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# **The Netherlands**

## **Tobacco and Products**

### **Annual**

### **2002**

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#### **Report Highlights:**

**Since 1998, Dutch imports of tobacco have increased steadily over the years to nearly 92,000 MT in 2001. Due to the lower price and higher availability, Brazilian tobacco is increasingly preferred above tobacco produced in other countries. In 2001, Dutch cigarette production declined by 2 percent to 120.4 billion.**

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Includes PSD changes: Yes  
Includes Trade Matrix: Yes  
Unscheduled Report  
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## Executive Summary

### Production

The Netherlands is one of the major tobacco processing countries in the EU. After five years of expansion, total Dutch cigarette production declined by 2 percent to 120.4 billion in 2001. During January - March 2002, Dutch tobacco imports declined significantly which could imply a further decline of cigarette production in 2002. The Netherlands is the second largest cigar manufacturer in the world after the United States and by far the largest producer of roll-your-own tobacco in Europe. Dutch cigar production increased from 1.8 billion in 1996, to 2.2 billion in 2000. Production of cut tobacco is relatively stable, but declined slightly by 1.5 percent to 30,200 MT in 2001.

### Consumption

According to the Dutch Central Bureau of Statistics, 29 percent of women and 36 percent of men smoke in The Netherlands. During the last decade, the number of men smoking declined, while the number of women smoking remained relatively stable. In 2001, the number of cigarettes sold declined by more than 2 percent to 16.3 billion with a value of Euro 2.38 billion. **Dutch cigar consumption increased strongly from 425 million pieces in 1996, to 513 million pieces in 2000**, with a value of Euro 0.15 billion. This trend is expected to continue with an increasing demand for premium cigars. Sales of cut tobacco declined by 5 percent to 12.4 million kg in 2001, worth Euro 0.86 billion. The supermarket is the most important sales outlet for tobacco products in The Netherlands. In 2001, sales by petrol station passed that of the sales volume by tobacco specialty shops. In the long term, however, the Ministry of Health is planning to restrict sales of tobacco products to tobacco specialty shops. In April 2002, the Dutch Senate agreed on amending the Dutch Tobacco Law which will further tighten the regulations. As of May 2002, a label with the text "Smoking is lethal" (Roken is dodelijk) or "Smokers die younger" (Rokers sterven jonger) is mandatory on packages of cigarettes. The size of the label is one third of the front side and forty percent of the back side.

### Trade

The Netherlands is the second largest tobacco importer in the EU after Germany. Since 1998 Dutch imports of tobacco have increased steadily to nearly 92,000 MT in 2001. In 2001, imports of Brazilian tobacco increased. Whereas, imports of U.S. tobacco declined for the first time since 1995. Trade sources informed FAS/The Hague that, due to the lower price and higher availability, Brazilian tobacco is increasingly preferred above tobacco produced in the U.S. During the first three months of 2002, imports of nearly all tobacco varieties declined sharply. Dutch re-exports of tobacco also declined during this period. This decline could be explained by a large tobacco stock volume, or by a lower cigarette production. In 2001, Dutch cigarette production declined by 2 percent. Whereas, cigarette imports increased by nearly 60 percent during that year.

Conversion rates:

**1997** EURO 1.00 = US\$ 1.16, **1998** EURO 1.00 = US\$ 1.08, **1999** EURO 1.00 = US\$ 1.06

**2000** EURO 1.00 = US\$ 0.92, **2001** EURO 1.00 = US\$ 0.90, June **2002** EURO 1.00 = US\$ 0.95

## Production

The Netherlands is one of the main tobacco importing and processing countries in the world. The tobacco processing industry's contribution to the Dutch economy in terms of employment, tax yield and trade has been increasing during the past five years. **Currently, there are 27 companies with annual sales of Euro 4.8 billion. About 5,700 people are employed in the Dutch tobacco industry. Indirectly, about 25,000 work in distribution, wholesale, retail and advertising. The Dutch Government receives Euro 1.6 billion from excise taxes yearly, VAT not included.**

In The Netherlands, tobacco production is negligible. There is some tobacco production in Belgium, heavily subsidized. Tobacco production in the EU is funded by about Euro 1 billion yearly. In March 2002, the EC agreed to reduce aid rates for low quality tobacco by 10 percent for the next three years.

## Cigarettes

After five years of expansion, total Dutch cigarette production declined by 2 percent from 123.1 billion pieces in 2000 to 120.4 billion in 2001. Due to the sharp decline of tobacco imports during the first three months in 2002, it is expected that cigarette production could decline further to about 100 billion pieces in 2002. Part of the import reduction is attributable to stock-piling in 2001. The two largest cigarette manufacturers in the Netherlands are BAT Manufacturing B.V. and Philip Morris Holland B.V. Currently, Phillip Morris is responsible for about 40 percent of cigarette production in The Netherlands of which about 95 percent is exported.

The four major Dutch cigarette manufacturers are:

**B.A.T. Manufacturing Nederland b.v.**

Kerkstraat 27  
6901 AA Zevenaar  
Tel. 31-316-590911

**J.T. International Company Nederland b.v.**

Vreelandseweg 46  
1216 CH Hilversum  
Tel. 31-35-622.28.88

**Philip Morris**

Groenelaan 5  
1186 AA Amstelveen  
Tel. 31-20-6564100

**Reemtsma Nederland b.v.**

Comeniuslaan 10  
1412 GP Naarden  
Tel. 31-35-694.97.66

Since the Dutch tobacco industry has an extensive production of cigar and cut tobacco (roll-your-own, pipe- and chewing tobacco) production, a brief overview of these products follows.

## Cigars

Dutch cigar production increased from 1.8 billion in 1996 to 2.2 billion in 2000. The Netherlands is the second largest cigar manufacturer in the world after the United States. A substantial part of Dutch cigars are produced by affiliates located just across the Belgium border, in Ireland and even Sri Lanka. In most cases, semi-manufactured cigars are made in the "foreign" affiliates, subsequently "exported" to the Netherlands and finished in this country. The Dutch Central Bureau of Statistics considers both cigars that have been entirely produced in the Netherlands and those semi-processed at a foreign affiliate as domestic production.

**In 2002, Dutch cigars and cigarillos exports stabilized at nearly 2 billion pieces. Dutch cigars and cigarillos are exported to more than 100 countries. The leading export destinations are France, 892 million in 2001, the UK, 212 million in 2001, and Germany, 172 million in 2001. Dutch exports to Belgium declined from 519 million in 1999 to only 98 million in 2001. The Dutch Cigar Manufacturers Association attributes this decline to inconsistencies made by companies in delivering trade figures to the Central Bureau of Statistics.**

### **Smoking and Cut Tobacco**

The Netherlands is by far the largest producer of roll-your-own tobacco in Europe although it is also produced in the U.K., Germany, Norway, Denmark and France. Production of roll-your-own, pipe- and chewing tobacco declined slightly by 1.5 percent to 30,200 **MT in 2001**. Imperial Tobacco Nederland R.Y.O. B.V., Koninklijke Theodorus Niemeyer B.V., Tabaksfabriek Heupink & Reinders B.V., Tabakskerverij J.B.G. Bloemen B.V. and Biggelaar Tabak B.V. account for the total production of cut tobacco products.

Between 1996 and 1999, Dutch exports of packed, cut tobacco declined from 14,800 MT to 13,900 MT, respectively. During the last two years, Dutch exports recovered to 14,300 MT in 2001. The Dutch roll-your-own tobacco industry is working very hard to develop export markets as they believe it is the only possibility to expand production. Germany and Belgium are already important customers of the Dutch roll-your-own tobacco industry, while the French market is trending upwards.

The four producers of roll-your-own and pipe tobacco in the Netherlands are:

**Tabakskerverij J.B.G. Bloemen B.V.**

De Mors 120  
7631 AK Ootmarsum  
Tel. 31-541-291218

**Tabaksfabriek Heupink & Reinders b.v.**

De Mors 84  
7631 AK Ootmarsum  
Tel. 31-541-291285

**Imperial Tobacco Nederland/Van Nelle Tabak  
Nederland**

Tabaksmaatschappij B.V.  
Van Nelleweg 1  
Tel. 31-10-4464444

**Koninklijke Theodorus Niemeyer b.v.**

Theodurus Niemeyerstraat 1  
9726 BB Groningen  
Tel. 31-50-3664911

### **Consumption**

According to the Dutch Central Bureau for Statistics, 29 percent of women and 36 percent of men smoke in The Netherlands. During the last decade, the number of male smokers has declined, while the number of female smokers has remained stable. According to the Social and Cultural Plan Bureau, this is directly related to greater freedoms and increased opportunities for women. Smoking is strongly related to age. Of the Dutch population between 16-24 years old, 40 percent smoke, between 25-44, 38 percent, between 45-64, 31 percent, and older than 65, 20 percent smoke. Recent research has shown that people start smoking at a younger age in the Netherlands. In general, the higher the educational level, the less people smoke.

Dutch Population Smoking Statistics (Percentage)						
	1996	1997	1998	1999	2000	2001
Total of Population	36.0	35.8	34.7	34.0	32.7	32.0
Men	40.5	39.4	38.7	36.3	36.2	36.0
Women	31.7	32.3	30.8	31.8	29.3	29.0

Source: Central Bureau for Statistics

Consumption of Tobacco Products in The Netherlands						
	1996	1997	1998	1999	2000	2001
Cigarettes (million pieces)	15,425	16,640	15,631**	16,543	16,679	16,309
Cigars (million pieces)	425	442	474	508	513	515*
Cut Tobacco (million kg)	14.0	14.0	14.2	14.3	14.1	12.4

Source: Central Bureau for Statistics, Association of the Cigarette Industry, 2002 \* Forecast of Office of Agricultural Affairs \*\* A new statistical calculation is used.

Although the percentage of smokers decreased during the past five years, the number of cigarettes sold increased. In 2001, however, the number of cigarettes sold declined by more than 2 percent to 16.3 billion, with a value of Euro 2.38 billion.

**Dutch cigar consumption increased strongly from 425 million pieces in 1996, to 513 million in 2000, with a value of Euro 0.15 billion. This is due to increasing** demand by young and middle-aged consumers, and is expected to continue with rising consumption of premium cigars. The Dutch market for cigars can be divided into premium cigars, about 20 percent of the market, medium quality cigars, about 65 percent of the market, and private label cigars, at 15 percent. Dutch cigar producers believe that there are good opportunities for cigars with added flavors and/or with filters. Currently, these cigars have a market share of 10 and 4 percent, respectively. During the past five years, Dutch cut tobacco consumption first increased, but then declined by 5 percent to 12.4 million kg in 2001, with a value of Euro 0.86 billion. The low consumption figures could, however, be an effect of stock-piling of cut tobacco.

Type Outlet for Cigarettes (percentage)			
	1999	2000	2001
Tobacco Specialty Shops	25.3	25.2	24.7
Supermarkets	36.1	36.3	36.2
Petrol Stations	20.0	21.7	24.8
Restaurants & Café's	6.9	6.8	6.0
Other	11.7	10.0	8.3

Source: Association of the Cigarette Industry, 2002

Supermarkets are the most important sales outlet for tobacco products in The Netherlands. During the past decade, Dutch supermarkets strengthened their position as the main retail outlet for cigarettes. In 2001, however, the sales percentage by supermarkets declined slightly, and appears to have stabilized. In 2001, sales by petrol station surpassed those of tobacco specialty shops. In recent years, cigars have been increasingly sold in gas stations and supermarkets, in particular, premium cigars. The Dutch Ministry of Health, however, has proposed to reduce the number of outlets by forcing supermarkets to choose between vending medicines or tobacco products. In the long term, the Ministry is planning to restrict sales of tobacco products to tobacco specialty shops. In response to the restrictions to tobacco advertisements, the tobacco company BAT opened a promotion outlet in Amsterdam. Besides cigarettes, beverages, snacks and magazines are available in the shop.

<b>The Most Popular Cigarette Brands by Sales:</b>					
	<b>1997</b>	<b>1998</b>	<b>1999</b>	<b>2000</b>	<b>2001</b>
1. Marlboro	21.4%	21.9%	<b>22.7%</b>	22.9%	24.6%
2. Marlboro lights	7.7%	8.5%	<b>9.9%</b>	10.7%	10.3%
3. Camel filter	8.3%	8.4%	<b>7.8%</b>	7.7%	7.7%
4. Caballero filter	5.5%	5.7%	<b>5.8%</b>	5.6%	5.5%
5. Barclay	5.9%	6.0%	<b>5.8%</b>	5.6%	5.4%
6. Peter Stuyvesant	5.6%	5.3%	<b>5.0%</b>	4.8%	4.7%
7. Caballero plain	4.6%	4.2%	<b>3.8%</b>	3.3%	2.9%
8. Pall Mall Export filter	3.4%	3.3%	<b>3.2%</b>	2.9%	2.8%
9. Camel Lights	-	2.2%	<b>2.1%</b>	2.4%	2.4%
10. Marlboro Medium	-		<b>2.2%</b>	2.4%	2.7%

Source: Association of the Cigarette Industry, 2002

## Prices

<b>Prices of Cigarettes</b> (25 Piece Pack)		
<b>Date:</b>	<b>Euro</b>	<b>US\$</b>
July 1, 1992	2.31	3.03
January 1, 1993	2.50	3.03
October 1, 1994	2.56	3.32
October 1, 1995	2.61	3.64
April 1, 1997	2.79	3.20
April 1, 1998	2.93	3.17
January 1, 1999	3.04	3.52
March 1, 2000	3.15	3.02

January 1, 2001	3.43	3.22
January 1, 2002	3.54	3.12

Source: Association of the Cigarette Industry, 2002

<b>Prices of Cigarettes as of January 1, 2002</b> (Prices for 25 Piece Pack)		
	<b>Euro</b>	<b>Percent</b>
Retail price	3.54	100.0
of which:		
Excise tax	2.01	16.0
Value-added Tax	0.57	57.0
Cost and margins	0.96	27.0

Source: Association of the Cigarette Industry, 2002

The EU excise tax on cigarettes was "harmonized" in 1993 to a minimum of 57 percent of the retail price. The Netherlands implemented the EU excise tax directive in that same year. However, as different EU countries have different retail prices, excise taxes are, in reality, far from harmonized. This is especially the case in northern EU countries which have higher cigarette prices than the southern "monopoly" countries. For instance, cigarette prices in Denmark are five times higher than in Spain. Southern European countries do not want to increase their prices as they fear competition by the more popular cigarettes (mostly American blends) from the northern EU countries. In the Northern countries, higher prices boost black market sales. The illegal importation of cigarettes results in large income losses for the government and huge profits for smugglers. The European Anti-Fraud Office (OLAF) estimates that "black market" cigarettes account for up to 10 percent of the EU market - worth US \$4.1 billion in tax revenues.

## Trade

The Netherlands is the second largest tobacco importer in the EU after Germany. Since 1998, Dutch imports of tobacco have increased steadily to nearly 92,000 MT in 2001. This import volume is, however, still lower than the record volume of 105,000 MT in 1997. The U.S. is the main supplier of tobacco to the Dutch market with a market share of about 25 to 30 percent. Other important exporters to The Netherlands are: other EU member states, 25 percent of the market, Brazil, 20 percent, and India, Zimbabwe and Turkey with each about 5 percent of the Dutch market. In 2001, imports of Brazilian tobacco increased. In contrast, Dutch imports of U.S. tobacco declined for the first time since 1995. Trade sources informed FAS/The Hague that, due to the lower price and higher availability, Brazilian tobacco was preferred above tobacco produced in the U.S. This explanation is in contrast with higher production levels in the U.S. and increased U.S. tobacco exports to the EU in 2001, compared to the previous year. Dutch tobacco imports from Zimbabwe have been reduced due to the political and economic situation in this country. During the first three months of 2002, imports of nearly all tobacco varieties declined sharply. If this trend continues through the remaining months of 2002, Dutch tobacco imports could decline to only 65,000 MT. The decline is mainly a result of lower imports of burley and flue cured tobacco varieties. Dutch re-exports of tobacco also declined significantly during January - March 2002. The main reasons for this decline are probably the lower cigarette production in The Netherlands, a high stock volume or possibly an inconsistency in the collection of the trade figures.





U.S. tobacco remains the preferred tobacco for Dutch tobacco product manufacturers, especially if the prices for U.S. tobacco are competing with prices for tobacco from Brazil and Zimbabwe. Burley tobacco is considered almost indispensable for making the roll-your-own or "shag" tobacco which is very popular in the Netherlands. Burley tobacco is also used in cigarette blends. Dark air and sun cured tobacco are used for the production of cigars. The U.S. flue-cured tobacco is used for flavor. Because of the EU's 1993 legislation for maximum levels of tar/nicotine (effective in 1998), there may be a minor shift to imports of lighter tobacco from the United States for the production of "light" cigarettes and "light" roll-your-own tobacco.

### **Burley**

During the past five years, Dutch imports of burley tobacco increased steadily to 20,800 MT in 2001. Dutch imports from the U.S., however declined by 23 percent to 7,800 MT in 2001. Despite this decline, the U.S. remains the main supplier to The Netherlands. During the first three months of 2002, burley tobacco imports declined by nearly 50 percent. In general, less than 1,000 MT of burley tobacco is re-exported by The Netherlands.

### **Dark Air and Sun Cured**

During the past four years, Dutch imports of dark air and sun cured tobacco increased steadily to 3,544 MT in 2001. This increase is in line with the growing cigar production in The Netherlands. During January - March 2002, Dutch imports remained stable compared to imports during the same period previous year. In general, about two thirds of dark air and sun cured tobacco imports is re-exported to other EU member states. In 2001, however, less than 1,000 MT was re-exported.

### **Flue Cured**

In general, Dutch imports of flue cured tobacco were around 45,000 MT per year. In 2001, Dutch imports remained at about 48,000 MT, comparable with 2000 imports. Imports increased from India and Brazil, while imports from China were nearly absent. During the past three years, imports from the U.S. increased significantly. In 2001, however, U.S. exports to The Netherlands declined to about 14,000 MT, which is nearly the level of 1998. During the first three months of 2002, Dutch imports of flue cured tobacco declined by about 30 percent.

### **Oriental**

In 2001, Dutch imports of oriental tobacco increased by 21 percent to 11,764 MT. The additional volume was mainly re-exported to other EU member states. Increased imports were mainly reported for Greece.

### **Cigarettes**

The Netherlands is second largest cigarette exporter in Europe, most of the Dutch production and imports are exported to Italy and France. In 2001, Dutch cigarette imports increased by nearly 60 percent while exports remained relatively stable. Cigarettes were mainly imported from other EU member states, with a major increase from Germany. The higher imports can be explained by lower domestic cigarette production and higher domestic consumption of cigarettes during this period. It is expected that this trend will continue in 2002 which is also reflected by the sharp decline of tobacco imports during the first three months in 2002.

Imports & Exports of Unmanufactured Tobacco (Metric Tons/Values in 1,000 Guilders)								
	1998		1999		2000		2001	
Imports	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Flue Cured	44,174	479,565	49,669	536,354	48,409	569,469	48,281	528,488
Burley	16,998	200,118	18,758	238,469	18,465	275,884	20,800	266,240
Dark Air	2,533	25,099	2,831	38,484	3,393	40,854	3,545	41,800
Oriental	13,496	141,426	13,603	143,185	9,726	104,576	11,764	132,919
<b>Grand Total</b>	77,201	846,208	84,861	956,492	79,993	990,783	84,390	969,447

Exports	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Flue Cured	6,345	99,770	8,652	138,808	10,996	157,795	6,310	126,315
Burley	745	6,312	1,253	9,758	1,268	10,108	563	6,571
Dark Air	1,512	14,418	1,759	16,233	2,416	18,901	972	9,316
Oriental	1,231	14,837	832	10,555	553	8,080	1,208	14,525
<b>Grand Total</b>	9,833	135,337	12,496	175,354	15,233	195,034	9,053	156,727

Source: Central Bureau for Statistics, 2002

## Quality, Safety and Health Regulations

In the European Union, health regulations and anti-smoking regulations exist on both the Member State and EU levels. For regulations on EC, please contact the Office of Agricultural Affairs of the United States Mission to the EU in Brussels (<http://www.useu.be/agri/usda.html>) or the website of the EU ([http://www.europa.eu.int/comm/health/ph/programmes/tobacco/index\\_en.htm](http://www.europa.eu.int/comm/health/ph/programmes/tobacco/index_en.htm)).

The Dutch government collects about Euro 2 billion on VAT and excise taxes and spends about Euro 1 million on prevention. In The Netherlands, health warnings, along with tar and nicotine levels, are required on cigarette packages. No advertising on billboards is allowed, except on the two Dutch racetracks. Television advertising is also prohibited. Advertisements cannot link smoking with sports, youth, or health care and people younger than 25 are not allowed to appear in ads. Free sampling of cigarettes is banned. No advertising is permitted in the neighborhoods of health care centers and schools. Restrictions on smoking in specific public places are currently in effect. As of May 2002, a label with the text "Smoking is lethal" (Roken is dodelijk) or "Smokers die younger" (Rokers sterven jonger) is mandatory on packages of cigarettes. The size of the label is one third of the front side and forty percent of the back side. On April 16, 2002, the Dutch Senate agreed on the following implementation schedule of the Dutch Tobacco Law:

- November 7, 2002, ban on tobacco commercials and sponsoring.
- January 1, 2003, ban on tobacco advertisement in newspapers and magazines.
- January 1, 2003, 16 years as maximum age for purchasing tobacco products, also from machines.
- January 1, 2003, prohibition on tobacco product sales in government buildings.
- January 1, 2003, prohibition on tobacco product sales in small boxes, less than 19 pieces.
- January 1, 2004, prohibition on smoking in public transportation.
- January 1, 2004, guarantee of smoking free working space.

## PSD & Trade Matrices - Tobacco, Unmfg., Total

PSD Table						
Country	Netherlands					
Commodity	Tobacco, Unmfg., Total				(HA)(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Area Planted	0	0	0	0	0	0
Beginning Stocks	18,337	18,337	7,542	8,000	2,358	12,000
Farm Sales Weight Prod	0	0	0	0	0	0
Dry Weight Production	0	0	0	0	0	0
U.S. Leaf Imports	29,606	30,768	31,797	24,205	0	20,000
Other Foreign Imports	50,387	57,777	44,189	67,372	0	45,000
TOTAL Imports	79,993	88,545	75,986	91,577	0	65,000
<b>TOTAL SUPPLY</b>	<b>98,330</b>	<b>106,882</b>	<b>83,528</b>	<b>99,577</b>	<b>2,358</b>	<b>77,000</b>
Exports	13,412	20,114	14,324	9,285	0	5,000
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	27,913	26,980	23,467	20,279	0	19,000
Other Foreign Consump.	49,463	51,788	43,379	58,013	0	44,000
TOTAL Dom. Consumption	77,376	78,768	66,846	78,292	0	63,000
TOTAL Disappearance	90,788	98,882	81,170	87,577	0	68,000
Ending Stocks	7,542	8,000	2,358	12,000	0	9,000
<b>TOTAL DISTRIBUTION</b>	<b>98,330</b>	<b>106,882</b>	<b>83,528</b>	<b>99,577</b>	<b>0</b>	<b>77,000</b>

Trade figures of 2000 and 2001:

Central Bureau for Statistics

Trade figures of 2002:

World Trade Atlas (based on CBS and EUROSTAT figures)

Production and consumption figures:

Central Bureau for Statistics, Association of the Cigarette Industry and Dutch Cigar Manufacturers Association

<b>Import Trade Matrix</b>			
Country	Netherlands		
Commodity	Tobacco, Unmfg., Total		
Time period	CY	Units:	Metric Tons
<b>Imports for:</b>	<b>2000</b>		<b>2001</b>
U.S.	29,606	U.S.	22,360
Others		Others	
E.U.	14,131	E.U.	21,381
-Belgium	1,424	-Belgium	1,218
-Germany	4,692	-Germany	6,050
-Greece	413	-Greece	4,585
Zimbabwe	4,031	Zimbabwe	5,528
Brazil	13,995	Brazil	16,834
Turkey	5,656	Turkey	3,649
Malawi	1,296	Malawi	1,694
India	2,907	India	5,070
Total for Others	42,016		54,156
Others not Listed	8,371		7,874
Grand Total	79,993		84,390

<b>Export Trade Matrix</b>			
Country	Netherlands		
Commodity	Tobacco, Unmfg., Total		
Time period	CY	Units:	Metric Tons
<b>Exports for:</b>	<b>2000</b>		<b>2001</b>
U.S.	30	U.S.	
Others		Others	
E.U.	11,121	E.U.	8,761
-Belgium	3,881	-Belgium	2,853
-Ireland	759	-Ireland	376
-Greece	3,707	-Greece	3,692
India	877		
Zimbabwe	599		
Brazil	1,660		
Total for Others	14,257		8,761
Others not Listed	946		292
Grand Total	15,233		9,053

## PSD & Trade Matrices - Tobacco, Unmfg., Flue Cured

PSD Table						
Country	Netherlands					
Commodity	Tobacco,Unmfg.,Flue Cured				(HA)(MT)	
	<b>Revised</b>	<b>2000</b>	<b>Preliminary</b>	<b>2001</b>	<b>Forecast</b>	<b>2002</b>
	<b>Old</b>	<b>New</b>	<b>Old</b>	<b>New</b>	<b>Old</b>	<b>New</b>
<b>Market Year Begin</b>		<b>01/2000</b>		<b>01/2001</b>		<b>01/2002</b>
Area Planted	0	0	0	0	0	0
Beginning Stocks	255	2,255	250	250	250	3,250
Farm Sales Weight Prod	0	0	0	0	0	0
Dry Weight Production	0	0	0	0	0	0
U.S. Leaf Imports	19,517	19,517	21,410	14,572	0	8,000
Other Foreign Imports	28,892	28,892	26,061	33,709	0	24,000
TOTAL Imports	48,409	48,409	47,471	48,281	0	32,000
<b>TOTAL SUPPLY</b>	<b>48,664</b>	<b>50,664</b>	<b>47,721</b>	<b>48,531</b>	<b>250</b>	<b>35,250</b>
Exports	10,996	10,996	13,338	6,310	0	3,000
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	14,967	15,586	15,360	11,668	0	7,500
Other Foreign Consump.	22,451	23,832	18,773	27,303	0	22,500
TOTAL Dom. Consumption	37,418	39,418	34,133	38,971	0	30,000
TOTAL Disappearance	48,414	50,414	47,471	45,281	0	33,000
Ending Stocks	250	250	250	3,250	0	2,250
<b>TOTAL DISTRIBUTION</b>	<b>48,664</b>	<b>50,664</b>	<b>47,721</b>	<b>48,531</b>	<b>0</b>	<b>35,250</b>

Trade figures of 2000 and 2001:

Central Bureau for Statistics

Trade figures of 2002:

World Trade Atlas (based on CBS and EUROSTAT figures)

Production and consumption figures:

Central Bureau for Statistics, Association of the Cigarette Industry and Dutch Cigar Manufacturers Association

<b>Import Trade Matrix</b>			
Country	Netherlands		
Commodity	Tobacco,Unmfg.,Flue Cured		
Time period	CY	Units:	Metric Tons
<b>Imports for:</b>	<b>2000</b>		<b>2001</b>
U.S.	19,517	U.S.	14,572
Others		Others	
E.U.	6,353	E.U.	8,152
-Germany	4,281	-Germany	3,363
Zimbabwe	3,991	Zimbabwe	5,675
Brazil	11,408	Brazil	13,334
Malawi	713	Malawi	946
India	2,516	India	3,577
Tanzania	747	Tanzania	663
China	1,066	China	278
Thailand	410	Thailand	
Total for Others	27,204		32,625
Others not Listed	1,688		1,084
Grand Total	48,409		48,281

<b>Export Trade Matrix</b>			
Country	Netherlands		
Commodity	Tobacco,Unmfg.,Flue Cured		
Time period	CY	Units:	Metric Tons
<b>Exports for:</b>	<b>2000</b>		<b>2001</b>
U.S.	20	U.S.	
Others		Others	
E.U.	7,874	E.U.	6,291
-Belgium	1,709	-Belgium	1,212
-Ireland	759	-Ireland	375
-Italy	990	-Italy	937
-Greece	3,707	-Greece	3,689
-Portugal	168	-Portugal	77
Brazil	1,660	Brazil	-
Zimbabwe	598	Zimbabwe	-
Tanzania	213	Tanzania	-
India	382	India	-
Total for Others	10,727		6,291
Others not Listed	249		19
Grand Total	10,996		6,310

**PSD & Trade Matrices - Tobacco, Unmfg., Burley**

PSD Table						
Country	Netherlands					
Commodity	Tobacco, Unmfg., Burley				(HA)(MT)	
	<b>Revised</b>	<b>2000</b>	<b>Preliminary</b>	<b>2001</b>	<b>Forecast</b>	<b>2002</b>
	<b>Old</b>	<b>New</b>	<b>Old</b>	<b>New</b>	<b>Old</b>	<b>New</b>
<b>Market Year Begin</b>		<b>01/2000</b>		<b>01/2001</b>		<b>01/2002</b>
Area Planted	0	0	0	0	0	0
Beginning Stocks	3,542	3,542	3,257	1,257	3,142	4,142
Farm Sales Weight Prod	0	0	0	0	0	0
Dry Weight Production	0	0	0	0	0	0
U.S. Leaf Imports	10,089	10,089	10,422	7,787	0	7,000
Other Foreign Imports	8,376	8,376	7,798	13,013	0	5,000
TOTAL Imports	18,465	18,465	18,220	20,800	0	12,000
<b>TOTAL SUPPLY</b>	<b>22,007</b>	<b>22,007</b>	<b>21,477</b>	<b>22,057</b>	<b>3,142</b>	<b>16,142</b>
Exports	1,268	1,268	1,283	563	0	250
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	7,683	10,085	7,929	6,631	0	7,000
Other Foreign Consump.	9,799	9,397	9,123	10,721	0	5,900
TOTAL Dom. Consumption	17,482	19,482	17,052	17,352	0	12,900
TOTAL Disappearance	18,750	20,750	18,335	17,915	0	13,150
Ending Stocks	3,257	1,257	3,142	4,142	0	2,992
<b>TOTAL DISTRIBUTION</b>	<b>22,007</b>	<b>22,007</b>	<b>21,477</b>	<b>22,057</b>	<b>0</b>	<b>16,142</b>

Trade figures of 2000 and 2001:

Central Bureau for Statistics

Trade figures of 2002:

World Trade Atlas (based on CBS and EUROSTAT figures)

Production and consumption figures:

Central Bureau for Statistics, Association of the Cigarette Industry and Dutch Cigar Manufacturers Association



<b>Import Trade Matrix</b>			
Country	Netherlands		
Commodity	Tobacco, Unmfg., Burley		
Time period	CY	Units:	Metric Tons
<b>Imports for:</b>	<b>2000</b>		<b>2001</b>
U.S.	10,089	U.S.	7,787
Others		Others	
E.U.	4,036	E.U.	6,789
-Belgium	71	-Belgium	266
-Germany	2,996	-Germany	1,572
-Italy	634	-Italy	4,683
Brazil	2,182	Brazil	2,918
Malawi	373	Malawi	597
Thailand	94	Thailand	503
Argentina	906	Argentina	1,451
Total for Others	7,591		12,258
Others not Listed	785		755
Grand Total	18,465		20,800

<b>Export Trade Matrix</b>			
Country	Netherlands		
Commodity	Tobacco, Unmfg., Burley		
Time period	CY	Units:	Metric Tons
<b>Exports for:</b>	<b>2000</b>		<b>2001</b>
U.S.		U.S.	
Others		Others	
E.U.	937	E.U.	539
-Belgium	144	-Belgium	464
-Germany	579	-Germany	50
Hungary	14	Turkey	11
Malawi	290	Cyprus	10
Total for Others	1,241		560
Others not Listed	27		3
Grand Total	1,268		563

## PSD &amp; Trade Matrices - Tobacco, Unmfg., Oriental

PSD Table						
Country	Netherlands					
Commodity	Tobacco, Unmfg., Oriental				(HA)(MT)	
	<b>Revised</b>	<b>2000</b>	<b>Preliminary</b>	<b>2001</b>	<b>Forecast</b>	<b>2002</b>
	<b>Old</b>	<b>New</b>	<b>Old</b>	<b>New</b>	<b>Old</b>	<b>New</b>
<b>Market Year Begin</b>		<b>01/2000</b>		<b>01/2001</b>		<b>01/2002</b>
Area Planted	0	0	0	0	0	0
Beginning Stocks	5,105	5,105	3,446	3,446	2,287	2,287
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	9,726	9,726	6,954	11,764	0	9,000
TOTAL Imports	9,726	9,726	6,954	11,764	0	9,000
<b>TOTAL SUPPLY</b>	<b>14,831</b>	<b>14,831</b>	<b>10,400</b>	<b>15,210</b>	<b>2,287</b>	<b>11,287</b>
Exports	553	553	368	1,208	0	500
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	0	0	0	0	0	0
Other Foreign Consump.	10,832	10,832	7,745	11,715	0	8,800
TOTAL Dom. Consumption	10,832	10,832	7,745	11,715	0	8,800
TOTAL Disappearance	11,385	11,385	8,113	12,923	0	9,300
Ending Stocks	3,446	3,446	2,287	2,287	0	1,987
<b>TOTAL DISTRIBUTION</b>	<b>14,831</b>	<b>14,831</b>	<b>10,400</b>	<b>15,210</b>	<b>0</b>	<b>11,287</b>

Trade figures of 2000 and 2001:

Central Bureau for Statistics

Trade figures of 2002:

World Trade Atlas (based on CBS and EUROSTAT figures)

Production and consumption figures:

Central Bureau for Statistics, Association of the Cigarette Industry and Dutch Cigar Manufacturers Association

<b>Import Trade Matrix</b>			
Country	Netherlands		
Commodity	Tobacco, Unmfg., Oriental		
Time period	CY	Units:	Metric Tons
<b>Imports for:</b>	<b>2000</b>		<b>2001</b>
U.S.		U.S.	
Others		Others	
E.U.	2,611	E.U.	6,379
-France	171	-France	-
-Germany	1,703	-Germany	1,109
-Greece	413	-Greece	4,585
Turkey	5,636	Turkey	3,648
Bulgaria	725	Bulgaria	688
Albania	260	Albania	369
Malawi	208	Malawi	147
Total for Others	9,440		11,231
Others not Listed	286		533
Grand Total	9,726		11,764

<b>Export Trade Matrix</b>			
Country	Netherlands		
Commodity	Tobacco, Unmfg., Oriental		
Time period	CY	Units:	Metric Tons
<b>Exports for:</b>	<b>2000</b>		<b>2001</b>
U.S.	9	U.S.	
Others		Others	
E.U.	540	E.U.	1,092
-Belgium	372	-Belgium	549
-Italy	163	-Italy	543
-U.K.	2	-U.K.	-
Kazakhstan	4	Switzerland	116
Total for Others	544		1,208
Others not Listed	0		0
Grand Total	553		1,208

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

PSD Table						
Country	Netherlands					
Commodity	Unmfg., Dark Air & Sun Cured				(HA)(MT)	
	<b>Revised</b>	<b>2000</b>	<b>Preliminary</b>	<b>2001</b>	<b>Forecast</b>	<b>2002</b>
	<b>Old</b>	<b>New</b>	<b>Old</b>	<b>New</b>	<b>Old</b>	<b>New</b>
<b>Market Year Begin</b>		<b>01/2000</b>		<b>01/2001</b>		<b>01/2002</b>
Area Planted	0	0	0	0	0	0
Beginning Stocks	4,389	4,389	4,066	4,066	3,442	3,442
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	1	0	0
Other Foreign Imports	3,393	3,393	3,966	3,544	0	3,500
TOTAL Imports	3,393	3,393	3,966	3,545	0	3,500
<b>TOTAL SUPPLY</b>	<b>7,782</b>	<b>7,782</b>	<b>8,032</b>	<b>7,611</b>	<b>3,442</b>	<b>6,942</b>
Exports	2,416	2,416	3,073	972	0	1,000
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	2	2	0	0	0	0
Other Foreign Consump.	1,298	1,298	1,517	3,197	0	3,000
TOTAL Dom. Consumption	1,300	1,300	1,517	3,197	0	3,000
TOTAL Disappearance	3,716	3,716	4,590	4,169	0	4,000
Ending Stocks	4,066	4,066	3,442	3,442	0	2,942
<b>TOTAL DISTRIBUTION</b>	<b>7,782</b>	<b>7,782</b>	<b>8,032</b>	<b>7,611</b>	<b>0</b>	<b>6,942</b>

Trade figures of 2000 and 2001:

Central Bureau for Statistics

Trade figures of 2002:

World Trade Atlas (based on CBS and EUROSTAT figures)

Production and consumption figures:

Central Bureau for Statistics, Association of the Cigarette Industry and Dutch Cigar Manufacturers Association

<b>Import Trade Matrix</b>			
Country	Netherlands		
Commodity	Unmfg.,Dark Air & Sun Cured		
Time period	CY	Units:	Metric Tons
<b>Imports for:</b>	<b>2000</b>		<b>2001</b>
U.S.		U.S.	1
Others		Others	
E.U.	1,130	E.U.	60
-France	18	-France	17
-Belgium	1,102	-Italy	19
Brazil	406	Brazil	581
Indonesia	325	Indonesia	380
India	348	India	1,359
Sri-Lanka	263	Sri-Lanka	255
Dom. Rep.	247	Dom. Rep.	168
Paraguay	329	Paraguay	445
Colombia	182	Colombia	136
Total for Others	3,230		3,384
Others not Listed	163		160
Grand Total	3,393		3,545

<b>Export Trade Matrix</b>			
Country	Netherlands		
Commodity	Unmfg.,Dark Air & Sun Cured		
Time period	CY	Units:	Metric Tons
<b>Exports for:</b>	<b>2000</b>		<b>2001</b>
U.S.		U.S.	
Others		Others	
E.U.	1,770	E.U.	839
-Belgium	1,656	-Belgium	806
Switzerland	25	Switzerland	101
Dom. Rep	17	Dom. Rep	31
India	486	India	-
Indonesia	65	Indonesia	-
Total for Others	2,363		971
Others not Listed	53		1
Grand Total	2,416		972

**PSD & Trade Matrices - Tobacco, Mfg., Cigarettes**

PSD Table						
Country	Netherlands					
Commodity	Tobacco, Mfg., Cigarettes				(MIL PCS)	
	<b>Revised</b>	<b>2000</b>	<b>Preliminary</b>	<b>2001</b>	<b>Forecast</b>	<b>2002</b>
	<b>Old</b>	<b>New</b>	<b>Old</b>	<b>New</b>	<b>Old</b>	<b>New</b>
<b>Market Year Begin</b>		<b>01/2000</b>		<b>01/2001</b>		<b>01/2002</b>
Filter Production	105,841	108,253	108,487	105,925	0	86,000
Non-Filter Production	14,818	14,818	15,188	14,500	0	14,000
TOTAL Production	120,659	123,071	123,675	120,425	0	100,000
Imports	14,725	14,725	13,694	23,380	0	50,000
<b>TOTAL SUPPLY</b>	<b>135,384</b>	<b>137,796</b>	<b>137,369</b>	<b>143,805</b>	<b>0</b>	<b>150,000</b>
Exports	101,550	101,550	102,897	104,818	0	110,000
Domestic Consumption	33,834	36,246	34,472	38,987	0	40,000
<b>TOTAL DISTRIBUTION</b>	<b>135,384</b>	<b>137,796</b>	<b>137,369</b>	<b>143,805</b>	<b>0</b>	<b>150,000</b>

Trade figures of 2000 and 2001:

Central Bureau for Statistics

Trade figures of 2002:

World Trade Atlas (based on CBS and EUROSTAT figures)

Production and consumption figures:

Central Bureau for Statistics, Association of the Cigarette Industry and Dutch Cigar Manufacturers Association

<b>Import Trade Matrix</b>			
Country	Netherlands		
Commodity	Tobacco, Mfg., Cigarettes		
Time period	CY	Units:	Million Pieces
<b>Imports for:</b>	<b>2000</b>		<b>2001</b>
U.S.		U.S.	6
Others		Others	
E.U.	14,482	E.U.	23,358
-France	220	-France	292
-Belgium	4,307	-Belgium	3,586
-Germany	3,397	-Germany	7,194
-U.K.	5,730	-U.K.	6,071
South Africa	0	South Africa	0
Poland	195	Poland	1
Switzerland	36	Switzerland	5
Total for Others	14,713		23,364
Others not Listed	12		10
Grand Total	14,725		23,380

<b>Export Trade Matrix</b>			
Country	Netherlands		
Commodity	Tobacco, Mfg., Cigarettes		
Time period	CY	Units:	Million Pieces
<b>Exports for:</b>	<b>2000</b>		<b>2001</b>
U.S.	94	U.S.	38
Others		Others	
E.U.	98,609	E.U.	103,113
-France	39,525	-France	40,371
-Belgium	6,188	-Belgium	6,239
-Germany	6,699	-Germany	7,150
-Italy	36,506	-Italy	40,159
-Greece	3,653	-Greece	2,824
Switzerland	130	Switzerland	314
Slovenia	105	Slovenia	112
Japan	802	Japan	253
Total for Others	99,646		103,792
Others not Listed	1,810		988
Grand Total	101,550		104,818