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**Poland**

**Tobacco**

**Annual Report**

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**Report Highlights:**

**Privatization of Poland's cigarette industry has led to increasing production of Western-style brands and higher demand for lighter tobacco varieties. Polish tobacco producers are planting more of the preferred varieties but will soon face more competition from imports as privatization agreement requirements to purchase domestic tobacco expire.**

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Includes PSD changes: Yes  
Includes Trade Matrix: Yes  
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## EXECUTIVE SUMMARY

Tobacco area and production are expected to remain stable in 1999 at 19,800 hectares and 38.7 million tons (dry weight), respectively. Producers will continue to shift to tobacco varieties favored by cigarette manufacturers in Poland. Since 1998, all cigarette manufacturing plants are privately owned except one which is still state-owned. This year, owners of the earliest privatized cigarette manufacturing companies will begin to emerge from the privatization requirement to purchase minimum quantities of domestic tobacco for five years after privatization. As a result, domestic producers will be faced with additional competition from imported tobacco.

Anti-smoking campaigns and new restrictions on content of tar and nicotine in cigarettes have prompted manufacturers to invest in new lines capable of producing lighter, Western-style brands resulting in a decline in cigarette imports from .5 billion pieces in 1997 to .3 billion pieces in 1998. Cigarette exports are estimated to be 4 billion pieces in 1998, a decline of .7 billion pieces from 1997 reflecting the economic crisis in many of Poland's major markets in the former Soviet Union.

Import taxes on tobacco have not changed since 1993. In contrast, excise taxes on cigarettes have continued to increase with substantial hikes planned for 1999.

## TOBACCO

### Production

Tobacco area in 1999 will remain unchanged from previous years with a strong tendency to change to new varieties. Polish tobacco production consists primarily of traditional varieties of dark tobacco. According to privatization agreements, tobacco companies are required to purchase minimum quantities of domestically-produced tobacco, usually for a period of 5 years. Some of these contracted periods will end in 1999. Since the price of locally grown tobacco is lower than imported tobacco, owners of cigarette plants have started an educational program to assist local farmers in changing to preferred varieties. In the southern part of Poland, one of the largest tobacco growing regions in the country, most farmers have already changed to these new varieties. The production of industrial tobacco and semi-processed products has steadily fallen since 1990:

Industrial and semi-processed tobacco products (thousand tons)

1990	1993	1994	1995	1996	1997	1998
52.6	47.4	33.1	43.6	33.9	39.1	39.5

Poland's share of the international tobacco market has shrunk from 1.6 percent in the mid 1980s to 0.6 percent at present. Total tobacco area in Poland is 20,000 hectares, with an average farm size of approximately 0.3 hectares. This accounts for 0.1 percent of the total arable area in Poland. The largest tobacco growing areas are located in the south near Zamosc (5,000 hectares), Kielce (4,000 hectares) and Krakow (3,000 hectares). The dominant variety grown in these regions is Virginia. In the region of Augustow (north-west of Poland), Brazilian varieties have been replaced by Virginia, Burley, Skroniowski strong and Kentucky varieties. The average area of tobacco plantations is quickly growing in this region and could reach 0.5 hectares in 2000, compared with 0.39 hectares in 1997.

The tobacco leaf harvest in 1999 is expected to be similar to 1997 and 1998 levels. Polish tobacco is still the main raw material for the national tobacco industry. However, Polish tobacco is used primarily as a filler which is not economically beneficial to Polish farmers.

## Consumption

Total leaf consumption in 1999 will remain unchanged from 1998. Domestic leaf consumption is estimated slightly higher than in 1998 but it will account only for around 46 percent of total tobacco consumption. It is estimated that with more modern production lines and greater demand for lighter cigarettes, the consumption of imported leaf will most likely rise and will provide an additional incentive for farmers to change to new varieties.

## Trade

Total imports of raw tobacco reached 37,943 metric tons in 1997 and was higher than originally estimated. Imports in 1998 should be unchanged from 1997 consisting primarily of light tobacco varieties. The main suppliers of unmanufactured tobacco to Poland are Zimbabwe, United States, Brazil, Greece, Malawi and Turkey. Exports in 1997 totaled 5,645 metric tons. It is estimated that approximately 2,000 metric tons was exported in 1998. This decrease was primarily the result of the economic crisis in Russia, Ukraine, and Kazakhstan, Poland's primary markets.

NOTE: Trade data for 1998 is available for the first six months only.

## Tariff changes and non-tariff barriers

Tariffs for tobacco were last changed in 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 tariffs which do not discriminate against U.S. suppliers. All exporting countries face the same tariff treatment for entry into Poland. The following tariff schedule has been in effect since July 5, 1993:

Item	Description	Import duty (percent)
2401	Unmanufactured tobacco; Tobacco refuse:	
2401.10	- not stemmed (except Oriental)	30, minimum 1.13 ECU/kg
2401.10.60	- not stemmed, Oriental	20, minimum 1.13 ECU/kg
2401.20	- partly stemmed	30, minimum 1.13 ECU/kg
2401.30	- tobacco refuse	30, minimum 1.13 ECU/kg

In accordance with the Uruguay Round Agreement, Poland established bound tariffs for tobacco and tobacco

products. In CY 1999, Poland will again maintain applied tariffs as noted in the preceding table, which are much lower than WTO bound rates. For CY 1999 tariff rate quotas were established at the levels listed below for individual suppliers, according to bilateral agreements :

Imports from Bulgaria - 200 tons

Imports from Hungary - 700 tons

Item	Description	Import duty (percent)
2401	Unmanufactured tobacco; Tobacco refuse:	
2401.10.10-90	- not stemmed, without Oriental	15, minimum 0.565 ECU/kg
2401.10.60	- not stemmed, Oriental	10, minimum 0.565 ECU/kg

## 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

Poland produces mainly cigarettes (96.5 billion pieces in 1998). Other tobacco products, like pipe tobacco, cigars and snuff, account for less than 0.1 percent of consumption and are mainly imported. The production and sale of snuff is prohibited, but the present ruling coalition supports a repeal of this law.

Cigarettes are produced in 11 plants owned by 7 independently-managed companies. Since early 1998, all manufacturing plants (excluding one in Lublin, which is still state owned) are owned or controlled by foreign investors. According to privatization agreements, the companies are required to invest in modernization of the industry, which they have successfully accomplished. To respond to a growing demand for light cigarettes with low tar and nicotine content, they have introduced new modern production lines and assist farmers in switching to new tobacco varieties.

Ninety-nine percent of cigarettes available on the Polish market are produced in Poland, and 65 percent of all cigarettes on sale are traditional Polish brands, in which most of the tobacco is Polish.

### Production policy

The excise tax accounts on average for 42 percent of cigarette prices and is increased every year. Four increases in the excise tax on cigarettes are foreseen in 1999, including a 10 percent increase in January and a 5 percent increases in March, June and September. The four excise tax categories existing in Poland, with changes expected in 1999 are listed in the following table.

CN Code	Description	Excise tax in PLN per 1000 pcs or in percent applicable in the period of:			
		Jan 1 - Feb 28, 1999	March 1 - May 31, 1999	June 1 - Aug 31, 1999	Sept 1 - Dec 31, 1999
2552	Tobacco products:				
	long Western types cigarettes produced locally and all imported cigarettes	84.20	88.40	92.80	97.40
	local brand long cigarettes	72.10	75.70	79.40	83.40
	local brand short cigarettes	56.70	59.50	62.50	65.60
	local brand non-filter cigarettes	55.00	57.80	60.60	63.70
2552.30	locally produced cigars	97.40	97.40	97.40	97.40
2552.40, 2552.70	other tobacco products	60 %	60 %	60 %	60 %

The 1995 Polish health law regarding tobacco and tobacco products forced the Minister of Health to introduce new norms for harmful substance content in tobacco products. The ordinance of July 1, 1998 introduced a norm of 15 mg of tar and 1.5 mg of nicotine in cigarettes. From 2003, these norms are to be reduced respectively to 12 mg of tar and 1.2 mg of nicotine.

### Consumption

Local producers try to meet the cigarette consumption of about 10 million smokers, i.e. 45 percent of adult men and 22 percent of adult women. Per capita consumption is 2,500 cigarettes per year. This level of smoking puts Poland among the top five countries for cigarette consumption. As a result of a health service campaign, over 2 million Poles have given up smoking since 1995, although the amount spent by the health service on illnesses caused by tobacco-smoking has risen. According to a report of the Center for Social and Economic Analyzes, tobacco products account for a substantial portion of Polish household budgets, rivaling expenditure on alcohol (1.9 percent on tobacco products, 1.2 percent on alcohol). The percentage of income spent on tobacco products has risen from 1.5 percent in 1997 to 1.9 percent in 1998. The average monthly expenditure per capita on tobacco products was PLN 10.03 (US\$ 3.3) in the first 9 months of 1998.

Since 1996, the tobacco industry has been generating at least 7.5 percent of all the state budget revenues and almost 7 percent of the entire added value in the economy.

### Trade

Cigarette imports continue to decline due to increasing domestic production of Western brands in Poland. Total imports and exports of cigarettes in 1998 have been not yet published but it is estimated that imports declined to 0.3 billion pieces in 1998 from 0.5 billion in 1997. Smuggling does not represent a major threat as in the past,

due to the tightened border control, and very high penalties for those who sell cigarettes without excise labels. Poland is mainly treated as a transit point from East to the West.

Polish exports of cigarettes are estimated to be 4 billion pieces in 1998, slightly lower than in 1997 (4.7 billion), which is due primarily to the economic crisis in Poland's major markets as well as a decrease in production of strong cigarettes. The largest importers of Polish cigarettes in the past were Cyprus and Turkey, where strong cigarettes are still in demand.

## Marketing

At present, tobacco advertising is not permitted on television or radio, as well as on signs placed closer than 200 m from schools and churches. Health warnings must cover one-third of all labels or advertisements for tobacco products. As might be expected, consumption does not very dependent on price fluctuations. However, other barriers exist which have a direct influence on the market, including the structure of the excise tax and the commitments of strategic investors to maintain employment levels, or their obligation to purchase tobacco from domestic growers. Last year, producers with the shops owners agreed to control the sale of cigarettes to children and teenagers.

## Tariffs and non-tariff barriers

Under the Uruguay Round, Poland established bound tariffs for tobacco and tobacco products. For CY 1999 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	20 million pcs at 55 %	189 % min. ECU 20/1000 pcs
2402.20.10-90	Cigarettes	6 bln pcs at 90 % and min. ECU 9/1000 pcs	189 % min. ECU 20/1000 pcs
2402.90	Other	20 million pcs at 90 %	189 % min. ECU 20/1000 pcs
2403	Other manufactured, homogenized and reconstituted tobacco:	1,300 tons	
2403.10	pipe tobacco	120 %	251.7 %
2403.91	homogenized or reconstituted tobacco	55 % or min. ECU 1.13/kg	251.7 %
2403.99.10	chewing and snuff tobacco	65 %	251.7 %

2403.99.90	other	55 % or min. ECU 1.13/kg	251.7 %
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According to bilateral agreements with the Czech and Slovak Republics, the following quotas and tariff rates were established for 1999:

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 % and min. ECU 4.5/1000 pcs
2402.90	Other	45 %
2403.10	pipe tobacco	60 %
2403.91	homogenized or reconstituted tobacco	27.5 % or min. ECU 0.565/kg
2403.99.10	chewing and snuff tobacco	32.5 %
2403.99.90	other	27.5 % or min. ECU 0.565/kg

Since April 1, 1994 all locally produced or imported tobacco products must be officially labeled (excise tax). The rates for excise taxes are different for Western and local brands. The GOP intends to equalize cigarette prices for Western and local brands in Poland by the year 2000 by increasing the excise tax which is one of the largest sources of income for the government. In 1998, the excise tax paid by the tobacco industry approached the level of excise paid on fuels, accounting for 28.5 percent of the total excise tax from Polish industry.



**Tobacco, Unmfg., Total - PSD**

PSD Table						
Country	Poland					
Commodity	Tobacco, Unmfg., Total				(HA)(MT)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1996		01/1997		01/1998
Area Planted	19040	19040	19100	19675	0	19800
Beginning Stocks	6688	6688	10227	9049	13570	10979
Farm Sales Weight Prod	41650	42990	44700	43000	0	43000
Dry Weight Production	37485	38691	40230	38700	0	38700
U.S. Leaf Imports	4657	7215	4575	7230	0	7500
Other Foreign Imports	22999	37311	19500	37000	0	38000
TOTAL Imports	27656	44526	24075	44230	0	45500
TOTAL SUPPLY	71829	89905	74532	91979	13570	95179
Exports	2863	5641	5170	4000	0	5000
Dom. Leaf Consumption	31265	32000	31450	33000	0	35000
U.S. Leaf Dom. Consum.	4657	7215	4575	7000	0	7500
Other Foreign Consump.	22817	36000	19767	37000	0	38000
TOTAL Dom. Consumption	58739	75215	55792	77000	0	80500
TOTAL Disappearance	61602	80856	60962	81000	0	85500
Ending Stocks	10227	9049	13570	10979	0	9679
TOTAL DISTRIBUTION	71829	89905	74532	91979	0	95179

**Tobacco, Unmfg. Total - Import**

Import Trade Matrix			
Country	Poland		
Commodity	Tobacco, Unmfg., Total		
Time period	Jan-Dec	Units:	MT
Imports for:	1997		1998
U.S.	7215	U.S.	3586
Others		Others	
Zimbabwe	9468	Zimbabwe	3304
Brazil	5030	Brazil	2598
Malawi	3049	Malawi	1593
Germany	2908	Germany	1176
Tanzania	921	Greece	1086
India	671	Tanzania	401
Greece	630	India	149
Indonesia	355	Philippines	140
Argentina	352	Indonesia	98
Total for Others	23384		10545
Others not Listed	13927		6198
Grand Total	44526		20329
Trade figures for 1998 are for Jan-June only.			

**Tobacco, Unmfg., Total - Export**

Export Trade Matrix			
Country	Poland		
Commodity	Tobacco, Unmfg., Total		
Time period	Jan-Dec	Units:	MT
Exports for:	1997		1998
U.S.	11	U.S.	
Others		Others	
Belgium	1646	Russia	780
Russia	1173	Kazakhstan	227
Ukraine	857	Lithuania	203
Kazakhstan	602	Switzerland	116
Germany	496	Germany	96
Switzerland	319	Ukraine	52
Hungary	190		
Brazil	187		
Egypt	99		
Total for Others	5569		1474
Others not Listed	61		3
Grand Total	5641		1477
Trade figures for 1998 are for Jan-June only.			

**Tobacco, Unmfg., Burley - PSD**

PSD Table						
Country	Poland					
Commodity	Tobacco, Unmfg., Burley				(HA)(MT)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1996		01/1997		01/1998
Area Planted	5200	5200	5400	5300	0	5400
Beginning Stocks	1638	1640	3782	3774	5015	3874
Farm Sales Weight Prod	13000	13000	14000	13000	0	13000
Dry Weight Production	11700	11700	12600	11700	0	11700
U.S. Leaf Imports	18	19	50	25	0	50
Other Foreign Imports	2867	4231	2500	4200	0	4500
TOTAL Imports	2885	4250	2550	4225	0	4550
TOTAL SUPPLY	16223	17590	18932	19699	5015	20124
Exports	556	566	1000	600	0	600
Dom. Leaf Consumption	9000	9000	10000	11000	0	11000
U.S. Leaf Dom. Consum.	18	19	50	25	0	50
Other Foreign Consump.	2867	4231	2867	4200	0	4500
TOTAL Dom. Consumption	11885	13250	12917	15225	0	15550
TOTAL Disappearance	12441	13816	13917	15825	0	16150
Ending Stocks	3782	3774	5015	3874	0	3974
TOTAL DISTRIBUTION	16223	17590	18932	19699	0	20124

**Tobacco, Unmfg., Import**

Import Trade Matrix			
Country	Poland		
Commodity	Tobacco, Unmfg., Burley		
Time period	Jan-Dec	Units:	MT
Imports for:	1997		1998
U.S.	19	U.S.	14
Others		Others	
Germany	1652	Malawi	994
Malawi	1250	Germany	621
Zimbabwe	299	Italy	171
Thailand	225	Venezuela	138
Greece	223	Philippines	131
		Brazil	130
Total for Others	3649		2185
Others not Listed	582		205
Grand Total	4250		2404
Trade figures for 1998 are for Jan-June only.			

**Tobacco, Unmfg., Export**

Export Trade Matrix			
Country	Poland		
Commodity	Tobacco, Unmfg., Burley		
Time period	Jan-Dec	Units:	MT
Exports for:	1997		1998
U.S.		U.S.	
Others		Others	
Russia	375	Kazakhstan	0.9
Egypt	100	Switzerland	0.4
Hungary	60		
Germany	20		
Switzerland	11		
Total for Others	566		1.3
Others not Listed			
Grand Total	566		1.3
Trade figures for 1998 are for Jan-June only.			

**Tobacco, Unmfg., Flue Cured - PSD**

PSD Table						
Country	Poland					
Commodity	Tobacco, Unmfg., Flue Cured				(HA)(MT)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1996		01/1997		01/1998
Area Planted	12500	12600	12700	12700	0	12800
Beginning Stocks	981	1250	2415	1809	4615	2209
Farm Sales Weight Prod	25000	24500	28000	25000	0	27000
Dry Weight Production	22500	24255	25200	22500	0	24300
U.S. Leaf Imports	3154	4687	3000	4600	0	5000
Other Foreign Imports	9957	14243	8000	14000	0	14000
TOTAL Imports	13111	18930	11000	18600	0	19000
TOTAL SUPPLY	36592	44435	38615	42909	4615	45509
Exports	2066	3996	4000	3700	0	3700
Dom. Leaf Consumption	19000	19700	19000	20000	0	22000
U.S. Leaf Dom. Consum.	3154	4687	3000	5000	0	5000
Other Foreign Consump.	9957	14243	8000	12000	0	13000
TOTAL Dom. Consumption	32111	38630	30000	37000	0	40000
TOTAL Disappearance	34177	42626	34000	40700	0	43700
Ending Stocks	2415	1809	4615	2209	0	1809
TOTAL DISTRIBUTION	36592	44435	38615	42909	0	45509

**Tobacco, Unmfg., Flue Cured - Import**

Import Trade Matrix			
Country	Poland		
Commodity	Tobacco,Unmfg.,Flue Cured		
Time period	Jan-Dec	Units:	MT
Imports for:	1997		1998
U.S.	4867	U.S.	2525
Others		Others	
Zimbabwe	7325	Zimbabwe	2581
Brazil	3409	Brazil	1961
Malawi	970	Malawi	220
Greece	367	Greece	126
Tanzania	271	France	113
India	253	Korea	113
Argentina	206	Italy	53
Germany	68	India	19
Philippines	40	Germany	18
Total for Others	12909		5204
Others not Listed	1154		646
Grand Total	18930		8375
Trade figures for 1998 are for Jan-June only.			



**Tobacco, Unmfg., Flue Cured - Export**

Export Trade Matrix			
Country	Poland		
Commodity	Tobacco,Unmfg.,Flue Cured		
Time period	Jan-Dec	Units:	MT
Exports for:	1997		1998
U.S.		U.S.	
Others		Others	
Belgium	1646	Kazakhstan	225
Ukraine	413	Lithuania	202
Kazakhstan	602	Russia	140
Germany	443		
Russia	419		
Switzerland	249		
Brazil	187		
Canada	35		
Total for Others	3994		567
Others not Listed	2		1
Grand Total	3996		568
Trade figures for 1998 are for Jan-June only.			

**Tobacco, Unmfg., Dark Fire Cured - PSD**

PSD Table						
Country	Poland					
Commodity	Unmfg., Dark Fire Cured				(HA)(MT)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1996		01/1997		01/1998
Area Planted	1190	1190	900	1100	0	1000
Beginning Stocks	2358	2358	2358	2281	2358	2081
Farm Sales Weight Prod	3350	3350	2500	2800	0	2500
Dry Weight Production	3015	3015	2250	2520	0	2250
U.S. Leaf Imports	32	0	25	0	0	0
Other Foreign Imports	983	1457	700	1300	0	1200
TOTAL Imports	1015	1457	725	1300	0	1200
TOTAL SUPPLY	6388	6830	5333	6101	2358	5531
Exports	0	242	0	200	0	200
Dom. Leaf Consumption	3015	2850	2250	2520	0	2250
U.S. Leaf Dom. Consum.	32	0	25	0	0	0
Other Foreign Consump.	983	1457	700	1300	0	1200
TOTAL Dom. Consumption	4030	4307	2975	3820	0	3450
TOTAL Disappearance	4030	4549	2975	4020	0	3650
Ending Stocks	2358	2281	2358	2081	0	1881
TOTAL DISTRIBUTION	6388	6830	5333	6101	0	5531

**Tobacco, Unmfg., Dark Fire Cured - Import**

Import Trade Matrix			
Country	Poland		
Commodity	Unmfg.,Dark Fire Cured		
Time period	Jan-Dec	Units:	MT
Imports for:	1997		1998
U.S.		U.S.	
Others		Others	
Tanzania	650	Tanzania	401
Indonesia	280	Kiribati	96
India	207	Kenya	74
Malawi	100	India	30
Greece	22	Indonesia	20
Argentina	21	Malawi	20
		Greece	19
		Sweden	4
Total for Others	1280		664
Others not Listed	177		
Grand Total	1457		664
Trade figures for 1998 are for Jan-June only.			

**Tobacco, Unmfg., Dark Fire Cured - Export**

Export Trade Matrix			
Country	Poland		
Commodity	Unmfg.,Dark Fire Cured		
Time period	Jan-Dec	Units:	MT
Exports for:	1997		1998
U.S.		U.S.	
Others		Others	
Ukraine	209	Switzerland	
Hungary	33	Germany	
		Ukraine	
		Kazakhstan	
		Lithuania	
Total for Others	242		0
Others not Listed			
Grand Total	242		0
Trade figures for 1998 are for Jan-June only.			

**Tobacco, Unmfg., Light Air Cured - PSD**

PSD Table						
Country	Poland					
Commodity	Unmfg., Light Air Cured				(HA)(MT)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1996		01/1997		01/1998
Area Planted	0	0	0	0	0	0
Beginning Stocks	0	0	0	0	0	0
Farm Sales Weight Prod	0	0	0	0	0	0
Dry Weight Production	0	0	0	0	0	0
U.S. Leaf Imports	1453	19	1500	20	0	25
Other Foreign Imports	3948	4785	3200	4000	0	4000
TOTAL Imports	5401	4804	4700	4020	0	4025
TOTAL SUPPLY	5401	4804	4700	4020	0	4025
Exports	182	876	100	150	0	250
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	1453	19	1500	20	0	25
Other Foreign Consump.	3766	3909	3100	3850	0	3750
TOTAL Dom. Consumption	5219	3928	4600	3870	0	3775
TOTAL Disappearance	5401	4804	4700	4020	0	4025
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	5401	4804	4700	4020	0	4025

**Tobacco, Unmfg., Light Air Cured - Import**

Import Trade Matrix			
Country	Poland		
Commodity	Unmfg., Light Air Cured		
Time period	Jan-Dec	Units:	MT
Imports for:	1997		1998
U.S.	19	U.S.	14
Others		Others	
Germany	2007	Malawi	994
Malawi	1250	Germany	986
Zimbabwe	299	Italy	171
Greece	223	Venezuela	138
Philippines	127	Philippines	131
India	22	Brazil	130
Indonesia	18	Indonesia	60
		India	24
Total for Others	3946		2634
Others not Listed	839		204
Grand Total	4804		2852
Trade figures for 1998 are for Jan-June only.			

**Tobacco, Unmfg., Light Air Cured - Export**

Export Trade Matrix			
Country	Poland		
Commodity	Unmfg., Light Air Cured		
Time period	Jan-Dec	Units:	MT
Exports for:	1997		1998
U.S.	11	U.S.	
Others		Others	
Russia	441	Ukraine	50
Ukraine	235	Kazakhstan	1
Egypt	99		
Hungary	60		
Germany	20		
Switzerland	10		
Total for Others	865		51
Others not Listed			
Grand Total	876		51
Trade figures for 1998 are for Jan-June only.			

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

PSD Table						
Country	Poland					
Commodity	Unmf,Dark Air & Sun Cured				(HA)(MT)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1996		01/1997		01/1998
Area Planted	150	130	100	120	0	110
Beginning Stocks	211	212	222	191	182	198
Farm Sales Weight Prod	300	350	200	300	0	250
Dry Weight Production	270	346	180	297	0	248
U.S. Leaf Imports	0	0	0	0	0	0
Other Foreign Imports	124	125	100	150	0	150
TOTAL Imports	124	125	100	150	0	150
TOTAL SUPPLY	605	683	502	638	182	596
Exports	9	51	20	40	0	40
Dom. Leaf Consumption	250	250	200	250	0	248
U.S. Leaf Dom. Consum.	0	0	0	0	0	0
Other Foreign Consump.	124	191	100	150	0	150
TOTAL Dom. Consumption	374	441	300	400	0	398
TOTAL Disappearance	383	492	320	440	0	438
Ending Stocks	222	191	182	198	0	158
TOTAL DISTRIBUTION	605	683	502	638	0	596



**Tobacco, Unmfg., Dark Air & Sun Cured - Import**

Import Trade Matrix			
Country	Poland		
Commodity	Unmfg.,Dark Air & Sun Cured		
Time period	Jan-Dec	Units:	MT
Imports for:	1997		1998
U.S.		U.S.	
Others		Others	
Lebanon	14	India	76
Lithuania	14	Indonesia	8
India	83	Belgium	8
Greece	5	Greece	1
		Turkey	1
Total for Others	116		94
Others not Listed	9		
Grand Total	125		94
Trade figures for 1998 are for Jan-June only.			

**Tobacco, Unmfg., Dark Air & Sun Cured - Export**

Export Trade Matrix			
Country	Poland		
Commodity	Unmfg.,Dark Air & Sun Cured		
Time period	Jan-Dec	Units:	MT
Exports for:	1997		1998
U.S.		U.S.	
Others		Others	
Switzerland	31		
Germany	19		
Total for Others	50		0
Others not Listed	1		
Grand Total	51		0
Trade figures for 1998 are for Jan-June only.			

**Tobacco, Unmfg., Oriental - PSD**

PSD Table						
Country	Poland					
Commodity	Tobacco, Unmfg., Oriental				(HA)(MT)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1996		01/1997		01/1998
Area Planted	0	0	0	0	0	0
Beginning Stocks	1500	1500	1450	1451	1400	1401
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	5120	6564	5000	6000	0	5000
TOTAL Imports	5120	6564	5000	6000	0	5000
TOTAL SUPPLY	6620	8064	6450	7451	1400	6401
Exports	50	50	50	50	0	50
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	0	0	0	0	0	0
Other Foreign Consump.	5120	6563	5000	6000	0	5000
TOTAL Dom. Consumption	5120	6563	5000	6000	0	5000
TOTAL Disappearance	5170	6613	5050	6050	0	5050
Ending Stocks	1450	1451	1400	1401	0	1351
TOTAL DISTRIBUTION	6620	8064	6450	7451	0	6401

**Tobacco, Unmfg., Oriental - Import**

Import Trade Matrix			
Country	Poland		
Commodity	Tobacco, Unmfg., Oriental		
Time period	Jan-Dec	Units:	MT
Imports for:	1997		1998
U.S.		U.S.	
Others		Others	
Turkey	2918	Turkey	1522
Greece	2116	Greece	941
Bulgaria	787	Macedonia	177
Macedonia	307	Albania	70
Italy	129	Italy	59
Albania	73		
Lebanon	14		
Lithuania	14		
Total for Others	6358		2769
Others not Listed	206		495
Grand Total	6564		3264
Trade figures for 1998 are for Jan-June only.			

**Tobacco, Unmfg., Oriental - Export**

Export Trade Matrix			
Country	Poland		
Commodity	Tobacco, Unmfg., Oriental		
Time period	Jan-Dec	Units:	MT
Exports for:	1997		1998
U.S.		U.S.	
Others		Others	
Switzerland	31		
Germany	19		
Total for Others	50		0
Others not Listed	1		
Grand Total	51		0
Trade figures for 1998 are for Jan-June only.			

**Tobacco, Mfg., Cigarettes - PSD**

PSD Table						
Country	Poland					
Commodity	Tobacco, Mfg., Cigarettes				mln PCS	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Filter Production	83300	83298	85000	85500	0	87000
Non-Filter Production	12500	12544	10000	11000	0	10500
TOTAL Production	95800	95842	95000	96500	0	97500
Imports	628	536	500	550	0	500
TOTAL SUPPLY	96428	96378	95500	97050	0	98000
Exports	110	4715	2000	4000	0	5000
Domestic Consumption	96318	91663	93500	93050	0	93000
TOTAL DISTRIBUTION	96428	96378	95500	97050	0	98000

**Tobacco, Mfg., Cigarettes - Import**

Import Trade Matrix			
Country	Poland		
Commodity	Tobacco, Mfg., Cigarettes		
Time period	Jan-Dec	Units:	mln PCS
Imports for:	1997		1998
U.S.	122	U.S.	58
Others		Others	
Germany	51	UK	74
Holland	203	Germany	10
UK	160		
Total for Others	414		84
Others not Listed			
Grand Total	536		142
1998 data refers to first six month of the year.			

**Tobacco, Mfg., Cigarettes - Export**

Export Trade Matrix			
Country	Poland		
Commodity	Tobacco, Mfg., Cigarettes		
Time period	Jan-Dec	Units:	mln PCS
Exports for:	1997		1998
U.S.	1	U.S.	
Others		Others	
Cyprus	1876	Cyprus	244
Turkey	139	Russia	408
Russia	523	Belgium	1182
Belgium	1535	Germany	82
Georgia	319	Finland	48
Finland	91	UAE	45
		UK	39
Total for Others	4483		2048
Others not Listed	231		94
Grand Total	4715		2142
1998 data refers to first six month of the year.			