cigarette companies have started promoting their products in foreign countries, particularly Eastern Europe.

## **Production**

### **General**

Total tobacco production in 1998 is estimated to be 127,000 mt (dry weight basis) which slightly exceeded the EU quota of 126,700. Production forecasts for 1999 call for a slightly reduced level of 126,000 mt. The GOG and the National Tobacco Board are trying to reduce production to within the EU quota while replacing less productive varieties with higher quality, more marketable strains (such as Basma, Katerini, K. Koulak, Flue-Cured). Flue cured tobacco production reached 30,500 mt, lower than in 1997 due to strong enforcement of EU regulations on quotas and premium payments. Burley production showed a slight reduction to 12,400 mt from last year due to the same reason.

Oriental production for 1998 was 84,100 mt compared to 80,900 MT a year earlier due to good yields. The EU quota for oriental was 82,899 mt for 1997 and 1998. Some oriental production has shifted from the less desirable varieties of Tsebelia and Mavra to the more easily marketed varieties of Basma and Kaba Koulak. However, production is still below the EU quota for these two varieties. Oriental tobacco is the most commonly produced tobacco in Greece with an estimated 56,018 out of 64,323 total tobacco farmers producing this type of tobacco. However, the number of farmers producing traditional oriental varieties is declining from year to year as farmers move to more productive and marketable varieties of oriental/flue cured tobacco. Oriental tobacco accounts for 78% of all acreage planted to tobacco.

**Greek Tobacco Quotas**

1998 tobacco production quotas, by variety, are as follows:

<b>QUOTAS FOR 1998 AND 1999 CROPS</b>			
Variety	Number of Growers	Quantity Tons	Guarantee Thresholds
<b>VI Basma</b>	<b>24.812</b>	<b>26.052</b>	<b>26.100</b>
<b>VII Katerini</b>	<b>7.960</b>	<b>17.451</b>	
S 79	2.934	4.787	
<b>Total</b>	<b>10.894</b>	<b>22.238</b>	<b>22.250</b>
<b>VIII K. Koulak Classic</b>	<b>4.247</b>	<b>6.996</b>	
Elassona	3.289	7.324	
Myr. Agrinion	3.350	5.210	
<b>Total</b>	<b>10.886</b>	<b>19.530</b>	<b>19.550</b>
<b>V Tsebelia</b>	<b>6.848</b>	<b>10.644</b>	
Mavra	1.944	3.966	
K.K. non Classic	634	1.076	
<b>Total</b>	<b>9.426</b>	<b>15.686</b>	<b>15.700</b>
<b>II Burley</b>	<b>2.301</b>	<b>12.388</b>	<b>12.400</b>
<b>I Virginia</b>	<b>6.004</b>	<b>30.686</b>	<b>30.700</b>
<b>Total</b>	<b>64.323</b>	<b>126.580</b>	<b>126.700</b>
(Source: National Tobacco Board)			

## **Crop Area**

The National Tobacco Board, the Ministry of Agriculture, and the Hellenic Tobacco Merchants Federation all confirm that there is a gradual reduction in crop area, particularly of oriental varieties. This reduction (87,000 ha in 1988 to an estimated 67,200 ha in 1998) is due to the implementation of the CAP reform which has reduced production quotas for each variety and has encouraged the abandonment of non marketable varieties. Planted area for flue cured tobacco has stabilized at 11,000 ha. Over the last several years, this variety has replaced some of the less marketable oriental varieties.

Planted area for Burley tobacco in 1997 and 1998 was down to EU quota levels. Since 1981, officials have been encouraging farmers to switch from Burley to other, more popular varieties, or other crops, because of an accumulation of large, low quality, Burley stocks. Acreage is expected to stabilize at around 3,600 ha by year 2000.

## **Inputs**

The average price of inputs for the Greek tobacco sector increased 15.5%, weighted average, in 1996, 1997 and 1998. The largest increases were for fertilizers, fuel, equipment and machinery. Increases were also seen in maintenance and repair costs of machinery, mainly due to increased costs of materials and labor. Cooperatives and individual farmers may borrow money from the Agricultural Bank of Greece to purchase their inputs at interest rates of 12% to 14%. This rate is lower 1-2% lower than those charged by commercial banks.

## **Yields**

Heavy rains in early spring caused some farmers to have to replant their seedlings for the 1999 crop. Some transplanting from seed beds to fields continue through early May, but this delay is not expected to affect yields.

## **Crop Quality**

Crop quality for 1997 and 1998 was considered good and all amounts are considered marketable. A campaign is under way to reduce the use of chemicals on the tobacco crop to further increase quality.

There have been concerns over crop quality for more than 15 years, particularly for Burley and oriental tobacco. After a number of buyers began reducing their purchases of Greek tobacco in the 1980's because of the poor quality, all involved parties (the National Tobacco Board, Ministry of Agriculture, Tobacco Institute, etc), began a concerted effort to improve the quality of Greek tobacco. Their goal is to better meet the demands of export markets for a quality product rather than be a supplier of filler. Many farmers have improved their practices and quality has improved significantly.

---

## **Production Policy**

The GOG and the relevant agencies are focusing on improving the quality of tobacco, as well as increasing the amount of high quality, marketable tobacco, as opposed to some of the more traditional varieties. The National Tobacco Board, through its Tobacco Institute, is one of the lead agencies working on these goals. Two methods for achieving this goal are through the implementation of better and more fair tobacco grading standards and a speeding up of the variety restructuring program focusing on those varieties that are more marketable (domestically and internationally).

Under current production policy, merchants and growers sign contracts with the price based on the merchants' opinions on quality. The Tobacco Board no longer has a role in grading.

There is some concern that farmers may not be willing to continue growing traditional tobacco varieties in the future because they are so labor intensive. Officials expect total oriental tobacco production to remain near current levels, but with more emphasis on the less labor intensive varieties. The National Tobacco Board is providing extension services to farmers, teaching them how to improve quality and how to farm more efficiently.

For some oriental varieties like Basma that are grown in very small plots and are highly labor intensive, production is impossible to mechanize. This practice results in better crop quality. However, there is a strong international demand for Basma and production is below the EU quota for this type. As a result, the GOG has argued that the EU should provide special production incentives for this variety. The increased average of the farmers is also a threat for these labor intensive varieties.

## Production Table

Product	Area (Ha.)			Production (MT)		
	1997	1998	1999	1997	1998	1999
Flue-Cured	11,000	11,000	11,000	34,500	30,500	30,000
Burley	3,650	3,650	3,650	12,500	12,400	12,400
Oriental	52,600	52,580	52,550	80,900	84,100	83,500
Dark Air/Sun-Cured						
Light Air-Cured						
Dark Air-Cured, Cigar						
Dark Fire-Cured						
Total	67,250	67,230	67,200	129,550	128,000	126,000

## Prices

During the discussion of the agricultural prices package for the 1998/99 season, the Commission suggested that the tobacco premiums for the 1998 crop remain the same as those of the 1997 crop. The decision was finally taken on closing the package for agricultural prices and other relative measures by the E.U. Council of Agriculture Ministers (June 1998). Following that, Reg. 1632/20.7.1998, with which the premiums for the 1998 crop were set, was issued.



The amount of the premium per variety is presented in the following table:

VARIETY	1998 CROP PREMIUM (ECU/kg)
Basma	3,75415
Katerini	3,18541
K. Koulak Classic, Elassona & Myr. Agrinion	2,27615
Tsebelia, Mavra & K. Koulak non Classic	2,16748
Burley	2,16748
Virginia	2,70965

There was a decrease in the average 1998 prices (including the premium, the commercial purchase price and the 10% specific aid) which was justified by the necessity to balance the market which had been disrupted by large price increases for crops in 1995, 1996 and 1997. The accumulative increase in the average price for crops in these years, in comparison with 1994, was nearly 35%. Community aid (10% over the premium given only to groups of tobacco growers) remained at the same levels for this period resulting in high prices that made Greek tobacco less competitive on the world market.

Flue Cured - According to the National Tobacco Board (NTB), 98% of the 1998 flue-cured crop was sold by farmers to merchants by the end of March 1999. The actual prices paid to farmers in MY 1998-1999 were 1,080-1,170 Drs/kg (\$3.50-3.80) including premiums.

Burley - Tobacco prices paid to growers, dropped by 10-12% compared to those in 1997.

Oriental - Tobacco prices for each of the oriental varieties (1998 crop) were as follows:

Variety	Drs/kg paid to w farmers
Basma	1,700-1,300
Katerini	1,660-1,180
S-79	1,180-1,100
K.K. Classic	1,070-760
Elassona	1,050-815
K.K. non Classic	800
K-63	1,050-890
Tsebelia	900-885
Mavra	890-810

w Exchange RATE 1998 \$1=294.30

## Consumption

Consumption for 1998 and 1999 is estimated at 45,000 MT and 46,300 MT respectively which accounts for unusable stocks that have been disposed of since 1995 (small carry overs from crops 1995, 1996, 1997).

Domestic consumption of tobacco fluctuates between 35-45,000 MT, depending on manufacturers' needs (for 1998, oriental - 22,000 mt, flue cured - 143,000 mt, and burley - 10,000 mt). Traders buy 95% of the crop, while 5% is purchased by cigarette manufacturers. Most of the 1998 crop was sold by the end of April, 1999. The tobacco utilized is mainly flue-cured and Burley to meet the increasing demand for blended cigarettes, which are gradually replacing cigarettes made primarily from oriental tobacco. Imports of blended tobacco have also been increasing. The Greek cigarette industry buys leaf tobacco from both domestic (farmers and traders) and international markets.

Because of improved quality and increased demand, there have been no reported purchases of tobacco by

DIDAGEP (the EU intervention agency). This agency intervenes to purchase excess tobacco after the end of the marketing period, which is set by the Commission to be the 15th of May every year. Most available stocks are in the hands of manufacturers and cooperative organizations.

## **Trade**

Export statistics for 1997, the most recent available, are from the Tobacco Merchants Federation and the National Statistical Service. Figures for 1998 and 1999, including trade data, are AgOffice estimates based on trade contacts.

Exports for calendar year 1997 totaled 103,000 mt, valued at \$365 million. Most of the exports were destined for the U.S., EU and Russia. Imports for the same period are estimated to be 17,000 mt made up of leaf tobacco and some strips for a total value of \$104 million. Preliminary export estimates for 1998 are 98,000 mt. This represents a drop in exports of oriental and burley. Exports for 1997 and 1998 are down because of a parallel reduction in total supply resulting from the decreased amount of stocks and lack of significant changes in domestic consumption, which remains stable.

Greece produces 36% of the tobacco consumed by the European Union compared to 38% for Italy, its main competitor. Greek farming organizations keep complaining that the new CAP policies for tobacco are unfair in that they impose quotas which limit European growers, while the EU still must import 530,000 MT of leaf tobacco from third countries each year.

The average export price for oriental tobacco in 1997 was at \$2.40/kg and \$4.50/kg for burley. Consumption of blended cigarettes is on the rise in Greece. This is reflected in total tobacco purchased by local manufacturing firms in the last five years. Imported tobacco leaf in 1998 was approximately 17,000 MT, mostly Virginia flue cured, some burley and other types not domestically produced. Imports of flue-cured tobacco in 1998 are estimated at 6,000 mt, of which 4,500 mt are of U.S. origin. Most of the imported U.S. flue-cured tobacco comes through the Netherlands and West Germany. Greece does not import much oriental tobacco (some amounts enter the country in the form of various blends and tobacco products), and this situation is unlikely to change in the future.

The Middle East and OECD countries are becoming very important markets for Greece. East African countries are also important customers for Greek exports even though they are not considered very stable markets. The search for new and stable customers for Greek tobacco is a major export policy goal.

## **Stocks**

Stocks for 1997 and onward have been reported by the National Tobacco Board by category to account for disposal of old, damage, or otherwise unusable, tobacco during the 1995/96 time period. Stocks are often held for several years, depending on domestic demand and periodically, the unusable tobacco is disposed of. PS&Ds are adjusted accordingly.

## **Policy**

The GOG's policy goal is to stabilize tobacco area and output to come within the EU CAP quota. Total production for 1997 and 1998 was close to the EU quota levels

The EU changed the system for premium payments beginning with the 1995 crop. According to the new system, premiums are separated from the final price and are paid directly to farmers. In general, farmers and Cooperative Unions are satisfied with this program.

The EU pays farmers only when contracts are signed between merchants-processors and the producers. In 1997, 92% of Greek farmers signed contracts and Greece received \$460 million in premiums. Some farmers deliberately produce tobacco in excess of their quota in an attempt to increase their incomes. The premiums are paid to the Greek Tobacco Manufacturers Federation who pass the funds to the farmers. Base premiums for the 1998 crop are given in the table above.

Greece's quota for 1999 did not change from 1998. No further changes in policy are reported since last year's annual report.

## **Quality, Safety & Health**

Tobacco farming organizations and Cooperative unions in Macedonia and Thrace are campaigning against the acceptance by the Greek Ministry of Health of the new EU measures against cigarette advertisement in Europe.

## **Marketing**

The National Tobacco Board is the only national organization involved in promoting Greek tobacco abroad. However, it does very little and most activities are handled by private traders through their Tobacco Export Federation.

## Cigarettes

### Production

#### General

Cigarette production and export needs in Greece are showing an upward trend in line with an increase in total consumption for 1996, 1997 and 1998. Greek cigarette production for 1998 was over 35,000 million pieces. Approximately 30% of the cigarettes in Greece are imported. There has been an increase in imports as preferences shift towards imported blended cigarettes. Smoking has increased despite intensifying anti-smoking campaigns and an increase in cigarette prices (18 to 20% in 1997 and 4% in 1998).

About 65% of the cigarettes consumed in Greece are locally produced and 35% imported. For 1998, the total consumption amounted to 30,000 million pieces and shows a small continuous growth. For the past three years, market shares have stabilized, following a rapid increase in the consumption of imported cigarettes and a corresponding decrease in that of domestic cigarettes. At the same time, there is also a stabilization of the market share of Greek brands at around 38%, with an increase of the Greek blended cigarettes' market share at the expense of the traditional Greek brands. The Greek and foreign blended brands produced in Greece increased their market share to 47% in 1998.

In 1998, domestic cigarette production, accounted for 5 industries, amounted to 35.600 million pieces, of which 19,400 were taxed and consumed in Greece and 16.500 million pieces were exported.

It is very important to note that the cigarette industries developed their export sector after 1990: While during 1985-1989 cigarette exports amounted to 1.800 million pieces on average, the last two years, 1997-1998, they exceeded 15.000 million pieces per year. Former Eastern Europe bloc countries absorb most Greek cigarette exports.

The largest share in the Greek cigarette market is held by PHILIP MORRIS (22.5%) followed by the Greek PAPASTRATOS (14.5%), ROTHMANS (14.4%), REYNOLDS (10.5%), SEKAP & KARELIA (10.4%), GALLAHER (3.9%), REEMTSMA (3.6%), KERANIS (2.7%) and all others 17.5%.

Greek cigarette manufacturers have started a strong marketing campaign to promote Greek cigarettes in foreign markets, particularly in Eastern European and Eastern African countries. Packs of 30 cigarettes with "Made in Greece" labels are becoming popular, particularly in Eastern Europe. In 1997, this region accounted for almost 50% of Greece's total exports of 20,227 mt, with continued growth expected for 1998 and 1999.

<b>Exchange Rates</b>
-----------------------

1997	\$1.00 U.S.	Drs 272.74
1998	\$1.00 U.S.	Drs 294.30
1999 (Jan - April)	\$1.00 U.S.	Drs 290.80

**Tobacco Unmufg., Total PS&D Table**

PSD Table						
Country	Greece					
Commodity	Tobacco, Unmfg., Total				(HA)(MT)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Area Planted	67250	67250	67300	67230	0	67200
Beginning Stocks	6731	6731	5031	4277	11531	5769
Farm Sales Weight Prod	132450	132450	132000	132200	0	130500
Dry Weight Production	127900	127900	127000	127000	0	126000
U.S. Leaf Imports	7000	6500	7000	6000	0	5500
Other Foreign Imports	14000	10500	18700	11500	0	11000
TOTAL Imports	21000	17000	25700	17500	0	16500
TOTAL SUPPLY	155631	151631	157731	148777	11531	148269
Exports	110000	103000	105000	98008	0	99000
Dom. Leaf Consumption	32200	34700	32700	35300	0	36300
U.S. Leaf Dom. Consum.	5300	6000	5000	5700	0	5800
Other Foreign Consump.	3100	3654	3500	4000	0	4200
TOTAL Dom. Consumption	40600	44354	41200	45000	0	46300
TOTAL Disappearance	150600	147354	146200	143008	0	145300
Ending Stocks	5031	4277	11531	5769	0	2969
TOTAL DISTRIBUTION	155631	151631	157731	148777	0	148269

**Tobacco Unmfg., Total Export Trade Matrix**

Export Trade Matrix			
Country	Greece		
Commodity	Tobacco, Unmfg., Total		
Time period		Units:	MT
Exports for:	1996		1997
U.S.		U.S.	9477
Others		Others	
		>EU Total	43457
		Germany	10206
		France	5073
		Italy	9250
		U.K.	4500
		Other EU	14428
		Russia	11385
		Algeria	3419
Total for Others	0		58261
Others not Listed			34880
Grand Total	0		102618



**Tobacco Unmfg., Total Import Trade Matrix**

Import Trade Matrix			
Country	Greece		
Commodity	Tobacco, Unmfg., Total		
Time period		Units:	MT
Imports for:	1996		1997
U.S.		U.S.	294
Others		Others	
		>EU Total	5871
		Netherlands	3020
		Germany	1220
		France	605
		Other EU	1026
		Turkey	1775
		Brazil	1438
		Malawi	1561
		Others	5261
Total for Others	0		15906
Others not Listed			
Grand Total	0		16200

**Tobacco, Unmfg., Flue Cured PS&D Table**

PSD Table						
Country	Greece					
Commodity	Tobacco, U nmfg., Flue Cured				(HA)(MT)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Area Planted	11000	11000	11000	11000	0	11000
Beginning Stocks	374	374	574	9574	350	9774
Farm Sales Weight Prod	35500	35500	35000	33000	0	32500
Dry Weight Production	34500	34500	34000	30500	0	30000
U.S. Leaf Imports	5000	5000	5000	4500	0	4000
Other Foreign Imports	3000	3000	2000	1500	0	1000
TOTAL Imports	8000	8000	7000	6000	0	5000
TOTAL SUPPLY	42874	42874	41574	46074	350	44774
Exports	29000	20000	28500	22000	0	21500
Dom. Leaf Consumption	7200	7200	6724	7800	0	7800
U.S. Leaf Dom. Consum.	4300	4300	4000	4500	0	4500
Other Foreign Consump.	1800	1800	2000	2000	0	2000
TOTAL Dom. Consumption	13300	13300	12724	14300	0	14300
TOTAL Disappearance	42300	33300	41224	36300	0	35800
Ending Stocks	574	9574	350	9774	0	8974
TOTAL DISTRIBUTION	42874	42874	41574	46074	0	44774

**Tobacco, Unmfg., Burley PS&D Table**

PSD Table						
Country	Greece					
Commodity	Tobacco, Unmfg., Burley				(HA)(MT)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Area Planted	3650	3650	3650	3650	0	3650
Beginning Stocks	1908	1908	1408	2708	1500	2900
Farm Sales Weight Prod	14150	14150	14500	14200	0	14200
Dry Weight Production	12500	12500	12700	12400	0	12500
U.S. Leaf Imports	2000	1500	2000	1500	0	1500
Other Foreign Imports	3500	3500	3500	3000	0	3000
TOTAL Imports	5500	5000	5500	4500	0	4500
TOTAL SUPPLY	19908	19408	19608	19608	1500	19900
Exports	12000	6000	11608	7008	0	7200
Dom. Leaf Consumption	5000	7500	5000	7500	0	7500
U.S. Leaf Dom. Consum.	1000	1700	1000	1200	0	1300
Other Foreign Consump.	500	1500	500	1000	0	1200
TOTAL Dom. Consumption	6500	10700	6500	9700	0	10000
TOTAL Disappearance	18500	16700	18108	16708	0	17200
Ending Stocks	1408	2708	1500	2900	0	2700
TOTAL DISTRIBUTION	19908	19408	19608	19608	0	19900

**Tobacco Unmfg., Oriental PS&D Table**

PSD Table						
Country	Greece					
Commodity	Tobacco, Unmfg., Oriental				(HA)(MT)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Area Planted	52600	52600	52580	52580	0	52550
Beginning Stocks	4449	4449	3049	4495	4657	5595
Farm Sales Weight Prod	82800	82800	82500	85000	0	83800
Dry Weight Production	80900	80900	80300	84100	0	83500
U.S. Leaf Imports	0	0	0	0	0	0
Other Foreign Imports	7500	7500	8200	7000	0	7000
TOTAL Imports	7500	7500	8200	7000	0	7000
TOTAL SUPPLY	92849	92849	91549	95595	4657	96095
Exports	69000	68000	64892	69000	0	70000
Dom. Leaf Consumption	20000	20000	21000	20000	0	21000
U.S. Leaf Dom. Consum.	0	0	0	0	0	0
Other Foreign Consump.	800	354	1000	1000	0	1000
TOTAL Dom. Consumption	20800	20354	22000	21000	0	22000
TOTAL Disappearance	89800	88354	86892	90000	0	92000
Ending Stocks	3049	4495	4657	5595	0	4095
TOTAL DISTRIBUTION	92849	92849	91549	95595	0	96095

**Tobacco, Mfg., Cigarettes PS&D Table**

PSD Table						
Country	Greece					
Commodity	Tobacco, Mfg., Cigarettes				(MIL PCS)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Filter Production	29000	34200	29200	35600	29200	36000
Non-Filter Production	300	300	200	300	200	350
TOTAL Production	29300	34500	29400	35900	29400	36350
Imports	11000	10400	11500	10600	11600	10300
TOTAL SUPPLY	40300	44900	40900	46500	41000	46650
Exports	10300	15000	10700	16500	10500	16500
Domestic Consumption	30000	29900	30200	30000	30500	30150
TOTAL DISTRIBUTION	40300	44900	40900	46500	41000	46650

**Tobacco, Mfg., Cigarettes Import Trade Matrix**

Import Trade Matrix			
Country	Greece		
Commodity	Tobacco, Mfg., Cigarettes		
Time period		Units:	MT
Imports for:	1996		1997
U.S.		U.S.	
Others		Others	
		>EU Total	11032
		Netherlands	5218
		Germany	4208
		Other EU	1606
		Bulgaria	55
		Cyprus	35
Total for Others	0		11122
Others not Listed			59
Grand Total	0		11181

**Tobacco, Mfg., Cigarettes Export Trade Matrix**

Export Trade Matrix			
Country	Greece		
Commodity	Tobacco, Mfg., Cigarettes		
Time period		Units:	MT
Exports for:	1996		1997
U.S.		U.S.	22
Others		Others	
		EU Total	1860
		Ukraine	6289
		Turkey	2907
		Serbia	1597
		Cyprus	1197
Total for Others	0		13850
Others not Listed			6355
Grand Total	0		20227