



AgEcon SEARCH
RESEARCH IN AGRICULTURAL & APPLIED ECONOMICS

The World's Largest Open Access Agricultural & Applied Economics Digital Library

This document is discoverable and free to researchers across the globe due to the work of AgEcon Search.

Help ensure our sustainability.

Give to AgEcon Search

AgEcon Search

<http://ageconsearch.umn.edu>

aesearch@umn.edu

*Papers downloaded from **AgEcon Search** may be used for non-commercial purposes and personal study only. No other use, including posting to another Internet site, is permitted without permission from the copyright owner (not AgEcon Search), or as allowed under the provisions of Fair Use, U.S. Copyright Act, Title 17 U.S.C.*

TB 587 (1937)

USDA TECHNICAL BULLETINS

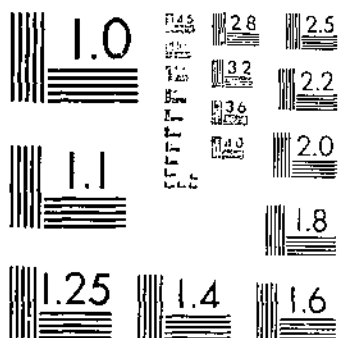
UPDATA

CONSUMPTION AND PRODUCTION OF TOBACCO IN EUROPE

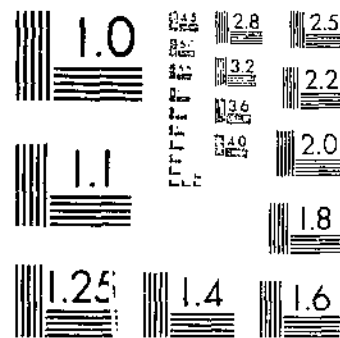
HUTSON, J. B.

1 OF 2

START



MICROCOPY RESOLUTION TEST CHART
NATIONAL BUREAU OF STANDARDS-1963-A



MICROCOPY RESOLUTION TEST CHART
NATIONAL BUREAU OF STANDARDS-1963-A



UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D. C.

CONSUMPTION AND PRODUCTION OF
TOBACCO IN EUROPE

By J. B. HUTSON¹

CONTENTS

	Page		Page
Introduction.....	1	Development in the European tobacco industry	
Changes in the European consumption of tobacco, 1913-32, and their causes.....	2	by countries—Continued.	
Types of tobacco used in Europe.....	3	Sweden.....	47
Uses of United States tobacco in Europe.....	5	Denmark.....	50
Consumer preferences by regions.....	7	Austria.....	54
Changes in the consumption of tobacco products.....	8	Portugal.....	56
Consumption per capita.....	10	Finland.....	58
Relation of prices of tobacco products to consumption.....	12	Latvia, Lithuania, and Estonia.....	60
Trade restrictions and their effects on consumption.....	19	Belgium.....	63
Production and classification of European leaf tobacco.....	21	France.....	68
Location and description of types.....	21	Germany.....	73
Development in the European tobacco industry by countries.....	23	Czechoslovakia.....	80
United Kingdom.....	23	Poland.....	83
Netherlands.....	40	Spain.....	88
Norway.....	44	Switzerland.....	90
		Italy.....	92
		Rumania.....	96
		Yugoslavia.....	100
		Hungary.....	103
		Bulgaria, Greece, and Turkey.....	107
		Total imports of leaf tobacco into Europe.....	113

INTRODUCTION

For a few years immediately following the close of the World War nearly one-half of the tobacco grown in the United States was consumed in foreign countries. Production was increased in several foreign countries and by 1924 foreign consumption of tobacco imported from the United States had begun to decline. However, European consumption of several important United States types is still greater than that of the same types in this country. Consequently developments in Europe are significant when the demand for our domestic tobacco is considered.

After the World War, marked changes took place in the consumption of tobacco products. There was an increase in the use of cigarettes and a decline in the use of cigars, chewing tobacco, and snuff. Many of the several types of tobacco used in each of these products are imported from the United States. Thus, there were changes in demand for the various types of tobacco imported from the United States. Trade restrictions of various kinds, including monopoly-control measures, also affected consumption of tobacco from this country.

¹ Mr. Hutson, now assistant administrator, Agricultural Adjustment Administration, began this study while serving as tobacco specialist, Bureau of Agricultural Economics. Credit is due Louise Moore Coleman for assistance in compiling the data included herein and for suggestions and revisions in the text. Credit is also due Hortense Kreul's for assistance in translating and compiling data from original sources.

During the period 1913-29 there was a marked increase in the use of United States flue-cured types in Europe, but this was partly offset by declines in the use of air-cured and fire-cured types. The increased consumption of flue-cured types was due chiefly to the increased use of cigarettes particularly in the United Kingdom. The decline in the use of other types was due partly to the decline in consumption of the particular products in which such types were used and partly to the substitution of European tobacco and European colonial tobacco in many blends. For the same reasons, there were declines in the use of practically all United States types during the period 1930-32.

In fact, the decline in consumption of products, and the substitution of foreign tobaccos, continued to such an extent that the total European consumption of United States leaf tobacco in 1932 was slightly less than pre-war quantities.

Changes that took place from 1913 to 1932 in the consumption of leaf tobacco and tobacco products are shown in this bulletin and attention is directed to the more significant causes. Consumer preferences, prices, and trade restrictions loom large. The types of tobacco grown in Europe are described, the producing areas are located, and the approximate production of each type is indicated. Cases in which production has been influenced by trade restrictions or other forms of Government influence are noted. The changes that have taken place in each country in the production of leaf tobacco, in the consumption and prices of tobacco products, and in the origin of import leaf, are traced.

CHANGES IN THE EUROPEAN CONSUMPTION OF TOBACCO, 1913-32, AND THEIR CAUSES

Developments leading to changes in the European consumption of tobacco during the period 1913-32 were of such a nature as to make it advisable to divide the period into four parts: The war period, 1913-20; the early reconstruction period, 1921-24; the later reconstruction period, 1925-29; and the depression period, 1930-32.

Statistics are not available as to the quantities of the different tobacco types used in European countries. Import statistics of the various countries do not always reflect the true situation, owing to the failure of some important trading countries to list their reexports.² This is particularly true of Germany and Belgium, and Germany has one of the largest reexport markets in Europe. The determination of European tobacco consumption is further complicated by the fact that many countries do not report tobacco stocks.³

Moreover, consumption of tobacco does not change in the same way as do imports. Large stocks of tobacco are usually held by manufacturers to permit the leaf to age from 1 to 3 years or more before it is used. New supplies are usually bought at about the

² Tobacco exported to continental Europe for the most part enters through the free ports, Bremen and Trieste, or through Antwerp, Amsterdam, and Rotterdam. A large part of that exported from the United States to continental Europe is distributed through these points. Exports to the free ports are reported in the statistics of the exporting country as shipments to the countries in which the ports are located, but only that part of such consignments actually taken into the customs boundaries is recorded as imports. The remainder is reexported and as the exports of foreign tobacco are not disclosed in the German and Belgian export statistics, the ultimate destination of tobacco thus passing through Bremen and Antwerp is lost or confused. With the exception of oriental types intended for use in the United States, tobacco consigned to Trieste is mostly consumed in Italy. The trade of Amsterdam and Rotterdam offers no great problems as all tobacco sold on the Netherlands international market is listed by type and country of ultimate destination.

³ Official reports are issued in the United Kingdom showing total stocks and Empire tobacco stocks at the end of each month.

same rate that old stocks are used up, though in periods of increasing consumption imports exceed manufactures, and in periods of declining consumption imports fall below manufactures.

Such trade and stocks statistics as are available for the different countries have been carefully reviewed together with statistics as to the quantities of tobacco products consumed, and the types of tobacco used in the various classes of products in each country. Based upon these factors, estimates have been made as to the annual consumption of the various types of tobacco at the beginning and end of each of the periods mentioned.

Since the estimates shown in table 1 were made, some data have become available for the years 1933, 1934, and 1935. Total European consumption in 1933 was around the level of the previous year; increases in some countries were offset by declines in others. In Germany, consumption in 1933 was 5 percent greater than in the previous year. In France, Czechoslovakia, Poland, and Sweden, consumption was slightly less than in the previous year. In 1934, consumption increased in several countries. The most marked increase was in the United Kingdom where there was an increase of 6 percent over the previous year. Information is lacking for several countries, but it appears that the total European consumption of tobacco in 1934 increased by a quantity equal to between one-fourth and one-half of the losses during the 1930-32 period.

TABLE 1.—Estimated consumption of leaf tobacco in European factories by type or source, specified years¹

Type or source	1913	1920	1924	1929	1932
United States:	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Flue-cured.....	(?)	(?)	140.0	210.0	177.0
Fire-cured.....	(?)	(?)	170.0	100.0	94.0
Dark air-cured ²	(?)	(?)	28.0	17.0	13.0
Burley.....	(?)	(?)	7.0	7.0	5.0
Maryland.....	(?)	(?)	15.0	13.0	8.0
Stems and trimmings.....	(?)	(?)	20.0	3.0	10.0
Total.....	320.0	400.0	350.0	350.0	300.0
Oriental.....	125.0	115.0	100.0	250.0	205.0
Semioriental.....	37.0	37.0	48.0	75.0	83.0
European dark.....	200.0	145.0	162.0	210.0	235.0
British colonial.....	2.1	4.8	11.9	28.6	37.0
Algerian.....	11.0	20.0	22.0	32.0	26.0
Netherland East Indian.....	150.0	152.0	151.0	155.0	130.0
Brazilian and Paraguayan.....	60.0	60.0	65.0	55.0	50.0
Philippine.....	25.0	35.0	40.0	40.0	40.0
West Indian.....	28.0	30.0	35.0	48.0	25.0
Other.....	4.5	6.6	7.0	7.2	3.0
Total.....	962.0	1,006.4	1,112.9	1,256.8	1,134.0

¹ Data relating to consumption in this table and elsewhere in the bulletin are based upon processing order. Production figures are expressed in terms of the weight of tobacco as sold by growers; this weight (except as otherwise indicated) is approximately 10 percent greater than that of processing order.

² As exports from the United States were not shown by types prior to 1923, estimates for 1913 and 1920 have been omitted. An estimated division of these totals in million pounds was as follows: in 1913 flue-cured 90.0, fire-cured 170.0, dark air-cured 40.0, Burley 5.0, Maryland 12.0, stems and trimmings 3.0; and in 1920 flue-cured 117.0, fire-cured 210.0, dark air-cured 44.0, Burley 5.0, Maryland 12.0, stems and trimmings 12.0.

³ Includes Green River, One Sucker, cigar leaf, and that classified in export statistics as "other leaf tobacco."

TYPES OF TOBACCO USED IN EUROPE

Almost 1,000,000,000 pounds of leaf tobacco were used by manufacturers in Europe in 1913 (not including the Union of Soviet Socialist Republics). About 362,000,000 pounds of this quantity were grown

in Europe and the remainder was imported. More than one-half of the imports or about one-third of the total quantity consumed was imported from the United States, and the remainder principally from Brazil, Paraguay, the Philippine Islands, the West Indies, and European colonial possessions. It is estimated that about 53 percent of that imported from the United States was fire-cured tobacco, 28 percent flue-cured, and most of the remainder air-cured.

During the war period there was an increase in the consumption of all United States types. The increased consumption of flue-cured tobacco, notably true in the United Kingdom, was due chiefly to the marked increase in consumption of cigarettes in which flue-cured types are used. Difficulties of transportation in some of the European exporting countries led to a reduced European production of tobacco. The reduction in production noted in most countries was partially offset by moderate increases in other countries, particularly Germany, where great difficulties were experienced in obtaining supplies from usual sources.

One result of the reduction was an increased use of fire-cured and air-cured tobacco from the United States. There was also an increase in the consumption of tobacco from Algeria due to greater French purchases. In Spain, imports from the Philippine Islands were much greater. The total consumption at the end of the war period, however, was but little greater than at the beginning, increases in some countries (particularly the United Kingdom and Spain) being offset by decreases in certain central European countries that found it difficult to obtain adequate supplies.

In early reconstruction period, 1921-24, the different countries became adjusted to a more nearly normal situation. By the end of that period there was a freer movement of goods in most countries and manufacturers were able to obtain more tobacco from countries other than the United States. Nevertheless, owing to the growing demand for cigarettes, the use of flue-cured types continued to increase along with the oriental types. In 1924 the consumption of flue-cured tobacco had increased by 56 percent, and oriental tobacco by 52 percent, as compared with 1913. The consumption of fire-cured and air-cured types from the United States and of dark air-cured types from Europe was somewhat less than in 1913, whereas the consumption of other types had risen slightly above the 1913 level.

Total consumption changed but little during the war period, but increased at an average rate of about 2.5 percent a year during the early reconstruction period, when trade restrictions began to affect the consumption of tobacco from the United States. This was particularly true in Italy and the United Kingdom, but such restrictions did not greatly influence total consumption until the following period.

The later reconstruction period, 1925-29, was characterized by further increases in the consumption of the types needed to supply the growing demand for cigarettes, by increases in the consumption of other European types in the countries in which they were grown, and by increases in the consumption of Algerian and British colonial types. Both of the latter increases were due largely to trade restrictions in France and Great Britain. Marked declines characterized the use of fire-cured and dark air-cured tobacco from the United States, consumption of which at the end of the period was little more than half of that in 1913. It has been estimated that 210,000,000 pounds of native dark tobacco were used in Europe in 1929, compared

with 162,000,000 pounds in 1924 and 200,000,000 pounds in 1913. Moreover, the consumption of all European-grown types in 1929 was 42 percent of the total compared with 37 percent in 1913. If the Algerian and British colonial types were included, both of which are affected by trade restrictions, the figure would be 47 percent in 1929 compared with 39 percent in 1913.

During the period 1930-32 there was a marked decline in the consumption of most types not protected by trade restrictions. On the whole, the consumption of types that were protected increased substantially. Total consumption was 10 percent less in 1932 than in 1929, about one-half of the decline taking place in 1931. The consumption of flue-cured types did not begin to decline until 1931 and the decline was slight for most other types in 1930. The reduced consumption was due largely to the low purchasing power of consumers and the high prices of tobacco products. Owing to needs for State revenues, prices of tobacco products were increased substantially during the early part of the period and remained high throughout.

In the later parts of this bulletin, changes in the consumption and prices of tobacco products and in trade restrictions are discussed in greater detail.

USES OF UNITED STATES TOBACCO IN EUROPE

The principal classes and types of United States tobacco consumed in European factories are flue-cured, fire-cured, dark air-cured, and Maryland. In addition, small quantities of Burley and irregular quantities of stems and trimmings are used.

FLUE-CURED TYPES

Flue-cured tobaccos gained greatly in favor in Europe after the World War. Approximately 78 percent of flue-cured types consumed in Europe in 1932 was used in the British Isles, largely in the manufacture of cigarettes but to a small extent in pipe mixtures. About 5 percent was consumed in the cigarette factories of continental Europe. Germany, France, and the Netherlands took most of the remaining 17 percent for use in the better grades of smoking mixtures. For European cigarettes, bright-colored cutting grades with good body are in demand. For smoking mixtures, bright-colored, light-bodied grades are preferred. Small quantities of tips, when they can be obtained at low prices, enter consumption in some of the northern continental countries. Tips are used largely in medium- and low-priced smoking mixtures.

FIRE-CURED TYPES

These were the leading types imported into Europe prior to, during, and just following the World War. During the period 1913-20 the consumption of fire-cured tobacco was greater in Italy than in any other country. A decline set in later, however, and only small quantities have been used since 1925. During the period of demand in Italy, medium-bodied brown grades of the Paducah type were largely sought. Since 1925, France and Spain have been the leading importers of the Paducah type, France favoring the light-bodied, light-colored grades for use in cigarettes and smoking mixtures and Spain importing lugs and seconds for smoking mixtures.

In the Netherlands, the Clarksville-Hopkinsville type is used largely in smoking mixtures for domestic consumption; but in smoking mixtures for export, light-brown leaf and seconds of good quality are used. On the whole, the domestic trade takes darker and heavier bodied grades for smoking mixtures and chewing tobacco.

In Germany, medium- to low-grade spinners of the Clarksville-Hopkinsville type are used in roll tobacco for chewing purposes. Lugs of the same type enter into the manufacture of the so-called "Schwarzer Krauser", a cut tobacco for both chewing and smoking.

Clarksville-Hopkinsville and Virginia fire-cured types also find favor in the Scandinavian countries, where medium to good spinner grades are in demand for roll tobacco, and seconds and lugs for smoking mixtures.

In Switzerland, Virginia fire-cured and Clarksville-Hopkinsville types are used largely in stumpen (a short, stubby cigar with the filler exposed at both ends), in Virginia cigars, and to a small extent in smoking mixtures. Over half the Swiss imports of these types consists of seconds and lugs for fillers. The remainder is largely composed of brown wrappers.

British factories use brown spinners of the Clarksville-Hopkinsville and Henderson types in roll tobacco for chewing and smoking. Belgian and Portuguese manufacturers favor low-priced lugs and seconds of any of the fire-cured types for their low-priced smoking tobaccos.

During the 1930-32 period the demand for the light-bodied, light-colored grades of the Paducah type and for the spinner grades of the Clarksville-Hopkinsville type was maintained at a higher level than that for other fire-cured types and grades.

DARK AIR-CURED TYPES

Dark air-cured types find a greater outlet in the United States than in foreign countries. The Green River type is exported principally (via the United Kingdom) to the Irish Free State where both spinner and filler grades are used in roll tobacco for chewing and smoking. Some of the light-brown spinner grades are used in the United Kingdom, and the lower-priced grades find a limited demand in Belgium. One Sucker tobacco is used to a limited extent in Belgium in low-priced smoking mixtures. Virginia sun-cured, another dark air-cured type, has no foreign market of any consequence.

MARYLAND

For a long period, between 12,000,000 and 15,000,000 pounds of Maryland tobacco were used annually in Europe, principally in France, Netherlands, Belgium, and Switzerland. In about 1928, however, cigarette manufacturers in the United States began to increase their use of Maryland tobacco, and other types were substituted for low grades of Maryland in Europe. Consequently, European purchases have been reduced, but considerable quantities of the cutting grades are still used in cigarettes and smoking mixtures in the countries mentioned.

BURLEY

Burley is used chiefly in the United States, but for several years small quantities have been exported to Europe and used in cigarettes similar to those that are popular here. Cigarettes thus blended have

been introduced largely since 1925. In 1932, one or more brands were sold in most countries in northern, central, and western Europe. Burley cutting grades are in demand for this purpose, and the European consumption of these grades increased slightly during the period 1930-32. However, the use of Burley-blended cigarettes is confined chiefly to native Americans living in Europe and to people who have been associated with them. When prices are low, Burley tips are used in Belgium, and to some extent in other countries, in low-priced smoking mixtures.

CIGAR TYPES

In former years, small quantities of United States cigar tobacco, chiefly the Connecticut Valley types, were used. Consumption has declined in recent years, but some cigar leaf is still used as binders and wrappers in France and Belgium. The market received an artificial stimulation in 1929, 1930, and 1931, from the irregular sale of some very cheap grades in France, but it returned to normal again in 1932.

STEMS AND TRIMMINGS

For several years following the close of the war considerable quantities of stems and trimmings were exported to Europe, particularly to Germany and the Netherlands. Stems and trimmings are used principally in cheap cigarettes and in low-grade smoking mixtures, the stems first being rolled flat. During the more prosperous years, terminating in 1929, their use decreased, but from 1930 to 1932 there was a marked increase in these imports of stems and trimmings. To some extent these imports displaced similar tobacco that had been obtained during the previous period from European cigar manufacturers and to some extent they represented an increase in the use of stems. Owing to the low-purchasing power of consumers and the increased use of lower priced cigars during the 1930-32 period, cigar manufacturers (particularly in Germany) used larger quantities of stems in some tobacco products than during the previous period and consequently had a smaller surplus to offer manufacturers of smoking mixtures. Moreover, many consumers turned to the lower priced smoking mixtures in which stems are used.

CONSUMER PREFERENCES BY REGIONS

From the standpoint of consumer preference for tobacco products, Europe may be divided into five parts: (1) The British Isles, (2) western continental Europe, (3) central Europe, (4) the Scandinavian countries, and (5) Union of Soviet Socialist Republics and eastern Poland.

In the British Isles, particularly the United Kingdom, a large part of the tobacco consumed is in the form of cigarettes made largely from flue-cured tobacco imported from the United States. Roll tobacco, used both for chewing and smoking, is also popular in the United Kingdom among the low-income groups. Roll tobacco was made originally from dark air-cured and fire-cured tobacco from the United States, but since 1920 the use of tobacco from Nyasaland and other colonies of South Africa has displaced about three-fourths of the United States types. Moreover, flue-cured tobaccos from Canada and southern Rhodesia have displaced some flue-cured tobacco from this country in the cigarettes and smoking mixtures of the United Kingdom.

In western continental Europe, particularly in France, Italy, Spain, Switzerland, and Belgium, the bulk of the consumption consists of dark cut tobacco for both cigarettes and pipes. Cut tobacco in western Europe is made from United States fire-cured and Maryland tobacco, from dark air-cured domestic tobacco, and from tobaccos imported from South America, the Philippines, Algeria, and Hungary. In parts of the area, particularly in Italy and Switzerland, dark, strong, cigars are used. Until recently these cigars were made principally from fire-cured tobacco imported from the United States, but in Italy they are now made from Italian-grown tobacco.

In that part of central Europe extending from the Mediterranean and the Black Sea to the North and Baltic Seas, the so-called oriental cigarette is the most popular product. In the northern part of that area, particularly in Germany and the Netherlands, mild cigars made chiefly from Netherland East Indian, German, and Brazilian tobacco also find great favor. These cigars usually have fillers from Brazil, Java, or Germany, with binders and wrappers from Java and Sumatra.

Snuff is the leading product in Sweden and one of the important products in Norway. Many Scandinavian consumers prefer blended cigarettes and blended smoking mixtures similar to those popular in this country. Others prefer Virginia cigarettes similar to those used in the United Kingdom. The preferences of some Scandinavians are similar to those of Germany and the Netherlands, where mild cigars and oriental cigarettes are used.

In the Union of Soviet Socialist Republics and eastern Poland, cut tobacco made of Makhorka, a dark coarse type with high nicotine content, is the leading product used by the low-income groups. The higher-income groups prefer cigarettes made from oriental tobacco.

It is possible to indicate consumer preferences by geographic divisions only in a general way. These preferences vary from country to country and from class to class within the divisions. For the most part, the low-income groups use dark strong cigarettes and pipe mixtures, or strong cigars, except in the countries in which the oriental types of tobacco are grown. The higher-income groups use lighter colored and milder cigarettes, or mild cigars. Chewing tobacco and snuff are consumed largely by persons with low incomes, except in Sweden, where snuff is used also by many in the high-income groups.

CHANGES IN THE CONSUMPTION OF TOBACCO PRODUCTS

Changes in the consumption of manufactured tobacco products may be measured in terms of total pounds or in terms of pounds per capita. Changes in total consumption of manufactured products roughly correspond to those of leaf tobacco mentioned earlier. It is of further interest, however, to note changes in the consumption of the various classes of products. In a general way, these changes are shown in table 2.

TABLE 2.—Estimated consumption of tobacco products in Europe, 1913 and 1920-35¹

Year	Cigars	Cigarettes	Smoking mixtures	Chewing tobacco	Snuff	Total
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
1913 ²	175, 087	115, 955	387, 613	34, 060	49, 312	762, 628
1920 ²	118, 084	233, 108	365, 466	31, 221	36, 325	784, 803
1921 ²	113, 382	248, 422	366, 198	30, 670	38, 569	820, 500
1922 ²	92, 651	263, 029	462, 287	27, 827	37, 247	823, 341
1923.....	91, 162	270, 362	428, 071	28, 106	34, 077	861, 888
1924.....	114, 275	298, 186	423, 649	26, 429	33, 583	895, 522
1925.....	115, 422	323, 531	416, 064	25, 221	34, 237	916, 435
1926.....	117, 000	322, 504	428, 234	25, 642	31, 989	925, 478
1927.....	124, 324	345, 440	442, 269	24, 808	31, 372	968, 153
1928.....	130, 080	398, 022	444, 181	22, 838	30, 087	996, 417
1929.....	131, 317	390, 781	437, 657	22, 334	29, 821	1, 011, 910
1930.....	135, 067	401, 296	417, 597	21, 341	29, 564	1, 004, 865
1931.....	120, 685	389, 116	463, 075	16, 851	28, 102	951, 889
1932.....	165, 291	355, 373	393, 745	18, 504	27, 334	930, 247
1933.....	113, 365	352, 748	391, 798	17, 373	26, 328	931, 552
1934.....	120, 330	390, 809	389, 337	18, 163	25, 576	950, 215
1935.....	144, 066	396, 515	383, 721	17, 993	24, 781	967, 016

¹ Total consumption of 20 countries for which data are listed separately, pp. 37 to 113. In this table and in later sections, the quantity of tobacco products sold is used as the measure of consumption. It is believed that such sales approximate consumption when all the European countries are considered as a unit. However, there was some movement of tobacco across frontiers, particularly during the period just following the close of the World War. Consequently, the data used as representing consumption, particularly in 1920, are greater in some countries and less in others than the quantity actually consumed.

² Includes estimates for 6 countries in 1913 and 1920, 4 in 1921, and 2 in 1922.

CIGARETTES

In many respects the growth of the cigarette industry of Europe resembles that of the United States, although cigarettes used in Europe are different from those in the United States. They even vary from section to section of Europe. In 1913 the European consumption of cigarettes was unimportant. It is estimated that their consumption represented less than one-sixth of all tobacco products. By 1920, consumption had doubled, increases having taken place in all countries. During subsequent years consumption continued to increase at a rapid rate. By 1929 it had increased by 68 percent as compared with 1920. Coincident with the trend in the United States, a peak was reached in 1930, when in Europe 401,000,000 pounds of tobacco were smoked in cigarettes, a quantity equivalent to about 182,000,000,000 in number. During 1931 consumption declined along with that of other classes of tobacco products, but turned upward in 1932 and exceeded that of any other tobacco product in half the European countries. In 1934 cigarette consumption in Europe was near that of 1930.

SMOKING MIXTURES

In the group of smoking mixtures are included all cut tobacco sold in bulk or in packages as contrasted with cut tobacco sold in manufactured cigarettes. Smoking tobacco was the leading tobacco product of Europe in 1913, and it has since maintained an important place, accounting in many years for nearly half the consumption. In Germany, France, Spain, the Netherlands, and Belgium particularly, the consumption of smoking mixtures has either increased or remained at a high level. Generally speaking, the consumption of smoking tobacco fluctuates along conservative lines. Countries showing increases did not reflect the extreme rises which characterized cigarette consumption from 1920 to 1930; and the decline in total consumption of smoking tobacco, beginning in 1928, has been very gradual.

CIGARS

The consumption of cigars declined substantially during the war and continued on a downward trend through 1923. Consumption began to increase in 1924, however, reaching a high point, along with cigarettes, in 1930. Between 75 and 80 percent of all the cigars used in Europe are consumed in Germany, Italy, and the Netherlands. Consumption was at a very low ebb in Germany in 1923, amounting to less than 39,000,000 pounds, but its recovery in subsequent years contributed greatly toward the increase in total European consumption. In the Netherlands the trend has been gradually upward. There was a marked break in the Italian sales in 1930, following an increase in retail prices of all tobacco products. The price increase became effective in May 1930, and the greatest reaction was in the cigar industry. Only 8,900,000 pounds of cigars were consumed in 1931-32, compared with 13,200,000 pounds in 1928-29 and 19,100,000 pounds in 1912-13. Italy formerly purchased its monopoly requirements for the manufacture of cigars in the United States. The scope of this trade covered many decades and was a source of profit to both countries.

CHEWING TOBACCO

Following a universal trend, consumption of chewing tobacco declined steadily from 1913 to 1932, representing in 1932 only 2 percent of the total European tobacco consumption. In the consumption of chewing tobacco, no country in the world compares with the United States, which uses six times as much in a year as all Europe put together. The total consumption of Europe since 1930 has been between 17,000,000 and 20,000,000 pounds on the average, consumption in the United Kingdom and Germany accounting for over 60 percent of it. The Scandinavian countries and France are also important consuming centers—consumption in Norway and Denmark amounts to nearly 20 percent of all chewing tobacco used in Europe.

SNUFF

There has been a tendency toward decline in snuff consumption throughout the last decade, in Europe, but the drop has been gradual, amounting to about 25 percent in the 10 years. The annual consumption of snuff in Europe amounts to about 10,000,000 pounds less than in the United States. In 1934 European consumption was 25,600,000 pounds. Snuff is consumed largely in Sweden, south France, south Germany, and Italy, but it is the leading product only in Sweden, where in 1934 it represented 57 percent of the total tobacco products used. Norway has a consumption ranging around 1,000,000 pounds annually, but chewing tobacco is much more popular in that country.

CONSUMPTION PER CAPITA

The annual per-capita consumption of all manufactured tobacco products is shown for designated years in tables 3 and 4. As consumption data can be obtained for only a few European countries in 1913, and as figures for the period 1920-22 are also incomplete, it is impossible to compute a per-capita consumption total for any of these years that will be comparable with the years subsequent to 1922. It may be noted, however (comparing only the countries which have data for both years), that per-capita consumption of all tobacco

CONSUMPTION AND PRODUCTION OF TOBACCO IN EUROPE 11

products increased in 1920 as compared with 1913. The population of Europe, and the per-capita consumption of tobacco, increased from 1921 to 1929. Population continued to increase during 1930, 1931, and 1932, whereas total consumption (and obviously per-capita consumption) of tobacco declined.

TABLE 3.—Per-capita consumption of all tobacco products in Europe, specified years

Country	1913	1920	1924	1929	1932	Country	1913	1920	1924	1929	1932
	Lb.	Lb.	Lb.	Lb.	Lb.		Lb.	Lb.	Lb.	Lb.	Lb.
Austria.....	(1)	1.98	3.65	3.02	3.51	Italy.....	1.21	1.34	1.54	1.59	1.30
Belgium.....	(1)	(1)	5.38	5.81	5.49	Netherlands.....	2.84	3.35	6.08	7.61	7.80
Bulgaria.....	1.15	1.34	1.82	1.86	1.22	Norway.....	2.86	2.73	2.55	2.49	2.30
Czechoslovakia.....	(1)	(1)	3.24	3.37	3.13	Poland.....	(1)	(1)	.88	1.50	1.33
Denmark.....	4.12	5.00	4.32	4.10	4.43	Rumania.....	(1)	1.10	2.05	1.85	1.37
Finland.....	1.67	1.87	2.01	2.19	1.05	Spain.....	(1)	1.91	2.30	2.67	2.37
France.....	2.45	2.00	3.17	2.95	2.90	Sweden.....	(1)	3.04	2.94	2.80	2.98
Germany.....	2.93	2.82	3.17	3.89	3.24	United Kingdom.....	2.14	3.07	2.97	3.34	3.22
Greece.....	(1)	2.15	1.82	1.70	1.56	Yugoslavia.....	(1)	(1)	1.52	1.68	1.22
Hungary.....	(1)	(1)	2.20	3.04	2.44						

1 Data not available.
 2 Estimated.
 3 3-year average.

TABLE 4.—Per-capita consumption of tobacco in Europe by countries and products specified years

Product and country 1	1913	1920	1924	1929	1932	Product and country 1	1913	1920	1924	1929	1932
	Lb.	Lb.	Lb.	Lb.	Lb.		Lb.	Lb.	Lb.	Lb.	Lb.
Cigars:						Smoking mixtures—					
Austria.....	(1)	0.24	0.31	0.29	0.25	Continued.....	(1)	(1)	1.47	1.29	1.27
Belgium.....	(1)	(1)	.52	.48	.46	Czechoslovakia.....	(1)	1.83	1.43	1.43	1.50
Czechoslovakia.....	(1)	(1)	1.15	1.24	1.16	Denmark.....	1.55	1.38	.37	.29	.25
Denmark.....	1.15	1.43	1.15	1.27	1.27	Finland.....	2.43	1.90	2.24	1.80	1.70
Finland.....	.23	.07	.07	.07	.63	France.....	1.74	1.90	1.12	1.39	1.12
France.....	.16	.13	.00	.00	.95	Germany.....	.80	.92	1.70	2.29	1.90
Germany.....	1.43	.99	.97	1.17	.82	Hungary.....	(1)	(1)	1.70	2.29	1.90
Hungary.....	(1)	(1)	.15	.16	.08	Italy.....	.36	.44	.44	4.00	4.32
Italy.....	.53	.42	.36	.32	.21	Netherlands.....	(1)	(1)	4.34	4.00	4.32
Netherlands.....	(1)	(1)	1.50	2.40	2.26	Norway.....	.90	.84	.79	.81	.88
Norway.....	.17	.11	.05	.07	.04	Poland.....	(1)	(1)	.64	.95	.76
Poland.....	(1)	(1)	.03	.03	.02	Rumania.....	(1)	1.08	1.62	1.26	1.07
Rumania.....	(1)	.02	.02	.02	.01	Spain.....	(1)	1.16	1.65	1.76	1.53
Spain.....	(1)	.18	.21	.18	.14	Sweden.....	(1)	.29	.37	.35	.36
Sweden.....	(1)	.35	.21	.25	.23	United Kingdom.....	1.01	1.21	.90	.85	.80
United Kingdom.....	.11	.06	.05	.04	.03	Yugoslavia.....	(1)	(1)	.90	.98	.38
Yugoslavia.....	(1)	(1)	.03	.04	.04	Chewing tobacco:					
Cigarettes:						Austria.....	(1)	(1)	.09	.14	.12
Austria.....	(1)	.87	1.30	1.57	1.85	Czechoslovakia.....	(1)	(1)	.02	.02	.04
Belgium.....	(1)	(1)	1.24	1.68	1.63	Denmark.....	1.00	.69	.77	.64	.56
Czechoslovakia.....	(1)	(1)	1.43	1.81	1.69	Finland.....	2.05	2.04	.04	.02	.01
Denmark.....	.31	.57	.75	.64	.83	France.....	.06	.06	.05	.05	.05
Finland.....	.02	1.34	1.47	1.75	1.33	Germany.....	.18	.11	.10	.11	.07
France.....	.22	.31	.57	.86	.07	Netherlands.....	(1)	(1)	.04	.06	(1)
Germany.....	.40	.72	.80	1.12	1.06	Norway.....	1.08	.90	.92	.75	.63
Greece.....	(1)	2.15	1.82	1.70	1.56	Sweden.....	(1)	.14	.08	.06	.05
Hungary.....	(1)	(1)	.35	.00	.46	United Kingdom.....	.20	.30	.22	.17	.15
Italy.....	.20	.35	.63	.78	.68	Yugoslavia.....	(1)	(1)	.03	.01	.01
Netherlands.....	(1)	(1)	.74	1.15	1.22	Snuff:					
Norway.....	.20	.40	.42	.49	.43	Austria.....	(1)	.06	.04	.05	.04
Poland.....	(1)	(1)	.31	.52	.56	Czechoslovakia.....	(1)	(1)	.01	.01	.01
Rumania.....	(1)	.11	.51	.57	.29	Denmark.....	.11	.18	.22	.24	.27
Spain.....	(1)	.57	.80	.73	.70	Finland.....	.04	.04	.06	.06	.04
Sweden.....	(1)	.43	.31	.46	.60	France.....	.27	.20	.22	.15	.13
United Kingdom.....	.71	1.40	1.73	2.20	2.33	Germany.....	.16	.08	.08	.07	.07
Yugoslavia.....	(1)	(1)	.47	.05	.70	Italy.....	.12	.13	.11	.00	.07
Smoking mixtures:						Norway.....	.42	.30	.40	.37	.32
Austria.....	(1)	.79	1.81	1.57	1.25	Sweden.....	(1)	2.43	1.66	1.73	1.74
Belgium.....	(1)	(1)	3.02	3.45	3.46	United Kingdom.....	.02	.01	.01	.02	.01

1 Per-capita consumption not shown for products of minor importance in several countries.
 2 Data not available.

3 Estimated.
 4 Included with smoking mixtures.

One outstanding fact of European tobacco consumption was that it was heaviest in the northern and central highly industrialized countries in which the purchasing power of consumers was greatest. It was lightest in Italy, Poland, Greece, Bulgaria, and Rumania—countries in which the purchasing power of consumers was lower.

Per-capita consumption of tobacco is greater than that of the United States in only one European country, the Netherlands, where in 1932 it was 7.8 pounds per capita compared with 6.0 pounds in the United States. Consumption in Belgium was 5.5 pounds, and in Denmark, 4.4 pounds per capita, but in other countries it ranged from one-fifth to three-fifths that of the United States. In the United Kingdom, cigarette consumption per capita was only 7 percent less than in the United States, but cigarette consumption represented about 70 percent of the total in the United Kingdom, compared with 41 percent of the total in the United States.

RELATION OF PRICES OF TOBACCO PRODUCTS TO CONSUMPTION

Tobacco is an important source of public revenue in nearly all parts of the world. In most European countries more than half, and in some as much as three-fourths, of the consumer's expenditures for tobacco are paid to or retained by the State. In nonmonopoly countries, tobacco is heavily taxed, and in monopoly countries, all or most of the profit made from the tobacco industry is revenue for the State. Generally speaking, the greater the portion received by the State the higher the level of prices of tobacco products.

The general level of prices of tobacco products and the purchasing power of consumers are important in determining tobacco consumption. In countries of high prices smaller quantities of tobacco are used than in countries of low prices. When prices are increased in a particular country, many consumers shift to the products of least increase. Conversely, when prices are reduced, many consumers shift to the products of greatest reduction. These reactions to price changes are greatest when the consumer's purchasing power is lowest. Customs, standards of living, and climatic conditions also effect the level of per-capita consumption.

Data showing average prices paid by consumers for tobacco products and reflecting price changes among the different classes of products within particular countries are shown in table 5. A comparison of the series for the different countries indicates the countries in which prices are high and those in which prices are low. However, this measure does not take into account changes in the quality of products or shifts among classes of products. Manufacturing costs are higher for cigars and cigarettes than for smoking mixtures, snuff, and chewing tobacco. Consequently, the average prices paid by consumers are higher in those countries in which a greater proportion of cigars and cigarettes are used.

Further, when prices are advanced or the purchasing power of consumers is reduced, more of the lower-priced and less of the higher-priced products are used. For example, when a consumer accustomed to purchasing cigarettes at 10 cents per package finds that the price has been increased to 15 cents, he has several alternatives. He may decide to use a cigarette of lower quality that sells for 10 cents after the price advance; he may smoke fewer cigarettes of the original quality; he may buy cut tobacco and smoke hand-made cigarettes,

unless a tax placed upon cut tobacco makes that process too expensive; he may use a pipe; or, if he has the money, he may decide to continue as usual with the old brand and pay the higher price.

TABLE 5.—Average retail price per unit of tobacco products

NETHERLANDS, 1923-35

Year	Cigars, each	Cigarettes, each	Smoking tobacco, per kilogram	Cigars, each	Cigarettes, per package of 20	Smoking tobacco, ¹ per pound
	<i>Florins</i>	<i>Florins</i>	<i>Florins</i>	<i>Cents</i>	<i>Cents</i>	<i>Cents</i>
1923	0.075	0.018	2.24	2.04	14.1	30.7
1924	.073	.017	2.32	2.79	13.0	46.2
1925	.073	.018	2.46	2.63	14.1	44.8
1926	.071	.017	2.41	2.81	13.7	43.8
1927	.069	.017	2.35	2.78	13.4	42.8
1928	.069	.017	2.36	2.78	13.5	43.0
1929	.069	.017	2.30	2.76	13.6	43.0
1930	.069	.017	2.30	2.76	13.6	43.0
1931	.065	.016	2.30	2.63	13.2	42.0
1932	.059	.013	2.16	2.37	10.8	38.5
1933	.053	.011	1.94	2.72	11.8	45.0
1934	.049	.011	1.90	3.33	15.2	60.0
1935	.045	.011	1.84	3.07	14.6	59.4

¹ Includes small quantities of chewing tobacco.

SWEDEN, 1921-34

Year	Cigars, per 1,000	Cigarettes, per 1,000	Cigarettes, per 1,000	Smoking tobacco, per kilogram	Chewing tobacco, per kilogram	Snuff, per kilogram	Cigars, each	Cigarettes, per package of 20	Cigarettes, per package of 20	Smoking tobacco, per pound	Chewing tobacco, per pound	Snuff, per pound
	<i>Kronor</i>	<i>Kronor</i>	<i>Kronor</i>	<i>Kronor</i>	<i>Kronor</i>	<i>Kronor</i>	<i>Ct.</i>	<i>Ct.</i>	<i>Ct.</i>	<i>Dol.</i>	<i>Dol.</i>	<i>Ct.</i>
1921	269.0	125.6	43.7	10.0	17.2	5.5	6.1	50.0	19.7	1.04	1.76	50.2
1922	246.1	123.7	44.6	10.3	17.2	5.4	6.4	64.7	23.3	2.29	2.04	61.1
1923	248.9	123.6	44.2	10.2	16.2	4.9	6.0	65.0	23.5	2.31	1.96	59.0
1924	250.8	123.4	42.9	10.5	15.9	4.8	6.7	65.5	22.8	2.35	1.91	57.7
1925	223.2	116.0	41.5	10.5	14.0	4.1	6.0	62.3	22.3	2.25	1.78	49.9
1926	219.7	112.0	37.7	10.8	14.3	3.9	5.9	66.0	20.2	2.26	1.74	47.3
1927	222.1	110.9	37.0	10.8	14.3	3.9	6.0	69.5	19.8	2.29	1.74	47.4
1928	220.6	110.1	34.4	10.9	14.4	3.9	5.9	59.0	18.4	2.30	1.75	47.4
1929	207.5	96.0	33.0	10.7	14.4	3.9	5.0	51.0	17.7	2.27	1.75	47.4
1930	207.1	91.4	31.9	10.7	14.5	3.9	5.0	49.1	17.1	2.28	1.77	47.1
1931	207.0	91.0	30.4	10.7	14.0	3.9	5.2	40.0	15.4	2.14	1.67	44.7
1932	204.4	91.6	31.8	10.1	14.5	3.9	3.8	33.8	11.8	1.60	1.22	32.5
1933	199.0	91.4	33.5	20.4	14.7	3.9	4.4	40.3	14.8	2.04	1.47	38.8
1934	165.6	91.4	36.1	21.0	14.8	3.9	5.1	47.5	18.7	2.47	1.74	45.8

DENMARK, 1927-34

Year	Cigars, per kilo-gram	Cigarettes, per kilo-gram	Cigarettes, per kilo-gram	Smoking tobacco, per kilo-gram	Chewing tobacco, per kilo-gram	Snuff, per kilo-gram	Cigars, each	Cigarettes, per package of 20	Cigarettes, per package of 20	Smoking tobacco, per pound	Chewing tobacco, per pound	Snuff, per pound
	<i>Kroner</i>	<i>Kroner</i>	<i>Kroner</i>	<i>Kroner</i>	<i>Kroner</i>	<i>Kroner</i>	<i>Ct.</i>	<i>Ct.</i>	<i>Ct.</i>	<i>Dol.</i>	<i>Dol.</i>	<i>Ct.</i>
1927	42.37	79.02	25.53	0.52	11.64	5.44	5.7	42.2	13.6	1.15	1.41	65.9
1928	42.70	82.90	25.12	0.35	11.68	5.31	5.7	44.3	13.4	1.13	1.42	64.4
1929	37.04	79.59	37.80	0.17	11.19	5.65	5.1	42.4	20.2	1.11	1.35	63.4
1930	37.37	77.01	37.32	0.09	11.08	5.84	5.0	41.2	20.0	1.10	1.35	70.9
1931	37.60	77.00	42.00	0.30	11.31	6.00	4.7	38.6	21.0	1.18	1.29	68.2
1932	35.50	73.78	39.48	8.05	11.40	6.74	3.3	27.8	14.0	.74	.98	57.6
1933	32.63	73.20	42.13	8.70	11.51	6.75	3.1	27.0	16.1	.75	1.00	58.1
1934	31.55	72.30	41.83	8.83	11.41	6.68	3.5	32.6	18.8	.90	1.16	68.2

TABLE 5.—Average retail price per unit of tobacco products—Continued

FINLAND, 1923-34²

Year	Cigars, per 1,000	Cigarettes, per box of 25	Smoking tobacco, per kilogram	Chewing tobacco, per kilogram	Snuff, per kilogram	Cigars, each	Cigarettes, per package of 20	Smoking tobacco, per pound	Chewing tobacco, per pound	Snuff, per pound
	<i>Markkaa</i>	<i>Markkaa</i>	<i>Markkaa</i>	<i>Markkaa</i>	<i>Markkaa</i>	<i>Cents</i>	<i>Cents</i>	<i>Cents</i>	<i>Dollars</i>	<i>Cents</i>
1923	1,301.99	4.01	89.57	133.33	26.67	3.0	8.6	109.0	1.02	32.5
1924	1,115.37	3.97	79.60	101.13	48.03	2.8	8.0	96.5	2.17	55.3
1925	1,099.97	4.04	77.35	191.43	48.44	2.8	8.2	83.5	2.10	55.4
1926	1,150.02	4.04	77.42	191.33	48.47	2.9	8.1	88.5	2.16	55.4
1927	1,168.34	4.04	75.64	191.81	48.57	2.9	8.1	86.5	2.19	55.5
1928	1,176.44	4.03	77.89	192.97	48.52	3.0	8.1	88.9	2.20	55.4
1929	1,270.86	4.03	79.36	193.02	48.47	3.2	8.1	87.1	2.21	55.3
1930	1,432.53	4.03	73.68	194.16	48.64	3.6	8.1	84.1	2.22	55.5
1931	1,553.08	4.29	78.08	202.42	53.25	3.7	8.2	84.6	2.19	57.7
1932	1,408.78	4.40	81.70	204.18	53.44	2.3	5.5	57.5	1.44	37.7
1933	1,406.07	4.15	81.73	204.70	53.45	2.6	6.2	69.4	1.74	45.4
1934	1,332.27	4.15	82.26	204.54	53.51	3.0	7.4	83.1	2.07	54.1

² Data for all products except cigarettes, computed on the basis of the excise tax rate and the excise tax collected.

AUSTRIA, 1926-35

Year	Cigars, per 1,000	Cigarettes, per 1,000	Cigarette tobacco, per kilogram	Pipe tobacco, per kilogram	Chewing tobacco, per kilogram	Snuff, per kilogram	Cigars, each	Cigarettes, per package of 20	Cigarette tobacco, per pound	Pipe tobacco, per pound	Chewing tobacco, per pound	Snuff, per pound
	<i>Schillings</i>	<i>Schillings</i>	<i>Schillings</i>	<i>Schillings</i>	<i>Schillings</i>	<i>Schillings</i>	<i>Cents</i>	<i>Cents</i>	<i>Dollars</i>	<i>Cents</i>	<i>Cents</i>	<i>Cents</i>
1926	182.88	47.40	33.14	6.34	5.25	1.96	2.57	13.3	2.12	40.5	33.5	12.5
1927	184.55	47.58	32.60	6.50	5.35	1.98	2.59	13.4	2.08	41.5	34.2	12.6
1928	185.13	48.10	32.28	6.52	5.38	1.97	2.61	13.5	2.00	42.3	34.3	12.6
1929	186.13	47.60	32.14	6.74	5.32	1.95	2.62	13.4	2.05	43.0	33.9	12.4
1930	186.75	47.07	32.05	6.71	5.28	1.97	2.63	13.4	2.05	42.9	33.7	12.6
1931	186.83	47.35	32.02	7.43	5.34	1.96	2.59	13.3	2.35	47.3	34.0	12.5
1932	186.30	41.84	48.80	8.18	5.32	1.94	2.60	11.7	3.09	51.8	33.7	12.3
1933	183.77	42.21	48.11	8.18	5.63	1.94	2.84	13.0	3.37	57.3	39.4	13.0
1934	183.05	47.18	47.14	8.28	6.11	1.92	3.44	17.7	4.02	70.6	52.1	16.4
1935	177.70	46.31	42.31	8.37	6.00	1.94	3.35	17.4	3.61	71.5	51.2	16.6

• GERMANY, 1925-35

Year	Cigars, per kilogram	Cigarettes, per kilogram	Smoking tobacco, ³ per kilogram	Chewing tobacco, per kilogram	Snuff, per kilogram	Cigars, each	Cigarettes, per package of 20	Smoking tobacco, ³ per pound	Chewing tobacco, per pound	Snuff, per pound
	<i>Reichsmarks</i>	<i>Reichsmarks</i>	<i>Reichsmarks</i>	<i>Reichsmarks</i>	<i>Reichsmarks</i>	<i>Cents</i>	<i>Cents</i>	<i>Cents</i>	<i>Dollars</i>	<i>Cents</i>
1925	27.25	40.70	5.74	13.06	5.76	3.2	19.4	62.0	1.40	82.2
1926	26.80	45.64	5.93	13.60	5.90	3.2	21.7	64.0	1.48	63.7
1927	27.34	48.25	6.07	13.81	5.88	3.2	22.9	65.4	1.49	63.4
1928	27.85	47.34	6.20	13.95	5.93	3.3	22.6	67.1	1.51	64.2
1929	27.44	49.07	6.51	14.04	5.96	3.3	23.3	70.3	1.52	64.4
1930	25.62	49.65	7.34	14.55	5.91	3.1	23.7	81.6	1.58	63.0
1931	22.84	37.32	8.16	17.00	5.87	2.7	20.7	87.5	1.82	62.9
1932	21.48	37.30	7.86	14.78	5.79	2.6	17.7	84.7	1.59	62.4
1933	19.50	35.01	7.28	14.82	5.76	3.0	21.4	100.8	2.05	79.7
1934	15.65	30.15	7.09	16.68	5.74	3.7	20.5	125.6	2.98	102.5
1935	15.42	30.09	7.31	16.97	5.74	3.7	27.1	133.5	3.10	104.8

³ Includes fine-cut, Schwarzer Krauser, and pipe tobacco.

CONSUMPTION AND PRODUCTION OF TOBACCO IN EUROPE 15

TABLE 5.—Average retail price per unit of tobacco products—Continued

CZECHOSLOVAKIA, 1923-34

Year	Cigars, per kilogram	Cigarettes, per kilogram	Cigarette tobacco, per kilogram	Pipe tobacco, per kilogram	Snuff, per kilogram	Cigars, each	Cigarettes, per package of 20	Cigarette tobacco, per pound	Pipe tobacco, per pound	Snuff, per pound
	<i>Crowns</i>	<i>Crowns</i>	<i>Crowns</i>	<i>Crowns</i>	<i>Crowns</i>	<i>Cents</i>	<i>Cents</i>	<i>Dollars</i>	<i>Cents</i>	<i>Cents</i>
1923.....	134.14	176.30	183.38	21.53	40.00	1.98	10.4	2.46	28.9	53.0
1924.....	132.43	164.64	178.90	21.37	40.43	1.98	9.7	2.40	28.6	54.2
1925.....	131.02	160.27	147.50	21.35	40.54	1.98	9.5	1.98	28.7	54.5
1926.....	132.24	154.02	131.28	21.48	40.12	1.96	9.1	1.78	28.0	52.9
1927.....	132.06	149.81	120.52	21.50	40.11	1.96	8.0	1.74	28.0	53.9
1928.....	132.95	154.68	122.21	21.40	40.42	1.97	0.2	1.04	28.8	54.3
1929.....	132.75	159.42	118.20	21.43	40.47	1.97	0.4	1.59	28.8	54.4
1930.....	130.10	154.15	117.78	21.50	40.70	1.93	0.1	1.58	28.9	54.7
1931.....	132.12	144.07	119.32	21.47	40.84	1.95	8.5	1.60	28.8	54.9
1932.....	149.84	152.92	136.70	24.30	41.03	2.22	9.1	1.84	32.0	55.1
1933.....	151.75	147.77	130.27	25.01	41.04	2.90	11.3	2.42	43.4	71.2
1934.....	151.14	138.50	135.14	24.06	40.92	3.21	11.8	2.60	47.6	78.7

POLAND, 1925-33

Year	Cigars, per 100	Cigarettes, per 100	Smoking mixtures, per kilogram	Chewing tobacco, per kilogram	Snuff, per kilogram	Cigars, each	Cigarettes, per package of 20	Smoking mixtures, per pound	Chewing tobacco, per pound	Snuff, per pound
	<i>Zloty</i>	<i>Zloty</i>	<i>Zloty</i>	<i>Zloty</i>	<i>Zloty</i>	<i>Cents</i>	<i>Cents</i>	<i>Dollars</i>	<i>Cents</i>	<i>Cents</i>
1925.....	21.02	2.61	23.30	7.09	3.79	3.90	9.3	1.88	37.1	30.5
1926.....	23.53	3.40	32.47	10.30	5.20	2.63	7.7	1.65	32.2	26.4
1927.....	25.36	3.54	35.36	11.76	5.51	2.86	8.0	1.81	40.2	28.2
1928.....	26.32	3.03	35.00	11.75	5.55	2.95	8.1	1.78	30.7	28.2
1929.....	27.00	3.74	30.34	12.30	5.70	3.02	8.4	2.09	62.5	29.9
1930.....	26.84	4.01	42.95	12.05	5.75	3.01	9.1	2.18	64.3	29.2
1931.....	25.90	3.08	43.64	12.83	5.71	2.91	8.0	2.22	65.2	29.0
1932.....	24.74	3.97	44.27	12.78	5.72	2.77	8.9	2.25	64.8	29.0
1933.....	22.86	3.64	43.47	12.47	5.66	3.29	10.5	2.84	81.5	37.6

* Stated in the original as "tobacco of inferior quality."

SPAIN, 1920-34

Year	Cigars, per kilogram	Cigarettes, per kilogram	Cut tobacco, per kilogram	Cigars, each	Cigarettes, per package of 20	Cut tobacco, per pound
	<i>Pesetas</i>	<i>Pesetas</i>	<i>Pesetas</i>	<i>Cents</i>	<i>Cents</i>	<i>Cents</i>
1920.....	23.13	19.67	10.43	1.84	6.3	75.4
1921.....	24.05	21.25	10.51	1.65	5.8	84.5
1922.....	25.24	21.20	10.29	1.95	6.6	72.3
1923.....	26.93	19.78	10.30	1.88	5.7	37.5
1924.....	26.40	18.50	10.41	1.70	5.0	68.0
1925.....	26.75	18.51	10.07	1.92	5.3	71.4
1926.....	27.56	18.33	11.22	2.05	5.5	75.8
1927.....	31.20	17.04	10.96	2.07	6.1	84.8
1928.....	30.54	19.52	11.11	2.53	6.5	83.6
1929.....	31.22	20.22	11.15	2.29	5.9	74.3
1930.....	30.60	20.02	11.21	1.60	4.7	59.5
1931.....	30.58	19.67	11.36	1.40	3.8	48.9
1932.....	36.88	20.10	12.83	1.48	3.2	46.8
1933.....	39.52	20.81	13.82	2.00	4.5	66.2
1934.....	38.35	20.29	14.00	2.61	5.5	80.5

* Reported for fiscal years 1920-26 inclusive; adjusted to calendar years.

The series showing actual prices of particular brands of products, as in table 6, is a satisfactory measure of price changes within a country when the brands retain their relative importance over long periods. This is true of the United Kingdom and France, but in some other countries new brands are being introduced continually. Sometimes the quality of a particular brand is changed. Moreover, when prices of tobacco products are increased, the increase in the average prices

TABLE 5.—Average retail price per unit of tobacco products—Continued

ITALY, 1921-22 to 1933-34

Year	Cigars, per kilo- gram	Cigarettes, per kilo- gram	Smoking tobacco, per kilo- gram	Snuff, per kilo- gram	Cigars, each	Cigarettes, per package of 20	Smoking tobacco, per pound	Snuff, per pound
	<i>Lira</i>	<i>Lira</i>	<i>Lira</i>	<i>Lira</i>	<i>Cents</i>	<i>Cents</i>	<i>Dollars</i>	<i>Cents</i>
1921-22	110.71	131.07	45.01	12.60	2.8	12.1	0.95	26.6
1922-23	111.54	134.50	52.06	18.51	2.0	12.0	1.10	30.2
1923-24	112.47	135.55	57.91	22.85	2.5	11.0	1.15	43.3
1924-25	112.50	136.1	58.18	23.02	2.4	11.5	1.11	43.9
1925-26	117.09	142.22	61.64	23.23	2.3	11.2	1.26	40.2
1926-27	122.20	146.89	63.96	23.37	2.7	12.8	1.54	57.0
1927-28	123.41	141.62	63.20	23.47	3.3	15.5	1.70	50.1
1928-29	123.11	145.37	63.30	23.63	3.2	15.2	1.50	59.1
1929-30	125.00	150.94	65.05	24.87	3.3	15.8	1.50	59.1
1930-31	141.11	170.59	78.54	30.62	3.8	18.5	1.87	71.7
1931-32	136.92	175.28	78.24	30.67	3.5	18.1	1.83	74.4
1932-33	132.94	169.68	77.23	30.81	3.5	18.1	1.87	74.4
1933-34	129.70	164.47	77.05	30.87	5.3	20.9	2.85	114.4

HUNGARY, 1925-26 to 1934-35

Year	Cigars, per kilo- gram	Cigarettes, per kilo- gram	Smoking tobacco, per kilo- gram	Snuff, per kilo- gram	Cigars, each	Cigarettes, per package of 20	Smoking tobacco, per pound	Snuff, per pound
	<i>Forints</i>	<i>Forints</i>	<i>Forints</i>	<i>Forints</i>	<i>Cents</i>	<i>Cents</i>	<i>Cents</i>	<i>Cents</i>
1925-26	17.02	29.11	6.46	3.89	1.57	10.22	51.45	30.98
1926-27	17.59	30.55	6.57	4.07	1.51	10.71	52.33	32.36
1927-28	15.69	31.92	6.61	4.19	1.37	11.15	52.35	33.18
1928-29	16.20	32.07	6.63	4.30	1.68	11.18	52.41	33.90
1929-30	23.76	32.26	6.93	4.07	2.06	11.27	54.91	32.25
1930-31	21.91	32.00	7.22	4.41	2.15	11.19	57.24	35.20
1931-32	24.27	29.76	6.90	4.30	2.12	10.36	54.62	34.04
1932-33	23.11	27.90	6.79	4.06	2.07	9.98	55.08	32.93
1933-34	23.00	26.86	6.78	4.20	3.20	14.91	52.61	32.89
1934-35	22.41	25.34	6.53	3.75	3.33	15.04	57.92	50.48

is materially less than the increase in the prices of some particular brands. The measure of prices by brands is of value as a supplementary agent.

A general limitation in the case of price measures is that prices for each country are necessarily reported in the currency of that country. During the period reviewed in this study, there were marked changes in the exchange rates of the various countries considered, and although conversions into United States currency were based upon exchange rates prevailing at the time, such conversions often reflect imperfectly the real price levels.

Quotations in the original currency units, however, reveal enough to permit some important generalizations. The prices of tobacco products in most European countries were characterized by sharp increases between 1921 and 1929. During the 1930-32 period, when the prices of most commodities declined substantially, the prices of tobacco products were increased in some countries and maintained at previous high levels in others. Relatively high prices constituted one of the important factors making for reductions in consumption during that period. After the close of the World War, many governments used their tobacco industries as an aid in reducing their internal war debts. In France, particularly, the tobacco monopoly has operated as a sinking-fund commission for the amortization of the public debt since 1926, and prices of French tobacco products have been increased since that time.

CONSUMPTION AND PRODUCTION OF TOBACCO IN EUROPE 17

TABLE 6.—Retail price per unit of tobacco products

UNITED KINGDOM, 1928-32

Product and unit	1928		1929		1930		1931		1932	
	s. d.	Cents	s. d.	Cents	s. d.	Cents	s. d.	Cents	s. d.	Cents
Cigars (per piece):										
Flor de Dindigue—Grandes.....	10	20.3	10	20.2	10	20.3	10	18.9	10	14.6
Casa Blanca Marqueses.....	7	14.2	7	14.2	7	14.2	7	13.2	7	10.2
Darvel Bay Perfectos.....	0	12.2	6	12.1	6	12.2	6	11.3	6	8.8
Reina Regenta Conchas.....	0	12.2	6	12.1	6	12.2	6	11.3	6	8.8
Flor de Dindigue—Bouquets.....	5	10.1	5	10.1	5	10.1	5	9.4	5	7.3
Key West Majors.....	4	8.1	4	8.1	4	8.1	4	7.6	(?)	(?)
Manikin Majors.....	4	8.1	4	8.1	4	8.1	4	7.6	5	5.8
Concord No. 2.....	3 1/2	7.1	3 1/2	7.1	3 1/2	7.1	3 1/2	6.6	(?)	(?)
El Capucelo Conchas.....	3	6.1	3	6.1	3	6.1	3	5.7	3	4.4
Cope's Courts.....	2 1/2	5.1	2 1/2	5.1	2 1/2	5.1	2 1/2	4.7	2 1/2	3.7
Cigarettes (per package of 20):										
Marlboro (Turkish).....	2 11	71.0	2 11	70.8	2 11	70.9	2 11	68.1	2 11	51.1
Pall Mall (ovns).....	2 2	52.7	2 2	52.6	2 2	52.7	2 2	48.1	2 2	38.0
Kensitas (Virginia).....	1 9	24.3	1 9	24.3	1 9	24.3	1 9	22.7	1 9	17.5
De Ruska (Virginia).....	1 9	24.3	1 9	24.3	1 9	24.3	1 9	22.7	1 9	17.5
Do Reszke (Turks).....	1 9	24.3	1 9	24.3	1 9	24.3	1 9	22.7	1 9	17.5
After Lunch (Turkish).....	1 9	24.3	1 9	24.3	1 9	24.3	1 9	22.7	1 9	17.5
Scarlet Band (Virginia).....	(?)	(?)	1 9	24.3	1 9	24.3	1 9	22.7	1 9	17.5
Three Castles.....	(?)	(?)	(?)	(?)	1 9	24.3	1 9	22.7	1 9	17.5
Gold Flake.....	1 9	24.3	1 9	24.3	1 9	24.3	1 9	22.7	1 9	17.5
Crown (Virginia).....	1 9	24.3	1 9	24.3	1 9	24.3	1 9	22.7	1 9	17.5
Craven "A".....	1 9	24.3	1 9	24.3	1 9	24.3	1 9	22.7	1 9	17.5
State Express, Ardagh.....	1 9	24.3	1 9	24.3	1 9	24.3	1 9	22.7	1 9	17.5
Black Cat (Virginia).....	10	20.3	10	20.2	10	20.3	10	18.9	10	14.6
Navy Cut (Empire).....	10	20.3	10	20.2	10	20.3	10	18.9	10	14.6
Band Master.....	8	16.2	8	16.2	8	16.2	8	15.1	8	11.7
Park Drive.....	8	16.2	8	16.2	8	16.2	8	15.1	8	11.7
Robin.....	8	16.2	8	16.2	8	16.2	8	15.1	8	11.7
Virginia Beauties.....	7 1/2	15.2	7 1/2	15.2	7 1/2	15.2	7 1/2	14.2	7 1/2	11.0
Smoking tobacco (per pound):	£ s. d.	Dol.	£ s. d.	Dol.	£ s. d.	Dol.	£ s. d.	Dol.	£ s. d.	Dol.
Ardath mixture.....	1 0 0	4.87	1 0 0	4.86	1 0 0	4.88	1 0 0	4.63	1 0 0	3.51
Craven "A".....	17 4	4.22	17 4	4.21	17 4	4.21	17 4	3.93	18 0	3.16
Three Kingdoms.....	17 4	4.22	17 4	4.21	17 4	4.21	17 4	3.93	18 0	3.16
High Curd (pure Virginia).....	16 8	4.06	16 8	4.05	16 8	4.05	16 8	3.78	17 4	3.04
Murray's Mellow Mixture.....	16 8	4.06	16 8	4.05	16 8	4.05	16 8	3.78	17 4	3.04
Country Life.....	16 8	4.06	16 8	4.05	16 8	4.05	16 8	3.78	17 4	3.04
Old Dominion Mixture.....	16 8	4.06	16 8	4.05	16 8	4.05	16 8	3.78	17 4	3.04
John Cotton's No. 5 Mixture.....	16 8	4.06	16 8	4.05	16 8	4.05	16 8	3.78	17 4	3.04
Waverly Mixture.....	16 4	3.97	16 4	3.97	16 4	3.97	16 4	3.70	17 0	2.98
Nut Brown.....	13 4	3.24	13 4	3.21	13 4	3.21	13 4	3.02	13 4	2.31
Larkin Mixture.....	12 0	2.92	12 0	2.91	12 0	2.92	12 0	2.72	12 8	2.22
Grapevine Mixture.....	12 0	2.92	12 0	2.91	12 0	2.92	12 0	2.72	12 8	2.22
King Lud.....	10 8	2.59	10 8	2.59	10 8	2.59	10 8	2.42	11 4	1.99
Sweet Rosemary (Empire).....	10 0	2.43	10 0	2.43	10 0	2.43	10 0	2.27	10 8	1.87
"Our Own" Colonial.....	(?)	(?)	10 0	2.43	10 0	2.43	10 0	2.27	10 8	1.87
Chewing tobacco (per pound):										
Mitchell's Tam O'Shanter (Flake).....	14 0	3.41	14 0	3.40	14 0	3.40	14 0	3.17	14 8	2.57
Mick McQuaid Cut Plug.....	14 0	3.41	14 0	3.40	14 0	3.40	14 0	3.17	14 8	2.57
Army and Navy Plug.....	12 8	3.08	12 8	3.08	12 8	3.08	12 8	2.87	13 4	2.34
Donegal Plug.....	12 0	2.92	12 0	2.91	12 0	2.92	12 0	2.72	12 8	2.22
Klondyke Bar XX.....	11 4	2.76	11 4	2.75	11 4	2.76	11 4	2.57	12 0	2.10
Golden Twist.....	11 4	2.76	11 4	2.75	11 4	2.76	11 4	2.57	12 0	2.10
Puncher Bar.....	(?)	(?)	(?)	(?)	10 8	2.50	10 8	2.42	11 4	1.90
Nynsa Shag.....	10 0	2.43	10 0	2.43	10 0	2.43	10 0	2.27	10 8	1.87
Nabob Plug.....	10 8	2.60	10 8	2.59	10 8	2.59	10 8	2.42	10 8	1.87
Redwing Shag (Empire).....	10 0	2.43	10 0	2.43	10 0	2.43	10 0	2.27	10 8	1.87
Snaff (per pound):										
Otto de Rose.....	16 0	3.89	16 0	3.89	16 0	3.89	16 0	3.63	16 0	2.80
Arnold's Best Scotch.....	16 0	3.89	16 0	3.89	16 0	3.89	16 0	3.63	16 0	2.80
Golden Pheasant.....	14 8	3.57	14 8	3.56	14 8	3.57	14 8	3.33	14 8	2.57
Kendal Brown.....	13 4	3.24	13 4	3.21	13 4	3.24	13 4	3.02	13 4	2.34
Pinbar Peppermint.....	11 4	2.76	11 4	2.75	11 4	2.76	11 4	2.57	12 0	2.10

¹ No quotation for Key West Majors; Key West, 1s. per packet of 6; Key West (Felix Cutpa), 4vd. each.

² No quotation.

³ Per packet of 26.

Compiled from The Smokers' Handbook of 5,000 Prices, issued by Tobacco (London).

TABLE 6.—Retail price per unit of tobacco products—Continued

FRANCE, 1929-32

Product	1929 ¹		1930		1931		1932	
	Per kilo-gram	Per piece	Per kilo-gram	Per piece	Per kilo-gram	Per piece	Per kilo-gram	Per piece
Cigars:	<i>Francs</i>	<i>Cents</i>	<i>Francs</i>	<i>Cents</i>	<i>Francs</i>	<i>Cents</i>	<i>Francs</i>	<i>Cents</i>
Ambassadeurs.....	1,500.0	29.4	1,500.0	29.4	1,500.0	29.4	1,500.0	29.5
Patriotas.....	437.5	8.6	562.5	11.0	562.5	11.0	562.5	11.0
Victorias.....	312.5	6.1	375.0	7.4	375.0	7.4	375.0	7.4
Cyranos.....	175.0	3.4	250.0	4.9	250.0	4.9	250.0	4.9
Alsaciens.....	150.0	2.9	187.5	3.7	187.5	3.7	187.5	3.7
Oranaiers.....	125.0	2.4	125.0	2.5	125.0	2.4	125.0	2.5
Picaduros.....	87.5	1.7	125.0	2.5	125.0	2.4	125.0	2.5
	Per kilo-gram	Per package of 20	Per kilo-gram	Per package of 20	Per kilo-gram	Per package of 20	Per kilo-gram	Per package of 20
Cigarillos:	<i>Francs</i> ²	<i>Cents</i> ³	<i>Francs</i> ⁴	<i>Cents</i> ⁵	<i>Francs</i>	<i>Cents</i>	<i>Francs</i>	<i>Cents</i>
Regalitas.....	425.0	33.2	475.0	37.3	475.0	37.2	475.0	37.3
Damitas.....	400.0	31.3	450.0	35.3	450.0	35.3	450.0	35.3
Coquetas.....	325.0	25.5	375.0	29.4	375.0	29.4	375.0	29.5
Senoritas.....	300.0	23.5	350.0	27.5	350.0	27.4	350.0	27.5
Ninas Rondes.....	200.0	15.7	250.0	19.6	250.0	19.6	250.0	19.6
Cigarettes:								
Primosa.....	500.0	39.2	500.0	39.2	500.0	39.2	500.0	39.3
Amazones-Vizir.....	300.0	23.5	300.0	23.5	300.0	23.5	300.0	23.6
Sultans.....	250.0	19.6	250.0	19.6	250.0	19.6	250.0	19.6
Favorites Maryland.....	220.0	17.2	220.0	17.3	220.0	17.2	220.0	17.3
Hidalgos.....	200.0	15.7	200.0	15.7	200.0	15.7	200.0	15.7
Grenades Maryland.....	200.0	15.7	200.0	15.7	200.0	15.7	200.0	15.7
High Life.....	175.0	13.7	175.0	13.7	175.0	13.7	175.0	13.7
Grenades Ordinaire.....	150.0	11.7	150.0	11.8	150.0	11.8	150.0	11.8
Elegantes Maryland.....	137.5	10.8	137.5	10.8	137.5	10.8	137.5	10.8
Gailloues.....	125.0	9.8	125.0	9.8	125.0	9.8	125.0	9.8
Elegantes Ordinaire.....	112.5	8.8	112.5	8.8	112.5	8.8	112.5	8.8
	Per kilo-gram	Per pound	Per kilo-gram	Per pound	Per kilo-gram	Per pound	Per kilo-gram	Per pound
Smoking tobacco (Seaferlat):	<i>Francs</i>	<i>Dollars</i>	<i>Francs</i>	<i>Dollars</i>	<i>Francs</i>	<i>Dollars</i>	<i>Francs</i>	<i>Dollars</i>
Vizir.....	180.0	3.20	180.0	3.20	180.0	3.20	180.0	3.21
Virginie.....	130.0	2.31	130.0	2.31	130.0	2.31	130.0	2.32
Maryland Extra.....	130.0	2.31	128.0	2.23	135.0	2.32	125.0	2.23
Maryland.....	100.0	1.78	100.0	1.78	100.0	1.78	100.0	1.78
Caporal Doux.....	75.0	1.33	75.0	1.34	75.0	1.33	75.0	1.34
Caporal Ordinaire.....	62.5	1.11	62.5	1.11	62.5	1.11	62.5	1.11
Chewing tobacco:								
Roles Ordinaire.....	62.5	1.11	62.5	1.11	62.5	1.11	62.5	1.11
Carottes.....	62.5	1.11	62.5	1.11	62.5	1.11	62.5	1.11
Roles (for troops and hospitals).....	10.0	.18	10.0	.18	10.0	.18	10.0	.18
Snuff:								
Portugal (in tins).....	120.0	2.13	120.0	2.14	120.0	2.13	120.0	2.14
Virginia Pur.....	80.0	1.42	80.0	1.42	80.0	1.42	80.0	1.43
Virginie haut-gout.....	80.0	1.42	80.0	1.42	80.0	1.42	80.0	1.43
Portugal.....	80.0	1.42	80.0	1.42	80.0	1.42	80.0	1.43
Superieure (in packages).....	80.0	1.42	80.0	1.42	80.0	1.42	80.0	1.43
Ordinaire (in packages).....	60.0	1.07	60.0	1.07	60.0	1.07	60.0	1.07

¹ Decree of Mar. 17, 1929, established prices per kilogram in francs as follows: Regalitas, 400; Damitas, 350; Coquetas, 275; Senioritas, 250; Ninas rondes, 200.

² Decree of Nov. 23, 1929.

³ Decree of July 17, 1930.

⁴ Decree of Mar. 17, 1929; price was reduced to 125 francs per kilogram on Sept. 9, 1929.

Journal Officiel de la Republique Francaise.

In 1932, prices of tobacco products in most European countries were higher than in the United States. They were highest in the United Kingdom, Italy, Germany, and the Scandinavian countries and lowest in Spain, Czechoslovakia, and the Netherlands. In general, cigarette prices ranged from 25 to 100 percent higher than in this country.

Quality considered, cigars were but little if any higher in the principal cigar-consuming countries, but in other countries, notably in the United Kingdom, France, and Italy, the prices of cigars were substantially higher. The prices of smoking mixtures were somewhat higher than in the United States, for mixtures of similar quality, but a large proportion of the total sales was somewhat below the quality used here. The prices of chewing tobacco and snuff in most cases were not greatly different, quality considered.

European taxation systems differ so greatly that it was not considered advisable to try to show what specific effect they had upon prices in the different countries. For example, in some of the nonmonopoly countries, import duties are levied on the raw material; in others, import duties are levied on the raw material and banderole or stamp taxes are collected on the product; in still others, both import duty and excise tax are levied upon the raw material, and stamp taxes are collected on the product. In the monopoly countries, on the other hand, taxes as such are not usually levied on the products, but all or a large portion of the profits from the industry are retained by the State. Changes in tax rates and taxation systems are considered later, when the effect of price changes in individual countries is discussed in more detail.

TRADE RESTRICTIONS AND THEIR EFFECTS ON CONSUMPTION

Restrictions preventing free competition in the trade of tobacco have had an important influence upon its consumption in Europe. This was particularly true from 1925 to 1932. Before considering the effects of trade restrictions, a review of the general set-up of European tobacco industries seems expedient. Of 25 countries considered in this study, 12 have monopoly control over all phases of the tobacco industry, and 5 exercise control over some phase of the industry, through cartels, Government supervision, or other regulatory measures. The remaining 8 are nonmonopoly countries. They levy import duties and excise taxes. The nonmonopoly countries of Europe are the United Kingdom, the Netherlands, Finland, Norway, Denmark, Greece, Switzerland, and Belgium.

In Germany, Portugal, and the Baltic States no actual monopolies exist but certain phases of the industry are subject to governmental regulation or other regulation of a monopolistic nature. In a broad sense these countries might be termed semimonopoly countries. (For further details see the discussion under each country.)

Monopoly countries may be subdivided into (1) those owned and operated by the State (in which instance they are called governmental monopolies or State monopolies), and (2) those rented or conceded to some private company. All the monopoly countries of Europe are State monopolies, except those of Spain and Sweden.

In countries in which tobacco monopolies exist the monopoly determines the area to be planted and the quantity to be marketed. The leaf tobacco is delivered to the monopoly. Growers' prices are fixed by the monopoly in advance of the planting season in some countries and at harvest time in others. In cases of Government-operated monopolies, or State monopolies, the State usually buys the whole crop and exports the surplus, if there is any. The manufacturing industry is likewise under control of the State which usually owns its factories. The factory output is turned over to retail distributors who sell at prices fixed by the State. Monopolies are in operation in

the following European countries: Austria, Czechoslovakia, France, Hungary, Italy, Poland, Rumania, Spain, Sweden, Turkey, Bulgaria, Yugoslavia, and the Union of Soviet Socialist Republics. (The Union has not been included in this study but its tobacco industry is one of the various State monopolies.)

Trade restrictions in nonmonopoly countries consist of import duties usually carrying a preferential or lower rate for domestic or colonial products or excise rates which tax products made of imported tobacco at a higher rate than products made from domestic tobacco. Trade restrictions in monopoly countries take two forms. Monopolies either pay higher prices for domestic tobacco than would need to be paid for tobacco of similar quality if purchased on outside markets or tobacco products in which domestic tobacco is used are sold at lower prices than other products.

Larger quantities of United States tobacco are consumed in the United Kingdom than in any other European country. In 1919, at least 90 percent of the tobacco used in the United Kingdom was imported from the United States. During that year a preference of one-sixth the full duty then in effect was granted on Empire-grown tobacco. This preference was increased in 1925, was stabilized for 10 years in 1926, and, at the Ottawa Conference in 1932, its period of effectiveness was extended until 1942. The rate of 1919 accorded an advantage to Empire-grown tobacco of 1 shilling 4½ pence (about 30 cents) per pound on unstemmed tobacco containing more than 10 percent moisture (the classification of the greatest part of the United States tobacco export trade to the United Kingdom). Since 1925 the rate has been 2 shillings and one half penny (about 50 cents) lower on Empire tobacco than on United States tobacco, a differential greater than the cost of leaf tobacco from the United States delivered to United Kingdom factories (not including the import duty). Practically no Empire-grown tobacco was used in the United Kingdom in 1919, whereas 28,600,000 pounds of Empire production were used in 1929, and 41,000,000 pounds in 1933. It is estimated that about 85 percent of Empire leaf consumed in the United Kingdom during the period 1929-32 displaced tobacco from the United States.

Since 1925 some tobacco from the United States has been displaced by home-grown tobacco in Germany. Prior to 1925, the German import duty on tobacco was low, but it was increased during that year and again in 1931. Since 1931 the excise tax on German fine-cut tobacco containing 50 percent or more domestic leaf has been materially less than the tax on products containing a smaller proportion of domestic leaf.

Estimates as to the quantities of United States tobacco displaced in the United Kingdom and Germany because of trade restrictions have been made after due consideration of the following factors: (1) Changes in production and use of the various types protected by import duties; (2) changes in blends, quantity, and quality of products sold in the United Kingdom and Germany, as compared with changes in other countries not affected by such restrictions; and (3) prices paid to growers for tobacco produced in Germany and the British colonies, compared with prices for which leaf of a similar quality could be purchased in outside markets.

It is estimated that in 1929 displacement of United States tobacco in Germany and the United Kingdom ranged between 29,000,000 and 36,000,000 pounds, of which a quantity somewhere between 19,000,000

and 23,000,000 pounds was dark air-cured and fire-cured tobacco, and the remainder flue-cured. That is, during the year 1929, because of trade restrictions of various kinds, the consumption of United States tobacco in these two countries is estimated to have been between 29,000,000 and 36,000,000 pounds less, and that of other types, greater, by an equal quantity. These displacements, which began to take place as the restrictive measures became effective, increased from year to year. Displacement in 1932 was between 40,000,000 and 48,000,000 pounds, of which from 26,000,000 to 30,000,000 pounds were dark air-cured and fire-cured, and the remainder flue-cured tobacco.

Of the monopoly countries, consumption of tobacco from the United States has been affected most by trade restrictions in Italy, France, Spain, and Poland. It has been estimated that in those countries between 50,000,000 and 60,000,000 pounds of United States tobacco were displaced by other tobaccos in 1929 and between 55,000,000 and 65,000,000 pounds in 1932. Displacements in the monopoly countries mentioned, consisting almost entirely of dark air-cured and fire-cured tobacco, began to take place during the latter part of the period 1921-24, but prevailed to a greater extent during the late reconstruction period (1925-29) and the depression period (1930-32).

Trade restrictions are discussed in greater detail under the heading of each country concerned.

PRODUCTION AND CLASSIFICATION OF EUROPEAN LEAF TOBACCO

With the exception of certain oriental tobaccos exported to the United States and Egypt, most of the leaf tobacco produced in Europe is used there. Before the World War, in fact, about 38 percent of the total manufacturing requirements of Europe was from the European crop. During the war, production was reduced, because of food needs in some countries and the difficulties in maintaining trade relations in others. At the end of the war and during subsequent years less than 30 percent of the European tobacco requirements was grown in Europe, but in 1924 approximately pre-war proportion of factory consumption was again supplied by European growers. Later, production was increased. In 1929 about 43 percent of the tobacco consumed in Europe was grown there and in 1932, 46 percent. Both production and consumption reached a high point in 1930 and declined the following years (table 7).

LOCATION AND DESCRIPTION OF TYPES

Many different types of tobacco are grown in Europe, but they may be roughly divided into the following main groups:

- (1) The oriental types, grown in Turkey, Greece, Bulgaria, southern Yugoslavia, and the Union of Soviet Socialist Republics.¹
- (2) The semioriental types, grown in southeastern Italy, southwestern Yugoslavia, Rumania, Hungary, southern Czechoslovakia, and Southern Poland.
- (3) The dark air-cured types, grown in Hungary, Rumania, Czechoslovakia, Germany, northern Italy,² France, Spain, Belgium, Sweden, and Switzerland.
- (4) Makhorka, grown in the Union of Soviet Socialist Republics and in central and northern Poland.

¹ Although the characteristics of Russian varieties are discussed, estimates of production have not been included in the total oriental crop owing to lack of information.

² Fire-cured principally.

TABLE 7.—Production of leaf tobacco in Europe by types, 1920-35¹

Year	Oriental	Semi oriental	Dark air-cured ²	Makhorka	Total
	<i>1,000 pounds</i>	<i>1,000 pounds</i>	<i>1,000 pounds</i>	<i>1,000 pounds</i>	<i>1,000 pounds</i>
1920	205, 503	40, 037	204, 232		458, 832
1921	132, 186	48, 110	188, 511		368, 813
1922	100, 647	55, 560	153, 650		309, 857
1923	320, 918	56, 220	173, 154	231	550, 518
1924	404, 258	103, 164	250, 346	225	758, 095
1925	355, 477	84, 012	227, 690	380	667, 559
1926	383, 801	104, 858	221, 430	685	710, 774
1927	350, 145	07, 042	253, 280	1, 143	701, 610
1928	286, 210	07, 252	242, 006	1, 014	608, 381
1929	322, 926	100, 286	290, 251	5, 015	724, 508
1930	325, 017	109, 170	369, 071	7, 068	750, 326
1931	297, 922	85, 598	328, 930	0, 985	722, 435
1932	185, 715	85, 643	349, 047	10, 709	591, 714
1933	270, 816	52, 483	300, 133	9, 357	632, 789
1934	224, 282	45, 179	338, 285	8, 340	616, 086
1935	257, 342	56, 004	330, 854	10, 880	654, 070

¹ Russian varieties not included; data not available.² Includes Italian fire-cured.

In each of the first three groups there are several types with more or less distinctive characteristics. The location of areas in which the four different types are grown is shown on the various maps accompanying each country; and the average production 1909-13 is compared with the annual production, 1920-35, in table 8.

ORIENTAL TYPES⁶

The oriental types of tobacco are grown largely on the mountainous sandy soils of Turkey, Greece, Bulgaria, southern Yugoslavia, and the Union of Soviet Socialist Republics. These types are distinguished by their color, small leaves, and aromatic qualities. The leaves are from 3 to 10 inches long and the width usually is from one-third to one-half the length. The color ranges from lemon to reddish brown, and the grades most in demand are highly aromatic. As a group they burn more readily than most other types.

In growing the oriental types, the plants are spaced from 9 to 18 inches in rows 1½ to 3 feet apart. The plants are not topped and usually grow from 4 to 6 feet tall. Leaves are far apart on the stalks and from 24 to 30 leaves are saved per plant. The priming method of harvesting is followed, and harvesting extends over a period of 3 or 4 weeks. Oriental types are air-cured, usually on frames or on strings that are moved to and from shade and shelter as weather conditions require.

Approximately 15 percent of oriental tobacco is exported to the United States and blended with Burley and flue-cured tobacco in the popular cigarette mixtures. The medium and lower grades and a part of the better grades are used in the manufacture of cigarettes consumed by the higher income group in central European countries.

Production of oriental tobacco was reduced during the war, but by 1920 it had increased to a point above pre-war levels. Supplies accumulated, and production was reduced the following year. However, rapid expansion in production began to take place again, and the largest oriental crop in history was grown in 1924. Only slight reductions followed. In fact, during the period 1925-31 the crop averaged almost twice pre-war production. The reduced consumption of

⁶ Acknowledgment is made to the following for much of the material on oriental tobacco: M. NESTOROFF, LES TABACS D'ORIENT. v. 1. [1929.]

1930 and 1931 resulted in larger stocks than ever, and production in 1932 was reduced below the 1913 level (table 8).

The following brief description of important oriental types is given for use in connection with tables 7 and 8.

Xanthi tobaccos are grown in the vicinity of Xanthi, Greece, and are manipulated at Cavalla and Salonika. They are very aromatic and have a fresh, sweet taste and high nicotine content. The color ranges from orange to reddish brown. They are fine in texture, very popular for blends in cigarette and smoking mixtures, and are often the basic element in mixtures that are comparatively high in nicotine. The Xanthi varieties grown outside of the Union of Soviet Socialist Republics represent from 4 to 5 percent of the oriental crop.

Macedonian tobaccos are grown in northern Greece, southwestern Bulgaria, and southeastern Yugoslavia. They are aromatic, having a pleasing taste, and low nicotine content, and they burn well. The color ranges from lemon to reddish brown. They are popular for blending with other oriental tobacco and are often the base of mixtures. Usually these varieties represent between 12 and 15 percent of the oriental crop.

TABLE 8.—Production of leaf tobacco in Europe and in Turkey, average 1909-13, annual 1920-35

Country and product	Average 1909-13 ¹	1920	1921	1922	1923	1924
Italy: ²	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
Fire-cured.....	15, 103	13, 186	16, 779	19, 954	30, 052	41, 640
Semioriental.....	815	6, 995	14, 294	20, 184	18, 816	17, 756
Air-cured.....	3, 395	1, 364	1, 735	1, 781	1, 434	2, 007
Total.....	19, 313	21, 545	32, 808	41, 919	50, 302	61, 402
Yugoslavia: ³						
Dark air-cured.....	(?)	3, 522	5, 080	3, 372	7, 029	15, 956
Semioriental.....	(?)	8, 822	10, 520	7, 911	14, 123	32, 236
Oriental.....	3, 730	8, 860	10, 431	9, 421	17, 082	30, 579
Total.....	31, 920	17, 210	26, 040	20, 704	38, 231	78, 671
Poland:						
Dark air-cured.....	249	10	22	22	22	24
Semioriental.....	7, 911	139	1, 993	741	1, 460	1, 148
Makhorka.....	565			110	221	225
Total.....	8, 725	149	2, 015	873	1, 709	1, 397
Czechoslovakia:						
Dark air-cured.....	(?)	870	838	1, 104	1, 622	3, 484
Semioriental.....	(?)	1, 543	1, 783	3, 443	4, 538	9, 236
Total.....	9, 497	2, 413	2, 621	4, 547	6, 160	12, 720
Hungary: ³						
Dark air-cured.....	100, 695	51, 912	38, 263	32, 328	27, 976	39, 579
Semioriental.....	11, 188	3, 000	2, 442	2, 064	1, 780	3, 210
Total.....	111, 883	54, 912	40, 705	34, 392	29, 756	42, 789
Rumania:						
Dark air-cured.....	(?)	5, 439	5, 692	7, 073	5, 106	8, 939
Semioriental.....	(?)	30, 538	17, 075	21, 217	15, 490	39, 573
Total.....	48, 174	35, 977	22, 767	28, 290	20, 662	48, 512
Greece: Oriental.....	88, 987	69, 850	51, 485	56, 857	127, 307	110, 885
Turkey: ³ Oriental.....	88, 180	64, 248	34, 347	45, 202	57, 518	114, 347
Bulgaria: Oriental.....	23, 435	64, 590	35, 923	58, 077	118, 951	108, 447
Sweden: Dark air-cured.....	1, 744	1, 691	1, 440	1, 166	1, 510	1, 299
France: Dark air-cured.....	53, 598	46, 031	52, 578	61, 495	55, 464	78, 820
Spain: Dark air-cured.....	(?)	(?)	73	819	565	1, 414
Switzerland: Dark air-cured.....	1, 280	661	860	819	794	794
Germany: Dark air-cured.....	64, 116	66, 061	54, 985	46, 387	31, 421	47, 452
Belgium: Dark air-cured.....	20, 723	13, 486	10, 190	7, 333	9, 692	15, 031
Total Europe.....	541, 541	458, 832	368, 813	408, 067	550, 518	723, 995

TABLE 8.—Production of leaf tobacco in Europe and in Turkey, average 1909-13, annual 1920-35—Continued

Country and product	1925	1926	1927	1928	1929	1930
Italy: ²	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
Fire-cured.....	53,157	52,642	43,898	43,062	52,383	62,157
Semioriental.....	24,560	31,438	29,451	37,296	21,254	26,106
Air-cured.....	2,392	2,507	2,056	1,583	1,349	1,853
Total.....	80,109	86,587	75,405	81,941	74,986	90,116
Yugoslavia: ²						
Dark air-cured.....	1,100	875	508	1,204	2,521	1,572
Semioriental.....	10,223	12,139	4,573	6,437	12,846	16,988
Oriental.....	9,157	18,849	9,500	7,162	18,650	16,327
Total.....	20,480	31,863	14,581	14,743	34,017	34,887
Poland:						
Dark air-cured.....	40	42	48	57	155	159
Semioriental.....	1,440	4,302	9,359	12,307	11,408	5,809
Makhorka.....	389	605	1,143	1,914	5,015	7,068
Total.....	1,875	5,129	10,550	14,308	16,578	13,036
Czechoslovakia:						
Dark air-cured.....	5,266	5,789	8,370	6,807	9,714	10,959
Semioriental.....	9,814	8,743	8,432	8,139	10,493	11,139
Total.....	15,080	14,532	* 16,802	15,006	20,207	22,098
Hungary: ²						
Dark air-cured.....	30,146	51,775	65,893	57,080	65,776	67,851
Semioriental.....	3,265	6,048	5,964	5,821	4,953	5,598
Total.....	33,411	57,823	71,857	62,901	70,729	73,449
Rumania:						
Dark air-cured.....	3,576	1,016	4,670	7,060	15,043	13,479
Semioriental.....	34,591	41,808	30,761	27,249	42,272	39,539
Total.....	38,167	42,824	35,431	34,309	57,315	53,018
Greece: Oriental.....	134,000	135,310	139,367	129,493	151,540	145,215
Turkey: ³ Oriental.....	121,196	119,752	153,449	94,874	89,475	104,081
Bulgaria: Oriental.....	88,115	50,041	47,820	34,750	72,261	59,394
Sweden: Dark air-cured.....	1,733	1,687	1,228	1,255	1,235	1,345
France: Dark air-cured.....	69,398	57,733	93,389	59,992	62,903	69,163
Spain: Dark air-cured.....	1,268	2,275	3,138	6,449	10,377	17,415
Switzerland: Dark air-cured.....	838	176	254	816	2,866	1,323
Germany: Dark air-cured.....	41,002	31,769	44,013	51,949	59,924	46,408
Belgium: Dark air-cured.....	16,925	13,153	16,035	15,522	15,035	15,387
Total Europe.....	667,608	660,653	701,619	603,381	724,508	750,326

TABLE 8.—Production of leaf tobacco in Europe and in Turkey, average 1909-18 annual 1920-35—Continued

Country and product	1931	1932	1933	1934	1935
Italy: ¹					
Fire-cured.....	1,000 lb. 78,091	1,000 lb. 66,399	1,000 lb. 61,560	1,000 lb. 62,969	1,000 lb. 61,200
Semioriental.....	36,000	29,728	29,129	30,547	19,580
Air-cured.....	2,314	2,905	4,208	4,300	4,250
Total.....	106,404	99,032	94,897	97,816	85,030
Yugoslavia: ²					
Dark air-cured.....	3,071	5,030	2,794	2,742	3,234
Semioriental.....	10,734	9,107	4,195	3,700	5,000
Oriental.....	20,580	23,191	7,406	6,834	15,203
Total.....	34,385	37,328	14,395	13,276	23,437
Poland:					
Dark air-cured.....	174	020	1,692	2,146	6,040
Semioriental.....	7,777	7,583	4,883	4,252	7,700
Muskatorka.....	9,085	10,700	9,357	8,340	10,880
Total.....	17,036	18,303	15,932	14,747	24,620
Czechoslovakia:					
Dark air-cured.....	21,288	26,336	18,175	27,630	25,476
Semioriental.....	9,190	11,287	7,790	2,627	2,340
Total.....	30,478	37,623	25,965	30,257	27,816
Hungary: ²					
Dark air-cured.....	73,418	79,310	66,537	33,837	30,385
Semioriental.....	6,864	6,513	5,515	4,903	3,928
Total.....	80,282	85,823	72,052	38,740	34,313
Rumania:					
Dark air-cured.....	7,998	5,184	3,874	3,920	10,267
Semioriental.....	16,928	10,425	9,971	9,160	18,470
Total.....	24,926	15,609	13,845	13,080	28,737
Greece: Oriental.....	95,273	64,497	123,985	62,108	101,549
Turkey: ³ Oriental.....	112,670	39,771	88,510	78,650	77,950
Bulgaria: Oriental.....	69,484	38,286	53,915	46,684	62,571
Sweden: Dark air-cured.....	961	1,327	1,202	1,084	1,000
France: Dark air-cured.....	69,559	67,716	62,675	87,181	86,794
Spain: Dark air-cured.....	12,001	10,695	16,003	18,000	16,000
Switzerland: Dark air-cured.....	882	1,698	2,447	3,307	2,645
Germany: Dark air-cured.....	51,164	62,223	64,889	76,897	60,491
Belgium: Dark air-cured.....	14,469	13,888	14,077	16,263	17,078
Total, Europe.....	722,435	591,714	632,789	616,665	662,670

¹ Present boundaries.

² Data for Italy throughout are growers' deliveries to the monopoly; for Hungary growers' deliveries to the monopoly beginning 1924. As tobacco is processed by the grower in these 2 countries, the data thus used are virtually equivalent to redried weights. Yugoslav data are also on redried basis.

³ Data not available.

⁴ Includes small quantities of Inco, an oriental type grown from seeds imported annually from Greece.

⁵ European and Asiatic.

⁶ Estimated.

⁷ None reported.

Southern Bulgaria types may be divided into Phillipople, Haskova, and Kochoukavak tobaccos. All three varieties have a mild, pleasing taste, and burn well. Phillipople is extremely aromatic; Haskova, slightly so; and Kochoukavak has but little aroma. The nicotine content is high in Kochoukavak, but comparatively low in the others. The color ranges from lemon to orange. These varieties, consumed chiefly in oriental cigarette mixtures of continental Europe, are used more often as filling material than as basic grades. They accounted for 8 or 10 percent of the crop during the period 1930-32.

Old Greek tobacco of several types is grown in southwestern Greece. Most of them range from orange to reddish brown in color and from neutral to bitter in taste. They burn poorly and have medium nico-

tine content. They are used mostly as filling material in medium and low-priced oriental cigarette mixtures. The Agrinian type is an exception—it burns reasonably well, is aromatic, and possesses a more pleasing taste than most of the other types grown in that section. During the 1930-32 period, between 6 and 7 percent of the oriental crop was of the old Greek varieties.

* *Smyrna* tobacco, grown around and inland from Smyrna, is said to be the most aromatic of the oriental varieties. Most Smyrna tobacco is pale yellow in color and often pale green before fermentation. It has fine texture, in some cases almost silky. It usually burns poorly and is low in nicotine content, but owing to its rich aroma, is used largely in mixtures where other types predominate. Smyrna tobacco is bought extensively by manufacturers of popular cigarettes in the United States. During the 1930-32 period, between 8 and 10 percent of the oriental crop was of this variety.

The *Aegean Sea Island* types, named from the region of their production, resemble Smyrna tobacco in most respects, but they are usually less aromatic. They enter into the composition of oriental mixtures in which types with better burning qualities are also used. Between 4 and 5 percent of the oriental crop is produced on the islands of the Aegean Sea.

The *Samsoun, Baffra, and Trebizond* tobaccos are grown along the south shores of the Black Sea. In general, they burn well and are high in nicotine content, as compared with other oriental varieties. They are moderately aromatic and have a pleasing taste. The color is reddish brown. In recent years many grades grown on the southern shores of the Black Sea have become popular with manufacturers of cigarettes in the United States. Other grades are used in mixtures with tobacco of lower nicotine content or for the trade that prefers strong mixtures. Samsoun and Baffra are generally regarded as superior to Trebizond. Production usually ranges between 6 and 10 percent of the oriental crop.

South of the Samsoun area proper and farther inland a type of tobacco with larger leaves is grown. This type has a lemon color, good burning qualities, and a low nicotine content. It is popular as a filler for domestic mixtures. From 4,000,000 to 5,000,000 pounds of this type are grown annually.

Anatolian tobacco grows south of Constantinople, inland from the Marmora Sea. It resembles Samsoun in that it burns well and has a high nicotine content. The color ranges from lemon to orange. It is generally regarded as less desirable than Samsoun, and its principal use is for fillers in cigarette mixtures. Anatolian tobacco represents about 5 or 6 percent of the total oriental crop.

The *oriental tobaccos of the Union of Soviet Socialist Republics* grow along the north and east shores of the Black Sea and a little farther inland. In many respects these varieties resemble Trebizond, grown on the south shores of the Black Sea. They are highly aromatic and burn well, but in most cases contain less nicotine than Samsoun. The color range is from light orange to reddish brown. Tobaccos grown farthest inland are lower in nicotine and lighter in color. In some localities artificial heat is used in curing. These types are used largely in Russia, but are exported to some extent to Germany and other central European countries and used in cigarette mixtures. During the period 1929-32 from one-fourth to one-third of the oriental crop was grown in the Union of Soviet Socialist Republics.

SEMIORIENTAL TYPES

Semioriental tobaccos are grown on well-drained, sandy, silty, soils of southeastern Italy, southwestern Yugoslavia, southeastern Rumania, northeastern Hungary, southern Czechoslovakia, and southern Poland. They are similar to the lower grades of tobacco grown in the so-called oriental regions. The seed in most cases was originally imported from the regions in which oriental varieties are grown, and the methods of harvesting the crop are similar. Semioriental tobaccos are less aromatic than the oriental varieties; in some cases, they are almost neutral. They are generally spaced somewhat farther apart in the fields and the leaves are larger. For the most part, semioriental varieties are grown in monopoly countries where efforts are being made to reduce imports. They are usually consumed in the country of origin, either as the sole content of low-quality cigarettes or combined with oriental tobacco in the better grades of cigarettes.

Production of semioriental tobacco has been expanded materially since the war, and present indications are that some further expansion is probable. The principal classes are (1) Levantine tobacco grown in southeastern Italy, (2) Herzegovina and related types grown in west Yugoslavia, (3) acclimatized Macedonian grown in Rumania, and (4) Kerti and related types grown in Rumania, Czechoslovakia, and Poland.

Levantine tobacco is used largely in cigarettes consumed in Italy. In 1930 approximately 27 percent of the Italian crop consisted of Levantine. Since 1924, through the existence of a trade agreement with Poland whereby coal is exchanged for tobacco, fairly important quantities have been exported to that country annually. In 1930 and 1931 production of similar varieties was increased in Poland. During most years some of the Levantine variety has more desirable characteristics than much of the low-grade oriental tobacco, and it is probable that in Italy for some time to come a large part of the cigarettes consumed will be made from this domestic variety.

Herzegovina and related types, grown for a long period in western Yugoslavia, are well known on most European markets. Considerable quantities have been exported in recent years to Czechoslovakia. Herzegovina differs from other semioriental tobaccos in that the leaves are larger and the color more uniform. The type is characterized by little aroma, fair burning qualities, orange color, and great elasticity. It is especially adapted to cutting purposes. More than any other European tobacco, Herzegovina resembles the flue-cured tobacco grown in the United States.

The *Dalmatian* type is also grown in western Yugoslavia. It is similar to the Herzegovina, but the color is darker and the leaves are slightly smaller. Dalmatian tobacco is largely used in domestic cigarettes and pipe mixtures. The *Servena* and *Bosnia*, minor types similar to the Dalmatia, are used for similar purposes. During the 1930-32 period slightly more than half of the Yugoslavian crop was of these types.

Acclimatized Macedonian tobaccos include several types grown in Rumania from acclimatized Macedonian seed. These types (principally *Suluk*, *Molovata*, and *Rezina*) are grown in Bessarabia and in the vicinity south of Bucharest. In both regions the land is hilly and the soil is silt loam. Leaves of acclimatized Macedonian are slightly larger, coarser, and less aromatic than those of the original

Macedonian tobacco of Greece and the color is darker. Between 35 and 45 percent of the tobacco grown in Rumania is acclimatized Macedonian, and it is used for making medium-priced cigarettes consumed in that country.

Tobacco resembling the Macedonian variety is also grown in Rumania from seed imported yearly from Macedonia. It is grown in the hilly vine regions of Oltenia and Dobruja, where the soil is rich in calcium and other mineral substances but poor in organic matter. It comprises from 5 to 8 percent of the tobacco grown in Rumania and is used in the better grades of cigarettes.

Kerti tobacco (sometimes called Hungarian Garden tobacco) is grown in western Hungary, southern Czechoslovakia, southeastern Poland, and northern Rumania on well-drained upland soils lacking in organic matter. It has somewhat larger leaves than other semi-oriental types and lacks the finer texture of many. The leaves range from 9 to 15 inches in length and the width is from one-half to one-



FIGURE 1.—A field of *Kerti* (garden) tobacco in southern Poland.

BAE 3632

third the length. Usually this variety is not topped (fig. 1). The color ranges from a light orange to a light brown. It blends well with other types and is used with the more aromatic types in medium and better grade cigarettes. Production of *Kerti* tobacco has been increased in recent years, and during the 1930-32 period it included roughly one-half the crops of Poland and Czechoslovakia and between 19 and 20 percent of the crops of Hungary and Rumania.

DARK AIR-CURED TYPES

With the exception of certain fire-cured types, grown in Italy, the dark tobaccos of Europe are air-cured. They resemble the dark air-cured types grown in the United States and compete with them to a limited extent. In general, they are grown on heavier, more fertile soils than the oriental and semi-oriental types. The leaves are larger, and the plants are spaced a greater distance apart in the field, usually from 2 to 3½ feet. The plants are topped and about 10 to 15 leaves

per stalk are saved. The leaves are usually from 15 to 24 inches in length and the width is about one-third the length. The color is dark, usually some shade of brown. In texture, dark air-cured types are more elastic than the oriental and semioriental types, but less elastic than the fire-cured types of the United States. In the countries where grown they enter into the manufacture of dark, strong pipe and dark cigarette mixtures. The most important classes are (1) Debrecene and related types, (2) cigar types of Baden in Germany, (3) the cutting types grown in Baden and adjacent regions, and (4) Paraguay grown in France.

Spanish Kentucky, Italian Kentucky, and other tobaccos of Italy (except Erba Santa used for snuff) are principally fire-cured; for convenience, however, they have been classified in this study with the air-cured group.

Debrecene tobacco has been the most important type grown in Hungary for a long period. It is also grown in Rumania and Czechoslovakia, but the most important producing area is in extreme eastern Hungary (fig. 2). *Debrecene* tobacco is less elastic than the Kentucky fire-cured types. It has a thin leaf and is used largely in pipe and dark cigarette mixtures. A



BAC 30628

FIGURE 2.—A *Debrecene* tobacco plant, one of the important dark air-cured types of Europe. It grows in Hungary, Rumania, and Czechoslovakia.

considerable part of the Hungarian crop usually is exported; France, Austria, and Poland have been important buyers during recent years.

The *Tiszai* type is similar to the *Debrecene*, but the leaves are smaller and the texture finer. *Tiszai* is grown on lighter soils. The producing area is in central Hungary. The *Szegedi* type produced in southeastern Hungary, and *Szuloki*, produced in southwestern Hungary, are similar to *Debrecene*, but they have smaller leaves and

Szegedi is of lighter color. From 3 to 4 percent of the Hungarian crop consists of Szegedi, and from 2 to 3 percent, Szuloki. Tiszai, Szegedi, and Szuloki are all used in pipe and low-priced cigarette mixtures. During most years small quantities of Tiszai are used in cigars.

Two other types of the Debrecene region are the *Kapa* and *Muskotaly*. The *Kapa*, representing from 3 to 5 percent of the Hungarian crop, belongs to the rustica group and is somewhat darker and heavier bodied than Debrecene and the leaves are slightly smaller and darker. The *Kapa* and *Muskotaly* types are used largely in pipe mixtures.

The cigar types of Baden include several varieties of cigar tobacco grown in central Baden. Of these the *Guedertheimer* variety is the most popular. It is said to have been obtained by crossing Maryland tobacco and an Alsatian variety. The leaves are large, thin, and fine in texture.

Two kinds of *Amersfoorter* are also grown. One, originating in the Dutch village of Amersfoort, is coarse and has rather large ribs. Recently an improved Amersfoorter has been obtained by crossing U-Stamm (a variety developed from some of the Hungarian types) with the old Amersfoorter. The new variety has a finer texture and smaller ribs and is more suitable for cigar purposes. The color of both varieties is usually brown. They are used chiefly as cigar fillers, and to a small extent as binders, for cigars consumed in Germany. During the 1930-32 period about 40 percent of the German crop consisted of the cigar types of Baden.

The cutting types of Baden and adjacent sections, of which the U-Stamm and *Friedrichstaler* varieties are the most common, are used for making cut tobacco. They are somewhat like the cigar types of Baden, except that they are thinner and somewhat lighter in color. The *Friedrichstaler* resembles the One Sucker type grown in Kentucky and probably has been developed from One Sucker seed.

Recent experiments in flue-curing U-Stamm have resulted, in some cases, in colors as bright as those of the flue-cured types grown in the United States. These domestic-grown types are mixed with flue-cured and fire-cured tobacco from the United States, and with Java tobacco, in making smoking mixtures for consumption in Germany. In 1931, approximately 50 percent of the German crop consisted of the cutting types of Baden and the adjacent sections.

Several types of *rustica* are also grown in Germany and are used in smoking mixtures. One type, grown near *Nuremberg*, is not topped, flowers quite low, cures easily (color ranging from orange to light brown), is not aromatic, blends well, and is used with other types in smoking mixtures when a light color is desired. Production has been increased in recent years, and during the 1930-32 period it represented from 3 or 4 percent of the German crop. Other types of *rustica* are grown in small quantities on the more fertile soils near Tilsit in East Prussia, near Marienwerder in West Prussia, and in the Eichsfeld in Saxony. When cured, the *rustica* types are brown, generally running to the darker shades. They are coarse, comparatively high in nicotine content, and used largely in low-priced smoking mixtures.

The *Paraguay* type of tobacco, usually called light Paraguay, is grown largely in France from seed believed to have been imported originally from South America. Its color ranges from light brown to

reddish brown. The leaves are thin and fine in texture with stems and cross ribs slightly smaller than those of most other dark air-cured types. It has but little aroma, is mild, and blends well with the more aromatic types. It is air-cured. The plants are spaced close in the field, usually ranging around 15,000 to an acre. This type is grown near and south of Bordeaux. It is used along with imported types in dark scaferlati, a smoking mixture which is the most popular tobacco product consumed in France.

The *Italian-grown Kentucky* tobacco is a fire-cured type similar in appearance to the fire-cured tobacco grown in western Kentucky and Tennessee. In general, the leaves appear slightly longer and narrower than those of the Kentucky and Tennessee types. This type is used in cigars, and to a limited extent in pipe mixtures. During the 1930-32 period approximately one-half of the Italian crop consisted of this dark tobacco, grown from Kentucky seed, and more than any other type it has displaced the Kentucky-Tennessee fire-cured tobacco, formerly imported in large quantities for Italian cigars.

The *Nostrano Brenta*, another fire-cured type, is grown in northeastern Italy. The leaves are wider and shorter than those of Kentucky, and the strength is milder. It is coarse in texture and suitable for making pipe mixtures. *Brasile Beneventano*, a fire-cured type grown in southwestern Italy and bearing leaves about half as large as dark Kentucky tobacco, is used chiefly in cigars. From 1930 to 1932 about 4 percent of the Italian tobacco crop was Nostrano Brenta, and 4 percent was Brasile Beneventano. Small quantities of *Maryland*, *Burley*, and *Virginia dark* are also grown in Italy.

Spanish-grown Kentucky tobacco resembles in appearance the fire-cured types of Kentucky and Tennessee, particularly the light-bodied and light-colored grades. The Spanish-grown type has thinner leaves, less body, and lighter color than the Italian-grown Kentucky, but it is coarser than the French-grown Paraguay. Spanish-grown Kentucky, representing in recent years about one-half of the Spanish crop, is used in smoking mixtures for consumption in Spain. It is grown principally in southern Spain in the Provinces of Seville and Granada, on irrigated lands.

Maryland, *Valencia*, and *Rich Wonder*, other types grown in Spain, resemble the Spanish Kentucky and are used for similar purposes. Of these, the Valencia appears to have gained in favor recently.

In addition to the dark air-cured types mentioned above, other types are grown in Belgium, Switzerland, Yugoslavia, and the Union of Soviet Socialist Republics. Two Belgian types, brown in color and coarse of texture, are used in low-priced smoking mixtures popular with Belgian farmers. A small quantity of *Burley* is grown in Belgium and in central Switzerland from United States seed. Small quantities of *Nostrano Brenta* are grown in southern Switzerland. Both types are used in low-priced smoking mixtures.

The *Vovodina* is a minor dark air-cured type grown in northeastern Yugoslavia. The color ranges from light to dark brown. It is used in making cigars and low-priced pipe mixtures. Production has decreased in recent years.

Bakoun tobacco, grown in the Ukraine, is a dark air-cured type with leaves practically round. It has a comparatively coarse texture

but is elastic and retains moisture well. It is slightly aromatic, has a low nicotine content, and burns well. Production in recent years has been approximately 5,000,000 pounds annually, most of which has been exported to Poland and Czechoslovakia.

MAKHORKA

Makhorka (or mahorka) tobacco is grown largely on the more fertile soils in eastern Russia and in central and northern Poland (fig. 3). This type belongs to the *Rustica* group, and its most distinguishing characteristic is its high nicotine content. It resembles the dark air-cured type and is cultivated and harvested in a similar way. Makhorka is somewhat coarser than most of the air-cured types and has a much higher nicotine content. It is the favorite type of peasants in the Union of Soviet Socialist Republics and eastern Poland.

Practically none of this type is exported now, but before the war Russia sold small quantities to Austria and Finland. European production of makhorka is for Poland only (table 8), but



BAC 30637

FIGURE 3.—Makhorka tobacco plant of the *Nicotiana rustica* family. Makhorka is a leading type of tobacco in the Union of Soviet Socialist Republics and in some parts of Poland. The long leaf-stem and the rounded leaf-ends mark characteristic differences between *N. rustica* and *N. tabacum*.

the Union of Soviet Socialist Republics is by far the greater producer. Data are not available for earlier years, but during the period 1930-32 production of makhorka in the Union of Soviet Socialist Republics averaged 198,000,000 pounds annually, compared with 9,000,000 pounds in Poland. In the plans approved by the Commissariat of Agriculture of Union of Soviet Socialist Republics in 1933, the area devoted to

makhorka amounted to 390,000 acres of a total area of 655,000 acres planted to all tobacco.

DEVELOPMENT IN THE EUROPEAN TOBACCO INDUSTRY BY COUNTRIES

With respect to the relationship between production and consumption of tobacco, European countries may be divided into four groups:

(1) Those in which little or no tobacco is grown (United Kingdom, Netherlands, Norway, Sweden, Denmark, Austria, Portugal, Finland, Lithuania, Estonia, Latvia).

(2) Those in which a portion of the factory consumption is grown (Germany, France, Spain, Belgium, Poland, Czechoslovakia, Switzerland).

(3) Those in which leaf production is approximately equal to the consumption (Italy, Yugoslavia, Rumania).

(4) Those in which a surplus of tobacco is grown (Greece, Turkey, Bulgaria, Hungary).

For each of these countries information is here given relating to the production and trade of leaf tobacco; consumption, prices, and trade of tobacco products; and trade restrictions which affect production and consumption.

UNITED KINGDOM

Manufacturers in the United Kingdom in 1913 used 107,100,000 pounds of leaf tobacco. By 1930 this quantity had been increased to 203,600,000 pounds (table 9). Owing chiefly to decreased exports of cigarettes, consumption of leaf tobacco declined in 1931 and 1932, amounting to only 187,500,000 pounds during the latter year. An upward trend started in 1933, and leaf consumption reached 219,700,000 pounds in 1935. Import duties are refunded (in the form of drawback) on stems and waste products and on tobacco products exported. Thus, the consumption of leaf in products actually consumed is much less than indicated in table 9, which includes leaf tobacco used in products manufactured for export. As many British colonies buy leaf tobacco in the United Kingdom, the leaf imports of that country are greater than leaf consumption in factories (table 10).

TABLE 9.—Estimated consumption of leaf tobacco types in the United Kingdom factories, 1913 and 1920-35

Year	United States tobacco		Other foreign tobacco	Empire tobacco	Total	Year	United States tobacco		Other foreign tobacco	Empire tobacco	Total
	Flue-cured	Other					Flue-cured	Other			
	Million pounds	Million pounds					Million pounds	Million pounds			
1913	35.4	71.0	0.6	2.1	107.1	1928	133.8	20.0	2.9	26.6	182.3
1920	71.0	67.0	8.7	4.8	151.5	1929	151.9	15.3	3.1	28.6	198.9
1921	78.1	69.0	7.7	6.4	161.2	1930	155.0	14.9	3.9	29.8	203.6
1922	78.0	53.5	7.9	8.4	146.9	1931	144.5	12.3	2.5	32.7	192.0
1923	81.5	37.0	0.8	9.8	146.1	1932	137.7	10.8	2.0	37.0	187.5
1924	87.0	40.0	0.1	11.0	148.0	1933	144.3	7.0	2.9	40.9	194.2
1925	97.8	35.0	5.0	11.6	153.3	1934	182.0	4.0	2.3	40.5	200.4
1926	107.2	25.8	5.1	10.8	157.9	1935	167.6	0.0	4.0	42.1	214.7
1927	119.2	21.0	4.0	22.8	167.0						

¹ Annual Statement of the Trade of the United Kingdom.

² Preliminary.

TABLE 10.—Imports of leaf tobacco into the United Kingdom by principal countries total reexports and imports retained, 1913 and 1920-35

Year	Imports						Reexports	Imports retained
	United States			Other foreign countries	British dominions and colonies	Total		
	Flue-cured ¹	Other ²	Total					
Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	
1913.....	67.0	75.0	142.0	18.2	2.2	162.4	3.7	158.7
1920.....	126.0	57.5	177.5	23.3	18.2	219.0	0.3	200.7
1921.....	152.0	62.7	214.7	5.0	7.5	227.2	16.3	211.5
1922.....	120.0	46.8	166.8	5.4	12.7	184.9	11.2	173.7
1923.....	93.4	61.5	154.9	5.2	12.9	173.0	14.6	158.4
1924.....	118.4	38.5	156.9	6.2	10.3	182.4	10.5	162.0
1925.....	121.5	38.2	162.7	7.4	18.9	189.0	12.4	176.6
1926.....	135.8	25.6	161.4	6.0	29.8	197.2	11.0	186.2
1927.....	162.0	15.4	177.4	4.0	49.9	222.3	9.8	212.5
1928.....	160.6	11.2	171.8	3.0	43.0	217.8	10.8	207.0
1929.....	191.0	14.4	205.4	3.1	31.5	240.0	9.4	230.6
1930.....	183.9	13.0	197.8	3.9	35.3	237.0	13.5	223.5
1931.....	145.0	12.2	157.2	2.5	34.3	194.0	8.0	186.0
1932.....	115.0	10.2	125.2	2.0	47.7	174.9	8.8	166.1
1933.....	150.0	9.0	159.0	2.0	39.2	211.1	9.0	201.2
1934.....	183.5	5.1	188.6	2.4	47.6	238.6	18.3	220.3
1935.....	195.6	6.0	202.6	4.0	45.1	251.7	11.3	240.4

¹ Estimates based on United States exports to the United Kingdom.² Estimates consisting almost entirely of fire-cured and dark air-cured tobacco.

TRADE

As no tobacco is grown for commercial purposes, all of the leaf supply must be imported. Since early colonial days the United Kingdom has been an important market for tobacco from the United States. During the decade ended in 1932, approximately one-eighth of the United States crop was sold there annually; and, compared with total leaf exports from the United States, sales to the United Kingdom amounted to about one-third. That these ratios are now decreasing is obvious from the declining imports from the United States and other foreign countries, and from the steady increase reflected in imports from colonial possessions.

Prior to 1920 more than nine-tenths of the leaf tobacco consumed was grown in the United States, and it is estimated that in 1913 more than one-half of the leaf consumption was of dark air-cured and fire-cured tobacco. A preference in import duties was accorded Empire-grown tobacco in September 1919, through a rebate of one-sixth the full rate of duty. From this advantage consumption of Empire-grown tobacco gradually expanded and comprised 8 percent of the total requirements in 1924. Owing to the increase in cigarette consumption, the years following the war marked a period of pronounced favoritism for light tobacco, and from 1919 to 1924 British consumption of flue-cured leaf increased as consumption of other types from the United States decreased.

In July 1925 the rebate on Empire tobacco was increased to one-fourth the full import duty rate, or 2 shillings one-half pence per pound (49.7 cents with exchange at par). This rebate is effective until 1942. (See Trade Restrictions and Their Effects on Consumption, p. 20.) The import duty rates were increased in 1927 and again in 1931, but the rebate rate on Empire tobacco remained unchanged,

Consumption of United States flue-cured tobacco continued to increase from 1923 through 1930, and after declining in the 2 following years, started upward again in 1933. Meanwhile the use of United States dark air-cured and fire-cured types was reduced successively from 1920 to 1934. Part of this reduction was due to the substitution of Empire tobacco, and part to a decrease in the consumption of products in which dark tobaccos are used. Consumption and exports of tobacco and snuff (the products containing dark tobaccos) declined from 75,000,000 pounds in 1920 to 46,000,000 pounds in 1932. Since then, both the export trade and the consumption of tobacco and snuff have increased materially, but there has been no corresponding increase in imports of dark types from the United States.

Of all tobacco used in United Kingdom factories in 1924, about 128,000,000 pounds were imported from the United States, 6,000,000 from other foreign countries, and 12,000,000 from British colonial possessions, principally India, Nyusaland, Canada, and Rhodesia. It is estimated that British consumption of United States tobacco in that year consisted of about 88,000,000 pounds of flue-cured and 40,000,000 pounds of dark air-cured and fire-cured. Flue-cured tobacco is used mainly in cigarettes, and to some extent in pipe mixtures and the dark types enter into the manufacture of roll tobacco for chewing and smoking. Tobacco from foreign countries other than the United States is used in cigars and oriental cigarettes; and the dark types of British colonies, or Empire tobacco, compete with the United States dark types in the manufacture of roll tobacco, pipe mixtures, and snuff. Flue-cured Empire tobacco competes, to a limited extent, with flue-cured from the United States in the manufacture of cigarettes and pipe mixtures.

British factories absorbed 155,000,000 pounds of United States flue-cured tobacco in 1930, but there was a marked decline from that year to 1932 in direct ratio to the decline in total leaf consumption of the country. Consumption of flue-cured leaf in 1932 was only 138,000,000 pounds, compared with a total consumption of 188,000,000 pounds. It is not without significance that in 1932, a year of low consumption and low output, British factories used 37,000,000 pounds of Empire leaf, consumption of which has reached a new high level almost every year since 1920. Preliminary reports for 1935 show total leaf consumption amounting to 220,000,000 pounds, the greatest on record. It is estimated that 168,000,000 pounds of the total consumption was United States flue-cured.

For many years the United Kingdom has been one of the world's greatest exporters of tobacco products. The most important trade is in cigarettes and chewing tobacco. Cigarettes are sold principally to British possessions and the Orient, and three-fourths of the exported chewing tobacco goes to British possessions. There is also an important export trade with Java in smoking tobacco, dating from 1933. Snuff exports, which declined after the post-war period, have increased somewhat since 1931 (table 11). During the period 1920-24, leaf tobacco consumed in the manufacture of tobacco products exported from the United Kingdom averaged about 22,000,000 pounds annually (estimated unstemmed weight), and by 1929 (the peak export year) the quantity so used had been increased to 47,000,000.

TABLE 11.—Exports of tobacco products from the United Kingdom, 1918 and 1920-35

Year	Cigarettes	Cavan- dish or Negro- head	Smoking tobacco	Snuff	Year	Cigarettes	Cavan- dish or Negro- head	Smoking tobacco	Snuff
	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>		<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>
1918	18,066,080	3,924,908	346,145	12,496	1928	26,608,180	1,980,070	450,647	16,421
1920	16,202,132	3,733,272	300,275	21,241	1929	32,842,484	1,715,748	705,230	10,270
1921	9,447,602	1,660,693	221,993	38,828	1930	31,008,449	1,542,484	476,453	23,167
1922	11,704,747	2,825,773	245,241	30,451	1931	19,679,280	1,068,250	364,627	12,513
1923	14,600,787	3,185,671	495,072	44,241	1932	16,660,545	915,630	537,043	13,030
1924	14,817,345	2,747,445	440,393	72,574	1933	16,484,048	878,041	4,072,400	13,444
1925	15,765,981	2,963,807	380,544	16,066	1934	19,749,804	697,330	1,682,921	19,060
1926	10,881,141	2,780,821	330,205	19,153	1935	22,123,574	727,196	5,885,330	0
1927	22,063,140	2,434,767	341,745	18,231					

* To Java in 1933, 3,539,420 pounds; in 1934, 5,548,166 pounds; in 1935, 4,230,000 pounds.

† Included with smoking tobacco.

Annual Statement of the Trade of the United Kingdom with Foreign Countries and British Possessions.

In addition to having a large export trade in tobacco products, the United Kingdom is an important reexport center for leaf tobacco, especially for much of the leaf consumed in Irish Free State. Australia and other British possessions also buy some of their leaf supply through the United Kingdom. In fact, sales to British possessions constitute the bulk of the reexport trade. There has been considerable fluctuation in the reexport trade during the last decade, the volume varying from 10,000,000 to 20,000,000 pounds. Reexports in 1931 and 1932 were the lowest in many years (table 10).

STOCKS

Of especial interest to the tobacco industry of any country is the accumulation and absorption of leaf stocks. Considered in relation to factory output, to consumption, and to trade, stocks might well be called the manufacturer's buying barometer.

In recent years leaf stocks sufficient to last factories between 2 and 2½ years have been maintained. Since the trend in consumption has been upward leaf stocks have been increased (table 12).

TABLE 12.—Stocks of leaf tobacco on hand in the United Kingdom, January 1, 1909-36

Year	Stocks Jan. 1	Year	Stocks Jan. 1	Stocks of empire, Jan. 1	Year	Stocks Jan. 1	Stocks of empire, Jan. 1
	<i>Million pounds</i>		<i>Million pounds</i>	<i>Million pounds</i>		<i>Million pounds</i>	<i>Million pounds</i>
1909	163.2	1920	263.8	0.0	1931	402.8	76.4
1910	207.3	1921	324.0	17.9	1932	455.2	77.5
1911	203.3	1922	368.6	14.8	1933	434.6	87.9
1912	200.1	1923	378.8	16.9	1934	437.3	94.8
1913	211.7	1924	365.4	18.5	1935	445.4	100.9
1914	238.8	1925	366.6	22.6	1936	453.2	101.5
1915	253.1	1926	369.4	26.2			
1916	286.1	1927	377.2	36.2			
1917	269.4	1928	405.0	54.4			
1918	441.4	1929	420.4	71.4			
1919	441.9	1930	440.1	73.9			

Accounts Relating to the Trade and Navigation of the United Kingdom: Monthly Empire Tobacco Report of Frank Watson & Co., Ltd.

CONSUMPTION OF TOBACCO PRODUCTS¹

There has been a marked increase in the consumption of cigarettes and a decline in the consumption of other classes of products since 1913 (table 13). The most marked increase was in the consumption of cigarettes during and after the war period. Moreover, the increased use of cigarettes, particularly by women, at that time added much to the consumption volume. Apparently the consumption of other classes of products was not greatly changed, and total consumption in 1920 amounted to 142,798,000 pounds, about 46 percent more than it was in 1913.

Total consumption was reduced during the early reconstruction period as the increase in consumption of cigarettes failed to offset the decline in other products.

The total consumption of tobacco products increased at an average rate of approximately 3 percent annually from 1924 to 1930. During that period the consumption of cigarettes increased at an average rate of 7 percent a year, but pipe and chewing tobacco declined at a rate of approximately 3 percent a year. Consumption of cigars declined whereas snuff consumption almost doubled, but in relation to other products neither the cigar nor snuff is used in important quantities. After declining slightly during the depression period the upward trend was resumed and the average rate of increase in total consumption between 1933 and 1935 was approximately 5 percent a year.

TABLE 13.—Estimated consumption of domestic tobacco products in the United Kingdom compared with leaf consumed in their manufacture, 1913 and 1920-35¹

Year	Cigars	Cigarettes	Smoking mixtures	Chewing tobacco	Snuff	Total	Leaf consumed ²
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
1913	4,796	32,325	40,015	13,374	955	97,465	94,079
1920	3,007	60,145	66,117	14,029	500	142,798	137,608
1921	2,504	72,150	54,759	13,363	503	143,289	138,805
1922	2,304	73,153	48,702	11,633	402	136,291	132,677
1923	2,205	75,187	45,750	10,679	481	134,281	128,257
1924	2,218	77,403	43,363	9,882	403	133,419	127,904
1925	2,050	83,400	42,127	9,373	551	137,501	132,591
1926	1,954	85,599	41,407	9,010	605	139,595	134,421
1927	1,918	90,499	40,842	8,552	639	142,550	137,288
1928	1,852	94,996	40,198	8,303	633	146,032	140,857
1929	1,808	103,505	38,702	7,793	750	152,558	146,983
1930	1,745	100,520	37,395	7,336	808	150,816	150,938
1931	1,469	108,295	37,371	7,140	791	155,709	149,823
1932	1,300	108,885	37,105	6,891	794	154,983	149,209
1933	1,303	109,185	37,169	6,350	775	154,872	149,102
1934	1,045	113,497	41,122	7,402	822	164,488	158,369
1935	1,703	117,538	42,586	7,065	852	170,344	163,967

¹ Estimates, except for 1913, 1924, and 1930, were based upon production for the census years and leaf retained for home consumption.

² Drawback on exported products and unsalable offal deducted; data from annual statement of the trade of the United Kingdom.

³ Based upon the census of production, 1912, and leaf retained for home consumption.

⁴ Computed from reports of the census of production.

⁵ Preliminary.

The bulk of pipe and chewing tobacco consumed consists of roll tobacco, used principally in pipes. Prior to 1920, roll tobacco was made almost exclusively from dark air-cured and fire-cured tobacco from the United States, but after the preferential duty rate on Empire tobacco became effective, the Empire product gradually displaced the

⁷ Consumption data for the United Kingdom as set forth in table 13 are estimates, based upon (1) leaf tobacco cleared for consumption, (2) factory output of products as shown by the census of production for certain years, and (3) import and export trade of tobacco products.

dark tobaccos from the United States. In 1932, Empire types used in roll tobacco amounted to almost three times the consumption of United States types in that product. Consumption of flue-cured tobacco from the United States has increased with the increase in the domestic consumption and exports of cigarettes. Per capita consumption of tobacco products is shown in table 4.

TAX RATES AND PRICES OF TOBACCO PRODUCTS

Regardless of the use made of leaf tobacco imported, the tax on it, which is the import duty, is the same for all types, except Empire tobacco. In most countries the tax rate is higher on cigarettes than on other classes of products. Consequently, prices of cigarettes are relatively low when compared with the prices of other tobacco products. The average wholesale prices of tobacco products, which are higher than those of any other European country, are shown for 1907, 1912, 1924, and 1930 in table 14.

TABLE 14.—*Factory prices per pound of tobacco products in the United Kingdom, specified years*

Product	1907	1912	1924	1930
Cigars.....	\$2.09	\$2.36	\$4.58	\$5.45
Cigarettes.....	1.33	1.42	3.02	3.06
Cavendish or Negrohead.....	.68	.55	1.28	1.38
Snuff for human use.....	.95	1.04	1.89	2.07
Other manufactured tobacco, largely roll.....	.92	1.06	2.32	2.51

Reported by the census of production.

Since 1925 the most popular cigarettes have sold at 1 shilling per package of 20 (table 6). The import duty on leaf tobacco was increased slightly in 1930 and again in 1931, but in the case of cigarettes, both increases were absorbed largely by manufacturers. For several years there have been a few brands of cigarettes on the market selling at 8 pence per package of 20 (16 cents with exchange at par). Some new brands of these low-priced cigarettes appeared on the market in 1931 and 1932, and their consumption has increased. It is estimated that in 1932 between 20 and 25 percent of the total consumption was accounted for by this class of products. Because of the shift to Empire tobacco, which is taxed at a lower rate, the average price of roll tobacco has not greatly changed since 1925. However, the prices for particular brands, in which United States tobacco is largely used, have advanced. In 1932 they were roughly 25 percent higher than in 1925.

Granulated smoking mixtures, which for several years have been made largely from Empire-grown tobacco, have increased slightly in price. Prices for cigars have been high enough for many years to keep consumption at a low level, and they were advanced slightly with the increase in import duties. The United Kingdom rates of import duty, and the dates effective, are shown from 1909 in table 15.

TABLE 15.—Rates of duty on tobacco entering the United Kingdom

UNMANUFACTURED

Date imposed	Unstemmed				Stemmed			
	Full rate per pound containing—		Preferential rate per pound containing—		Full rate per pound containing—		Preferential rate per pound containing—	
	10 per cent or more moisture	Less than 10 per cent moisture	10 per cent or more moisture	Less than 10 per cent moisture	10 per cent or more moisture	Less than 10 per cent moisture	10 per cent or more moisture	Less than 10 per cent moisture
	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.
Apr. 30, 1909	3 8	4 1	—	—	3 8½	4 1½	—	—
Sept. 22, 1915	5 0	6 1½	—	—	5 6½	6 2	—	—
May 3, 1917	7 4	8 2	—	—	7 4½	8 2½	—	—
July 16, 1917	6 5	7 1½	—	—	6 5½	7 2	—	—
Apr. 23, 1918	8 2	9 0½	—	—	8 2½	9 1	—	—
Sept. 1, 1919	—	—	8 9½	7 6½	—	—	6 10½	7 8½
July 1, 1925	—	—	8 1½	6 9½	—	—	6 1½	6 9½
Apr. 12, 1927	8 10	9 9½	6 9½	7 6¾	8 10½	9 10	6 9½	7 6¾
Sept. 11, 1931	9 0	10 0	7 5½	8 2½	9 6½	10 6½	7 5½	8 3¼

MANUFACTURED

Date imposed	Cigars ¹		Cigarettes		Cavendish or Negrohead			
	Full rate per pound	Preferential rate per pound	Full rate per pound	Preferential rate per pound	Not manufactured in bond		Manufactured in bond	
					Full rate per pound	Preferential rate per pound	Full rate per pound	Preferential rate per pound
	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.
Apr. 30, 1909	7 0	—	5 8	—	5 4	—	4 8	—
Sept. 22, 1915	10 6	—	8 6	—	8 0	—	7 0	—
May 3, 1917	14 0	—	11 4	—	10 8	—	9 4	—
July 16, 1917	12 3	—	9 11	—	9 4	—	8 2	—
Apr. 23, 1918	15 7	—	12 7	—	11 10½	—	10 4½	—
Sept. 1, 1919	—	12 11½	—	10 5½	—	9 10½	—	8 7¾
July 1, 1925	—	11 8½	—	9 5½	—	8 10½	—	7 9¾
Apr. 12, 1927	16 10	12 11½	13 7	10 5½	12 10	9 10¾	11 2½	8 7¾
Sept. 11, 1931	18 1	14 2½	14 7	11 5½	13 9	10 9¾	12 0	9 4¾

Date imposed	Smoking tobacco		Snuff			
	Full rate per pound	Preferential rate per pound	Full rate per pound containing moisture		Preferential rate containing moisture	
			More than 13 percent	Not more than 13 percent	More than 13 percent	Not more than 13 percent
	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.
Apr. 30, 1909	4 8	—	4 5	5 4	—	—
Sept. 22, 1915	7 0	—	6 7½	8 0	—	—
May 3, 1917	9 4	—	8 10	10 8	—	—
July 16, 1917	8 2	—	7 8½	9 4	—	—
Apr. 23, 1918	10 4½	—	9 9½	11 10½	—	—
Sept. 1, 1919	—	8 7¾	—	—	8 11½	9 10¾
July 1, 1925	—	7 9¾	—	—	7 4½	8 10¾
Apr. 12, 1927	11 2½	8 7¾	10 7	12 10	8 1½	9 10¾
Sept. 11, 1931	12 0	9 4¾	11 4	13 9	8 10½	10 9¾

¹ From Apr. 1, 1920 to May 10, 1931, there was an additional import duty on foreign cigars of 50 per cent ad valorem; and to the preferential rate already existing was added an advantage of two-thirds of the full ad valorem rate.

NETHERLANDS

The Netherlands produces practically no leaf for commercial purposes but probably more tobacco is sold within its bounds than in any other European country. The two outstanding features of the Netherlands tobacco industry are the leaf market, which is one of the unique auction markets of the world, and the export trade in tobacco products.

LEAF CONSUMPTION AND TRADE

The Netherlands leaf market is an international one, conducted from the customs bonded warehouses of the country. The auction sales are called inscriptions. There cigar tobaccos of the Netherland East Indies are disposed of to buyers from many countries. Since the Civil War period of the United States, this market has been the main outlet for the Netherlands' colonial tobaccos.

Tobaccos from all the major producing countries of the world are also found on the Netherlands market, where between 200,000,000 and 300,000,000 pounds of leaf tobacco are sold annually. Important quantities from the United States are included. Total leaf receipts from all countries in 1932 amounted to 218,000,000 pounds, of which Netherlands manufacturers bought 59,000,000 pounds and foreign buyers, 131,000,000 pounds (table 16).

In addition to the leaf bought by Netherlands factories on the customs bonded warehouse markets, some tobacco is imported direct; although it must pass through the warehouses for customs purposes, it is not sold there. Table 17, showing imports for consumption, contains not only the quantities bought on warehouse markets (see domestic deliveries, table 16) but the direct purchases that have been made from foreign countries.

Manufacturing plants in the Netherlands used about 65 million pounds of tobacco in 1913. This quantity was increased and during the period from 1925 to 1932, factory consumption averaged 71 million pounds annually.

TABLE 16.—Netherlands; Bonded warehouse receipts and deliveries of leaf tobacco, by country of origin, 1928-35

Country of origin, product and year	Receipts at bonded warehouses	Deliveries from bonded warehouses for—		Country of origin, product and year	Receipts at bonded warehouses	Deliveries from bonded warehouses for—	
		Domestic use	Foreign use			Domestic use	Foreign use
East Indian:				Borneo:			
Sumatra:	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	1928.....	202,162	57,044	155,993
1928.....	37,269,746	4,782,077	34,543,478	1929.....	58,674	75,492	87,190
1929.....	40,400,854	4,923,800	36,082,721	1930.....	147,294	31,687	84,012
1930.....	42,023,331	5,547,642	31,473,026	1931.....	37,117	21,550	87,968
1931.....	39,169,200	5,621,067	31,232,601	1932.....	81,253	26,854	59,797
1932.....	32,798,880	4,098,501	29,488,591	1933.....	55,820	20,303	34,048
1933.....	24,006,778	4,512,082	24,406,642	1934.....			
1934.....	24,648,981	4,314,492	26,270,014	1935.....			
1935.....	23,878,023	3,805,528	19,003,129	Total East Indian:			
Java:				1928.....	147,817,491	27,801,551	132,425,815
1928.....	110,257,564	22,081,544	97,726,344	1929.....	140,229,941	28,770,771	133,495,626
1929.....	105,772,413	23,831,470	97,325,711	1930.....	154,321,598	28,519,768	115,837,038
1930.....	111,550,943	22,940,430	84,270,160	1931.....	153,748,107	27,671,012	88,525,252
1931.....	114,542,850	22,029,265	57,204,683	1932.....	153,553,241	33,328,480	93,204,183
1932.....	120,673,102	28,301,134	66,055,885	1933.....	92,030,830	31,031,267	80,311,821
1933.....	97,977,222	26,498,702	61,811,131	1934.....	04,048,230	25,877,595	89,544,239
1934.....	69,998,255	21,563,193	63,274,225	1935.....	101,007,683	26,162,404	78,523,443
1935.....	77,189,000	22,200,036	68,620,314				

CONSUMPTION AND PRODUCTION OF TOBACCO IN EUROPE 41

TABLE 16.—Netherlands; Bonded warehouse receipts and deliveries of leaf tobacco, by country of origin, 1928-35—Continued

Country of origin, product and year	Receipts at bonded warehouses	Deliveries from bonded warehouses for—		Country of origin, product and year	Receipts at bonded warehouses	Deliveries from bonded warehouses for—	
		Domes-tic use	Foreign use			Domes-tic use	Foreign use
American:				American—Con.			
United States:				Brazilian—Con.			
Seedleaf:	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	1931.....	20,832,187	4,774,550	7,004,203
1928.....	373,435	679,425	405,737	1932.....	10,611,701	5,224,904	10,144,923
1929.....	187,404	303,948	81,206	1933.....	5,940,222	3,885,874	10,350,869
1930.....	203,908	270,983	05,092	1934.....	21,175,183	4,601,000	12,457,700
1931.....	171,245	134,840	2,340	1935.....	14,618,498	6,457,273	7,528,709
1932.....	47,787	90,807	1,025	Paraguayan:			
1933.....	899,007	342,809	05,403	1928.....	1,214,153	417,172	948,790
1934.....	116,844	108,754	70,547	1929.....	2,801,598	1,196,592	683,393
1935.....	227,074	150,527	08,343	1930.....	1,104,524	1,280,024	1,168,526
Maryland:				1931.....	3,087,900	1,103,021	570,447
1928.....	1,970,180	1,955,110	513,387	1932.....	1,200,020	1,037,015	386,496
1929.....	342,098	1,000,722	169,157	1933.....	2,090,902	646,897	1,112,058
1930.....	221,100	676,221	74,390	1934.....	1,417,558	751,769	1,437,399
1931.....	314,280	201,036	28,093	1935.....	1,613,787	668,787	1,250,008
1932.....	784,000	564,307	17,544	Other Ameri-			
1933.....	1,443,118	1,691,945	44,663	can:			
1934.....	1,911,388	1,044,980	59,524	1928.....	7,343,276	172,898	7,622,647
1935.....	425,488	945,773	284,303	1929.....	9,094,786	343,391	9,994,523
Kentucky:				1930.....	6,580,528	232,660	6,017,444
1928.....	6,984,515	9,139,839	714,067	1931.....	3,784,809	156,620	4,396,777
1929.....	6,555,850	7,373,009	609,140	1932.....	2,002,158	103,442	3,392,903
1930.....	10,003,831	7,206,595	182,032	1933.....	2,506,533	81,826	3,615,035
1931.....	2,760,403	4,849,070	164,986	1934.....	6,685,663	41,887	2,533,085
1932.....	2,869,983	3,282,222	48,431	1935.....	0,175,085	125,002	7,217,860
1933.....	2,093,611	3,487,095	204,499	European:			
1934.....	1,333,783	2,120,644	220,400	1928.....	10,333,783	1,224,305	0,827,384
1935.....	1,306,852	1,582,908	468,557	1929.....	8,396,160	1,149,000	4,560,677
Virginia:				1930.....	6,555,823	1,243,098	0,007,374
1928.....	7,587,083	0,750,843	1,815,109	1931.....	20,183,468	2,319,336	3,800,180
1929.....	8,474,606	6,470,788	2,038,721	1932.....	21,329,075	3,482,000	13,207,181
1930.....	5,315,848	6,282,398	300,163	1933.....	12,413,781	0,675,718	21,842,688
1931.....	0,787,871	0,706,233	218,333	1934.....	4,058,220	2,590,405	6,078,082
1932.....	13,664,842	6,973,016	498,610	1935.....	3,734,592	2,967,392	2,720,476
1933.....	6,790,567	8,333,941	1,186,489	Other leaf:			
1934.....	11,483,761	5,839,985	2,292,784	1928.....	7,040,570	5,232,724	5,075,680
1935.....	4,576,760	5,236,925	2,001,777	1929.....	11,245,050	5,161,398	5,489,895
Total United States:				1930.....	11,424,140	8,000,701	4,862,168
1928.....	16,915,193	18,531,217	3,449,200	1931.....	8,523,579	0,080,162	4,570,559
1929.....	15,520,714	15,217,468	2,888,224	1932.....	9,855,206	3,081,499	5,165,942
1930.....	16,344,783	14,495,507	621,547	1933.....	7,995,515	5,825,450	2,931,931
1931.....	13,009,805	11,054,188	413,668	1934.....	3,780,889	3,441,331	5,150,559
1932.....	14,363,412	10,896,351	565,610	1935.....	4,609,343	3,216,511	1,805,567
1933.....	12,023,263	13,255,545	1,561,114	Stems and waste:			
1934.....	14,845,776	0,184,363	2,643,315	1928.....	989,407	989,065	645,746
1935.....	6,696,164	7,921,128	2,813,070	1929.....	164,026	490,611	36,137
Cuban:				1930.....	121,160	262,791	96,795
1928.....	2,410,610	414,020	2,846,871	1931.....	321,404	272,244	394,731
1929.....	3,534,704	505,074	2,550,812	1932.....	1,334,530	120,801	1,160,257
1930.....	11,792,447	890,905	4,207,552	1933.....	552,803	194,450	87,073
1931.....	7,015,524	1,474,051	4,541,463	1934.....	90,389	119,048	357,145
1932.....	3,864,185	1,208,506	3,720,503	1935.....	220,460	293,212	169,596
1933.....	1,060,704	1,295,030	3,362,077	Total leaf to-			
1934.....	727,518	1,038,367	2,515,449	bbacco:			
1935.....	540,127	890,477	1,688,724	1928.....	204,025,227	57,954,302	168,067,708
Brazilian:				1929.....	209,264,441	67,127,136	168,014,018
1928.....	9,652,744	3,171,341	7,955,654	1930.....	228,275,070	65,103,725	149,348,552
1929.....	11,676,502	3,282,001	8,096,819	1931.....	251,087,023	55,871,994	113,119,516
1930.....	20,430,087	4,157,902	9,940,008	1932.....	218,123,128	50,397,727	130,888,062
				1933.....	140,229,522	62,903,059	133,310,080
				1934.....	140,429,632	47,045,815	122,913,063
				1935.....	139,233,719	48,551,909	103,737,453

1 Including Turkey and Asiatic Union of Soviet Socialist Republics.

Nederland-Jaarstatistiek van den In-, Uit-en Doorvoer.

TABLE 17.—Netherlands: Imports of leaf tobacco by types, 1920-35

Country and product	1920	1921	1922	1923	1924	1925	1926	1927
East Indian:	<i>1,000</i> pounds	<i>1,000</i> pounds	<i>1,000</i> pounds	<i>1,000</i> pounds	<i>1,000</i> pounds	<i>1,000</i> pounds	<i>1,000</i> pounds	<i>1,000</i> pounds
Sumatra.....	12,046	5,142	3,889	5,584	4,960	5,183	4,721	4,438
Java.....	37,285	25,546	17,903	21,076	18,513	24,420	24,376	20,159
Borneo.....	81	119	119	115	79	118	59	37
Total.....	49,412	30,807	21,911	26,776	23,552	29,721	29,056	24,634
American:								
Seedleaf.....	3,815	1,173	573	739	1,525	1,448	1,868	1,069
Maryland.....	3,680	5,294	4,284	4,738	3,538	3,005	3,687	4,215
Kentucky.....	10,050	10,177	7,040	8,615	10,242	12,521	11,526	13,275
Virginia.....	7,318	6,130	4,231	6,001	7,335	5,875	7,203	7,742
Total United States.....	24,893	22,774	16,134	20,093	22,611	22,909	24,342	20,301
Cuba.....	497	195	348	159	210	380	427	838
Brazil.....	4,445	3,724	4,317	5,578	4,182	4,308	4,182	4,869
Paraguay.....	817	549	694	1,155	1,480	1,236	1,848	1,133
Other American.....	678	169	209	904	553	632	759	238
Total American.....	31,330	27,411	21,702	27,940	29,078	29,465	31,558	33,370
European¹:								
Algerian.....	940	1,340	1,285	1,055	2,110	1,672	1,393	1,414
Philippine.....	251	753	357	844	2,474	793	1,041	1,128
Turkish ²	424	602	302	450	670	385	684	010
Other leaf tobacco.....	1,139	1,190	2,248	2,072	2,251	2,540	2,509	3,469
Tobacco stems and waste.....	2,421	1,648	902	2,079	3,353	1,774	1,590	1,322
Total leaf tobacco.....	874	662	758	1,025	2,425	1,244	2,511	2,215
Total leaf tobacco.....	86,707	64,322	49,643	62,847	65,898	67,603	70,952	68,150

Country and product	1928	1929	1930	1931	1932	1933	1934	1935
East Indian:	<i>1,000</i> pounds	<i>1,000</i> pounds	<i>1,000</i> pounds	<i>1,000</i> pounds	<i>1,000</i> pounds	<i>1,000</i> pounds	<i>1,000</i> pounds	<i>1,000</i> pounds
Sumatra.....	4,844	4,094	5,601	5,670	5,018	4,551	4,332	3,907
Java.....	23,178	24,212	21,850	22,313	28,426	20,585	21,645	22,319
Borneo.....	62	18	33	23	21	21	21	2
Total.....	28,084	29,224	27,483	28,006	33,465	31,157	26,001	26,228
American:								
Seedleaf.....	874	652	387	322	127	450	370	260
Maryland.....	4,074	2,554	1,743	867	1,812	3,174	4,019	5,078
Kentucky.....	13,750	14,094	12,193	13,255	6,031	5,904	5,677	5,592
Virginia.....	7,373	7,462	7,523	8,672	8,765	10,126	9,149	6,517
Total United States.....	26,071	24,762	21,846	23,117	17,335	19,714	19,215	14,398
Cuba.....	453	561	1,009	1,589	1,278	1,523	1,294	1,030
Brazil.....	5,324	5,235	6,626	7,617	7,410	5,974	6,204	7,112
Paraguay.....	811	1,575	1,555	2,495	2,192	1,725	1,950	625
Other American.....	249	397	310	403	158	88	51	143
Total American.....	32,908	32,530	31,355	35,221	28,362	29,024	28,744	23,309
European¹:								
Algerian.....	2,218	2,425	2,429	3,652	4,671	8,252	5,165	7,302
Philippine.....	680	400	406	207	243	152	60	201
Turkish ²	937	820	640	272	114	120	238	227
Other leaf tobacco.....	3,645	4,069	5,722	4,543	2,530	4,275	2,754	1,431
Tobacco stems and waste.....	872	1,339	1,674	1,780	1,402	1,964	1,678	1,312
Total leaf tobacco.....	1,047	1,592	836	893	716	1,729	1,481	589
Total leaf tobacco.....	71,296	72,438	70,504	74,524	71,925	76,673	66,121	61,099

¹ From Greece and Bulgaria principally.² European and Asiatic.

Nederland-Jaarstatistiek van den In- en Doervoer, deel 1.

In 1913 about 17 million pounds of tobacco used in the Netherlands were imported from the United States. Largely because of expansion of exports in which United States types were used, imports increased after the close of the war. Between 20 and 25 million pounds were imported from the United States annually. Approximately one-third

of the imports from the United States consisted of the flue-cured types, which were used in smoking mixtures and cigarettes. Almost two-thirds consisted of Kentucky and Tennessee fire-cured tobacco, used in smoking mixtures primarily, and to a small extent in chewing tobacco. The small quantities of imported Maryland tobacco were used in smoking mixtures and cigarettes. During the 1925-29 period about 28 million pounds of tobacco from the Netherland East Indies were imported for consumption, the Sumatra types for cigars, and the Javas for smoking mixtures and cigars. It is estimated that about 85 percent of the Javas is used in smoking mixtures.

Greece, Turkey, and Bulgaria furnish small quantities for cigarettes. Brazil tobaccos are being used more and more as fillers for better brands of cigars; Java fillers are used mainly in cheap cigars. Paraguay contributes small quantities of leaf for smoking mixtures.

An active export trade in tobacco products, which between the years 1925 and 1930 averaged 13 million pounds annually, has declined to less than half of what it was in those years (table 18). The most important item is cut tobacco, sold to the Netherlands colonial possessions. The decline in exports of cut tobacco accounts for the decreased purchases of certain leaf types from the United States. Before the World War, the Netherlands was the foremost exporter of cigars but a decline began in 1920, brought about at first by competition from Germany. Later the trade ran into the same obstacles encountered by all cigar industries—the demand for shorter and cheaper "smokes," increased tariff barriers from other countries, increased excise taxes at home, and labor troubles. Cigar exports amounted to only 140,000 pounds in 1935, compared with 4,712,000 pounds in 1913.

CONSUMPTION OF TOBACCO PRODUCTS

Principally because tobacco products can be bought very cheaply in the Netherlands, the use of tobacco has become a pronounced national custom. The country has control of the raw leaf supply of the East Indian colonies, and for many generations the tobacco industry has been interwoven with the economic welfare of the people.

TABLE 18.—Netherlands: Trade in tobacco products, 1913, 1920-35

Year	Cigarettes		Cigars		Cut, rolled, and snuff	
	Imports	Exports	Imports	Exports	Imports	Exports
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
1913.....	644	100	45	4,712	238	10,022
1920.....	9,845	3,888	666	3,681	235	10,267
1921.....	7,898	3,029	1,338	1,585	1,392	7,491
1922.....	1,269	527	4,804	1,819	81	6,393
1923.....	946	417	796	1,433	183	7,262
1924.....	857	395	49	1,856	287	9,328
1925.....	356	547	45	1,695	159	12,092
1926.....	422	348	17	542	65	15,150
1927.....	548	290	17	608	59	12,157
1928.....	907	320	14	644	50	13,696
1929.....	1,162	343	11	632	47	13,645
1930.....	439	98	10	562	43	12,594
1931.....	508	83	8	375	46	9,933
1932.....	598	39	7	204	91	6,551
1933.....	712	33	7	126	290	5,380
1934.....	680	36	7	127	922	4,980
1935.....	788	20	7	140	1,302	5,229

Per-capita consumption in the Netherlands is large. Only a few times since 1900 has it dropped below 6 pounds. In 1932, the year when per-capita consumption dropped almost universally, the Netherlands per-capita was 7.8 pounds (table 3). Total consumption was 51,431,000 pounds. It was increased to a new high the following year but declined in 1934 and 1935 (table 19). From 1923 to 1932 smoking mixtures averaged about 57 percent of the total; cigars, 29 percent; cigarettes, 13 percent. Since then there has been no marked change in these ratios.

TABLE 19.—Netherlands: Consumption of tobacco products, 1923-35

Year	Cigars	Ciga- rettes	Smoking mixtures ¹	Total	Year	Cigars	Ciga- rettes	Smoking mixtures ¹	Total
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.		1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
1923.....	11,474	4,319	27,961	43,754	1930.....	15,066	7,014	25,323	48,503
1924.....	11,403	5,527	32,178	49,110	1931.....	15,061	7,835	27,143	50,042
1925.....	11,603	4,369	23,417	39,379	1932.....	14,902	8,059	28,470	51,431
1926.....	12,596	5,223	27,640	45,465	1933.....	15,503	8,630	28,093	52,226
1927.....	13,174	5,712	26,113	44,999	1934.....	15,711	8,656	23,188	47,555
1928.....	13,036	6,152	25,906	45,094	1935.....	15,749	8,838	23,300	47,887
1929.....	14,807	7,010	21,010	46,727					

¹ Includes chewing tobacco, which was not reported separately after 1931; consumption from 1923 to 1931 amounted to 300,000 pounds annually. Consumption of snuff was not reported.

PRICES OF TOBACCO PRODUCTS

The average retail prices of tobacco products in the Netherlands from 1923 to 1932 are shown in table 5. Prices of smoking tobacco and cigarettes changed but little from 1923 to 1930. As manufacturing costs were reduced, the prices of cigars declined. In 1932 retail prices of all classes of tobacco products were reduced. New brands of full-sized cigars were placed upon the market at 5, 6, and 8 Dutch cents, resembling those formerly retailing at 8, 10, and 12 Dutch cents. Although tax rates on cigarettes were increased, retail prices of cigarettes were reduced, some brands as much as 30 percent and more. Consumption in the Netherlands continued to increase whereas most European countries were experiencing a decline.

NORWAY

Norway is one of the few countries of Europe that has not followed a monopolistic trend in the tobacco industry but has left all phases in the hands of private individuals. No tobacco is grown for commercial purposes. During the last decade, Norwegian factories have consumed between 5 and 6 million pounds of tobacco annually (table 20).

TRADE

During recent years between 80 and 90 percent of the tobacco used has been obtained from the United States. The greater part reaches Norway as direct shipments, but important quantities come in via European redistribution centers, particularly Hamburg and Bremen. This route was closed by the war but was reopened during the last few years. For many years Norway has been a market for the fire-cured tobacco of Virginia. This type accounts for about 45 percent of the total leaf imports. It is used principally for smoking tobacco and snuff. Kentucky and Tennessee fire-cured tobaccos are also found on Norwegian markets, but not in important quantities. They are used in chewing tobacco and smoking mixtures.

TABLE 20.—Norway: Imports of tobacco, 1923-85

UNMANUFACTURED

Country from which imported	1923	1924	1925	1926	1927	1928	1929
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
United States.....	5,309	4,519	3,413	3,904	3,967	3,965	3,945
United Kingdom.....	130	107	80	49	35	31	53
Netherlands.....	139	143	132	171	78	74	88
Belgium.....	63	98	87	125	108	128	95
Germany.....	176	295	482	567	711	719	907
Denmark.....	89	192	91	83	65	58	88
Greece.....	12	(1)	(1)	(1)	(1)	108	85
Turkey.....	(1)	(1)	(1)	(1)	41	32	170
Other countries.....	26	112	72	82	38	95	162
Total.....	5,944	5,457	4,360	4,951	5,103	5,210	5,533
Total value.....	1,000 kr. 14,927	1,000 kr. 13,610	1,000 kr. 9,567	1,000 kr. 8,249	1,000 kr. 7,283	1,000 kr. 6,949	1,000 kr. 7,023

Country from which imported	1930	1931	1932	1933	1934	1935
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
United States.....	3,889	4,554	3,657	3,243	3,703	4,336
United Kingdom.....	41	93	140	172	204	66
Netherlands.....	144	122	156	136	181	219
Belgium.....	103	49	58	17	66	107
Germany.....	950	1,318	1,040	728	676	144
Denmark.....	148	213	226	265	190	120
Greece.....	37	73	58	72	44	256
Turkey.....	47	122	147	230	151	183
Other countries.....	92	99	163	64	173	308
Total.....	5,457	6,665	5,040	4,927	5,388	5,772
Total value.....	1,000 kr. 6,407	1,000 kr. 7,558	1,000 kr. 5,917	1,000 kr. 5,135	1,000 kr. 5,315	1,000 kr. 5,913

¹ Not separately reported.

² Includes Luxemburg, subsequent to 1931.

³ Includes Bulgarian, 31,522 pounds; Cuba, 31,160 pounds; Austria, 62,767 pounds; not separately reported for other years.

MANUFACTURED

Year	Cigars		Cigarettes		Smoking tobacco		Chewing tobacco		Snuff		
	Quantity	Value	Quantity	Value	Quantity	Value	Quantity	Value	Quantity	Value	
	Lb.	Kroner	Lb.	Kroner	Lb.	Kroner	Lb.	Kroner	Lb.	Kroner	
1923.....	238,781	*3,010,500	57,215	1,093,500	107,371	*512,400	(1)	Kroner	353	Kroner	1,300
1924.....	89,727	676,060	13,150	117,500	80,759	383,600	16,548	57,300	1,146	4,100	
1925.....	78,755	714,600	13,150	117,500	48,869	213,600	3,274	13,660	7,487	18,300	
1926.....	72,648	494,400	11,937	140,500	49,299	218,400	3,618	11,700	6,775	20,000	
1927.....	72,888	496,100	13,091	147,100	63,775	231,400	2,637	8,300	5,326	13,500	
1928.....	66,978	425,500	10,895	85,000	65,750	208,800	2,612	7,100	298	800	
1929.....	97,714	420,500	11,138	81,000	75,523	212,200	2,227	5,300	481	1,300	
1930.....	72,401	413,461	9,700	66,100	70,173	208,100	2,655	6,300	428	1,200	
1931.....	63,492	403,260	15,305	103,787	134,134	309,847	67,487	160,713	17,311	47,112	
1932.....	35,929	433,365	6,182	45,005	75,644	296,201	1,457	5,616	13	21	
1933.....	38,408	385,170	5,844	35,693	73,186	168,136	1,755	5,168	31	54	
1934.....	39,817	358,420	5,881	32,756	85,755	170,915	1,354	4,078	22	38	
1935.....	36,936	(1)	4,012	(1)	*113,916	(1)	(1)	(1)	(1)	(1)	

* Includes cigarettes.

† Includes with cigars.

‡ Includes chewing tobacco.

§ Not available.

¶ Preliminary.

* Included with smoking tobacco.

From 1928 to 1932 there was a decided trend toward the consumption of light tobaccos, accompanied by increased imports of flue-cured leaf from the United States. Lower prices placed on cigarettes containing flue-cured tobacco (effective in 1929) increased the consumption. Flue-cured imports in 1928 amounted to only 20 percent of the total; in 1932 the proportion had risen to 52 percent. Flue-cured tobacco enters into the manufacture of cigarettes similar to those that are popular in the United Kingdom. Small quantities of oriental tobacco are imported for use in cigarettes of the Turkish variety.

CONSUMPTION OF TOBACCO PRODUCTS

No statistics are available as to the consumption of tobacco products except those released by the Statistical Office showing the quantities on which stamp taxes are paid. From 1925 these are practically complete. Some products were not taxed during the early part of the period under review, and for such years it has been necessary to make estimates of consumption. This is particularly true of chewing tobacco prior to 1923. These estimates, together with stamp-sale data, are shown in table 21.

Until the World War, the manufacture of tobacco products was confined chiefly to chewing tobacco, cheap smoking tobacco, and snuff. But transportation difficulties, incident to the war, forced domestic factories to increase their output to meet the demands previously supplied by imports. For many years the industry has been encouraged because duties were higher on imported tobacco products than on leaf tobacco, and in 1923 a surtax of 33½ percent was placed on all import duties (in addition to a specific duty collected on a gold basis to offset the depreciation of the krone). The surtax was raised in 1924 to 50 percent and in 1932 to 80 percent. Thus, tobacco consumption consists mainly of domestic products.

Consumption of tobacco products has fluctuated somewhat with the economic conditions of the country but there was no marked change in the total consumption during the period under review. The greatest decline was in the use of cigars. Moderate declines in the consumption of chewing tobacco and snuff were offset by an increase in the use of cigarettes. The consumption of smoking mixtures did not change materially.

TABLE 21.—*Norway; Consumption of tobacco products, 1919 and 1920-35*

Year	Cigars	Cigarettes	Smoking mixtures	Chewing tobacco	Snuff	Total
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
1919	441	485	2,425	2,616	1,047	7,044
1920	295	1,400	12,205	12,646	1,047	7,593
1921	183	1,268	2,315	12,646	1,045	7,457
1922	125	1,215	2,205	12,646	1,036	7,227
1923	90	1,248	2,094	3,291	1,078	7,731
1924	92	1,157	2,170	2,648	1,043	7,110
1925	143	1,486	2,163	2,535	1,157	7,469
1926	105	1,367	2,008	2,425	1,171	7,076
1927	81	1,318	2,013	2,315	1,082	6,809
1928	150	1,281	2,216	2,083	1,049	6,781
1929	150	1,362	2,315	2,136	1,052	7,024
1930	172	1,554	2,467	2,030	1,027	7,259
1931	146	1,431	2,586	1,836	910	6,960
1932	144	1,416	2,669	1,626	916	6,803
1933	144	1,434	2,738	1,502	864	6,682
1934	169	1,318	3,026	1,441	851	6,835
1935	260	1,370	3,091	1,412	857	6,996

¹ Estimates based upon the quantity of products upon which taxes were paid.

SWEDEN

The tobacco industry of Sweden has been a Government monopoly since June 1, 1915, operated by a concessionaire company (Aktiebolaget Svenska Tabaksmonopolets) in partnership with the State. The concessionaire company has exclusive rights over the purchase of leaf tobacco and its manufacture but the importation and sale of tobacco products and the cultivation of tobacco is free to anyone who will comply with regulations required in the interest of revenue and for the protection of the company.

PRODUCTION OF LEAF TOBACCO

Since the World War, tobacco manufacturing plants of Sweden have been using about 12,500,000 pounds of leaf tobacco annually, less than 1,500,000 pounds of which were grown in the country. For a long time small quantities of tobacco have been grown, but production was decreased during the war and has remained at a low level since that time, notwithstanding the fact that the monopoly company has continued its efforts to further the growth of domestic tobaccos. All the Swedish crop is bought by the Monopoly and used in making snuff. Prices paid to the growers range from 15 to 20 cents per pound. Most of the crop is grown in the counties of Kristianstad and Malmöhus; the remainder (about one-eighth) is grown in central Sweden, where the best prices are realized.

TRADE

Most of the tobacco consumed is imported from the United States, either directly or through other European countries. Consumption of foreign leaf tobacco during the decade ending in 1930 amounted to over 11,000,000 pounds annually, two-thirds of which originated in the United States. Very little United States tobacco is used in Swedish cigarettes. The cigarette taste in Sweden inclines toward oriental varieties, although in recent years a leaning toward the flavor of United States flue-cured has been noted. From 1923 to 1928 consumption of United States flue-cured tobacco in Swedish cigarette factories amounted to about 516,000 pounds annually, or one-twelfth of the consumption of all United States tobacco in Sweden. The consumption of oriental tobacco in Swedish cigarettes for the same period was about 1,400,000 pounds annually (table 22).

In response to an increase in cigarette consumption, and through trade advantages derived from barter arrangements with Greece, the annual consumption of oriental leaf more than doubled during the period 1929-32 compared with 1923-28. It amounted to 2,908,000 pounds. The consumption of United States flue-cured leaf increased only 53 percent during that period. It amounted to 791,000 pounds. A commercial arrangement with Greece, which expired in 1933 and limited the amount of the Swedish tobacco purchase to 80,000 pounds sterling, has been supplanted by a new agreement (effective Jan. 1, 1934) providing that Sweden shall purchase from Greece as much tobacco as is "compatible with Swedish monopoly requirements." As before, payment is to be made in Swedish machinery or other industrial products, consequently oriental tobacco is in a more favorable position than ever before for Swedish consumption.

TABLE 22.—Sweden: Imports of tobacco, 1913 and 1920-34

UNMANUFACTURED

Country from which imported	1913	1920	1921	1922	1923	1924	1925	1926
	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>
United States	4,108	9,061	6,303	7,100	6,217	9,608	5,235	6,108
Cuba		163	126		29			105
Brazil		525	378		12	486	627	873
United Kingdom	490	230	106	74	310	384	340	590
Netherlands	398	500	330	145	730	450	861	748
Germany	4,082	112	0	1,072	1,447	251	577	2,050
Denmark	59	17	3	132	145	49	55	
Greece	28	469	669	750	683	1,172	1,008	1,096
Turkey	364	423	386	147	36	102	135	425
Other countries	278	1,388	1,326	77	193	6	94	226
Total	10,319	12,778	9,093	9,500	9,813	12,506	9,022	12,830
Total value	<i>1,000 kronor</i>	<i>1,000 kronor</i>	<i>1,000 kronor</i>	<i>1,000 kronor</i>	<i>1,600 kronor</i>	<i>1,000 kronor</i>	<i>1,600 kronor</i>	<i>1,000 kronor</i>
	6,726	17,527	15,722	11,180	15,261	21,535	17,513	21,269

Country from which imported	1927	1928	1929	1930	1931	1932	1933	1934
	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>
United States	6,679	4,481	4,751	4,274	7,605	4,241	9,238	2,403
Cuba	828	127	1,127	307	417	494	308	654
Brazil	910	550	1,050	861	861	64	483	661
United Kingdom	217	294	438	367	289	400	657	326
Netherlands	820	915	744	678	750	920	682	562
Germany	855	1,401	4,151	1,595	1,118	402	228	350
Denmark	463	171	120	141	4	13	24	69
Greece	1,558	704	3,462	1,583	1,510	2,232	2,256	2,373
Turkey	153	146	142	729	178	801	1,137	714
Other countries	2	50	48	150	60	104	106	140
Total	12,764	8,788	17,061	16,415	12,850	9,730	15,119	8,857
Total value	<i>1,600 kronor</i>	<i>1,000 kronor</i>	<i>1,000 kronor</i>	<i>1,000 kronor</i>	<i>1,000 kronor</i>	<i>1,000 kronor</i>	<i>1,000 kronor</i>	<i>1,000 kronor</i>
	19,645	11,508	30,080	16,199	11,630	16,899	18,414	12,357

MANUFACTURED

Year	Cigars and cigarillos		Cigarettes		Smoking tobacco*	
	<i>Pounds</i>	<i>Kronor</i>	<i>Pounds</i>	<i>Kronor</i>	<i>Pounds</i>	<i>Kronor</i>
1913	402,278	2,280,990	692,850	3,457,014	291,378	434,369
1920	594,303	7,108,590	264,730	2,898,396	704,880	3,621,847
1921	716,769	9,794,687	220,431	1,896,637	433,974	2,121,130
1922	217,330	2,078,324	111,336	645,068	302,382	1,203,327
1923	234,580	1,198,364	104,608	616,616	221,303	869,240
1924	103,132	1,221,059	121,160	526,636	165,347	562,909
1925	182,091	1,131,761	278,688	1,014,513	105,616	516,051
1926	197,693	1,208,193	241,618	936,167	115,777	435,186
1927	188,802	1,260,156	273,613	1,028,714	101,092	339,062
1928	176,469	1,231,207	236,383	901,385	201,499	495,303
1929	136,169	987,561	247,296	1,038,243	267,759	590,265
1930	148,694	936,953	288,823	1,007,991	255,405	551,641
1931	117,401	716,443	282,147	951,163	312,082	579,201
1932	65,465	416,591	166,379	616,956	279,670	495,219
1933	70,243	432,403	141,297	521,351	329,098	524,299
1934	69,944	410,011	176,776	634,316	442,795	643,270

* Data for 1913, and 1920-25 contain unimportant quantities of chewing tobacco and snuff.

Handel Bertittelse av Kommersekollegium, Sweden.

About one-third of the United States tobacco from 1929 to 1932 was made up of the fire-cured tobacco of western Kentucky and Tennessee, most of which entered into the production of snuff and smoking mixtures; one-sixth consisted of Virginia fire-cured, used

largely in chewing tobacco. It has been reported by the Swedish Monopoly that two-thirds of the tobacco bought from the United States was used in the manufacture of snuff. This quantity includes stems, an important item in snuff manufacture.

In addition to leaf imports from the United States, small supplies of cigar tobaccos are bought from Cuba, Brazil, and the Netherlands. Some of the oriental used by the Monopoly comes in through Germany. At one time the tobacco requirements of the country were filled largely through brokers in Bremen and Hamburg, but after the establishment of the Monopoly, direct purchases were consummated and the Monopoly company even established its own packing houses in Cuba and Brazil.

CONSUMPTION OF TOBACCO PRODUCTS

Owing to a general decline in the use of snuff and chewing tobacco, the consumption trend of tobacco products was downward from 1920 to 1929, when the increase in cigarette consumption became great enough to offset this decline. Total consumption in 1932 was about 18,400,000 pounds, compared with 17,600,000 in 1929 and 21,400,000 pounds in 1920 (table 23).

It is estimated that in 1913 almost 80 percent of the total tobacco consumption was in the form of snuff. This was gradually reduced until in 1932 snuff accounted for only 58 percent of the total. The consumption of cigars declined almost one-fourth between 1920 and 1932. Cigarette consumption declined after 1920 and did not again reach the level of that year until 1928, when an upward trend began. In 1934 it amounted to 3,700,000 pounds. Consumption of smoking mixtures increased after 1920 but has shown little change since 1924. The general trend of tobacco consumption in Sweden has been downward since 1932.

TABLE 23.—Sweden: Consumption of tobacco products, 1920-35

Year	Cigars	Cigarettes	Smoking tobacco	Chewing tobacco	Snuff	Total
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,500 lb.
1920	1,046	2,404	1,700	840	14,383	21,372
1921	1,518	2,152	1,797	725	13,441	19,633
1922	1,588	1,707	1,078	644	12,463	18,470
1923	1,285	1,713	2,081	575	12,128	17,782
1924	1,350	1,833	2,207	522	11,825	17,737
1925	1,411	1,827	2,260	491	11,706	17,707
1926	1,463	2,002	2,255	465	11,500	17,775
1927	1,440	2,148	2,205	434	11,314	17,541
1928	1,465	2,531	2,163	603	11,032	17,594
1929	1,535	2,816	2,152	377	10,579	17,559
1930	1,590	3,250	2,070	328	10,706	17,971
1931	1,515	3,028	2,030	313	10,657	18,143
1932	1,458	3,087	2,224	295	10,679	18,373
1933	1,420	3,045	2,238	267	10,456	18,020
1934	1,449	3,721	2,202	240	10,039	17,711
1935	1,458	3,038	2,202	227	9,857	17,682

Aktiebolaget Svenska Tobaksmonopolets.

PRICES OF TOBACCO PRODUCTS

Retail prices of domestic tobacco products are fixed by the monopoly company, which is the agency through which the State receives its tobacco revenue. Since the main tax is levied against the price of products, there is a close coordination between prices and the tax system. For about 10 years after the establishment of the Monopoly, the company paid customs duty on all leaf tobacco and tobacco products imported. It also paid to the State an excise tax based upon the retail price of tobacco products sold. Thus, any reduction in the price of tobacco products led to a loss of revenue to the State, unless the tax rate were raised or unless the increase in consumption (resulting from reduced prices) were sufficient to offset the loss in revenue. Many changes have been made in the Swedish tax system since the establishment of the Monopoly in 1915. In general, tax rates have been increased while the prices of tobacco products have been reduced (tables 24 and 5).

The rates for 1934 apply only to domestic tobacco products. The specific duty dates from 1924, when a general revision was made in the tax system and the import duty was supplanted by the specific duty. Prices of all classes of tobacco products were lowered the following year. The period 1925-31 was characterized by annual reductions in the prices of all classes of tobacco products except snuff, the item of greatest consumption. For 7 years, ended in 1932, the price of snuff was 3.9 kronor per kilogram (about 47 cents per pound in United States currency).

TABLE 24.—Comparison of tax rates on tobacco products in Sweden, 1915-16 and 1934

	Excise tax based on retail price		Ad valorem based on retail price, 1934	Specific duty, 1934
	1915	1916		
	Percent	Percent	Percent	Crowns per kilogram
Cigars.....	15	15	25	1 0.006
Cigarillos.....	15	15	37	1 .004
Cigarettes.....	20	30	54	1 .002
Smoking tobacco.....	10	20	48	1.50
Chewing tobacco.....	10	20	32	1.00
Snuff.....	15	25	35	.75

1 Each.

2 With mouthpieces.

3 Without mouthpieces.

DENMARK

The tobacco industry in Denmark is controlled by private enterprise but it is not entirely free. The present limitation is found in the Foreign Exchange Commission created in January 1932, for the purpose of upholding the Danish krone by restricting imports until a favorable trade balance should be preserved. (Denmark withdrew from the gold standard in September 1931.) It is reported that a tacit understanding exists whereby goods from England are favored, as coming from an important customer, and are given preference over wares from other nations that have imposed heavy duties on Danish goods. In the case of tobacco, restrictions are placed only on the manufactured product, leaf tobacco remaining on a free basis as a necessity to the industry.

It is possible but not feasible to grow tobacco in Denmark. It does not mature with pleasing taste and aroma. No large quantities have been grown except during the World War period, when it was difficult to obtain supplies from outside sources. From 1926 to 1932 the manufacturing plants used between 12 and 14 million pounds of leaf tobacco annually.

TRADE

Most of the leaf tobacco used in Denmark originates in the United States. It is not all bought direct. Much of the supply is bought by Danish manufacturers or their brokers on the markets of Germany, the Netherlands, and (since the war) the United Kingdom. Just before the war, when Danish manufacturers were consuming more United States tobacco than at any other time of their history, less than 10 percent of the Danish leaf imports were recorded as from the United States. Disruption of the German market by the war left only the Netherlands market free, consequently direct imports from the United States began to increase in 1915.

More than one-fourth of the total Danish leaf imports are direct from the United States. It is not definitely known what portion of the leaf imported from Germany, the Netherlands, and the United Kingdom is of United States origin, as it is through these three trade channels that Danish factories also obtain their oriental and cigar-leaf supplies (table 25).

Around the war period the United States tobacco consumed was of the fire-cured types. Since the war United States types have been displaced to some extent by other tobaccos, and from 1925 to 1932 about equal quantities of United States fire-cured and flue-cured tobaccos were used. The fire-cured types are used in snuff, chewing tobacco, and smoking mixtures; the flue-cured types in the medium and better grades of smoking mixtures, and in cigarettes. The use of flue-cured tobaccos in cigarettes increased in the early twenties, but declined during 1925-29 owing to agitation as to their low nicotine content. It is reported by the trade that the use of oriental types increased during 1925-29 but consumption of East Indian types did not greatly change.

A fairly important export trade exists in smoking and chewing tobacco and snuff. Only minor quantities of other tobacco products are exported (table 26).

TABLE 25.—Denmark: Imports and reexports of tobacco, 1913 and 1920-34

UNMANUFACTURED

Year	Imports by countries						Total value	Total re-exports
	United States	United Kingdom	Netherlands	Germany	Other countries	Total imports		
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 kroner	1,000 pounds
1913	167	57	3,140	5,498	305	10,306	6,774	69
1920	10,651	808	4,000	845	4,050	20,554	43,527	4,881
1921	2,841	784	1,356	1,801	1,201	7,983	12,606	2,103
1922	4,118	1,313	2,315	2,481	546	10,873	14,656	1,303
1923	3,193	2,302	3,616	3,660	650	13,570	10,421	1,801
1924	3,321	2,135	3,278	1,478	711	11,869	15,575	1,907
1925	3,471	2,118	3,663	1,671	392	11,383	14,079	1,029
1926	3,640	1,324	4,117	3,513	414	13,008	13,712	795
1927	3,230	1,376	3,300	3,426	159	13,517	15,550	1,893
1928	4,472	1,736	3,448	3,620	593	13,869	14,789	1,557
1929	4,162	1,168	4,128	3,627	921	13,930	14,248	1,416
1930	4,128	1,411	4,723	3,670	1,366	15,598	16,282	1,101
1931	3,713	1,627	4,602	3,574	1,243	14,810	14,192	1,330
1932	3,169	1,204	5,063	3,503	1,744	15,093	15,265	1,038
1933	4,176	1,333	6,840	3,267	1,780	17,402	18,336	886
1934	3,640	1,375	8,397	3,351	1,467	18,230	20,482	945

MANUFACTURED

Year	Imports				Reexports					
	Cigars and cheroots		Cigarettes		Smoking tobacco		Cigars and cheroots		Cigarettes	
	1,000 pounds	1,000 kroner	1,000 pounds	1,000 kroner	1,000 pounds	1,000 kroner	1,000 pounds	1,000 kroner	1,000 pounds	1,000 kroner
1913	329	1,189	200	410	407	473	21	1	7	72
1920	277	3,160	733	5,168	773	2,656	6	107	6	7
1921	791	4,550	443	1,713	1,123	3,275	11	43	43	140
1922	1,085	4,168	509	1,335	832	1,029	4	34	34	101
1923	415	1,857	368	1,104	669	1,569	6	8	8	69
1924	81	609	306	1,119	571	1,320	2	32	2	66
1925	57	483	342	1,054	620	1,255	3	31	4	49
1926	181	1,015	288	882	797	1,134	4	22	55	55
1927	260	1,325	305	892	783	1,058	4	31	52	52
1928	194	1,013	367	1,265	772	1,030	2	28	54	52
1929	203	968	413	1,366	726	973	3	76	65	65
1930	217	1,116	395	1,503	982	1,285	3	67	102	102
1931	205	947	424	1,570	1,169	1,518	3	38	140	140
1932	63	310	314	1,113	648	885	1	17	62	62
1933	21	165	274	1,054	169	416	2	24	40	40
1934	19	125	203	1,180	175	371	2	46	66	66

¹ Data for 1913 and 1920-23 contain unimportant quantities of chewing tobacco.

Danmarks Vareindførsel og = Udførsel.

TABLE 26.—Denmark: Exports of tobacco products, 1913 and 1920-34

Year	Cigars and cheroots		Cigarettes		Smoking and chewing tobacco		Snuff	
	1,000 pounds	1,000 kroner	1,000 pounds	1,000 kroner	1,000 pounds	1,000 kroner	1,000 pounds	1,000 kroner
1913	114	816	13	35	318	304	71	75
1920	134	2,068	414	1,702	787	2,323	123	513
1921	60	908	24	162	179	626	58	340
1922	36	485	7	45	150	453	67	393
1923	29	414	22	129	174	553	99	436
1924	34	474	32	153	187	559	95	465
1925	32	460	34	170	210	625	102	497
1926	28	424	31	135	223	552	105	391
1927	33	434	27	112	217	528	152	344
1928	40	516	25	111	239	544	181	377
1929	30	414	30	117	216	495	117	405
1930	31	303	24	87	242	515	115	427
1931	24	310	17	68	280	491	133	449
1932	23	269	12	49	265	408	82	299
1933	31	337	7	37	307	471	94	338
1934	31	348	10	39	335	516	76	276

Danmarks Vareindførsel og = Udførsel.

REEXPORTS

During the war, when the ports of Bremen and Hamburg were closed as distribution centers for tobacco in Europe, a reexport trade sprang up from Copenhagen. The trade, which was in leaf tobacco principally, began to take on some importance in 1916, when 1,295,000 pounds were reexported. It reached its zenith in 1919 when reexports of leaf amounted to 6,682,000 pounds. As the nearest neighbors were the logical buyers, steady sales were made to Norway and Sweden. Low-grade flue-cured leaf was also sold to Estonia, Latvia, and Lithuania in fairly important quantities. But owing to the more advantageous geographical location of Bremen and Hamburg, Germany has been able to reclaim most of the reexport trade lost by the war, and tobacco reexports from Denmark in 1934 amounted to only 945,000 pounds.

CONSUMPTION OF TOBACCO PRODUCTS

In 1920 the consumption of tobacco products amounted to approximately 16,000,000 pounds, a quantity 40 percent greater than in 1913. All classes of products shared in the increase. Cigars accounted for about 29 percent of the total, smoking mixtures 36 percent, cigarettes 11 percent, chewing tobacco 20 percent, and snuff 4 percent (table 27). During the last decade, however, at least 60 percent of the tobacco consumed was in the form of smoking tobacco and cigars, of a near-equal importance. Cigarette consumption did not reflect the rapid increase, characteristic of most countries after the war, and the decline in chewing tobacco consumption was very gradual. Because of the activities of the Foreign Exchange Commission, which became effective early in 1932, there was an increase in the output of factories to supply the products previously imported, but consumption subsequently decreased. Any advantage that may have been gained by eliminating imports of products was offset by the lowered purchasing power of the people and other adversities confronting the industry.

TABLE 27.—Denmark: Consumption of tobacco products, 1913 and 1920-34

Year	Cigars †	Cigarettes	Smoking mixtures	Chewing tobacco	Snuff	Total
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
1913.....	3,387	866	4,352	2,820	295	11,680
1920.....	4,724	1,876	5,968	3,269	551	16,388
1921.....	3,408	1,914	5,081	2,608	522	13,536
1922.....	3,576	2,069	5,073	2,707	568	14,041
1923.....	3,966	2,438	5,073	2,730	668	14,881
1924.....	3,845	2,533	4,855	2,634	712	14,579
1925.....	3,413	2,692	4,775	2,626	716	14,222
1926.....	3,631	2,910	5,064	2,612	794	15,011
1927.....	3,508	3,005	4,905	2,348	851	14,617
1928.....	3,435	3,395	4,947	2,185	871	14,833
1929.....	4,103	2,258	5,046	2,244	807	14,548
1930.....	4,566	2,912	5,110	2,227	944	15,766
1931.....	4,639	2,910	4,951	2,096	992	15,611
1932.....	3,696	2,580	5,403	1,865	851	14,295
1933.....	4,189	2,517	5,421	1,697	975	14,708
1934.....	4,816	2,477	5,417	1,559	1,007	15,476

† Including cigarillos.

PRICES OF TOBACCO PRODUCTS

Prices of all tobacco products except cigarettes and snuff were reduced in 1929, reduction in cigar prices amounting to almost 12 percent. An increase in the cigarette tax, effective in December 1928, brought cigarette prices up about 48 percent, a change that helped to check, for a time at least, the growth in cigarette consumption. The effect of this price increase was somewhat offset by a currency depreciation in 1931 and 1932, occasioned by the Danish Government's abandonment of the gold standard. Cigarette taxes were increased again in 1932, but during that year little of this increase was passed on to the consumer in the form of price advance. Average prices of tobacco products are shown in table 5.

AUSTRIA

The present tobacco monopoly in Austria is based upon laws created in 1835, although the Government has exercised control over the tobacco industry since the latter part of the seventeenth century. Prior to the World War, Austria and Hungary maintained separate monopolies. Favorable trade relations existed between them. They were advantageous to both countries since Hungary supplied a large part of the Austrian leaf requirements. By the terms of post-war settlements, Hungary lost tobacco area and Austria-Hungary lost population, thus decreasing the leaf surplus of Hungary and the potential consumption of both. Leaf consumed in Austrian factories between 1925 and 1932 amounted to about 25,000,000 pounds annually.

TRADE

Most of the tobacco used in the manufacture of cigarettes is imported from Bulgaria, Greece, and Turkey. That used in making cigars is imported from Hungary, Netherland East Indies, the United States, Dominican Republic, and Brazil. That used in pipe mixtures comes from Java, Paraguay, Hungary, and the United States (table 28). Many of these tobaccos, especially those from the United States, are bought by the Monopoly in the free ports of Bremen and Hamburg and other markets of Europe. Between 1925 and 1932, the imports of Virginia and Kentucky-Tennessee fire-cured tobacco, amounting to about 2,000,000 pounds annually, were used principally in the so-called Virginia cigars. There was also an annual consumption of approximately 7,000,000 pounds of other tobacco from the United States (principally flue-cured and Maryland). The flue-cured types were used in cigarettes and other types largely in pipe mixtures.

Trade agreements, effective during 1934, increased the imports from Hungary and Turkey (as compared with 1933) and materially decreased those from Bulgaria.

CONSUMPTION AND PRODUCTION OF TOBACCO IN EUROPE 55

TABLE 28.--*Austria: Imports of leaf tobacco, 1919-23 and 1930-35*

Country of origin	1919	1920	1921	1922	1923	1924	1925	1926
	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>
United States.....	1		4,207	2,075	5,859	3,187	1,828	4,010
Cuba.....					61	214	343	475
Dominican Republic.....				(1)	3,667	2,873	1,071	1,112
Brazil.....				(1)	1,797		2,472	210
Hungary.....			1,038		2,752			659
Bulgaria.....			5,980	9,489	8,987	12,973	10,812	2,039
Greece.....		960	1,538		1,631	726	1,479	1,502
Turkey.....	299	298	942	3,627	3,596	4,983	970	9,847
Netherland East Indies.....	1,291	3,644	9,391	2,617	5,127	4,744	5,250	4,337
Other countries.....	224	5,001	1,009	13,748	660	3,800	2,314	3,903
Total.....	1,725	9,909	24,108	31,556	33,040	30,540	26,525	28,094
Total leaf and manufactured.....	1,730	9,923	25,082	32,521	34,186	30,554	26,543	28,721

Country of origin	1927	1928	1930	1931	1932	1933	1934	1935
	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>
United States.....	3,009	2,985	3,031	2,158	965	788	1,240	1,010
Cuba.....	749	432	379	294				
Dominican Republic.....	(1)			305		193	117	280
Brazil.....	(1)	1,413	308	291	215	529	623	282
Hungary.....	3,004	4,883	4,311	2,981	4,861	5,548	7,020	8,789
Bulgaria.....	8,066	8,757	3,119	9,328	5,986	6,689	1,784	3,176
Greece.....	13,002	4,552	3,880	8,214	8,905	4,362	4,307	3,396
Turkey.....	3,734	6,332	3,733	3,652	2,719	2,654	3,167	1,619
Netherland East Indies.....	2,763	3,488	2,497	1,061	138	2,557	2,224	3,763
Other countries.....	4,724	183	190	276	127	386	251	1,450
Total.....	39,551	33,025	22,048	29,160	23,076	24,566	20,753	21,789
Total leaf and manufactured.....	39,551	33,260	22,057	29,181	24,011	24,500	20,756	21,784

¹ Possibly included in Other countries.

² From United Kingdom, 4,617,314 pounds; from Italy, 2,628,015 pounds.

³ From French Africa in 1924, 820,500 pounds; in 1925, 1,207,865 pounds; in 1926, 3,810,661 pounds; in 1927, 2,310,641 pounds.

⁴ Not available by countries for 1929; total leaf imports amounted to 20,080,000 pounds.

Statistik des Auswärtigen Handels Österreichs.

CONSUMPTION OF TOBACCO PRODUCTS

The consumption of tobacco products was at a low level following the war. Even as late as 1923 the total tobacco consumption of the country amounted to only 21,400,000 pounds; but from 1924 to 1929 the annual consumption was around 24,000,000 pounds, the gain having been brought about chiefly by an increase in cigarette consumption (table 29). A steady decline was reflected in the consumption of smoking tobacco from 1923 to 1933, when only 8,100,000 pounds were used. The consumption of Virginia cigars, in which fire-cured tobacco from the United States is used, increased from 1925 to 1930, but has decreased considerably since 1931. However, most of the decline in cigar consumption was in the higher-priced groups.

PRICES OF TOBACCO PRODUCTS

For many years it was the policy of the Austrian Monopoly to keep the variety range of its products (except chewing tobacco and snuff) well up into the higher-priced brackets, so that among the cheap and medium-priced brands there was little choice for the consumer. Responding to a demand for greater variety among the low-priced products, which started even before the economic crisis began in Europe and became more insistent as the depression advanced, the Monopoly has developed many new brands to retail at popular prices. Efforts were centered on cigarettes, average prices of which were decreased

from 47.7 shillings per kilogram in 1929 to 41.8 shillings per kilogram in 1932 (table 5). The Monopoly has introduced cigarettes similar in blend to American, Italian, and other foreign makes, to meet the demands of tourists and to reduce the number of cigarettes imported.

TABLE 29.—*Austria: Consumption of tobacco products, 1920-35*

Year	Cigars	Cigarettes	Smoking mixtures	Chewing tobacco	Snuff	Total
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
1920.....	1,528	5,586	5,076	(1)	370	12,560
1921.....	1,867	7,001	5,978	(1)	374	15,240
1922.....	1,867	7,936	10,132	(1)	280	20,215
1923.....	1,730	6,470	12,438	508	278	21,433
1924.....	2,250	8,247	11,867	639	276	23,279
1925.....	2,377	8,761	11,615	659	287	23,699
1926.....	2,248	9,688	11,347	692	279	24,254
1927.....	1,920	9,972	10,933	838	277	23,930
1928.....	1,993	10,451	10,741	885	284	24,354
1929.....	1,992	10,519	10,537	874	272	24,194
1930.....	1,944	10,646	10,183	773	265	23,211
1931.....	1,700	10,559	9,512	845	253	22,869
1932.....	1,405	11,353	8,137	838	250	21,983
1933.....	1,176	10,658	8,123	801	233	20,991
1934.....	1,037	9,701	8,650	674	227	20,322
1935.....	1,149	9,816	8,676	627	213	20,481

¹ Included with smoking mixtures.

PORTUGAL

No tobacco is grown for commercial purposes in Portugal. For several years prior to 1927, the manufacture and sale of tobacco products were controlled by a French monopoly company which rented its privileges from the State, but in 1927 the industry was made "free" under certain conditions and the State factories were rented by tender to the *cia*. Portuguesa de Tabacos (a subsidiary of the old monopoly company). Only two companies submitted bids on the factories, and as the successful bidder was not to be granted a monopoly, Tabaqueira (the other bidding company) declared its intention of becoming a competitor and qualified later for manufacturing and selling tobacco products. However, in recent years, these companies sell their products at the same prices.

TRADE

During the period from 1925-32, manufacturing plants used between 5,000,000 and 7,000,000 pounds of leaf tobacco annually, more than half of which came from the United States (table 30). For a long time United States tobacco has played a leading part in the tobacco industry, purchases having increased as the industry developed. About one-half of the tobacco from the United States consists of lugs and seconds of the fire-cured types, which are used largely in low-priced smoking mixtures; and approximately one-third consists of Burley, used in blended cigarettes, some of which are similar to those popular in the United States. Almost 1,000,000 pounds of flue-cured (cutting grades) are used annually, in blended cigarettes principally. Small quantities of dark tobacco, imported from Angola and Java, are used in low-priced smoking mixtures. Some cigar tobacco is imported from Cuba and Brazil.

Both manufacturing companies have declared their intention of using as much tobacco as possible from the Portuguese colonies in Africa. This tobacco is subject to a reduction of 10 percent from the ad-valorem tax on sales which the manufacturing companies must pay to the State.

Portugal has no important export trade in tobacco or tobacco products.

TABLE 30.—Portugal: Imports of leaf tobacco, 1920-35

Year	United States	Brazil	France	Netherlands	Other countries	Total
	Pounds	Pounds	Pounds	Pounds	Pounds	Pounds
1920.....	3,324,748	284,437	71	251,607	635,849	4,408,712
1921.....	3,225,498	598,192			565,039	4,388,729
1922.....	8,490,295	256,772	357,416	1,031,863	1,181,568	11,227,912
1923.....	3,900,881	740,833	2,800,460	681,359	1,436,595	9,560,084
1924.....	5,454,900	543,743	1,019,065	800,845	1,823,031	9,641,580
1925.....	2,180,778	101,687	515,330	774,979	838,060	4,411,834
1926.....	3,180,226	5,331	53,905	1,339,929	579,924	5,159,316
1927.....	5,987,762	17,258	89,030	1,047,275	850,733	7,992,058
1928.....	103,114	13,677	295	1,390,395	3,506,394	4,983,876
1929.....	5,307,489	50,785	129,192	700,639	2,057,066	8,246,131
1930.....	4,400,794	48,559	2,108	583,489	1,874,703	6,969,633
1931.....	3,991,882	0,887	767	633,666	2,179,497	6,809,719
1932.....	4,224,585	1,598	1,695	577,259	1,982,468	6,787,005
1933.....	4,032,213	(*)	(*)	211,642	1,686,724	5,932,570
1934.....	4,323,221	(*)	(*)	188,731	1,894,068	6,336,020
1935.....	4,950,088	(*)	(*)	157,652	1,108,355	6,306,095

* Unofficial.
 † Not separately stated.

Estadística Comercial; Comercio a Navegação.

CONSUMPTION OF TOBACCO PRODUCTS

Official statistics for early years are not available as to the sales of tobacco products. Estimates supplied by trade contacts, however, indicate that the consumption of cigarettes in 1929 was almost three times greater than in 1913. The consumption of other products changed but little during the time.

It is estimated that total consumption increased at an average rate of about 2 percent a year from 1913 to 1929, and that the consumption of cigarettes in 1932 accounted for approximately 33 percent of the total, smoking mixtures 64 percent, cigars 1.4 percent, and snuff 1.6 percent. Reports of the two producing companies indicate total sales of tobacco products in 1934 amounting to 6,096,431 pounds segregated as follows: Smoking tobacco, 4,037,554 pounds; cigarettes, 1,433,493 pounds; small cigars, 506,863 pounds; cigars, 51,510 pounds; snuff, 67,011 pounds.

PRICES OF TOBACCO PRODUCTS

Prices of most grades of tobacco products are lower than in most other European countries. However, official statistics are not available for average prices of tobacco products. In August 1932, prices of smoking mixtures were increased by 8 percent and the prices of cigarettes by 25 percent. These were the first important changes since the manufacture and sale of tobacco products were turned over to private enterprise in 1927, and were reported to be due to the depreciation of the currency. Since September 1931 the value of the currency has fluctuated with sterling. Prior to the increase just mentioned, the prices of popular smoking mixtures ranged from 48 cents to \$1.45 a pound. A leading product, in which fire-cured tobacco from the United States is used, sells at \$1 per pound. Before the price increase, popular cigarettes sold at prices ranging from 7 to 13 cents for a package of 20. Two brands made largely from Burley and flue-cured tobacco sold at 8 to 9 cents for a package. The above

prices were calculated with exchange at par. The depreciation in the Portuguese currency during the latter part of 1931 and 1932 was substantially greater than the 1932 increase in the prices of tobacco products.

FINLAND

In Finland the tobacco industry is in the hands of private enterprise, although the Finnish law permits no one but manufacturers (or their agents) to import raw tobacco. From 1925 to 1929 about 7 million pounds of leaf tobacco were used by manufacturers annually (table 31). Several unsuccessful attempts have been made to grow tobacco. During and immediately following the World War, when transportation was difficult, the cultivation of tobacco was tried in the southwestern part of the country. The last attempt was made in 1921. Apparently the seasons are too short to mature tobacco of good quality.

TRADE

The origin of much of the tobacco consumed is not definitely known, as import statistics show the country of purchase rather than the country of origin. Moreover, the principal purchases are obtained from Germany, Belgium, Netherlands, Denmark, and the United Kingdom—all reexport centers. It is generally agreed, however, that most of the supply originates in the Balkan countries. It is estimated that in recent years, between two-thirds and three-fourths of the total tobacco used in the country has been of oriental types.

Tobacco from the United States is estimated to represent approximately 20 percent of the total. About one-half consists of flue-cured tobacco for use chiefly in cigarettes, and the remainder is largely fire-cured, for use in smoking mixtures, chewing tobacco, and snuff.

Finland has no tobacco export trade of any consequence.

TABLE 31.—Finland: Imports of leaf tobacco, 1922-33

Country of origin	1922	1923	1924	1925	1926	1927
United States.....	Pounds 648, 106	Pounds 494, 329	Pounds 355, 527	Pounds 263, 670	Pounds 355, 362	Pounds 128, 850
Union of Soviet Socialist Republics.....	63, 395	8, 607	322, 180	252, 195	308, 887	512, 631
Sweden.....	350, 171	181, 037	151, 178	230, 431	60, 794	14, 262
Denmark.....	48, 991	320, 992	436, 556	338, 600	288, 697	223, 423
Germany.....	854, 518	1, 994, 989	2, 711, 662	2, 119, 611	2, 319, 872	3, 232, 667
Netherlands.....	489, 463	742, 392	795, 733	896, 834	603, 356	648, 679
Belgium.....	334, 092	851, 542	1, 080, 414	1, 108, 455	1, 097, 274	893, 776
United Kingdom.....	989, 563	1, 089, 957	624, 446	1, 019, 516	1, 036, 729	789, 328
Italy.....						131, 723
Switzerland.....	202, 493	325, 632	272, 400	291, 683	117, 882	59, 185
Turkey.....		10, 357		51, 983	75, 200	53, 693
Greece.....	128, 224	49, 548	30, 891	126, 218	219, 575	374, 623
Other countries.....	453, 133	239, 387	171, 577	93, 997	79, 915	144, 033
Total.....	4, 568, 749	6, 338, 637	7, 268, 610	6, 685, 520	6, 557, 269	7, 106, 843
Total value.....	Marks 82, 293, 120	Marks 91, 261, 888	Marks 108, 348, 914	Marks 106, 976, 608	Marks 95, 351, 426	Marks 104, 859, 224

TABLE 31.—Finland: Imports of leaf tobacco, 1922-33—Continued

Country of origin	1928	1929	1930	1931	1932	1933
	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>
United States	178, 983	311, 027	504, 804	188, 216	79, 573	105, 737
Union of Soviet Socialist Republics	731, 153	327, 720	283, 373		140, 080	300, 383
Sweden	45, 723	3, 849	10, 442	28, 435	90, 024	87, 170
Denmark	140, 607	257, 951	206, 443	149, 115	212, 391	194, 840
Germany	3, 598, 637	4, 092, 399	5, 122, 972	3, 125, 896	2, 515, 795	2, 559, 951
Netherlands	482, 821	424, 194	401, 385	207, 455	171, 110	330, 743
Belgium	716, 306	820, 385	1, 357, 732	371, 513	723, 658	1, 237, 257
United Kingdom	691, 083	616, 689	903, 778	220, 091	480, 101	516, 721
Italy	227, 491	312, 478	158, 341	9, 336	3, 525	55, 249
Switzerland	30, 090	14, 612			241, 349	
Turkey			84, 141	23, 638	202, 500	220, 535
Greece	350, 237	492, 150	770, 297	133, 816	91, 348	1-8, 484
Other countries	68, 233	95, 161	344, 815	200, 740	112, 065	286, 243
Total	7, 370, 458	7, 738, 594	10, 285, 581	4, 604, 550	5, 078, 525	6, 053, 319
	<i>Marks</i>	<i>Marks</i>	<i>Marks</i>	<i>Marks</i>	<i>Marks</i>	<i>Marks</i>
Total value	105, 192, 669	114, 515, 728	152, 859, 151	45, 004, 560	56, 824, 448	72, 325, 848

Finlands Handel på Utrikes Orter Samt Uppboden vid Tullverket.

CONSUMPTION AND PRICES OF TOBACCO PRODUCTS

From the standpoint of consumption, Finland is a cigarette country; smoking tobacco ranks a poor second. During the 1913-20 period there was a marked increase in cigarette consumption. Nearly 7,000,000 pounds of cigarettes were consumed in 1930 (table 32). The per-capita consumption of cigarettes in 1932 was 1.33 pounds; the per-capita consumption of all tobacco products, 1.66 pounds (tables 3 and 4).

To meet increases in tariff rates and excise taxes applicable to tobacco, manufacturers raised their prices in 1931 and consumption declined. As a means of checking this decline, and because of lowered leaf prices, manufacturers decreased the prices of tobacco products in October 1932. In some instances prices of cigarettes were reduced as much as 16 percent. Cigarette consumption increased 6 percent in 1933, 9 percent in 1934, and about 6 percent in 1935. It is estimated that 60 percent of the cigarette consumption is in the form of papirosi, a Russian type, about one-half of which is mouthpiece made of cardboard.

TABLE 32.—Finland: Consumption of tobacco products, 1920-35

Year	Cigars	Cigarettes	Smoking mixtures	Chewing tobacco	Snuff	Total
	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>
1920	204	4, 504	1, 005	183	130	6, 006
1921	198	3, 794	697	174	126	4, 899
1922	222	4, 117	750	103	160	5, 427
1923	271	4, 907	1, 003	165	216	6, 562
1924	227	5, 140	1, 269	139	217	6, 993
1925	242	5, 242	1, 038	120	220	6, 852
1926	223	5, 233	996	124	204	6, 690
1927	230	5, 741	942	113	195	7, 221
1928	254	6, 160	955	110	192	7, 680
1929	225	6, 370	1, 022	100	206	7, 917
1930	188	6, 636	1, 101	97	201	8, 521
1931	84	5, 164	950	58	158	6, 414
1932	90	4, 939	919	41	141	6, 139
1933	109	5, 246	904	37	144	6, 400
1934	127	5, 093	837	36	149	6, 842
1935	143	6, 021	797	34	163	7, 158

* Estimate based upon data for the period January to September.

Relatively speaking, prices of tobacco products are low. Even after the increase in 1931 they were not as high as in many European countries, nor as high as in the United States. Cigarettes retailed, from 1926 to 1930, at about 4 markkaa per box of 25, or around 8 cents in United States currency for a box of 20. Cigars sold for an equivalent of about 3 cents apiece, at a normal rate of exchange. Pipe tobacco was about 85 cents per pound (table 5).

LATVIA, LITHUANIA, AND ESTONIA

Latvia, Lithuania, and Estonia, three independent republics on the Baltic Sea, were created mainly from Russian territory after the World War. Latvia and Lithuania have been independent since 1922, and Estonia since 1920. No tobacco is grown in this region commercially, but some is produced and consumed by the grower and his family. The three republics consume in their factories about 6,000,000 pounds of imported leaf tobacco annually, much of which comes indirectly from the United States. No monopolies exist in any of the three countries, although the question has been agitated at various times and the importation and manufacture of tobacco is at present under limited control in all of them.

CONSUMPTION AND TRADE

The greatest tobacco consumption of Latvia is in the form of papirosi. Fourteen factories were in operation in 1932, with an annual output of about 1,000,000 pounds of papirosi and smoking tobacco each. In general, light tobacco is used. That imported from the United States is mainly of the flue-cured type.

Total leaf imports average about 2,500,000 pounds annually (table 33). During the earlier years direct imports from Germany, Denmark, Belgium, and the Netherlands represented fully one-half of the leaf import trade. These countries are all secondary markets for United States tobacco, and it is estimated that a good part of their shipments to Latvia were of United States origin. Russian tobacco which, through a trade agreement, enters at a preferential rate of 15 percent from the regular duty, amounts to about one-fifth of the total leaf imports. Other oriental types have been used in increasing quantities during the last few years. In 1934 and 1935 tobacco from Bulgaria, Greece, and Turkey represented almost one-half the consumption. Consumption of tobacco products since 1929 has amounted to about 2,300,000 pounds annually (table 34).

There is at present no actual tobacco monopoly in Lithuania, but the manufacture and sale of tobacco products is under control of the Lithuanian temporary excise regulations, which regulate, among other things, the size and number of factories through an established minimum output.

These control measures grew out of a state of overproduction which threatened the industry in 1929 and 1930. Numerous small factories had sprung up over the country, and as prices were fixed by the Government, consumers derived no competitive advantage from the increased output of products. Thus, there was no resultant increase in consumption, except, perhaps, in the consumption of raw leaf among farmers. Nearly half the factories failed.

CONSUMPTION AND PRODUCTION OF TOBACCO IN EUROPE 61

TABLE 33.—Latvia: Imports of leaf tobacco, 1923-35

Country of origin	1923	1924	1925	1926	1927	1928	1929
	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>
United States.....	58,556	55,402	5,841	1,190	15,381	148,943	137,847
Germany.....	600,859	631,336	600,520	593,163	628,143	977,664	942,131
Denmark.....	524,040	771,824	547,804	702,028	534,849	301,214	428,435
Netherlands.....	61,389	205,698	302,476	368,479	451,476	311,479	266,890
Belgium.....	37,089	38,195	139,280	228,075	269,639	290,341	236,705
France.....	13,690	4,693	27,513	169,889	108,653	113,715	173,465
United Kingdom.....	791,057	816,890	618,116	209,158	108,591	65,056	98,140
Austria.....			30,936	75,056	31,160	5,882	1,241
Estonia.....	101,227	84,361	159,878	50,150	21,846	6,330	21,365
Poland and Danzig.....	16,125	36,274	89,769	53,188	15,551	4,167	36,572
Italy.....	2,284	7			2,070	271	1,248
Lithuania.....	159		2	1,706	1,506	13	22
Union of Soviet Socialist Republics.....	47,681	14,632	2,260	183	37	147,362	463,680
Bulgaria.....	3,982	166,786		(1)	(1)	(1)	46,200
Greece.....				(1)	(1)	(1)	26,939
Turkey.....				(1)	(1)	(1)	9,427
Other countries.....	140,700	7,256	28,903	135,685	262,820	223,695	133,551
Total.....	2,286,757	2,893,041	2,468,415	2,504,344	2,451,741	2,688,812	3,081,877
Total value.....	<i>Lats</i>	<i>Lats</i>	<i>Lats</i>	<i>Lats</i>	<i>Lats</i>	<i>Lats</i>	<i>Lats</i>
	3,350,048	4,066,433	3,063,286	4,515,303	4,280,640	4,080,247	4,227,184

Country of origin	1930	1931	1932	1933	1934	1935 ²
	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>
United States.....	170,318	109,754	142,407	454,854	502,219	533,513
Germany.....	727,275	623,062	307,957	106,778	(1)	(1)
Denmark.....	466,281	421,679	312,590	52,342	(1)	(1)
Netherlands.....	219,548	163,140	212,661	77,051	24,246	(1)
Belgium.....	219,161	230,460	274,373	165,958	(1)	(1)
France.....	115,955	198,025	63,612	21,698	(1)	(1)
United Kingdom.....	12,330	2,265	7,833	23,201	(1)	(1)
Austria.....	843	4,466				
Estonia.....	7,310	15,432	1,538	3,452	(1)	(1)
Poland and Danzig.....	269	(1)	12,170	5,551	(1)	(1)
Italy.....	2,668	4,466	2,130	254	(1)	(1)
Lithuania.....	1,173	4,466	(1)	(1)	(1)	(1)
Union of Soviet Socialist Republics.....	520,810	604,060	644,696	314,568	409,138	423,283
Bulgaria.....	38,001	(1)	(1)	221,285	531,882	432,102
Greece.....	42,639	(1)	(1)	200,383	297,211	264,562
Turkey.....	28,660	(1)	(1)	145,221	294,715	253,529
Other countries.....	120,255	178,573	126,643	50,400	122,369	130,071
Total.....	2,683,608	2,519,557	2,169,385	1,904,959	2,271,774	2,037,050
Total value.....	<i>Lats</i>	<i>Lats</i>	<i>Lats</i>	<i>Lats</i>	<i>Lats</i>	<i>Lats</i>
	4,222,217	4,018,000	3,189,385	2,528,390	2,615,055	2,323,000

¹ Not separately stated.
² Unofficial.

Latvijas Aroja Tirdznieciba un Transits (Commerce Extérieur et Transit de la Lettonie).

TABLE 34.—Latvia: Consumption of tobacco products, 1921-35

Year	Cigars ¹	Papirosi	Smoking tobacco	Total	Year	Cigars ¹	Papirosi	Smoking tobacco	Total
	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>		<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>
1921.....	13	673	330	916	1929.....	37	1,298	1,670	3,095
1922.....	17	791	538	1,346	1930.....	37	1,333	1,330	2,706
1923.....	25	986	1,120	2,149	1931.....	31	1,257	1,264	2,492
1924.....	21	1,003	1,453	2,667	1932.....	21	1,063	957	2,011
1925.....	28	1,110	1,164	2,301	1933.....	23	1,102	972	2,097
1926.....	28	1,221	1,189	2,435	1934.....	24	1,168	977	2,169
1927.....	29	1,170	1,214	2,413	1935.....	27	1,154	904	2,175
1928.....	34	1,214	1,436	2,684					

¹ Including cigarillos, and cigarettes, the annual consumption of which amounted to from 1,000 to 3,000 pounds.

The normal leaf consumption in Lithuania is a little more than 2,000,000 pounds annually. The consumers incline toward papirosi; of the other cigarettes used, those containing light tobacco only are preferred. Pipe tobacco, most of which is grown and consumed in the raw state by the grower, constitutes an important item. Cigar consumption is unimportant. Much of the leaf used in Lithuanian factories originates in the United States, although it is imported indirectly through other European countries. Direct imports from the United States fluctuate considerably but average about 275,000 pounds annually (table 35).

Nearly all the leaf tobacco imported into Estonia is used in the manufacture of papirosi, which are made from United States flue-cured types, blended with oriental and some Russian tobacco. Leaf imports average about 1,100,000 pounds annually, much of which, according to the Estonian Ministry of Trade and Industry, comes from the United States via Denmark, Germany, and the United Kingdom. Direct imports from the United States have declined, amounting to less than 100,000 pounds annually (table 36). Total imports of leaf tobacco decreased in 1932 by one-third, showing in part the effects of a barter system (proposed during the early part of the year) wherein imported tobacco was to be paid for, not in Estonian money, but in Estonian merchandise.

The annual output of Estonian tobacco factories amounts to about 1,000,000 papirosi and 500,000 pounds of smoking tobacco. Cigar production is unimportant. There is no monopoly in Estonia; plans for one (to supply greater revenue) were dropped in 1931 in favor of an increase in the excise tax. Later, tobacco was imported by special license only, but that restriction is reported to have been dropped.

TABLE 35. Lithuania: Imports of leaf tobacco, 1924-35

Country of origin	1924	1925	1926	1927	1928	1929
	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>
United States.....	77,822	397,930	637,129	636,863	731,045	573,410
United Kingdom.....	96,311	30,683	22,707	57,540	1,794	1,543
Netherlands.....	569,510	583,337	858,012	929,680	740,525	1,561,580
Belgium.....	10,362	441				
Germany.....	613,320	813,277	260,161	219,668	411,581	147,920
Latvia.....		26,455	6,291	29,810	26,019	
Denmark.....	101,278	32,187	111,653	3,527	2,425	28,880
Union of Soviet Socialist Republics.....	(1)	(1)	(1)	(1)	(1)	214,728
Other countries.....	79,686	96,121	267,168	370,633	464,368	177,691
Total.....	1,571,210	1,980,431	2,201,054	2,191,133	2,397,722	2,726,767

Country of origin	1930	1931	1932	1933	1934	1935
	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>
United States.....	282,189	549,166	176,509	409,355	252,807	181,420
United Kingdom.....					2,640	601
Netherlands.....	1,132,062	741,497	402,084	477,957	410,056	76,838
Belgium.....	2,866	8,818	15,322	62,170	220	
Germany.....	62,170	174,384	208,776	68,312	98,281	14,901
Latvia.....	1,323	4,159		(1)	(1)	(1)
Denmark.....		20,762	54,674	30,200	36,847	1,984
Union of Soviet Socialist Republics.....	211,404	101,477	215,830	82,011	257,921	237,215
Other countries.....	343,255	722,227	578,487	765,217	1,026,461	218,697
Total.....	2,065,269	2,391,330	1,712,092	1,942,252	2,065,269	730,825

¹ If any, included with Other countries.

² From Turkey, Greece, and Bulgaria principally.

Statistikos Biuletens.

TABLE 36.—*Estonia: Imports of leaf tobacco, 1923-34*

Country of origin	1923	1924	1925	1926	1927	1928
	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>
United States.....		18, 047	244, 948	313, 141	348, 029	501, 637
France.....	(¹)		(¹)	(¹)	(¹)	256, 037
Netherlands.....		55, 437	175, 516	88, 510	217, 274	40, 224
United Kingdom.....	291, 067	283, 320	145, 828	119, 481	8, 144	32, 341
Germany.....	935, 221	800, 102	398, 351	335, 607	167, 241	15, 057
Belgium.....	(¹)	(¹)	(¹)	(¹)	(¹)	3, 554
Latvia.....	117, 928	5, 015		11, 040	10, 020	40
Denmark.....	207, 451	264, 530	127, 737	27, 436	110, 022	559, 543
Bulgaria.....		10, 810	235, 874	363, 602	112, 463	103, 654
Turkey.....		91, 951	403, 181	735, 580	207, 263	37, 370
Other countries.....	180, 155	215, 709	203, 108	83, 109	58, 733	127, 402
Total.....	1, 222, 722	1, 757, 910	1, 905, 051	2, 072, 384	1, 246, 089	1, 637, 110

Country of origin	1929	1930	1931	1932	1933	1934
	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>
United States.....	582, 184	522, 552	221, 419	103, 030	86, 524	71, 347
France.....	132, 684	55, 108	117, 896	73, 704	00, 042	334, 821
Netherlands.....	29, 654	74, 051	37, 461	1, 293	20, 341	127, 585
United Kingdom.....	1, 580		4, 643	2, 585		
Germany.....	1, 716	35, 077	67, 384		30, 199	19, 508
Belgium.....	60	15	4, 471	73, 292	490, 851	207, 775
Latvia.....		55, 042	323, 214	89, 853		
Denmark.....	590, 021	309, 260	327, 348		147, 217	131, 326
Bulgaria.....	207, 295	200, 770	159, 077	132, 030	54, 542	34, 003
Turkey.....	45, 329	146, 222	159, 580	171, 811	110, 875	76, 641
Other countries.....	158, 492	304, 433	235, 420	369, 795	78, 251	96, 034
Total.....	1, 820, 300	1, 893, 053	1, 857, 021	1, 107, 220	1, 074, 740	1, 100, 000

¹ If any, included with Other countries.

Vatiskanbandus, 1928-33.

BELGIUM

Tobacco factories of Belgium used between 50,000,000 and 60,000,000 pounds of leaf annually during the period 1925-32. Of this quantity between 12,000,000 and 15,000,000 pounds were grown in Belgium and the remainder imported. There is no tobacco monopoly and until recent years the tobacco trade has been restricted very little by tariffs.

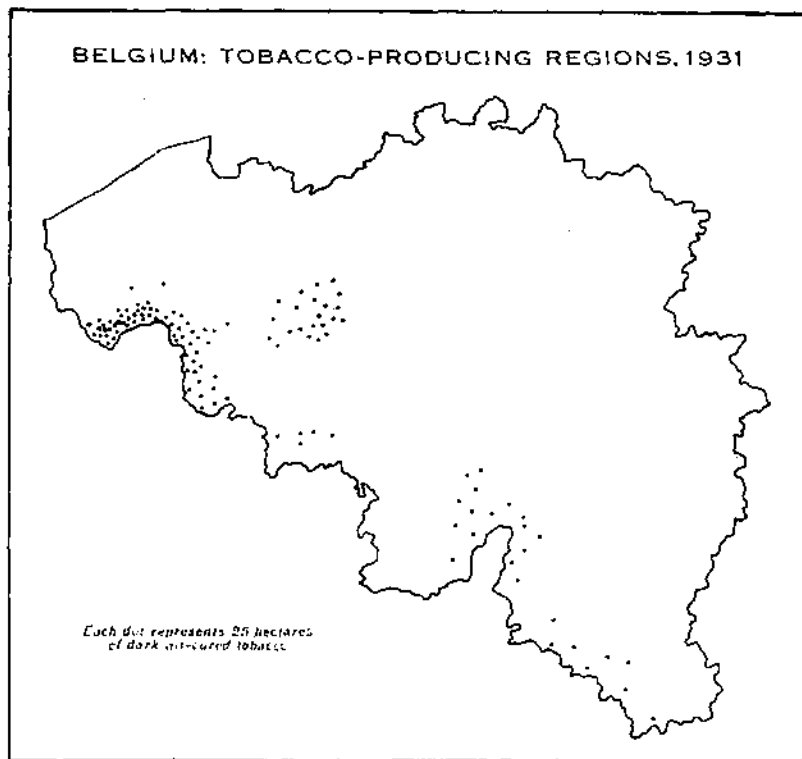
PRODUCTION OF LEAF TOBACCO

Before the World War the production of tobacco was approximately 20,000,000 pounds annually. Production was discontinued during the war, and for 5 years afterward it remained at a low level. By 1925 the crop was slightly less than 17,000,000 pounds, and from 1926 to 1932 it averaged about 15,000,000 pounds annually (table 8). The tobacco grown consists of dark, coarse leaf, used in low-priced pipe mixtures. Much of it goes through a process of semimanufacture by being cut on the farm, or by small manufacturers in the communities where it is grown. Two-thirds of the crop is grown in West Flanders (fig. 4). Only air-cured types are produced, and the culture of tobacco has not been greatly encouraged during the last few years. At no time since the war has the crop been equal to pre-war production.

About 22,000,000 pounds of various Belgian crops were reported on hand at the end of 1932. Belgian tobacco is used with imported stock in the manufacture of pipe tobacco and low-grade cigarettes. There are no loose-leaf markets in Belgium and sales are made direct from the farms, either to the manufacturer or his agent.

TRADE

The predominating United States types on Belgian markets are fire-cured Kentucky-Tennessee, Burley, and flue-cured. Appreciable quantities of Virginia fire-cured and Maryland and Ohio are also sold there. In fact, almost every type of tobacco grown in the United States finds an outlet on the Antwerp market. In 1913 about one-sixth of the leaf tobacco used was imported from the United States, but in recent years this proportion has increased to three-eighths. Imports were increased greatly after the close of the World War (table 37). During the period 1925-32, 10,000,000 pounds of fire-cured tobacco (largely seconds and lugs) were used annually in the



BAC 232-3

FIGURE 4.—Only dark air-cured types are grown in Belgium. About two-thirds of the crop grows in West Flanders.

manufacture of low-priced smoking mixtures. From 1925 to 1929 about 2,300,000 pounds of medium-grade flue-cured, and 3,000,000 pounds of Burley, were used annually, the flue-cured in cigarettes and the Burley in cigarettes and smoking mixtures.

The break in United States prices, combined with the fact that Belgium is a price market mainly, brought an increase in the consumption of both these types during the depression. Small quantities of Green River and One Sucker tobacco are also used in Belgian smoking mixtures when they can be obtained at low prices compared with prices of other leaf types.

CONSUMPTION AND PRODUCTION OF TOBACCO IN EUROPE 65

TABLE 37.—Belgium: Imports of leaf tobacco, 1913 and 1920-35¹

Country of origin	1913	1920	1921	1922	1923	1924
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
United States	7,094	19,072	18,900	21,848	19,993	24,563
Brazil	71	1,720	1,808	2,010	1,754	1,736
United Kingdom	250	864	738	1,069	828	701
Netherlands	8,591	10,243	10,053	13,898	11,381	10,907
Germany ²	1,000	56	415	758	1,975	980
Greece		120	434	843	654	1,033
Hungary					67	61
Netherland East Indies	652	995	963	1,076	1,106	1,114
Turkey	274	292	282	318	413	816
Algeria	308	166	756	683	426	366
Other countries	2,489	2,301	2,115	3,891	3,447	2,878
Total	21,597	36,389	36,142	46,244	41,461	45,974
	1,000 francs	1,000 francs	1,000 francs	1,000 francs	1,000 francs	1,000 francs
Total value	45,353	88,174	70,007	91,543	102,432	134,845

Country of origin	1925	1926	1927	1928	1929	1930
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
United States	20,056	19,818	22,109	21,881	19,383	18,044
Brazil	1,576	1,634	1,621	898	951	1,011
United Kingdom	510	380	297	266		502
Netherlands	12,537	11,350	13,610	12,170	12,410	13,325
Germany ²	888		971	1,313	1,287	1,332
Greece	1,264	1,116	1,323	2,071	2,811	2,606
Hungary	311	355	402	1,102	2,153	2,683
Netherland East Indies	1,044	1,035	1,141	1,143	1,577	1,847
Turkey	673	630	623	754		687
Algeria	721	1,165	1,420	1,624	1,321	2,041
Other countries	2,819	4,595	2,282	2,580	5,666	4,660
Total	43,248	41,732	44,558	46,742	47,748	48,880
	1,000 francs	1,000 francs	1,000 francs	1,000 francs	1,000 francs	1,000 francs
Total value	130,811	133,807	183,038	194,015	208,028	213,591

Country of origin	1931	1932	1933	1934	1935
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
United States	18,015	18,831	16,484	17,517	15,603
Brazil	3,030	3,055	1,894	1,615	1,802
United Kingdom	530				
Netherlands	12,064	12,596	11,501	11,120	11,348
Germany ²	1,384	1,412	1,372	1,732	898
Greece	2,616	1,025	1,196	1,080	1,827
Hungary	2,556	1,627	1,400	1,513	1,742
Netherland East Indies	2,140	1,652	1,750	2,452	3,472
Turkey	611	2,820	2,533	619	1,428
Algeria	1,662	61	61	(?)	65
Other countries	1,137	5,146	5,046	5,020	5,668
Total	49,646	49,634	44,905	43,587	43,785
	1,000 francs	1,000 francs	1,000 francs	1,000 francs	1,000 francs
Total value	206,672	179,215	141,029	140,179	137,785

¹ Luxembourg included, beginning January 1922

² Includes imports from Bremen and Hamburg

³ Not separately shown in source.

⁴ From China as follows: 1932, 281,393 pounds; 1933, 1,307,687 pounds; 1934, 379,011 pounds; 1935, 458,116 pounds.

Tableau Annuel du Commerce avec les Pays Etrangers.
Bulletin Mensuel du Commerce avec les Pays Etrangers.

Netherlands is Belgium's next most important source of tobacco. In addition to direct purchases made from the Netherland East Indies and from Netherlands dealers, large quantities of East Indian leaf are bought on the Netherlands bonded warehouse market. Java is the chief variety used. Purchases of Java from 1932 to 1935 aver-

aged 10,000,000 pounds annually (table 38). The use of East Indian tobaccos increased after the close of the war. They are used with domestic grown tobacco in smoking mixtures and, to a lesser extent, in cigars. Very little oriental tobacco was used prior to the war, but during the period 1925-32 between 2,000,000 and 3,000,000 pounds were imported from Greece and Bulgaria and used in the higher-priced cigarettes. The use of Brazilian tobacco in cigars also increased following the close of the war. The average annual importation of this type from 1933 to 1935 was about 2,000,000 pounds.

In Belgium, more than in most countries, changes in blends are made in response to prices of leaf tobacco, and there is considerable shifting from year to year in the leaf purchases from the different countries.

The Belgian industry maintains a fairly active export trade in tobacco products, cigarettes, and smoking tobacco mainly. The principal buyers are the Belgian Congo, Germany, and France. Owing to high import duties, imports of products are not of great importance. Comparable data (available from 1925) are shown in table 39.

TABLE 38.—Purchases by Belgium on the Netherlands tobacco warehouse market, 1927-35

Country and product	1927	1928	1929	1930	1931	1932	1933	1934	1935
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
Netherlands East Indies	10,408	10,602	12,307	15,000	8,822	13,813	9,005	10,628	12,040
Sumatra	1,052	1,000	1,577	1,635	1,947	1,139	1,238	1,305	1,100
Java	9,352	9,489	10,708	13,360	6,850	12,674	7,762	9,323	10,880
Borneo	24	26	22	11	16	1	5	5	5
United States	573	475	2,016	43	163	90	218	498	509
Seedleaf	182	89	16	46	2		20	35	49
Kentucky	325	246	186	9			113	51	123
Virginia	66	140	1,782	4	161	69	70	412	121
Maryland			32	34			15		216
Cuba	240	378	224	389	459	602	640	364	441
South America	1,061	1,483	1,531	1,479	1,458	1,450	1,680	1,420	3,266
Brazilian	596	883	668	707	807	823	1,107	911	1,157
Paraguayan	112	162	87	137	215	204	266	335	37
Other	363	438	776	645	356	425	553	174	2,072
European countries	497	834	678	318	171	153	440	203	474
Other leaf	2,467	2,130	1,610	737	316	157	424	328	406
Stems	30	53			61	754	1		2
Total	15,204	15,955	18,405	18,052	11,462	17,109	12,729	13,403	17,237

Invoer, Uitvoer, en Entrepotverkeer Nederland Doel I

TABLE 39.—Belgium: Trade in tobacco products, 1925-35¹

Year	Exports			Imports		
	Cigars and cigarillos	Cigarettes	Smoking tobacco ²	Cigars and cigarillos	Cigarettes	Smoking tobacco ²
	Pounds	Pounds	Pounds	Pounds	Pounds	Pounds
1925	54,895	993,369	235,758	40,124	104,157	84,057
1926	65,036	860,274	265,490	22,046	23,580	53,792
1927	65,036	1,035,280	305,558	32,028	28,850	48,060
1928	48,501	1,460,720	205,689	51,588	53,131	58,556
1929	36,376	2,400,809	146,826	54,454	77,351	82,911
1930	46,517	982,814	225,531	78,263	104,468	72,531
1931	27,409	1,073,190	146,000	57,540	105,380	60,358
1932	3,527	1,770,735	116,844	51,808	58,863	34,832
1933	2,646	1,514,119	108,025	45,194	73,634	35,915
1934	3,627	1,197,153	80,027	44,312	107,304	69,207
1935	5,291	1,182,768	97,884	53,131	103,802	372,677

¹ Luxembourg included.

² Including chewing tobacco, unimportant quantities.

CONSUMPTION OF TOBACCO PRODUCTS

With the exception of cigarettes, there was very little change in the consumption of tobacco products from 1921 to 1932. Cigarette consumption began to increase from the war period, and between 1920 and 1931 it doubled, amounting in the latter year to 15,000,000 pounds (table 40). The most important product of Belgian consumption is smoking tobacco, which comprises well over half the total. Belgium had a total per-capita consumption of 5.5 pounds in 1932, accounted for principally by smoking tobacco (per capita, 3.5 pounds) and cigarettes (per capita, 1.6 pounds) (tables 3 and 4). Consumption of chewing tobacco is unimportant, and consumption of cigars declined every year from 1929 to 1935.

Increases in January 1933 of import duties and excise taxes on leaf tobacco, and a shift from graduated to uniform rates in the banderole tax, brought about higher retail prices. A decline in total consumption followed, influenced principally by a decline in cigarette consumption.

TABLE 40.—Belgium: Consumption of tobacco products,¹ 1921-35

Year	Cigars ²	Cigarettes	Smoking mixtures	Snuff	Total	Year	Cigars ²	Cigarettes	Smoking mixtures	Snuff	Total
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.		1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
1921	3,064	7,542	24,804	877	36,177	1920	3,914	13,406	27,832	(3)	45,212
1922	3,735	7,818	25,982	780	38,304	1930	3,880	14,089	27,450	(3)	46,331
1923	4,019	8,322	27,837	799	40,947	1931	3,774	15,074	27,079	(3)	46,827
1924	3,887	9,160	27,898	795	41,680	1932	3,221	13,188	28,005	(3)	44,414
1925	3,715	9,275	27,558	800	41,348	1933	3,013	12,172	29,000	(3)	44,185
1926	3,172	8,820	29,200	(3)	41,288	1934	2,807	10,982	26,188	(3)	42,037
1927	3,633	10,646	29,068	(3)	43,347	1935	3,241	10,124	28,521	(3)	42,886
1928	3,600	12,213	28,252	(3)	44,125						

¹ Does not include Luxembourg.
² Including cigarillos.
³ Included with smoking mixtures.
⁴ Estimated.

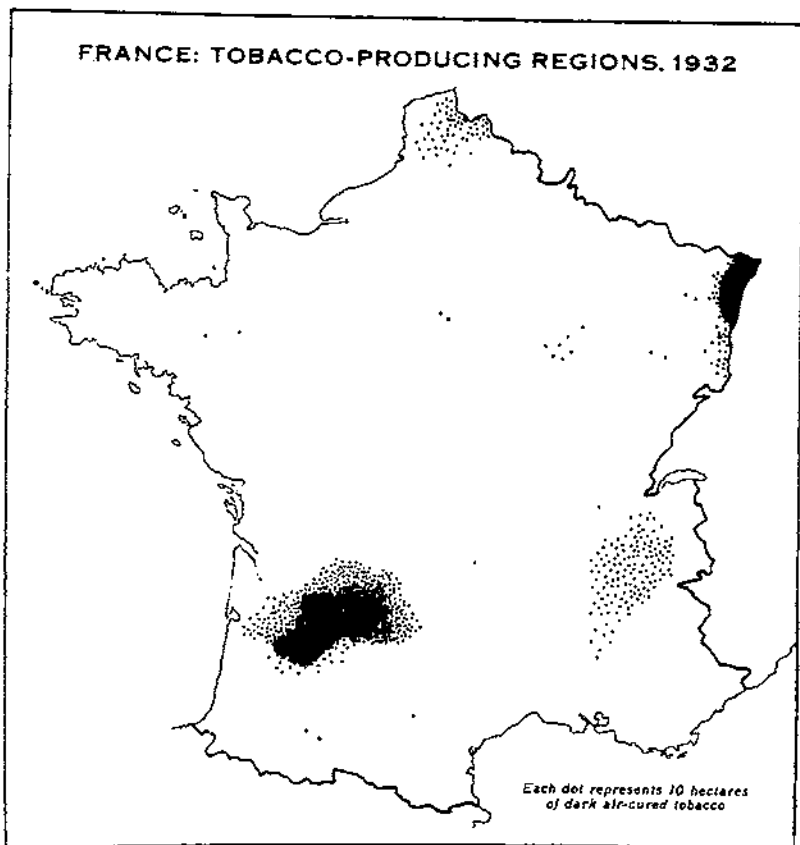
PRICES OF TOBACCO PRODUCTS

Prices of tobacco products are lower than in most other countries. Statistics are not available over a series of years as to the average prices, but an examination of the tax rates from 1925 to 1932 shows only minor changes prior to 1930, when there was a small increase in the rate on smoking mixtures, and in July 1931 the rate on cigarettes was advanced. There is a production tax on leaf tobacco grown in Belgium, a small import duty, and excise taxes on tobacco products. However, rates on all classes of products are low compared with those in most other countries.

Average sales prices in 1931 were as follows: Cigars, 2.8 cents each; cigarillos, 17.4 cents per package of 20; cigarettes, 4.8 cents per package of 20; smoking tobacco and snuff, 32.5 cents per pound. Imported cigarettes are much higher; cigarettes from the United States retail from 6 to 8 francs per package (17 cents to 22 cents, United States currency). Relatively low wages prevail and imported cigarettes are too high to meet the demand of most Belgium consumers.

FRANCE

The tobacco industry of France is controlled by a State monopoly known at present as the Service de l'Exploitation Industrielle des Tabacs. A French tobacco monopoly, established in 1730, abolished in 1791, restored by Napoleon in 1811, and renewed every 5 years thereafter until 1892, was made a permanent institution in that year. The idea back of its early organization was to increase the revenue available for governmental operations. This idea was enlarged upon



BAE 29220

FIGURE 5. - All tobacco grown in France is dark air-cured. The principal type is Paraguay, produced principally in southwestern France near Bordeaux and northeastern France near Strasbourg. Producing areas of less importance are centered in the north and southeast.

in 1926; since that time the monopoly income has been used for the amortization of the public debt. As a result there has been an improvement in the quality of products placed upon the market.

PRODUCTION OF LEAF TOBACCO

From 1925 to 1932, the tobacco factories used about 140,000 000 pounds of leaf tobacco annually, three-eighths of which was grown in France and the remainder imported. About 40,000 acres of tobacco are under cultivation, mostly in the southwest. Production has been encouraged, and some increase in the crop has been made on the

mainland but the greatest expansion has taken place in Algeria and Madagascar. The pre-war crop of France proper amounted to 53,600,000 pounds; the average annual crop of 1920-25 was 60,600,000 pounds; and the annual crop, 1926-32 (after the exploitation of the Monopoly by the State) amounted to 62,900,000 pounds (table 8).

This gain of 9,000,000 pounds in 20 years was due largely to a greater yield per acre, as the area harvested was not greatly different from that of pre-war years. The territory acquired following the close of the war contained a large tobacco-producing area, and upon the acquisition of that territory, production was reduced in the old area.

TYPES GROWN

Tobacco grown in France is dark air-cured. The principal type is Paraguay, production of which amounts to practically 90 percent of the crop. Greatest producing areas of this type are in southwestern France near Bordeaux, and in northeastern France near Strasbourg. The Paraguay type is used largely in pipe and cigarette mixtures and in low-priced cigarettes. The Auriac and Nijkerk are two minor types grown. These types are grown in areas adjacent to those in which Paraguay is grown and are used in snuff and in low-priced pipe mixtures. Producing areas are shown in figure 5.

TRADE

For many years France has been an important consumer of tobacco from the United States. In pre-war times approximately 30,000,000 pounds of tobacco from the United States were imported annually, consisting principally of fire-cured and Maryland tobaccos. From 1925 to 1932, with more territory, greater population, and greater efforts upon the part of the Monopoly to sell products, an average of 45,000,000 pounds of United States tobacco were used annually (table 41). Of this total about 25,000,000 pounds were fire-cured tobacco (mainly the light-bodied and light-colored grades of the

TABLE 41.—France: Imports of leaf tobacco, 1913 and 1920-35

Country of origin	1913	1920	1921	1922	1923	1924
United States.....	1,000 lb. 47,135	1,000 lb. 49,798	1,000 lb. 35,353	1,000 lb. 76,032	1,000 lb. 24,368	1,000 lb. 27,898
Dominican Republic.....		5,261	1,974	1,207	15,328	1,273
Argentina.....	1,571	1,413	1,082	3,793	1,811	22
Brazil.....		2,122	21,068	3,625	7,770	4,421
Colombia.....		1,757	731	4,898	2,241	1,152
Uruguay.....				1,733	1,737	458
Netherlands.....	3,703	19	11,781	622	197	4,260
Netherland East Indies.....		172	1,385	1,187	1,532	1,560
Belgium.....	22		720	461	78	94
Germany.....	7,700			579	12	
Greece.....		200	58	28		175
Philippine Islands.....	1,363	270		14,452	2,067	2,856
Turkey.....	497	514		126	22	28
Algeria.....	4,555	7,482	8,543	16,771	6,087	13,635
Bulgaria.....				1,622		56
Madagascar.....				25	640	612
Hungary.....	14,338					
Italy.....						
Other countries.....	10,828	8,322	1,732	644	499	115
Total.....	81,781	77,240	85,027	128,797	65,010	58,537
Total value.....	1,000 francs 42,100	1,000 francs 197,460	1,000 francs 154,831	1,000 francs 183,146	1,000 francs 164,164	1,000 francs 162,480

1 Austria-Hungary.

2 From the Union of Soviet Socialist Republics, 6,751,000 pounds.

TABLE 41.—France: Imports of leaf tobacco, 1918 and 1920-35—Continued

Country of origin	1926	1926	1927	1928	1929	1930
	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>
United States.....	58,617	53,088	48,349	26,904	32,068	71,074
Dominican Republic.....	12,118	5,018	536	2,694	2,830	4,219
Argentina.....	755					
Brazil.....	3,142	4,473	3,324	1,086	1,302	2,461
Colombia.....	103	676				
Uruguay.....	1,448					
Netherlands.....	1,767	4,220	13,048	6,507	9,046	8,289
Netherland East Indies.....	17,433	5,711	1,217	803	4,323	9,204
Belgium.....	59	633	662	244	1,701	2,736
Germany.....	9,309	720	1,840	2,731	5,420	8,563
Greece.....	428	1,131	1,032	688		1,551
Philippine Islands.....		1,571	3,654		3,215	6,125
Turkey.....	25	223	366			1,553
Algeria.....	11,801	19,070	10,100	21,093	15,258	19,296
Bulgaria.....			696	187		4,861
Madagascar.....			1,590	2,182	2,478	4,106
Hungary.....				698	3,549	4,321
Italy.....				715	1,690	1,752
Other countries.....	2,109	1,550	434	1,093	1,098	3,059
Total.....	119,014	98,090	91,108	67,825	85,508	154,960
Total value.....	<i>1,000 francs</i> 314,931	<i>1,000 francs</i> 327,525	<i>1,000 francs</i> 254,697	<i>1,000 francs</i> 227,268	<i>1,000 francs</i> 264,529	<i>1,000 francs</i> 452,773

Country of origin	1931	1932	1933	1934	1935
	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>
United States.....	34,272	40,125	27,015	25,812	20,902
Dominican Republic.....	5,327	911	408	396	1,459
Argentina.....	449				
Brazil.....	456	748	751	1,472	1,473
Colombia.....	580	1,026	622		
Uruguay.....					
Netherlands.....	9,182	8,759	2,726		
Netherland East Indies.....	6,392	3,623	2,399	3,882	4,866
Belgium.....		297			
Germany.....	7,096	3,854	7,368	579	90
Greece.....	6,083	3,358	5,320	2,698	5,170
Philippine Islands.....	2,296		507		
Turkey.....					
Algeria.....	18,036	14,935	22,141	11,542	28,221
Bulgaria.....	5,383	743	2,112	256	1,501
Madagascar.....	5,401	6,042	5,192		3,686
Hungary.....	12,589	15,704	8,024	6,813	6,254
Italy.....	1,154	650		7,096	
Other countries.....	34,573	48,288	536	1,417	3,383
Total.....	111,876	106,583	85,850	61,303	73,935
Total value.....	<i>1,000 francs</i> 327,529	<i>1,000 francs</i> 273,654	<i>1,000 francs</i> 226,009	<i>1,000 francs</i> 147,125	<i>1,000 francs</i> 193,875

¹ From Paraguay, 2,348,000 pounds in 1930, and 3,877,000 pounds in 1931.

² From Paraguay, 1,779,000 pounds; Yugoslavia, 1,263,000 pounds; Rumania, 3,403,000 pounds.

Tableau General du Commerce Extérieur.

Paducah type) and the remainder was largely Maryland and fire-cured tobacco. United States fire-cured tobacco is used with other imported tobacco and French domestic-leaf in dark cigarettes, cigarette mixtures, and pipe mixtures. Consumption of United States fire-cured tobacco declined after 1932, and amounted to less than 20,000,000 pounds annually from 1933 to 1935.

Maryland tobacco has been popular for a long time but the high prices of recent years have reduced its use. It is estimated that consumption of Maryland tobacco in 1932 was slightly less than 4,000,000 pounds and in 1935 less than 1,000,000 pounds. Several brands of cigarettes and smoking mixtures in France which still carry the name Maryland now contain but little Maryland tobacco.

After the financial reforms of 1926, France increased the imports of United States flue-cured tobacco. Purchases of that type almost reached 12,000,000 pounds in 1930, but owing to the reduced consumption of higher-priced cigarettes in which flue-cured tobacco was used, imports have declined in recent years to an average of about 1000,000 pounds annually. At one time, important quantities of flue-cured tobacco were also used in other tobacco products. Small quantities of cheap cigar tobacco, imported from the United States during 1929-32 were used for cigar binders.

Algeria supplies more tobacco to France than does any other colonial possession, although the cultivation of tobacco is being encouraged in Madagascar. In fact, since 1926, Algeria has ranked next to or greater than the United States as a source of supply for leaf tobacco, and from 1926 to 1935 an average of 18,000,000 pounds of Algerian tobacco were used annually, compared with 6,000,000 pounds during the pre-war period. Algerian tobacco is used largely in the low-priced and medium-priced cigarette and pipe mixtures. The tobacco industry of Madagascar came into prominence about 1927, and imports from that source increased until 1934 when over 6,800,000 pounds were imported. Cigar tobaccos are imported from the Netherland East Indies (via the Netherlands principally), from the Dominican Republic, and from Brazil. Much of the Java and Philippine tobacco, brought in by the Monopoly enters into the manufacture of smoking mixtures.

France has no important tobacco export trade. Annual leaf exports consist principally of about 1,000,000 pounds sent to Algeria, and the exports of tobacco products are insignificant. There is an import trade of some importance, however, in tobacco products. It has been the policy of the Monopoly since 1926 to supply consumers with the brands they prefer, especially in cigarettes. This policy led not only to the introduction of many new French brands but to an increase in the variety of imported brands, a fact not to be considered apart from the improved distribution methods which took place at about the same time.

Thus an important import trade was opened up, and the sale of foreign cigarettes on French markets from 1926 to 1935 averaged over 2,800,000 pounds annually (table 42). At least one-third of the foreign cigarettes on sale are of United States origin.

TABLE 42.—France; Imports of tobacco products, 1913 and 1920-35

Year	Cigarettes	Cigars	Rolled and other	Year	Cigarettes	Cigars	Rolled and other
	Pounds	Pounds	Pounds		Pounds	Pounds	Pounds
1913.....	127, 046	251, 562	4, 408	1928.....	2, 344, 592	125, 708	332, 674
1920.....	2, 297, 414	503, 787	1, 466, 501	1929.....	3, 441, 822	417, 772	278, 882
1921.....	1, 215, 175	387, 294	1, 384, 268	1930.....	4, 076, 957	623, 969	342, 374
1922.....	1, 303, 527	259, 054	729, 022	1931.....	4, 569, 730	687, 748	334, 217
1923.....	652, 782	165, 937	183, 422	1932.....	3, 225, 169	643, 067	1, 052, 607
1924.....	845, 773	214, 245	11, 684	1933.....	2, 875, 019	581, 673	1, 125, 007
1925.....	751, 548	438, 054	244, 711	1934.....	2, 938, 291	574, 024	415, 567
1926.....	1, 055, 122	386, 294	558, 866	1935.....	2, 307, 943	260, 435	340, 870
1927.....	1, 276, 463	378, 530	455, 470				

CONSUMPTION OF TOBACCO PRODUCTS

Dark, medium- to low-priced scaferlati, or cut tobacco, has been the most popular tobacco product for a long time. Its consumption during recent years accounts for approximately 60 percent of the total. The content of scaferlati varies roughly, but it contains from 40 to 50 percent domestic-grown leaf, from 10 to 15 percent Algerian leaf, from 15 to 30 percent fire-cured leaf (largely from Paducah type), from 10 to 20 percent oriental, Java, or Hungarian leaf, and about 5 percent United States flue-cured leaf.

Scaferlati is used largely in hand-made cigarettes. The price of a kilogram of cheapest scaferlati is but little more than one-half the price of the same quantity of cheapest ready-made cigarettes. So peasants, industrial workers, and those in many other groups roll their own cigarettes. The consumption of scaferlati or cut tobacco in 1925 amounted to nearly 81,000,000 pounds, compared with 23,000,000 pounds of ready-made cigarettes, and a total consumption of 118,000,000 pounds.

The total consumption of tobacco in 1926 dropped back to 99,000,000 pounds, or only a little higher than the pre-war level (table 43). Consumption had really begun to decline in 1925, when a price increase of from 20 to 25 percent became effective. An upward trend began in 1927 when the effects of the new regime became evident and when monopoly profits began to be applied to the State sinking fund. This trend continued through 1930. In 1931, consumption started on a decline that continued through 1935, partly because of a decrease in the tourist traffic. Consumption leaned heavily toward the medium-priced and cheaper brands.

The consumption of snuff, which has been declining since the war period, averaged 5,700,000 pounds annually from 1929 to 1934. Consumption of chewing tobacco remained steadily around 2,000,000 pounds. The consumption of both snuff and chewing tobacco is limited principally to laborers in the industries in which smoking is hazardous.

TABLE 43.—Consumption of tobacco products in France, 1913 and 1920-35¹

Year	Cigars	Cigarettes	Smoking mixtures	Chewing tobacco	Snuff	Total
	<i>1,000 pounds</i>	<i>1,000 pounds</i>	<i>1,000 pounds</i>	<i>1,000 pounds</i>	<i>1,000 pounds</i>	<i>1,000 pounds</i>
1913.....	0,445	8,377	69,534	2,510	10,202	97,068
1920.....	6,410	12,001	74,751	2,407	7,355	101,927
1921.....	3,470	13,024	83,314	2,537	9,597	112,951
1922.....	3,314	15,615	85,975	2,353	9,606	116,863
1923.....	3,610	17,952	84,200	2,379	9,592	117,632
1924.....	3,326	21,723	88,257	2,451	8,571	124,498
1925.....	3,440	23,368	80,660	2,318	8,592	118,297
1926.....	3,629	20,020	65,738	2,140	7,069	99,205
1927.....	3,697	24,554	74,771	2,286	6,845	111,853
1928.....	3,366	20,290	75,211	2,281	6,567	110,715
1929.....	3,332	35,131	75,649	2,297	6,312	122,111
1930.....	2,955	30,382	73,370	2,254	6,205	121,166
1931.....	2,085	40,458	71,780	2,182	5,880	123,394
1932.....	1,867	40,623	71,245	2,076	5,592	121,403
1933.....	1,783	39,633	71,031	2,006	5,289	120,633
1934.....	1,670	38,012	60,969	1,963	5,032	116,646
1935.....	1,615	36,803	60,041	1,870	4,781	112,100

¹ Including Alsace-Lorraine subsequent to 1926.

PRICES OF TOBACCO PRODUCTS

In France, all tobacco prices are set by the Monopoly. Growers know ahead of time what they will receive for specified grades of leaf, and retailers of tobacco products sell at fixed prices. Dark cigarettes and pipe mixtures made of French, Algerian, and United States fire-cured tobaccos are low in price as compared with those of other countries, but prices of most other tobacco products are comparatively high.

With the stabilization of the currency in 1926 and a change in the policy of the Monopoly, prices of all tobacco products were advanced. Since that time few changes have been made except in the case of cigars. Dark cigarettes have sold at prices ranging from 6 to 10 cents per package of 20, the most popular-selling brand being priced at 8 cents; and the bulk of scaperlati at prices ranging from \$1.10 to \$3.20 per pound, the most popular brand selling at \$1.50 per pound. In July 1930 the prices of cigars and cigarillos were advanced, the increases ranging from 25 to 60 percent. Since the 1930 advance, the greatest cigar sales have been made at prices ranging from 2 to 10 cents each, the most popular-selling brand being priced at about 3 cents.

So-called de luxe products, made almost entirely from imported tobacco sell at prices materially higher than those indicated above. Balto cigarettes, introduced in 1930 and containing flue-cured, Burley, and oriental tobacco, sell at 20 cents for a package of 20. One important brand of cigarettes, made from flue-cured and oriental tobacco, sells at 14 cents per package of 20. The blended brands, so popular in the United States, have been imported for several years, and since 1930 have sold at about 26 cents for a package of 20. Prices of certain brands, as reported by the Caisse Autonome d'Amortissement, appear in table 6.

GERMANY

Several attempts have been made to establish a Federal tobacco monopoly in Germany, but the industry continues to be handled by private individuals. However, Government restriction concerning packing and warehousing, and numerous taxation laws have greatly burdened the industry in recent years. Moreover, the importation of leaf tobacco is now within the jurisdiction of the new German import control laws, which have functioned since March 22, 1934; these laws allowed some latitude on the exchange requirements to buy leaf tobacco up until September 24, 1934, when tobacco was placed under a supervisory and control board, and from the standpoint of importation became a "controlled" commodity. Leaf production was already under Government regulation, and the cigarette and smoking-tobacco industries have been under cartel organization for several years. Thus, no phase of the industry is left entirely free and there is probably almost as much control in the tobacco industry as if it operated as a monopoly.

Before the war, approximately one-fifth of the leaf tobacco used in Germany was grown there; the remainder was imported. From 1925 to 1932 manufacturers used about 250,000,000 pounds of leaf tobacco annually. Of this quantity 47,500,000 pounds were domestic and the remainder imported, the relationship between the domestic crop and imports being near that of pre-war times.

PRODUCTION OF LEAF TOBACCO

The tobacco crop is grown in small patches, generally as a side line. The crop of 1932, amounting to 62,200,000 pounds, was the largest since 1920. It was produced by 67,000 farmers on an area of about 27,000 acres, and owing to an unusually heavy yield combined with increased prices, the return to German farmers amounted to reichsmarks 32,700,000, the greatest income from this product in many years. The crop sold for an average price of reichsmarks 116 per doppelzentner (12.5 cents per pound), compared with reichsmarks 96 per doppelzentner (10.3 cents per pound) in 1931 (table 44).

Owing to difficulties in obtaining supplies from the usual outside sources, the production of tobacco was increased substantially during the period immediately following the war. By 1923, however, production had been reduced to a point far below the pre-war level, and more attention was being devoted toward improving the quality of the crop. The acreage was reduced but the yield per acre greatly increased. In February 1931 it was provided by governmental decree that the area planted to tobacco should not exceed 26,967 acres. The maximum that could be grown under these regulations was almost reached in 1932, and at that time growers began to agitate for regulations that would permit expansion of the tobacco area and at the same time require the use of more German tobacco in domestic products. (The decree of May 1931 lowered the tax on fine-cut smoking tobacco, provided the cuttings should conform to a certain size, and provided further that the mixture should contain at least 50 percent of domestic leaf in order to be subject to the lowered tax.) The German Government increased the production area to 29,595 acres in 1933, and the crop for that year amounted to 64,889,000 pounds. The area was further increased in 1934 and 1935; production rose accordingly, and it is estimated that the crop of 1935 amounted to nearly 80,000,000 pounds.

TABLE 44.—Germany: Area, production, and farm value of tobacco, 1925-35

Year	Planters ¹		Area planted	Production	Farm value	Prices paid to growers	
	Number	Acres				Per doppelzentner	Per pound
	Number	Acres	Pounds	Reichsmarks	Reichsmarks	Cents	
1925	102,369	19,800	41,002,171	11,000,000	58	6.3	
1926	62,577	16,321	31,769,388	18,700,000	130	14.0	
1927	65,457	22,731	44,012,855	22,500,000	113	12.2	
1928	66,160	24,682	51,043,533	20,200,000	80	9.1	
1929	61,202	23,838	50,024,055	18,600,000	81	8.7	
1930	55,041	22,916	46,408,153	21,000,000	118	12.8	
1931	50,749	25,508	51,104,592	22,300,000	96	10.4	
1932	66,735	26,736	62,222,851	32,700,000	116	12.5	
1933	75,028	29,595	64,888,674	34,300,000	116	12.5	
1934	75,567	30,304	70,896,668	45,200,000	130	23.2	
1935	78,074	31,473	† 79,800,000				

¹ Including small growers who produce tobacco mainly for their own consumption.

² Estimated.

Statistisches Jahrbuch für das Deutsche Reich.

TYPES GROWN

All tobacco grown in Germany is air-cured (table 8) (fig. 6). There are several types, the most important groups of which are the cigar tobaccos of Baden and the cutting tobaccos of Baden and adjacent

sections. Minor types include the light *rustica* grown near Nürnberg, the dark *rustica* in the southwestern part of East Prussia, and the dark tobaccos grown near Stettin and Hanover. The location of the producing areas is shown in figure 7. During the 1930-32 period almost one-half of the German crop was used in cigars, largely as fillers and binders. Much of the remainder was used for cutting purposes in smoking mixtures. Small quantities, principally *rustica* types, were used in making snuff.

TRADE

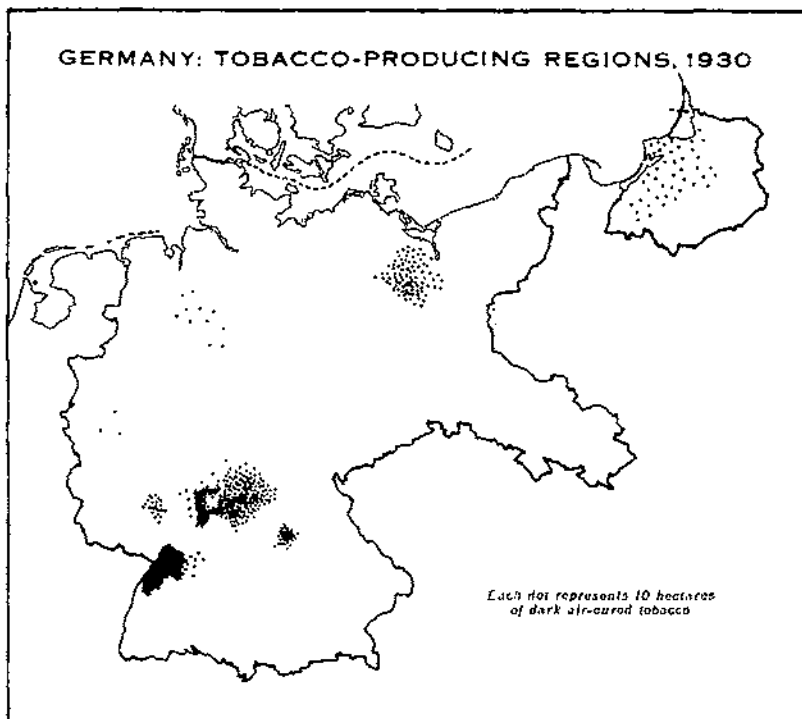
For many years Germany has ranked as one of the world's greatest importers of leaf tobacco. In 1932 imports amounted to 179,000,000 pounds, compared with 175,000,000 pounds imported into the United Kingdom; since that time Germany has held second place as a leaf importer, and the United Kingdom, first. The principal countries of



FIGURE 6.—Harvesting tobacco near Linx, Germany.

DAE 35677

supply for leaf tobacco are Bulgaria, Greece, and Turkey (considered together as the source of oriental tobacco), the Netherland East Indies, Brazil, and the United States (table 45). In 1913, about two-thirds of the imports were from the Netherland East Indies, Brazil, and Dominican Republic. Almost one-third of the remainder came from the United States and one-third from Bulgaria, Greece, and Turkey. Following the close of the war, compared with 1913, imports from Bulgaria, Greece, and Turkey increased greatly, those from the United States increased slightly, while those from other important countries did not change much. These tendencies continued through 1930, after which imports of all types declined sharply. An uptrend began in 1932, but due partly to an increased consumption of the Brazilian, Javan, and oriental types, United States tobacco failed to share in the rise.



DAE 78208

FIGURE 7.—The tobacco crop of Germany is grown in small patches. The production area is most concentrated in Baden and vicinity where clear and cutting tobacco types are produced. Light *rustica* types grow northeast of Baden; dark *rustica*, in East Prussia; and other dark types, in northern areas.

TABLE 45.—Germany: Imports of tobacco, 1913 and 1920–35

UNMANUFACTURED

Country of origin	1913	1920	1921	1922	1923	1924
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
United States.....	10,360	32,443	28,697	21,021	29,190	51,975
Mexico.....	819	206	228	371	161	338
Cuba.....	3,163	213	359	223	85	331
Dominican Republic.....	16,234	12,247	8,348	5,722	5,628	6,911
Brazil.....	20,404	13,898	21,139	14,526	12,445	27,017
Colombia.....	5,671	1,018	1,044	1,614	734	952
Paraguay.....	1,041	1,321	511	546	144	862
Venezuela.....	129	813	209	125	191	748
Netherlands.....	360	1,841	1,342	1,471	1,740	1,031
Union of Soviet Socialist Republics.....	3,475	363	2,332	1,394	3,170	2,760
Netherland East Indies.....	84,484	86,923	107,979	72,929	51,610	73,173
China.....	1,547	3,527	4,481	2,903	2,446	4,059
Philippine Islands.....	210	105	177	142	21	660
Turkey.....	18,028	23,742	26,200	18,304	10,955	23,153
Algeria.....	177	201	532	778	850	1,028
Hungary.....		88	358	71	27	285
Bulgaria.....		3,069	11,400	9,193	5,331	12,963
Greece.....	4,968	8,200	27,192	20,335	14,767	25,528
British India.....		381	252	380	718	1,243
Other countries.....	2,880	2,631	2,394	3,183	3,433	4,126
Total.....	182,775	190,160	248,550	175,323	140,570	230,098
	1,000 marks	1,000 marks	1,000 marks	1,000 marks	1,000 marks	1,000 marks
Total value.....	134,584	(1)	(1)	15,189,667	119,081	211,623

1 No value stated.

CONSUMPTION AND PRODUCTION OF TOBACCO IN EUROPE 77

TABLE 45.—Germany: Imports of tobacco, 1913 and 1920-35—Continued

Country of origin	1925	1926	1927	1928	1929	1930
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
United States.....	26,628	14,210	20,903	21,190	21,812	23,672
Mexico.....	244	141	253	427	396	296
Cuba.....	1,494	896	3,117	3,136	2,430	3,242
Dominican Republic.....	11,873	9,018	15,253	18,780	14,133	15,019
Brazil.....	32,531	12,230	18,831	23,383	21,024	21,594
Colombia.....	876	730	1,254	1,900	1,450	1,120
Paraguay.....	793	336	417	481	409	401
Venezuela.....	301	32	25	—	—	39
Netherlands.....	1,044	298	367	444	372	1,043
Union of Soviet Socialist Republics.....	1,509	189	117	1,373	3,049	4,185
Netherland East Indies.....	90,477	41,968	70,598	81,294	74,170	75,925
China.....	3,814	2,437	3,870	2,258	1,700	1,740
Philippine Islands.....	523	134	139	314	347	613
Turkey.....	24,311	11,590	18,327	22,740	25,167	26,195
Algeria.....	817	288	470	485	758	1,521
Hungary.....	293	153	338	604	532	748
Bulgaria.....	28,941	14,288	21,168	18,135	17,290	15,860
Greece.....	38,834	24,505	33,357	45,118	38,861	39,555
British India.....	985	283	214	207	120	290
Other countries.....	4,017	1,590	2,835	1,986	1,725	3,749
Total.....	270,225	135,346	210,918	244,280	228,112	254,688
	1,000 marks	1,000 marks	1,000 marks	1,000 marks	1,000 marks	1,000 marks
Total value.....	261,524	143,710	230,788	255,072	240,057	280,468

Country of origin	1931	1932	1933	1934	1935
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
United States.....	14,901	23,781	20,000	18,011	15,000
Mexico.....	142	82	60	106	117
Cuba.....	3,016	3,522	3,429	3,322	2,280
Dominican Republic.....	6,052	4,263	4,580	4,831	4,205
Brazil.....	12,470	15,492	17,400	20,020	22,907
Colombia.....	500	473	718	778	1,216
Paraguay.....	188	—	257	200	102
Venezuela.....	—	—	—	2	—
Netherlands.....	1,591	2,188	1,701	1,728	1,221
Union of Soviet Socialist Republics.....	3,902	4,389	4,230	5,016	4,310
Netherland East Indies.....	47,181	42,487	49,762	56,280	55,822
China.....	1,682	1,783	2,321	2,454	2,179
Philippine Islands.....	223	91	157	281	47
Turkey.....	10,241	20,105	10,050	21,193	21,970
Algeria.....	1,058	1,130	—	102	(¹)
Hungary.....	185	157	189	586	490
Bulgaria.....	14,180	10,537	23,705	27,170	26,078
Greece.....	28,180	35,233	35,424	36,805	39,921
British India.....	113	60	30	33	20
Other countries.....	2,870	4,194	1,880	2,090	2,458
Total.....	158,258	179,057	185,602	201,684	201,201
	1,000 marks	1,000 marks	1,000 marks	1,000 marks	1,000 marks
Total value.....	159,267	180,616	121,131	124,447	119,511

¹ Less than 500 pounds.

MANUFACTURE¹⁾

Year	Cigars	Cigarettes	Smoking tobacco	Chewing, rolled, etc.	Year	Cigars	Cigarettes	Smoking tobacco	Chewing, rolled, etc.
	Pounds	Pounds	Pounds	Pounds		Pounds	Pounds	Pounds	Pounds
1913.....	930,121	1,803,804	182,100	900,125	1928.....	150,575	108,564	1,573,644	553,954
1920.....	420,638	4,465,638	1,373,466	249,120	1929.....	48,943	93,035	2,054,247	3,065,058
1921.....	51,367	340,831	556,062	196,871	1930.....	43,872	131,174	2,895,963	6,048,320
1922.....	30,644	671,962	897,713	224,428	1931.....	102,734	193,345	2,996,933	8,817,930
1923.....	11,085	216,492	347,004	42,990	1932.....	179,014	325,170	2,805,574	527,781
1924.....	96,121	304,235	841,496	302,691	1933.....	219,799	514,995	2,876,342	515,215
1925.....	26,541	95,476	598,786	462,745	1934.....	259,852	422,842	2,818,140	421,520
1926.....	70,989	17,857	542,993	336,484	1935.....	31,746	100,750	636,688	361,334
1927.....	27,777	42,769	1,416,456	483,686					

Der Auswärtige Handel Deutschlands. Monatliche Nachweise über den Auswärtigen Handel Deutschlands.

Of the Netherland East Indian types, that grown in Sumatra is used for cigar wrappers, and that grown in Java is used as cigar binders and in smoking mixtures. Tobacco imported from Brazil and the Dominican Republic also enters into the manufacture of cigars, but imports from Turkey, Greece, and Bulgaria are used principally in cigarettes. During the period from 1925-32, about one-half of that imported from the United States was Kentucky and Tennessee fire-cured tobacco and most of the remainder was flue-cured. Spinner grades of the fire-cured type were used in roll tobacco for chewing. From fire-cured lugs and seconds are made the so-called Schwarzer Krauser, a cut tobacco used both for chewing and smoking. The flue-cured type is used with Java and domestic-grown tobacco in fine-cut smoking mixtures. For this purpose, thin, bright-colored cutting grades are in demand.

Owing to a preferential tariff agreement between Germany and the Saar district, most all the German import trade in tobacco products was with that district. The agreement, which admitted certain quotas from the Saar duty-free, and charged but a nominal tariff on others, was officially framed in April 1928. Its purpose was to alleviate the adverse economic conditions in the Saar district by opening an outlet for Saar products. The regular import duty on manufactured tobacco entering Germany is almost prohibitive (Reichsmarks 9,000 per quintal for cigars, cigarettes, and smoking tobacco, and Reichsmarks 5,000 per quintal for chewing tobacco). Thus the advantage offered practically eliminated competition from other sources. The most important trade is in smoking tobacco, annual imports of which 1929-34 averaged nearly 3,000,000 pounds.

There is no tobacco export trade of importance. Shortly after the war, Germany built up an interesting trade in cigars with the Netherlands and other neighboring countries that have low trade barriers, but subsequent changes in the tariff restrictions of those countries diverted the cigar export trade to home consumption (table 46).

TABLE 46.—Germany: Exports of tobacco, 1913 and 1920-35

Year	Leaf ¹		Cigars	Cigarettes	Smoking tobacco	Chewing, rolled, etc.	Year	Leaf ¹		Cigars	Cigarettes	Smoking tobacco	Chewing, rolled, etc.
	Pounds	Pounds						Pounds	Pounds				
1913	956,579	907,413		338,847	384,923	82,232	1928	581,574	814,380	380,519	223,767	121,033	
1920	739,777	1,280,211		480,693	219,578	89,727	1929	746,903	929,414	456,351	252,200	139,332	
1921	920,641	2,067,694		793,656	356,925	192,021	1930	1,730,831	674,698	445,109	176,588	114,198	
1922	701,928	1,881,004		1,460,327	707,677	138,008	1931	508,540	584,890	334,217	117,064	100,530	
1923	622,358	3,354,533		690,005	313,935	250,481	1932	547,623	464,950	313,274	85,318	82,073	
1924	521,698	2,215,182		391,316	89,286	46,517	1933	671,521	508,501	305,558	85,759	75,177	
1925	530,160	856,928		370,153	125,001	66,341	1934	587,464	508,500	241,404	132,270	62,611	
1926	606,026	535,937		413,892	135,804	80,089	1935	73,193	220,240	223,687	46,517	24,251	
1927	621,608	535,896		378,310	300,960	97,443							

¹ Not including stems.

² May to December.

Der Auswärtige Handel Deutschlands. Monatliche Nachweise über den Auswärtigen Handel Deutschlands.

CONSUMPTION OF TOBACCO PRODUCTS

It is reported that in 1932 Germany had about 30,000 tobacco shops selling tobacco products and smokers' accessories exclusively. At that time the total consumption of tobacco products amounted to

230,000,000 pounds, a quantity considerably below the average established during the later reconstruction period. In 1913 almost one-half of the tobacco consumed consisted of cigars. Smoking mixtures of various kinds, including both fine- and coarse-cut, accounted for 30 percent of the total. Consumption of cigarettes was small at that time and the combined consumption of chewing tobacco and snuff was less than that of cigarettes. During the post-war period there was a marked increase in the consumption of cigarettes and a decline in the consumption of cigars, chewing tobacco, and snuff. The consumption of smoking mixtures did not change materially. The inflationary period was characterized by a general decline in tobacco consumption, and the later reconstruction period by marked increases in the consumption of all products except chewing tobacco and snuff.

Following an increase in the tax rates and prices, the consumption of all classes of products, except cigars, declined in 1930. The tax rates were increased again at the end of 1930, and total consumption during the following year declined 12.6 percent (table 47). Consumption in 1932 was slightly above the level of the previous year, but it marked the beginning of an upward trend which established a long-time record of nearly 255,000,000 pounds in 1935. Differing from the trend in most countries, this peak figure was reached through a continued rise in the consumption of cigars as well as cigarettes. Cigar consumption in 1935 amounted to 97,000,000 pounds, or 10 percent more than pre-war. Preliminary data for 1936 show a slight decline in total consumption.

TABLE 47.—Germany: Consumption of tobacco products, 1913 and 1920-36

Year	Cigars †	Cigarettes †	Smoking mixtures	Chewing tobacco †	Snuff	Total †
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
1913.....	88,181	26,698	58,146	12,346	10,893	196,177
1920.....	60,015	43,431	55,468	7,180	5,831	170,905
1921.....	50,211	50,734	62,168	7,180	5,946	185,179
1922.....	40,651	51,014	49,193	4,920	5,293	151,080
1923.....	38,951	47,710	69,445	4,963	4,367	165,436
1924.....	60,610	57,055	69,085	6,819	5,172	190,541
1925.....	62,833	65,820	72,487	7,154	5,126	213,429
1926.....	62,033	62,474	82,907	7,282	5,101	220,487
1927.....	76,411	68,415	85,329	7,048	5,060	230,209
1928.....	75,000	72,183	82,427	6,594	4,945	241,060
1929.....	75,177	73,380	89,528	6,445	4,852	249,384
1930.....	80,792	70,283	78,806	6,217	4,645	240,745
1931.....	71,083	56,293	73,014	5,344	4,136	210,479
1932.....	60,575	60,110	73,979	4,798	4,067	212,529
1933.....	69,136	72,418	79,468	4,743	3,862	223,657
1934.....	81,766	79,620	71,953	4,732	3,855	241,926
1935.....	97,237	81,624	68,532	4,500	3,079	254,772
1936.....	91,428	84,214	70,661	4,564	3,705	254,575

† In calculating the weight of cigars, cigarettes, and chewing tobacco (reported in thousand pieces), the following conversion factors were used uniformly throughout the period covered: 1,000 cigars equal 5 kilograms, 1,000 cigarettes equal 1 kilogram, 80 pieces of chewing tobacco equal 1 kilogram. Recent information indicates, however, that the size of the pieces was larger in earlier years. Consequently the actual increase in consumption was less than here indicated. If adjustments were made for changes in weight the increase in total consumption from 1926 to 1936 would be approximately 12 percent instead of 15 percent.

Developments led to decreased consumption of tobacco from the United States. The increase in tax rates at the end of 1930 caused a marked reduction in the consumption of the fine-cut mixtures in which the flue-cured types were used. The decline was so great in this class of products that the rates were revised to near the old basis in October 1931. About half of the loss was regained, but the consumption of the flue-cured types remained about 25 percent below

the 1929 level. The consumption of chewing tobacco, which has gradually declined for years, has resulted in some reductions in the imports of United States fire-cured types.

PRICES OF TOBACCO PRODUCTS

Owing to a tax system that provides for lower rates on cigars than on other tobacco products, cigar prices are relatively low and cigarette prices are relatively high. In 1925 cigarettes sold at an average price of 19.4 cents per package of 20; in 1929, 23.3 cents; and in 1932, 17.7 cents. During the same years cigars sold respectively at 3.2, 3.3, and 2.6 cents each. The average price of smoking mixtures ranged from 62 to 70 cents per pound during the period 1925-29, but the range was much higher in 1930-35 (table 5).

CZECHOSLOVAKIA

The Republic of Czechoslovakia came into existence in October 1918. Having been created chiefly from States which were originally a part of the old Austro-Hungarian monarchy (where a tobacco monopoly had prevailed for 130 years), the monopoly system for the production and sale of tobacco was no novelty to the people of the new Republic. The organization of the Czechoslovakian Tobacco Monopoly, therefore, consisted virtually of assembling the units and setting them to work under the jurisdiction of the Minister of Finance. This was done in 1918. The Monopoly (executive branch) is officially known as *Ustredni Reditelstvi Ceskoslovenske Tabakove Rezie*.

PRODUCTION OF LEAF TOBACCO

Perhaps no other European country has shown such rapid expansion in the production of leaf tobacco. When the Republic was set up, 95 percent of the Monopoly requirements of leaf tobacco was imported; only 74 percent was imported from 1930 to 1932. Domestic tobacco is used chiefly in the manufacture of low-priced cigarettes and pipe tobacco.

The tobacco crop increased from 2,400,000 pounds in 1920 to 37,600,000 pounds in 1932, and the average crop from 1933 to 1935 was 28,000,000 pounds (table 48). The production of tobacco was not important in the Czechoslovakian area formerly included in Hungary, as more suitable land was available in Bosnia and Herzegovina, but the crop has been spread into new areas. Until recently, great attention has been directed toward the quantity of leaf produced. Yields per acre increased from less than 1,000 pounds during the earlier years to more than 1,200 pounds during later years. Recently, the quality of the crop has become a matter of sufficient concern to cause the policy of the Monopoly to be reversed in certain respects. Nevertheless, the area planted continued to increase up until 1933. Production in 1933 was materially less than in either of the 2 preceding years. Prices paid to growers have never been high. During most years from 1920 to 1933, growers received prices ranging from 7 to 9 cents per pound.

TABLE 48.—Czechoslovakia: Area, production, and value of tobacco produced 1919-35

Year	Growers	Area har- vested	Production	Farm value	Price per pound	
					Crowns	Cents
	<i>Number</i>	<i>Acres</i>	<i>Pounds</i>	<i>Crowns</i>		
1919.....	371	1,480	498,987	1,399,085	2.81	10.7
1920.....	1,523	3,892	2,412,542	10,638,805	4.41	6.9
1921.....	1,592	3,313	2,020,675	14,423,170	5.50	7.0
1922.....	1,708	3,121	4,647,642	16,647,520	3.66	8.8
1923.....	2,074	6,559	5,169,001	19,679,803	3.18	9.4
1924.....	5,040	10,244	12,719,814	34,550,292	2.72	8.0
1925.....	9,289	13,239	15,159,747	37,124,289	2.45	7.3
1926.....	9,289	14,141	14,532,022	37,440,069	2.58	7.5
1927.....	5,026	13,315	16,894,286	47,267,748	2.81	8.3
1928.....	4,611	14,735	15,905,545	55,182,813	3.01	8.9
1929.....	4,517	15,769	20,206,724	53,476,195	2.65	7.8
1930.....	4,110	18,529	22,095,161	55,843,478	2.53	7.5
1931.....	4,944	22,370	30,494,570	67,718,555	2.22	6.6
1932.....	5,598	24,793	37,522,069	81,193,949	2.16	6.4
1933.....	5,412	24,764	25,964,818	48,495,258	1.87	7.1
1934.....	5,458	25,044	30,165,960	68,532,012	1.94	8.2
1935.....	5,400	25,695	27,811,929	68,000,000	2.09	8.7

Superficies Ensemenées et Récoltés des Produits Agricoles dans la République Tchécoslovaque. See also Annuaire Statistique de la République Tchécoslovaque, 1934.

TYPES GROWN

The tobacco of Czechoslovakia belongs either to the senioriental or to the dark air-cured type (table 8). Kerti tobacco, the senioriental

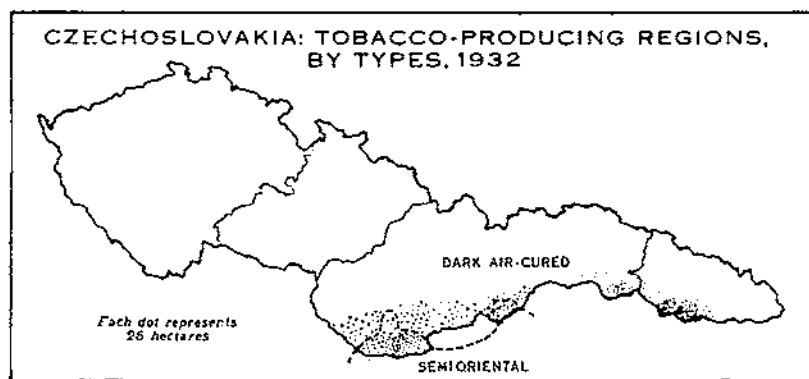


FIGURE 8.—Tobacco production in Czechoslovakia is confined to two Provinces. Considerable expansion has taken place since the World War, particularly in the dark air-cured area.

type (for description see p. 28), is used in cigarettes and in smoking mixtures. Debrecene and related varieties are dark air-cured; they are used in smoking mixtures and to a limited extent in cigars (p. 29). Location of the tobacco-producing areas in Czechoslovakia is indicated in figure 8.

TRADE

The large domestic crops have been supplanting imports of foreign tobacco since 1927, leaf imports having declined from that time by almost one-third. Cigarette tobacco is obtained from Turkey, Yugoslavia, Greece, and Bulgaria (table 49). By reason of an exchange of manufactured products for raw tobacco, leaf imports from Yugoslavia more than doubled in 1932. Trade in cigar tobacco is with the Philip-

pine Islands mainly. About 500,000 pounds of leaf tobacco are bought from the United States annually. In the earlier years, greater quantities of United States tobacco were used in smoking mixtures, but this has been largely displaced by domestic-grown tobacco, and imports from the United States consist principally of fire-cured types used in snuff. At various times unimportant quantities of Burley and flue-cured tobacco have been used in blended cigarettes, and it is probable that small quantities will continue to be imported for this purpose.

Czechoslovakia has no export trade of importance in either leaf or products. Imports of tobacco products are kept within reasonable bounds by an import duty, amounting to 437.50 crowns per kilogram, plus 3 percent turn-over tax, applied when imports are made by any agent other than the monopoly.

TABLE 49.—Czechoslovakia: Imports of leaf tobacco, 1920-35

Country of origin	1920	1921	1922	1923	1924	1925	1926	1927
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
United States.....	817	4,054	8,957	145	659	832	751	2,197
Turkey.....	237	201	1,523	3,601	1,622	2,340	6,213	10,135
Yugoslavia.....				10	393	1,717	2,401	3,690
Netherlands.....	7,000	8,803	12,383	652	2,742	2,793		
Bulgaria.....	3,388	1,888	11,866	497	9,563	3,942	12,263	5,064
Rumania.....		103	2,232		5		2,754	15
Greece.....			1,128		4,020	328	6,725	5,913
Germany.....	893	228		8,858	2,887	8,919		
Hungary.....		2,803	5,342	5,882	3,902	5,916	53	2,920
Italy.....	2,521	11,044		210	920	68	56	
Trieste.....				16,150	12,283	9,756		
Union of Soviet Socialist Republics.....	588				367	3	337	1,271
Brazil.....	92	1,065	1,236	1,103	724	569	541	322
Philippine Islands.....					1,292	5,203	4,034	6,722
Netherlands East Indies.....	6,277	7,169	6,385	44	1,435	1,216		244
British India.....	104	1,070	2,072	2,268	1,219	(*)	1,589	1
Other countries.....	1,030	250	4,587	60	82	1,364	3,801	56
Total.....	23,016	39,698	57,702	39,480	44,166	45,622	41,628	37,626
	1,000 crowns	1,000 crowns	1,000 crowns	1,000 crowns	1,000 crowns	1,000 crowns	1,000 crowns	1,000 crowns
Total value.....	281,685	470,482	360,885	347,304	486,753	395,462	461,056	415,734

Country of origin	1928	1929	1930	1931	1932	1933	1934	1935
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
United States.....	687	899	525	901	953	790	567	467
Turkey.....	2,429	7,223	1,895	5,478	4,058	5,471	478	2,837
Yugoslavia.....	2,041	4,344	1,450	4,029	11,033	8,506		7,008
Netherlands.....	1,510	2,717	664	2,778		696	46	1,583
Bulgaria.....	3,297	4,572	4,780	2,518	967	1,471	1,310	4,246
Rumania.....	1,272	106	353	1,154		1,154		
Greece.....	2,148	7,310	6,215	1,078	1,113	1,310	1,495	1,678
Germany.....			86	115				
Hungary.....	80	4,275	74					
Italy.....			112		57			
Trieste.....						4		
Union of Soviet Socialist Republics.....	780	1,530	669	1	651	1,464	333	1,986
Brazil.....	1,607	2,648	470		877	678	805	390
Philippine Islands.....	7,594	8,183	3,650	4,474	1,320	1,325		238
Netherlands East Indies.....	60			106		2,704	1,660	3,671
British India.....	21							
Other countries.....	1,392	1,477	1,029	168	550	5,645	3,571	1,147
Total.....	24,918	45,284	21,967	22,800	22,279	30,064	30,265	25,251
	1,000 crowns	1,000 crowns	1,000 crowns	1,000 crowns	1,000 crowns	1,000 crowns	1,000 crowns	1,000 crowns
Total value.....	213,179	502,640	357,189	250,651	246,065	211,909	70,418	208,875

* Includes quantities from Hamburg as follows: 1923, 319,442 pounds; 1924, 112,510 pounds; 1925, 267,066 pounds; from Bremen, 1925, 7,442,968 pounds.

† Probably included in imports via Bremen. See note 1.

‡ Reported as from Other South American Republics.

Commerce Extérieur de la République Tchécoslovaque.

CONSUMPTION OF TOBACCO PRODUCTS

Between 40,000,000 and 50,000,000 pounds of tobacco products are consumed annually, over one-half of which is in the form of cigarettes and slightly more than 40 percent in smoking tobacco (table 50). From 1923 to 1929 consumption increased at an average rate of about 2.8 percent per year. The increase was most marked in the case of cigarettes, the average rate of increase being approximately 8 percent per year. Owing to price increases and lowered purchasing power, total consumption declined throughout the 1930-32 period, and was reduced further in 1933. In 1934 it remained at a low level (table 5).

TABLE 50.—Czechoslovakia: Consumption of tobacco products, 1923-34

Year	Cigars		Ciga- rettes	Smoking mixtures	Snuff	Total	Year	Cigars		Ciga- rettes	Smoking mixtures	Snuff	Total
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.		1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
1923.....	4,134	17,031	19,837	185	41,787	1929.....	3,085	26,264	18,721	202	48,892		
1924.....	4,081	19,632	19,938	200	43,857	1930.....	3,591	26,720	18,018	196	48,525		
1925.....	4,112	20,027	18,759	214	44,012	1931.....	3,100	27,004	17,580	187	47,857		
1926.....	3,878	22,581	19,473	269	46,144	1932.....	2,404	25,055	18,900	174	40,533		
1927.....	3,712	23,858	19,870	199	47,019	1933.....	2,026	23,516	18,508	150	44,290		
1928.....	3,740	25,432	19,436	205	48,813	1934.....	1,822	24,143	18,101	134	44,260		

POLAND

The Polish Tobacco Monopoly had its beginning in 1922. After several reorganizations, the last of which was in March 1932, it has become a State enterprise, strictly exempt from taxes and operating under its own control except for indirect supervision by the Minister of Finance. Monopoly profits are paid into the treasury of the Polish Government and constitute about one-third of the receipts from State controlled enterprises.

PRODUCTION OF LEAF TOBACCO

For several years past a policy leading to the reduction of tobacco imports has been followed by the Monopoly with fairly successful results in the low grades. Many unsuitable areas have been taken out of production entirely, in an effort to improve the domestic crop, but the most important factor has probably been the increased demand for low-grade tobacco brought about by the low purchasing power of the country. From 1925 to 1932 the manufacturing plants used 45,000,000 pounds of tobacco annually, about three-fourths of which was imported.

TABLE 51.—Poland: Area and production of tobacco, 1925-35

Year	Planters		Area	Production	Year	Planters		Area	Production
	Number	Acres	Pounds	Number		Acres	Pounds		
1925.....	22,368	2,128	1,875,233	1931.....	44,608	13,209	17,936,185		
1926.....	33,258	3,845	5,128,781	1932.....	43,805	12,804	18,021,420		
1927.....	46,058	7,126	10,548,072	1933.....	39,646	11,056	15,031,983		
1928.....	48,838	9,442	14,307,834	1934.....	35,483	10,432	14,746,569		
1929.....	71,455	16,385	19,637,915	1935.....	44,900	13,212	18,064,000		
1930.....	46,731	12,138	13,079,071						

¹ Estimated.

Prior to 1919, between 5,000,000 and 10,000,000 pounds of tobacco were grown in the region which now forms the southern part of Poland

but which was then a part of Austria. During the period from 1919 to 1925 production was continued on a restricted basis in that section. Production was increased substantially in 1926 and the years following until in 1929 the crop consisted of approximately 20,000,000 pounds. In 1930, production was reduced, but was increased again in 1931 and 1932 (table 51). About two-thirds of the crop is produced in the departments of Tarnopol and Stanislawow (fig. 9).

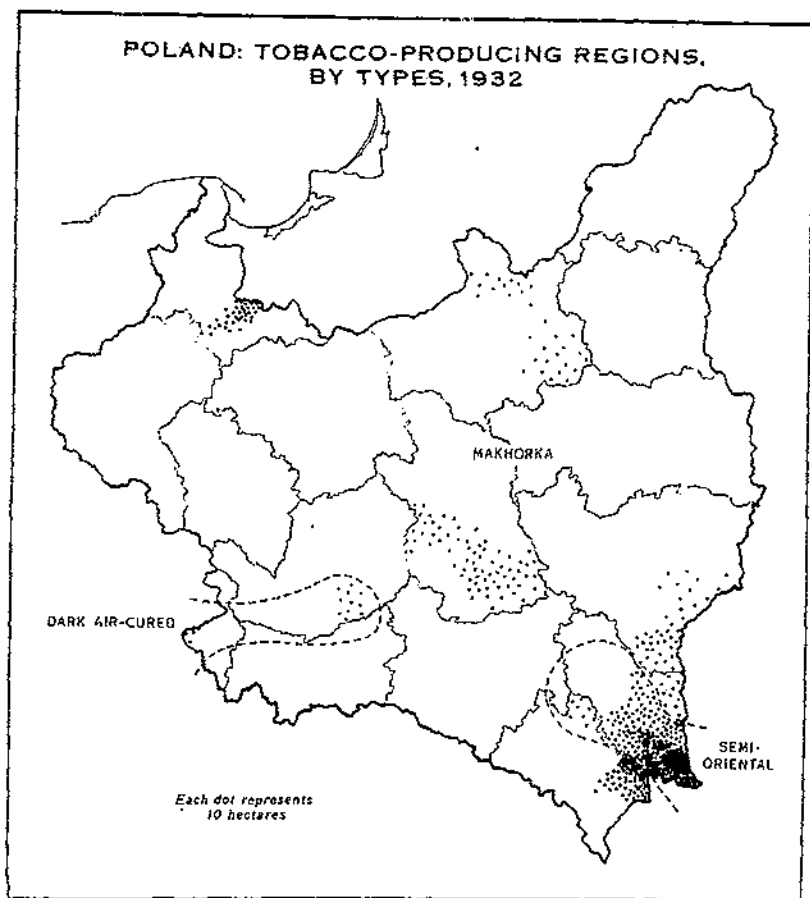


FIGURE 9.—Many unsuitable areas have been taken out of production in an effort to improve the quality of the crop, but the increasing demand for low grades has nevertheless increased the domestic crop at the expense of imports. About two-thirds of the crop is produced in the departments of Tarnopol and Stanislawow.

TYPES GROWN

The two chief types of tobacco grown are Kerti (Hungarian garden) and Makhorka. Of 19,000,000 pounds produced in 1932, 11,000,000 pounds were Makhorka and 7,500,000 pounds Kerti. In recent years a considerable portion of the Kerti crop has been cured by artificial means. The method of curing resembles that used in the fire-curing section of the United States, and the cured-leaf color is brighter than when the air-curing method is used (fig. 10). Kerti tobacco is used as filling material in cigarettes and in the better grades of pipe mix-

tures, both for domestic consumption. Experimental work in curing Makhorka by artificial means has also been undertaken. Makhorka is used largely in pipe mixtures, which are in great demand by the peasant class of Poland.

TABLE 52.—Poland: Farm prices of tobacco

Year and type	Special		Class I		Class II	
	Per kilo-gram	Per pound	Per kilo-gram	Per pound	Per kilo-gram	Per pound
1933						
Oriental	<i>Zlotych</i> 6.20	<i>Cents</i> 40.5	<i>Zlotych</i> 5.00	<i>Cents</i> 32.7	<i>Zlotych</i> 3.25	<i>Cents</i> 21.2
Kerti (Hungarian garden)	3.00	19.6	2.50	16.3	2.00	13.1
Cigar tobaccos	2.00	13.1	1.00	10.5	1.25	8.2
Kentucky (seed)			1.55	10.1	1.15	7.5
Makhorka			1.45	9.5	1.05	6.9
Virginia cigarette (seed)			2.00	13.1	1.50	9.8
1932						
Oriental	6.80	34.5	5.50	27.9	3.70	18.8
Kerti (Hungarian garden)	3.30	10.7	2.80	14.2	2.30	11.7
Cigar tobaccos	2.30	11.7	1.00	9.6	1.50	7.6
Kentucky (seed)			1.70	8.6	1.30	6.6
Makhorka			1.60	8.1	1.20	6.1

Year and type	Class III		Class IV		Class V	
	Per kilo-gram	Per pound	Per kilo-gram	Per pound	Per kilo-gram	Per pound
1933						
Oriental	<i>Zlotych</i> 1.70	<i>Cents</i> 11.1	<i>Zlotych</i> .60	<i>Cents</i> 3.9	<i>Zlotych</i> .25	<i>Cents</i> 1.6
Kerti (Hungarian garden)	1.10	7.2	.60	3.9	.25	1.6
Cigar tobaccos	.85	5.6	.40	3.0	.25	1.6
Kentucky (seed)	.60	3.9	.25	1.6		
Makhorka	.60	3.9	.25	1.6		
Virginia cigarette (seed)	1.00	6.5	.60	3.9	.25	1.6
1932						
Oriental	2.00	10.1	.75	3.8	.30	1.5
Kerti (Hungarian garden)	1.30	6.6	.75	3.8	.30	1.5
Cigar tobaccos	1.00	5.1	.75	3.8	.30	1.5
Kentucky (seed)	.75	3.8	.30	1.5	.70	3.6
Makhorka	.75	3.8	.30	1.5	.70	3.6

In addition to Kerti and Makhorka, about 100 acres of oriental tobacco have been grown annually in recent years in the area near the Kerti type. Oriental tobacco, as in other countries, is used in cigarettes. In southwestern Poland, there is a cigar-tobacco area of approximately 75 acres. Tobacco grown from Kentucky seeds was produced for the first time in 1931, in the Krakow area. This type resembles the fire-cured tobacco from the United States. The crop in 1932 covered 247 acres and amounted to 523,000 pounds. In 1933 small areas were also planted to United States fire-cured tobaccos from United States seed.

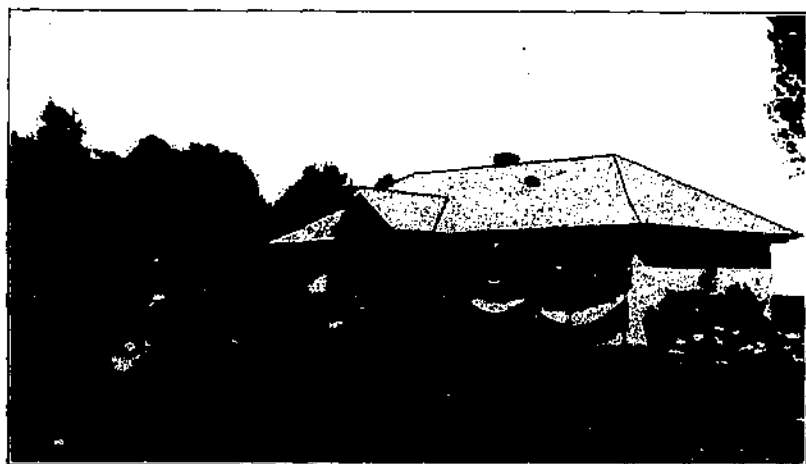
Prices paid to producers are fixed by the Minister of Finance. For medium grades of Makhorka (the prevailing type) producers received an equivalent of 3.9 cents per pound in 1933. Kerti brought about twice as much (table 52).

TRADE

Tobacco consumed since the war has been obtained from various sources. The content of the better quality of cigarettes originated principally in Bulgaria and the Union of Soviet Socialist Republics, and after 1930 Greece and Yugoslavia became important sources for cigarette tobacco (table 53). Since 1927, in buying leaf tobacco,

Poland has given preference to countries willing to accept Polish merchandise in payment therefor. This factor has figured particularly in the tobacco trade with Italy and Yugoslavia. Cigar tobaccos are drawn variably from the Netherland East Indies, Brazil, and Hungary, but imports in 1931 and 1932 were curtailed to unimportant quantities from all sources. Moderate quantities of the Netherland East Indies tobacco (Java) enter into the manufacture of smoking tobacco.

During the period 1925-29 tobacco imports from the United States averaged 8,200,000 pounds, largely lugs and seconds of the fire-cured types. These types were used with domestic-grown Makhorka tobacco in smoking mixtures and in dark low-priced cigarettes. Small quantities of fire-cured tobacco are also used in snuff. With



BAE 36631

FIGURE 10.—One method of curing Kertl (garden) tobacco in southern Poland. Other curing methods resemble those of the fire-cured region in the United States.

the increase in the domestic crop, the use of United States fire-cured tobacco has been greatly reduced.

TABLE 53.—Poland: Imports of leaf tobacco, 1924-35

Country of origin	1924 ¹	1925	1926	1927	1928	1929
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
United States.....	5,011	14,405	4,428	10,509	6,817	5,009
United Kingdom.....	73	809	351	3,301	425	1,960
Netherlands.....	4,477	5,953	2,903	3,971	2,799	2,128
Germany.....	5,472	1,300	1,170	713	1,050	4
Hungary.....	1,092	1,331	62	4,552	1,954	3,304
Union of Soviet Socialist Republics.....	61	47	1,750	1,045	1,849	3,475
Bulgaria.....	4,944	9,065	2,608	1,191	1,915	4,527
Yugoslavia.....		503				
Greece.....	276	824	870	14	140	
Turkey.....	3,290	5,293	5,065	448	156	891
Netherland East Indies.....			419	813	873	1,770
Algeria.....	1,567	2,569	3,040	3,894	1,025	643
Italy.....	303	1,200	1,369	1,346	2,176	6,694
Brazil.....					350	1,226
Other countries.....	2,970	5,828	3,369	1,895	970	4,693
Total.....	29,616	49,178	27,434	33,863	22,568	36,342
	1,000 Zlotych	1,000 Zlotych	1,000 Zlotych	1,000 Zlotych	1,000 Zlotych	1,000 Zlotych
Total value.....	27,953	49,307	30,356	33,370	33,009	51,795

¹ Data by countries prior to 1924 not comparable with subsequent years.

TABLE 53.—*Poland: Imports of leaf tobacco, 1924-35—Continued*

Country of origin	1930	1931	1932	1933	1934	1935
United States.....	1,000 lb. 11,805	1,000 lb. 3,194	1,000 lb. 7,420	1,000 lb. 4,948	1,000 lb. 7,007	1,000 lb. 4,773
United Kingdom.....	1,135	1,005				
Netherlands.....	612					
Germany.....						
Hungary.....	1,959					
Union of Soviet Socialist Republics.....	7,783	1,552	1,690	1,178	1,314	2,076
Bulgaria.....	4,720	4,751	2,589	459	668	1,376
Yugoslavia.....		1,041	1,711	1,786	1,597	2,754
Greece.....		1,152	1,542	50	226	1,102
Turkey.....	732		217	193	37	264
Netherland East Indies.....	342	298	319	349	634	531
Algeria.....	2,988	2,707	710			
Italy.....	7,019	3,028	1,103	6,411	6,784	4,924
Brazil.....	1,034	1,472	983	252	674	297
Other countries.....	2,264	1,728	592	215	110	21
Total.....	42,342	22,438	18,792	15,832	19,015	18,118
Total value.....	1,000 Zlotych 60,289	1,000 Zlotych 32,437	1,000 Zlotych 32,878	1,000 Zlotych 21,687	1,000 Zlotych 22,907	1,000 Zlotych 19,397

Annuaire du Commerce Extérieur de la République Polonoise et de la Ville Libre de Dantzig.

CONSUMPTION OF TOBACCO PRODUCTS

More than 95 percent of the Polish consumption of tobacco is in the form of smoking mixtures and cigarettes. The consumption of these products increased steadily from 1923 to 1929. Small quantities of snuff and cigars are used. The consumption of snuff showed some increase while that of cigars declined during the 1923-29 period. The total consumption of all products was more than twice as large in 1929 as in 1923 (table 54).

The consumption of all classes of products began to decline in 1930 and this decline continued through 1933. Total consumption was 17 percent less during the latter year than in 1929.

TABLE 54.—*Poland: Consumption of tobacco products, 1922-35*

Year	Cigars	Cigarettes	Smoking mixtures	Snuff	Total	Year	Cigars	Cigarettes	Smoking mixtures	Snuff	Total
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.		1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
1922...	1,638	8,413	13,250	681	23,982	1929...	860	15,362	28,084	983	45,889
1923...	1,210	7,650	12,813	(1)	21,686	1930...	778	15,007	28,062	981	45,428
1924...	768	9,063	15,512	(1)	25,343	1931...	611	13,638	26,923	873	42,045
1925...	767	11,898	24,781	800	38,306	1932...	469	13,870	23,807	785	38,931
1926...	617	10,549	25,873	951	38,000	1933...	397	13,453	23,200	604	37,640
1927...	688	12,103	27,065	994	40,853	1934...	385	12,088	25,895	655	38,033
1928...	860	14,321	28,572	990	44,692	1935...	311	10,698	20,984	501	38,584

¹ Included with smoking mixtures.

PRICES OF TOBACCO PRODUCTS

Prices of all Polish tobacco products shared in an increase from 1925 to 1932. But, in spite of these increases, prices of tobacco products were not any higher in 1932 than those prevailing in most other European countries at that time. Prices of cigars increased through 1929 and began a series of drops in 1930, but these price reductions failed to check the decline in consumption.

The average retail prices of all tobacco products from 1925 to 1933 are shown in table 5.

SPAIN

Manufacturing plants in Spain used an average of about 65,000,000 pounds of leaf tobacco annually during the period 1925-32. The Spanish tobacco industry is controlled by a monopoly conceded since 1900 to the *Compania Arrendataria de Tabacos*, which receives a stipulated percentage of the net profits for its services.

PRODUCTION OF LEAF TOBACCO

Spain was probably the first country in Europe in which tobacco was grown. It is reported to have been introduced from Mexico during the sixteenth century, and toward the end of that century Spanish-grown tobacco was exported to England. From Spain, tobacco was introduced into France, the Philippines, and Cuba. In time, Spain ceased to grow tobacco, and for a long time before 1921 the Monopoly imported the greater part of its tobacco from the Philippine Islands and the United States.

In December 1919 the Spanish Government authorized experimentations in tobacco growing for a period of 3 years. Active field experimental work started in 1921, and during that year almost 80,000 pounds were produced. The results were considered satisfactory, and the period has since been extended from time to time. The last extension expires August 1, 1945. Production has expanded to an annual crop of about 16,000,000 pounds (table 8).

The two principal types grown are the Valencia and Kentucky. The Kentucky type is grown from seed imported from western Kentucky or western Tennessee and resembles the lighter colored or lighter bodied grades of the types grown in the areas from which the seeds are obtained. It is air-cured. The Valencia is also an air-cured type resembling Kentucky. Small quantities of cigar types are also grown.

TRADE

Most of the tobacco consumed during the period 1913-32 was obtained from the Philippine Islands and the United States, and its principal use is for smoking mixtures and cigarettes (table 55). Cigar tobacco is imported in moderate quantities from Brazil and Cuba. Practically no oriental tobacco is used. An increased consumption of the domestic-grown types (in smoking mixtures mainly) has brought about a decline in the import trade since 1932.

At one time tobacco imported from the United States consisted largely of seconds and lugs of the Paducah variety. During the period 1920-24 approximately 15,000,000 pounds of that variety were used annually. Later the consumption of Paducah tobacco declined somewhat, averaging about 10,000,000 pounds annually. United States tobacco is used to a great extent in smoking mixtures. Few other countries import tobacco from the United States at a lower cost per pound than Spain.

CONSUMPTION OF TOBACCO PRODUCTS

The consumption of tobacco products increased substantially from 1926 to 1931. Much of this increase consisted of smoking tobacco (including cut tobacco used for both pipes and cigarettes), consump-

tion of which amounted to about 40,000,000 pounds in 1931, or more than twice that of cigarettes. In spite of rising prices, cigar consumption increased until 1926, after which the trend was downward (tables 5 and 56). There was a substantial decline in total consumption from 1931 to 1935; nevertheless, the average annual consumption during those years was approximately 40 percent greater than in 1920.

TABLE 55.—Spain: Imports of leaf tobacco, 1924-34

Country of origin	1924	1925	1926	1927	1928	1929
United States.....	1,000 lb. 30,800	1,000 lb. 24,376	1,000 lb. 1,708	1,000 lb. 20,307	1,000 lb. 15,792	1,000 lb. 11,261
Cuba.....	1,000 lb. 1,064	1,000 lb. 1,404	1,000 lb. 2,211	1,000 lb. 2,640	1,000 lb. 6,064	1,000 lb. 7,960
Dominican Republic.....	507	441				1,920
Brazil.....	104			2,706	1,638	2,110
Philippine Islands.....	31,897	21,794	17,031	23,049	31,584	37,207
Netherland East Indies.....		1,197	12,816	2,341	11,008	6,733
Algeria.....		3,953	770		352	
Canary Islands.....	3	14	15	383	293	192
Other countries.....	35	10	260	101	465	54
Total.....	72,355	56,448	25,758	51,826	65,156	67,417
Total value.....	1,000 pesetas 164,100	1,000 pesetas 128,024	1,000 pesetas 58,418	1,000 pesetas 117,540	1,000 pesetas 154,570	1,000 pesetas 50,457

Country of origin	1930	1931	1932	1933	1934
United States.....	1,000 lb. 2,174	1,000 lb. 6,448	1,000 lb. 15,336	1,000 lb. 15,733	1,000 lb. 8,397
Cuba.....	10,693	7,552	13,599	9,297	8,455
Dominican Republic.....		388			
Brazil.....	2,406	5,252	6,329		57
Philippine Islands.....	37,082	29,639	33,732	27,555	19,074
Netherland East Indies.....	2,007	14,172	12,456	8,405	1,829
Algeria.....	1,739	1,050	1,776	2,251	2,213
Canary Islands.....	342				
Other countries.....	178	118	13		
Total.....	57,970	65,419	88,211	63,151	30,816
Total value.....	1,000 pesetas 42,713	1,000 pesetas 24,687	1,000 pesetas 27,483	1,000 pesetas 18,972	1,000 pesetas 11,800

¹ In 1925 reported in original as from the Netherlands; in 1926, 542,000 pounds from the Netherlands.

Estadística del Comercio Exterior de España.

TABLE 56.—Spain: Consumption of tobacco products, 1920-35

Year	1920-24				1925-35				
	Cigars	Ciga- rettes	Smoking mix- tures	Total ¹	Year	Cigars	Ciga- rettes	Smoking mix- tures	Total ¹
1920 ²	1,000 pounds 3,728	1,000 pounds 12,145	1,000 pounds 24,729	1,000 pounds 40,602	1928.....	1,000 pounds 4,301	1,000 pounds 14,533	1,000 pounds 41,040	1,000 pounds 60,788
1921 ²	3,749	11,983	25,085	43,817	1929.....	1,116	16,241	40,022	60,379
1922 ²	3,883	12,750	34,110	50,743	1930.....	3,693	17,244	39,584	60,601
1923 ²	4,222	13,857	38,004	56,083	1931.....	4,490	16,800	40,115	61,501
1924 ²	4,616	13,225	34,211	52,052	1932.....	3,433	16,749	30,538	56,780
1925 ²	5,127	11,859	32,273	49,259	1933.....	3,135	15,187	38,027	56,290
1926 ²	5,567	11,214	30,579	56,359	1934.....	3,111	15,480	37,755	56,340
1927.....	4,720	11,040	42,344	58,013	1935.....	3,000	15,840	30,333	55,242

¹ Not including snuff, information for which was unavailable for some years; consumption for the period 1920-34 averaged about 2,000 pounds annually.

² Reported for fiscal years adjusted to calendar years.

PRICES OF TOBACCO PRODUCTS

Prices of tobacco products are fixed by the Minister of Finance, and as compared with other countries, they are extremely low. The retail prices of all tobacco products were increased on April 1, 1932. Prior to that time, as far back as 1920, cigar prices had been on an ascending scale generally, but the prices of cigarettes and cut tobacco remained more or less steady, the price of cigarettes ranging around 20 pesetas per kilogram (5 cents per packet of 20), and cut tobacco, 11 pesetas per kilogram (70 cents per pound) (table 5). From 1929 to 1932 the prices of tobacco products were increased in most countries, whereas the prices of most other products declined. In Spain the depreciation of the currency was great during that period, and prices of most products, including tobacco, in 1931 were around the 1929 levels.

SWITZERLAND

Only small quantities of tobacco are grown in Switzerland, and most of the tobacco requirements are imported. Switzerland has no tobacco monopoly. In 1925 manufacturers used 10,500,000 pounds of leaf tobacco, compared with nearly 18,000,000 pounds consumed annually from 1929 to 1932.

PRODUCTION OF LEAF TOBACCO

During the period from 1924 to 1928 the production of tobacco was only 575,000 pounds annually. Production was increased to 2,900,000 pounds in 1929, but as difficulties were experienced in disposing of that crop, growers agreed to restrict production for 5 years. They obtained a small Government loan for a period of 3 years without interest, by which time it was hoped that manufacturers would use the surplus. Annual production from 1929 to 1932 was near 1,700,000 pounds, which was as much as the Swiss industry could absorb. Nevertheless, under the influence of good prices, the crop increased to an average of 2,800,000 pounds during the period 1933-35. A surplus accumulated, and production quotas were established to remedy the situation (table 8). The crop is all air-cured.

Tobacco is grown in the valley between Berne and Geneva and in extreme south Switzerland. That grown in south Switzerland resembles the Italian-grown Nostrano Brenta, the type having come from Italian seed. Burley seed is planted in the Berne-Geneva area. Both types are used in smoking mixtures.

TRADE

Almost one-half the tobacco consumed is imported from the United States (table 57). Imports from the United States increased from 5,100,000 pounds in 1925 to 7,900,000 pounds in 1930, but declined slightly during the following years. Total imports increased from 9,800,000 pounds in 1925 to 16,200,000 pounds in 1929-32. Total imports, as well as imports from the United States, increased in 1933.

Statistics are not available as to the imports of tobacco by types, and only about one-half the United States tobacco is imported directly, the remainder being first consigned to Bremen, Antwerp, Genoa, or Marseilles and later reshipped to Switzerland. Because of these indirect shipments, export declarations of the United States are not a good index to the quantities of the different types used. The little

information available indicates that all types shared in the increase in consumption from 1921 to 1930 and that the consumption of Maryland and Kentucky continued to increase in 1931 and 1932 but that of other types declined.

It is estimated that the United States fire-cured tobacco imported consists chiefly of medium-priced grades of the Clarksville-Hopkinsville type. However, small quantities of the better-grade dark Virginia type are also used. These types are used largely in Swiss cigars, known as Stumpen, Brissago, and Toscani.

Stumpen are short cigars, rather small, clipped at both ends and wrapped (in recent years) with Java tobacco. Brissago are long, slender cigars, made entirely from Kentucky-Tennessee and dark Virginia tobacco. Toscani are short cigars of conical shape, manufactured almost entirely from Kentucky tobacco of the Springfield variety.

TABLE 57.—Switzerland: Imports of leaf tobacco, 1920-34

Country of origin	1920	1921	1922	1923	1924	1925	1926	1927
United States	1,000 lb. 13,776	1,000 lb. 3,210	1,000 lb. 4,579	1,000 lb. 11,482	1,000 lb. 2,172	1,000 lb. 5,482	1,000 lb. 6,358	1,000 lb. 6,336
Cuba	565	309	1,519	59	309	395	565	565
Netherland East Indies	5,484	503	2,383	3,845	423	1,213	1,212	1,401
Argentina	172	63	26	308	99	213	257	352
Brazil	3,708	757	1,878	3,845	406	1,402	1,493	1,606
Italy	78			4	153	166	176	177
Union of Soviet Socialist Republics	62	34	3	31	50	76	1	3
Greece	1,660	356	267	767	242	456	690	645
Bulgaria	73	89	12	79	2	7	86	47
Turkey	1,115	137	176	674	264	646	595	669
British India	392		1	5	2	30	12	8
Philippine Islands				22	1	10	13	27
China	295	19	51	295	8	36	31	28
Japan				22	10	10	10	20
Algeria	351	10	81	256	109	218	340	417
Hungary		5	1	6	90	28	25	3
Uruguay					62	562	786	618
Other countries	1,031	10	10	63	24	81	128	168
Total	20,093	5,792	16,640	22,950	4,281	9,354	12,795	13,634
Total value	1,000 francs 70,110	1,000 francs 11,528	1,000 francs 13,858	1,000 francs 30,374	1,000 francs 7,405	1,000 francs 15,689	1,000 francs 19,331	1,000 francs 20,324

Country of origin	1928	1929	1930	1931	1932	1933	1934
United States	1,000 lb. 6,835	1,000 lb. 7,792	1,000 lb. 7,904	1,000 lb. 7,632	1,000 lb. 6,835	1,000 lb. 7,458	1,000 lb. 6,500
Cuba	887	794	684	89	89	149	94
Netherland East Indies	1,722	2,094	2,225	2,269	2,264	2,683	2,274
Argentina	263	415	430	590	538	518	374
Brazil	1,360	1,463	1,688	1,926	2,202	2,716	2,111
Italy	253	218	200	201	282	422	378
Union of Soviet Socialist Republics	15	26	11	9	4	20	18
Greece	1,036	907	947	878	883	857	727
Bulgaria	56	144	217	497	592	445	385
Turkey	466	413	344	346	258	320	314
British India	11	3	3	18	20	23	50
Philippine Islands	16	28	22	19	17	10	3
China	37	39	49	46	20	20	17
Japan	23	31	28	9	9	13	6
Algeria	350	351	318	264	212	264	126
Hungary	251	492	505	442	374	317	260
Uruguay	669						
Paraguay		591	547	392	451	523	400
Other countries	25	30	59	1,052	1,005	1,698	778
Total	13,890	15,051	16,373	16,692	16,097	17,833	14,886
Total value	1,000 francs 20,576	1,000 francs 22,763	1,000 francs 23,963	1,000 francs 23,118	1,000 francs 19,494	1,000 francs 18,503	1,000 francs 13,969

Maryland tobacco is used largely in cigarettes. The increase in the use of this type is due to the growing preference for Maryland cigarettes. Burley and flue-cured tobacco are used in blended cigarettes and smoking mixtures. Consumption of the products in which these types are used did not change much from 1925 to 1929, but declined during the depression period.

The Netherland East Indies and Brazil are the second most important sources of leaf supply, annual imports usually ranging around 2,000,000 pounds from each country. These tobaccos, together with leaf imported from Cuba, Paraguay, Argentina, Hungary, and Italy, are used for cigars and smoking mixtures. Cigarette tobacco is imported from Greece, Bulgaria, and Turkey, and imports from these countries usually are between 1,500,000 and 2,000,000 pounds annually.

ITALY

In Italy a State Monopoly controls the production of tobacco from seed to Government warehouse, where the crop is ultimately stored. All tobacco is inspected and that not coming up to the Government standard is destroyed. Authorization for growing tobacco may be given in four ways: (1) By manifesto concessions (*Concessioni di manifesto*); (2) by special concessions (*Concessioni speciali*); (3) for experimental purposes (*coltivazione in cooperazione con lo Stato*); and (4) for export (*Coltivazione per l'esportazione*).

CROP REGULATIONS

Manifesto concessions are granted to small growers. Under this form of concession, prevalent in regions where tobacco production is traditional, the leaf is purchased in the raw state by the Monopoly.

Special concessions are granted in connection with extending tobacco production to new districts. It is the form of concession granted to the more important commercial growers and embraces about seven-eighths of the tobacco area. Under a special concession, tobacco is manipulated by the grower; it may be purchased by the Monopoly, or it may be exported by the grower with the consent of the Monopoly.

Concessions for experimental purposes are granted to a few selected growers in the different sections to try out new varieties and to determine whether they are adapted to local conditions.

Cultivation for export is made under special license for exportation. As a rule, tobacco is purchased by the Monopoly before being exported.

During the period from 1925 to 1932 manufacturers used about 75,000,000 pounds of leaf tobacco annually. Prior to 1923 (1920-22) over 60 percent of the leaf tobacco used was imported. In 1923 the use of domestic-grown tobacco began to increase, and in 1929 nearly 83 percent of the quantity consumed in Italy was grown there. From 1931 to 1934, more tobacco was exported than was imported.

PRODUCTION OF LEAF TOBACCO

After the World War, the Italian Tobacco Monopoly adopted the policy of arbitrarily filling the State's requirements of leaf tobacco largely from the domestic crop.

The ground work for expansion of the Italian tobacco crop really began in 1895, when a tobacco experimental station was established

at Scafati in south-central Italy. For a number of years this station did notable work in developing varieties of tobacco suited to conditions in Italy, but it was not until 1921 that marked expansion in production began to take place. At that time production was approximately 33,000,000 pounds, or about 52 percent greater than in 1920, when the crop was slightly larger than in any previous year. From 1922 to 1926 the crop increased each year, amounting to 87,000,000 pounds. Production remained at a lower level for 3 years, but reached an average of 97,000,000 pounds during the period 1930-32 (table 8).

For the distribution of these three heavy crops there was only a small increase in domestic leaf consumption and no appreciable increase in exports. The accumulation of stocks made it necessary to reduce subsequent crops, and the harvest from 1933 to 1935 averaged about 86,000,000 pounds.

TYPES GROWN

Kentucky and Seme-Levantine are the major types of tobacco grown; the most important minor types are Brasile Beneventano and Brenta. Seme-Levantine, grown in southeastern Italy, is similar to the types grown in Bulgaria, Greece, and Turkey, but generally of lower quality. This type is used largely in cigarettes, but increasing quantities are being exported. During the period 1930-32 about one-fourth of the Italian crop was Seme-Levantine. The Italian-grown Kentucky type is similar to the fire-cured types grown in Kentucky and Tennessee. In general, the leaves are slightly longer and more narrow than the Kentucky-Tennessee types. The Italian Kentucky type is fire-cured. It is used in cigars, and to some extent in pipe mixtures. It is grown in central, western, and northern Italy, and more than any other type, it has displaced the fire-cured tobacco imported formerly in large quantities from the United States. During the period from 1930 to 1932 more than half of the crop was Kentucky type.

The Brasile Beneventano is a type similar to Kentucky but slightly coarser, darker, and heavier. It is fire-cured and is grown in southeastern Italy. Brenta, another fire-cured type, is not quite so dark as Kentucky, and the leaves are slightly smaller. It is grown in northeastern Italy. These two types are used in pipe mixtures and in low-priced cigarettes. Their combined production usually comprises less than 5 percent of the total crop.

Other minor types include Burley, Maryland, and dark Virginia, grown largely for experimental purposes at present. They are similar to United States types of the same name. Producing areas are shown in figure 11.

TRADE

Prior to 1923 most leaf tobacco consumed consisted of fire-cured tobacco (principally the Paducah variety) imported from the United States. From 1910 to 1922 imports of these types into Italy ranged between 35,000,000 and 50,000,000 pounds annually. Imports from the United States began to decline in 1922, however, falling to 5,000,000 pounds in 1923 and to less than 1,500,000 pounds in 1933 and 1934 (table 58). Imported Kentucky tobaccos were formerly used in cigars and smoking mixtures, but in recent years their use has been confined chiefly to a few grades of cigars, the reduction having been brought about by the increased production of a near-Kentucky type in Italy.

For several years some Bulgarian, Greek, and Turkish tobacco has been imported for the higher-priced grades of cigarettes, and in recent years imports of these types have ranged around 5,000,000 pounds annually. The use of Brazil tobaccos in the manufacture of cigars has been declining since 1929. Very little tobacco is imported from any other countries.

Following the expansion of tobacco production an attempt was made to develop an export market. Exports averaged 8,000,000

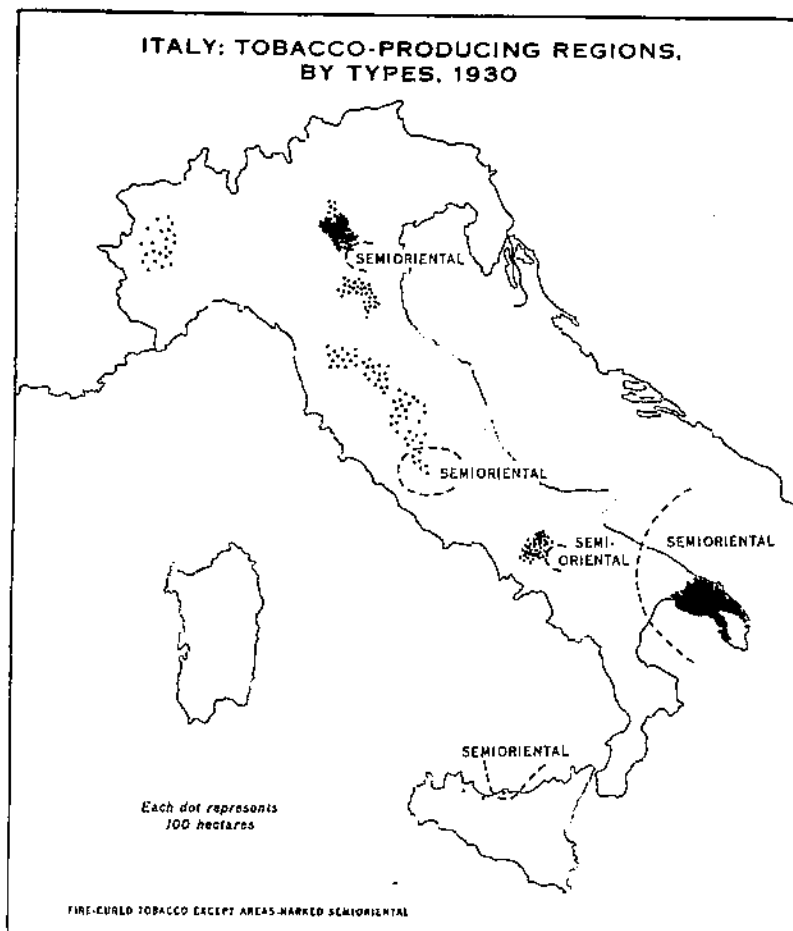


FIGURE 11.—After the World War the Italian Tobacco Monopoly adopted the policy of filling the State's requirements of leaf tobacco from the domestic crop. About one-fourth of the present production is grown in southeastern Italy from Greek, Turkish, and Bulgarian seed. The remainder is produced principally from seed of the dark tobacco of Kentucky and Tennessee, imports of which have almost been eliminated.

pounds annually from 1928 to 1932, exceeding imports for the first time in 1931. By 1934, over 10,000,000 pounds of Italian tobacco were being sold abroad (table 59). Most of the exports have gone to Poland. Trade with Poland resulted from a commercial agreement covering a period of years. In developing the trade an export corporation has been maintained by the Italian Government which could export tobacco at prices somewhat lower than those paid to growers.

CONSUMPTION AND PRODUCTION OF TOBACCO IN EUROPE 95

TABLE 58.—Italy: Imports of leaf tobacco, 1928-34

Country of origin	1923	1924	1925	1926	1927	1928
United States.....	1,000 lb. 30,586	1,000 lb. 22,274	1,000 lb. 13,489	1,000 lb. 5,088	1,000 lb. 4,748	1,000 lb. 4,814
Haiti and Dominican Republic.....	85	198	280	501	609	483
Brazil.....	126	4,300	1,283	498	754	1,340
Bulgaria.....	2,407	3,245	5,164	2,045	2,054	2,613
Greece.....	3,837	3,550	2,435	1,170	2,370	1,828
Turkey.....	3,381	1,408	1,640	2,226	881	804
Netherland East Indies.....		751	107		302	
China.....	790	1,103	801	307	273	
Other countries.....	2	893	341	237	206	1,452
Total.....	41,304	35,712	25,600	12,070	12,383	13,831
Total value.....	1,000 lire 272,809	1,000 lire 100,310	1,000 lire 204,022	1,000 lire 107,000	1,000 lire 90,096	1,000 lire 84,000

Country of origin	1929	1930	1931	1932	1933	1934
United States.....	1,000 lb. 6,351	1,000 lb. 4,027	1,000 lb. 2,350	1,000 lb. 2,036	1,000 lb. 1,306	1,000 lb. 1,382
Haiti and Dominican Republic.....	34	5				
Brazil.....	2,441	1,092	390	351	28	
Bulgaria.....	1,407	2,180	796	2,550	3,211	2,554
Greece.....	3,572	1,868	1,589	2,713	1,538	1,312
Turkey.....	2,106	2,083		745		1,102
Netherland East Indies.....		307	282	344	87	
China.....			280			
Other countries.....	626	413	317	39	177	266
Total.....	16,531	12,633	6,004	8,893	6,347	6,616
Total value.....	1,000 lire 131,568	1,000 lire 60,081	1,000 lire 39,800	1,000 lire 57,361	1,000 lire (1)	1,000 lire (1)

¹ Not yet available.

Movimento Commerciale del Regno D'Italia; Statistica del Commercio Speciale di Importazione e di Esportazione.

TABLE 59.—Italy: Exports of leaf tobacco, 1928-34

Year	Germany	Hungary	Switzerland	Poland	Tripoli and Cyrenaica	Other countries	Total quantity
1928.....	1,000 lb. 110	1,000 lb. 209	1,000 lb. 6,221	1,000 lb. 980	1,000 lb. 75	1,000 lb. 7,601	
1929.....	165	218	270	7,481	531	9,345	
1930.....	1,581	440	217	3,228	942	7,285	
1931.....	1,438	680	234	6,293	485	9,361	
1932.....	1,176		478	5,820	229	7,616	
1933.....	206	194	451	6,308	142	8,328	
1934.....	1	681	751	7,861		10,273	

Movimento Commerciale del Regno D'Italia; Statistica del Commercio Speciale di Importazione e di Esportazione.

CONSUMPTION OF TOBACCO PRODUCTS

Owing to an increase in the consumption of cigarettes and smoking tobacco, the total consumption of tobacco products increased steadily from the war period to 1929. The trend of cigar and snuff consumption was downward during most of this period. Cigar consumption was but little more than half as large in 1932 as in 1920. Total consumption declined from 1929 to 1934. Because of increases in both cigars and cigarettes, total consumption was larger in 1935 (table 60).

A low wage scale and relatively high-priced products have kept tobacco consumption very low. The per-capita consumption in 1932 was only 1.30 pounds, compared with 1.59 pounds in 1929 and 1.21 pounds before the war (table 3).

PRICES OF TOBACCO PRODUCTS

The prices of tobacco products are high compared with prices in most other countries, having been gradually increased from 1910 to 1930. Substantial increases became effective in 1926 and in 1927. Another increase became effective in May 1930, the increase for the leading brands being 15 to 25 percent of the retail price. Retail prices of most tobacco products in 1932 were roughly from 30 to 40 percent higher than in 1920 (table 5).

The two most popular cigarettes are the Ciubeck and the Macedonia, the former selling at 26 cents and the latter at 21 cents for packages of 20. These cigarettes are made from domestic Levantine and imported oriental tobacco. The brand of cigarette that resembles more nearly than any other the popular brands of the United States sells at 26 cents. It was designed as a substitute for imported brands. Another popular cigarette, made from domestic tobacco, sells at 16 cents. Two brands of the higher-priced cigarettes, made from imported tobacco, sell for 35 cents and 52 cents, respectively. Popular American brands sell at 36 cents for packages of 20.

Toscani, strong cigars of the stogy type, have been for a long period the most popular cigars; in 1930, 94 percent of all cigars smoked were Toscani. Formerly large quantities of Kentucky and Tennessee fire-cured tobacco were used in these cigars, but recently they have been made almost entirely from domestic tobacco. They sell for 4 cents each. Several brands made largely from imported tobacco, more nearly resemble the cigars popular in the United States. One brand sells at 13 cents and the other at 8 cents.

One popular mixture of cut tobacco is made largely from domestic tobacco and sells slightly under \$3 per pound. Only small quantities of cut tobacco are sold for pipes. These mixtures are made largely from domestic tobacco and sell from \$1 to \$2 per pound, the most popular mixture selling at \$2.35 per pound. Snuff sells from 48 cents to \$1.20 per pound.

TABLE 60.—Italy: Consumption of tobacco products, 1912-13 and 1919-20 to 1935-36

Year beginning July 1	1912-13					1919-20					
	Cigars	Cigarettes	Smoking mixtures	Snuff	Total	Cigars	Cigarettes	Smoking mixtures	Snuff	Total	
1912-13	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	
1912-13	10,063	7,437	12,350	4,106	42,955	1927-28	13,684	30,806	17,304	3,852	65,646
1919-20	16,069	15,968	16,014	4,333	52,383	1928-29	13,163	31,704	16,820	3,609	65,296
1920-21	15,473	22,986	15,146	4,938	58,604	1929-30	11,831	31,512	16,300	3,575	63,218
1921-22	14,844	24,138	17,202	5,017	61,321	1930-31	9,261	28,338	14,451	3,369	55,365
1922-23	14,486	24,383	15,816	5,116	60,206	1931-32	8,884	27,545	14,152	3,069	53,640
1923-24	14,409	24,733	17,806	4,252	61,233	1932-33	8,412	27,469	13,858	2,854	52,630
1924-25	13,064	25,451	17,673	4,128	61,516	1933-34	8,284	28,253	13,352	2,729	52,618
1925-26	13,067	27,630	17,632	4,027	62,816	1934-35	9,741	28,735	12,906	2,614	53,996
1926-27	13,903	29,862	17,547	3,923	65,235	1935-36	8,408	31,371	12,414	2,522	54,616

RUMANIA

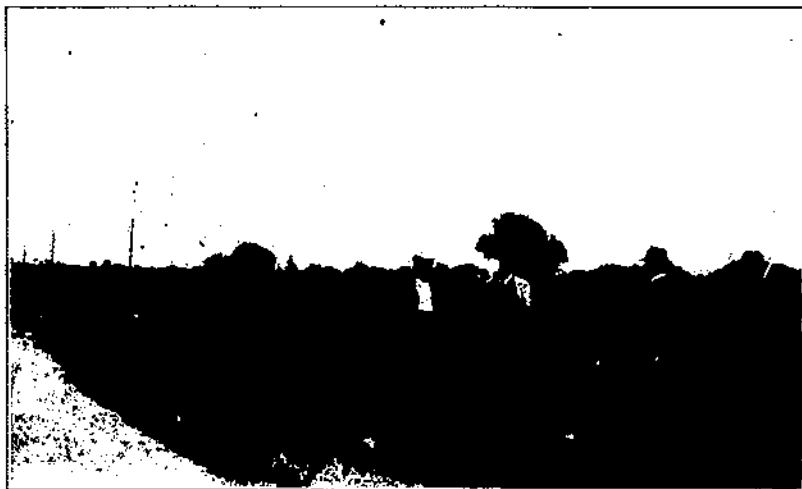
The production of leaf tobacco and the manufacture and sale of tobacco products in Rumania are controlled by a State Monopoly concessioned in 1929 for a 30-year period to the Caisse Autonome des Monopoles, an independent government unit created for the specific purpose of handling the tobacco revenue of the country.

During the period 1925-30 consumption of leaf tobacco by manufacturers averaged about 40,000,000 pounds annually. Consumption

declined during the following years. Practically all the domestic tobacco requirements are grown in Rumania. Exports are small and have not exceeded 1,000,000 pounds since 1930. In earlier years Czechoslovakia was the principal buyer of Rumanian tobacco, but since production has been expanded in that country, there is no important foreign buyer of Rumanian leaf.

PRODUCTION OF LEAF TOBACCO

Before the World War the annual production of tobacco in old Rumania was between 15,000,000 and 18,000,000 pounds. At that time there were large producing areas in Bessarabia and Transylvania, both of which were parts of other countries. Following the close of the war, production expanded and in 1924 approximately 48,000,000



BAE 30629

FIGURE 12.—A field of acclimatized Macedonian tobacco in Rumania.

pounds were produced, fully half of which was in Bessarabia and Transylvania. Production remained slightly below this figure until 1929, when it increased to 57,000,000 pounds. The crop was still above 50,000,000 pounds in 1930, and the combined production of the 2 years was greater than domestic requirements. Owing to difficulties in finding an outlet for this surplus, the crops of 1931 and 1932 were reduced well below consumption requirements, the crop during the latter year amounting to about 16,000,000 pounds, about one-half the quantity consumed during that year (table 8). Low production continued through the period 1933-35. In November 1935 stocks had been lowered to such an extent that the area allotted to tobacco for 1936 was increased to a maximum of 20,000 hectares, compared with 10,000 hectares planted in 1935.

TYPES GROWN

The types grown vary greatly in their characteristics. A small quantity of the Macedonian type is grown from seed imported yearly

TB 587 (1937)

USDA TECHNICAL BULLETINS

UPDATA

CONSUMPTION AND PRODUCTION OF TOBACCO IN EUROPE

HUTSON, J. B.

2 OF 2

from Macedonia. This type is grown in the hilly vine sections of Oltenia and Dobruja and is used in the better grades of cigarettes. Usually from 5 to 8 percent of the crop is of the Macedonian type, grown from imported seed. The most important type grown is the acclimatized Macedonian, common varieties of which are the Suluk, Molovata, and Rezina, grown in Bessarabia and near Bucharest. The seeds for these varieties were originally imported from Macedonia (fig. 12). Usually from 35 to 45 percent of the crop is acclimatized Macedonian. It is used principally in making medium and high-grade cigarettes.

Kerti is another important type grown, the most common varieties of which are the Chimpatzi, Procean, Banat, and Samsun. This type

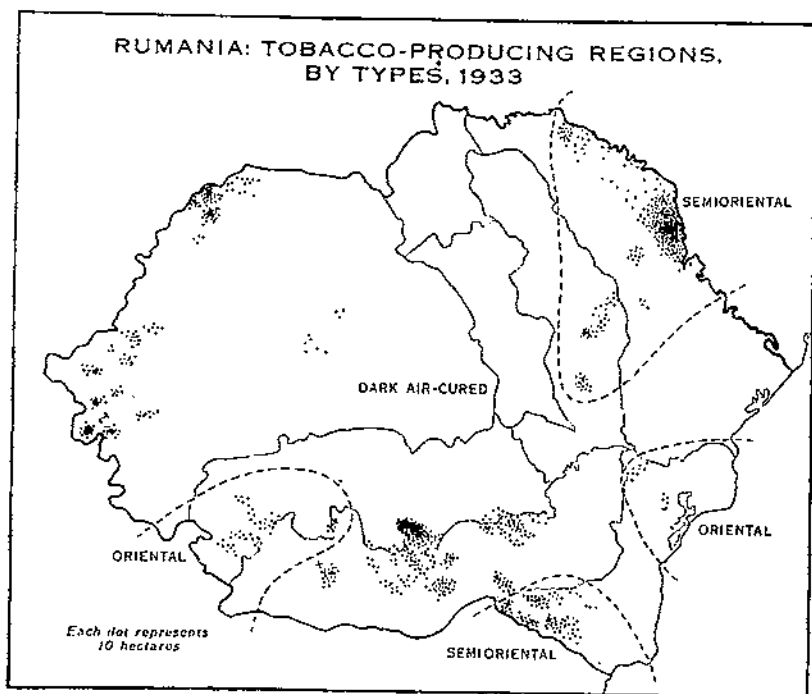


FIGURE 13.—Tobacco production in Rumania expanded with the acquisition of territory after the World War. The crop was reduced during the period 1931-35 to allow for absorption of stocks. The most important types are those grown from oriental seed.

is grown in the hilly sections of Muntenia, Banat, and the Transylvanian Plateau. It is used in medium and low-grade cigarettes and pipe mixtures. Usually between 30 and 40 percent of the crop is Kerti.

Debreccen, the common varieties of which are the Jalomitza and Satmarcan, is grown chiefly on the Danube plains of Wallachia and the Tisza plains of Transylvania; it is used in low-grade cigarettes, cigar fillers, and to a small extent for cigar binders. From 20 to 25 percent of the crop is Debreccen. The tobacco-producing areas are shown in figure 13, and curing methods in figure 14.

TRADE

Rumania has a very irregular trade in leaf tobacco and practically no trade at all in tobacco products. Neither imports nor exports of leaf tobacco average much more than half a million pounds annually (table 61). Greece and Turkey furnish small quantities of cigarette tobacco for blends, and small quantities of cigar tobacco are obtained occasionally from the Netherlands. Price increases of tobacco products combined with the economic depression and the low purchasing power of the people have reduced consumption to such an extent that the already small imports have been curtailed along with the production.

CONSUMPTION OF TOBACCO PRODUCTS

The consumption of tobacco products increased somewhat unsteadily from 1920 to 1928. All classes of tobacco products shared in the



BAE 7050

FIGURE 14.—Green tobacco drying in the open on frames, district of Ilfov, Ottenila section, Rumania.

increase, but the gain was greatest in the case of cigarettes. In 1928 approximately 23 percent of the total consumption consisted of cigarettes and 76 percent of smoking mixtures which were used in making hand-made cigarettes and in pipes. The remainder consisted of cigars and insignificant quantities of snuff. Prices were advanced during the depression period; consumption of all classes of tobacco products declined, but the decline was greatest in the case of cigarettes and cigars (table 62). The per capita consumption of tobacco is very low, amounting to less than 2 pounds during most years (table 3).

TABLE 61.—*Rumania: Imports and exports of leaf tobacco, 1929-34*

IMPORTS

Country of origin	1929	1930	1931	1932	1933	1934
	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>
France.....	4,409	1,102	4,159			
Germany.....		220	601	33,730	14,330	220
Bulgaria.....			6,614		74,736	21,605
Greece.....	350,090	137,120	40,824	65,477	52,240	46,958
Netherlands.....	196,871	4,309	16,975	1,643	46,737	14,330
Turkey.....	2,425	41,005	150,575	165,345	120,190	103,396
United Kingdom.....	220	1,323	441	441		
Other countries.....	1,764	883	1,102	441	26,235	2,205
Total.....	555,779	186,068	230,381	266,977	343,477	188,714
Total value.....	<i>1,000 lei</i> 41,664	<i>1,000 lei</i> 25,987	<i>1,000 lei</i> 25,105	<i>1,000 lei</i> 18,949	<i>1,000 lei</i> 27,509	<i>1,000 lei</i> 11,982

EXPORTS

Country of destination	1929	1930	1931	1932	1934
	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>
Belgium.....	237,735	145,944	23,589	220	117,946
Czechoslovakia.....	882	1,504,860	2,866		
Germany.....	244,490		3,307		7,055
Netherlands.....	145,063	82,482	170,185		
Sweden.....	33,009		11,684		
Switzerland.....			45,856	23,928	
Other countries.....	220	3,968	220	220	220
Total.....	651,459	1,737,224	257,717	23,368	126,221
Total value.....	<i>1,000 lei</i> 33,483	<i>1,000 lei</i> 41,464	<i>1,000 lei</i> 5,010	<i>1,000 lei</i> 420	<i>1,000 lei</i> 2,250

¹ No exports reported for 1933.

Commercial Exterior of Rumania.

TABLE 62.—*Rumania: Consumption of tobacco products, 1920-35*

Year	Cigars	Cigarettes	Smoking mixtures	Total	Year	Cigars	Cigarettes	Smoking mixtures	Total
	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>		<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>
1920.....	425	1,806	17,560	19,791	1928.....	411	8,614	28,592	37,620
1921.....	450	3,887	21,301	25,638	1929.....	271	8,911	21,232	30,414
1922.....	622	4,936	34,131	39,692	1930.....	215	6,646	20,303	27,254
1923.....	320	6,000	28,000	34,320	1931.....	158	5,726	18,020	23,904
1924.....	301	5,574	25,361	31,226	1932.....	141	5,299	19,175	24,615
1925.....	317	8,434	26,153	34,934	1933.....	145	5,179	19,162	24,486
1926.....	384	8,988	26,054	36,306	1934.....	162	4,804	18,379	23,345
1927.....	391	9,380	23,213	32,984	1935.....	169	5,093	19,345	24,577

¹ Fiscal year.

² Reported for 9 months only; adjusted for full calendar year.

³ Estimated.

YUGOSLAVIA

The tobacco industry in Yugoslavia is controlled by a monopoly. The whole crop must be turned over to the Monopoly each year; not even an allowance may be retained by the grower for home consumption. Tobacco is the chief source of income to a large part of the population, especially in South Serbia and Herzegovina. In fact, before the war Herzegovina supplied the Austro-Hungarian tobacco Monopoly with considerable quantities of leaf tobacco.

PRODUCTION OF LEAF TOBACCO

During the period 1925-32, between 25,000,000 and 30,000,000 pounds of leaf tobacco were used by manufacturing plants annually, practically all of which was grown within the country. Some tobacco was grown in the old Kingdom of Serbia prior to the war. The new territory acquired after the war contained large producing areas, most important of which was that acquired from Turkey. Production expanded rapidly in both old and new areas, reaching its highest point in 1924 with a crop of 79,000,000 pounds. Difficulties were experienced in finding an outlet for the increased production and the crop was reduced. During the period 1925-28, production ranged between 15,000,000 and 32,000,000 pounds annually. A small export market was developed and the annual crop from 1929 to 1932 amounted to about 35,000,000 pounds, but the crop during the 3 years following that period was much reduced. The area and production by types during 1920-35 are shown in table 8.

TYPES GROWN

Type characteristics of Yugoslav tobacco vary widely. A large part of the crop consists of highly aromatic varieties belonging to the oriental group. A considerable part is of the bright-colored neutral types belonging to the semioriental group. A small part of the crop is dark, heavy, and elastic and belongs to the dark air-cured group. Macedonia tobacco, grown in the southeastern part of the country, is the most important variety. It is used in Yugoslav factories in the medium and better grades of cigarettes, and it is also exported. From 1925 to 1932, between 45 to 55 percent of the crop was Macedonia. Montenegro tobacco is similar to the Macedonia variety and is used for similar purposes. It represents from 4 to 6 percent of the crop.

The Herzegovina is the second most important variety. Blending well with other tobacco, it is used in cigarettes, and in cigarette and pipe mixtures. It is grown in the eastern part of Yugoslavia and accounts for 25 to 35 percent of the crop. On the Adriatic coast south of the Herzegovina section Dalmatia tobacco is grown. This variety resembles the Herzegovina in some respects, but the color is darker and the leaves are slightly smaller. It is used principally in low-priced cigarette and pipe mixtures. Between 4 and 6 percent of the crop is Dalmatia. The Servena and Bosnia are minor varieties similar to Dalmatia and are used for similar purposes.

The Vojvodina is grown in northeastern Yugoslavia. This variety has large leaves with color ranging from light brown to mahogany. The flavor is similar to dark Virginia but the quality is poorer. Vojvodina is used in cigars and in common pipe mixtures. Production has declined since 1920. In 1929 it comprised about 6 percent of the crop, compared with about 20 percent in 1920 and 1921. During the 1930-32 period it comprised less than 4 percent of the total crop.

Location of the tobacco-producing areas is shown in figure 15.

CONSUMPTION AND TRADE

In normal times Yugoslavia has an annual consumption of about 22,000,000 pounds of tobacco products. Consumption declined in 1931-35, however, amounting in the latter year to about 16,000,000 pounds (table 63). The trend at present is toward cigarettes. Although this form of tobacco consumption has increased since 1922, it was not

until 1930 that the consumption of cigarettes was greater than that of smoking mixtures. The Yugoslav tobacco taste for many years has inclined toward light tobaccos. Even their smoking mixtures have only slight blends of dark tobaccos. Cigars are consumed in negligible quantities, and chewing tobacco and snuff are used only by the miners of Slovenia.

It is estimated that about 80 percent of the consumption consists of low-priced products, 15 percent medium-priced products, and 5 percent, high-priced products. Yugoslavia has a very low per-capita

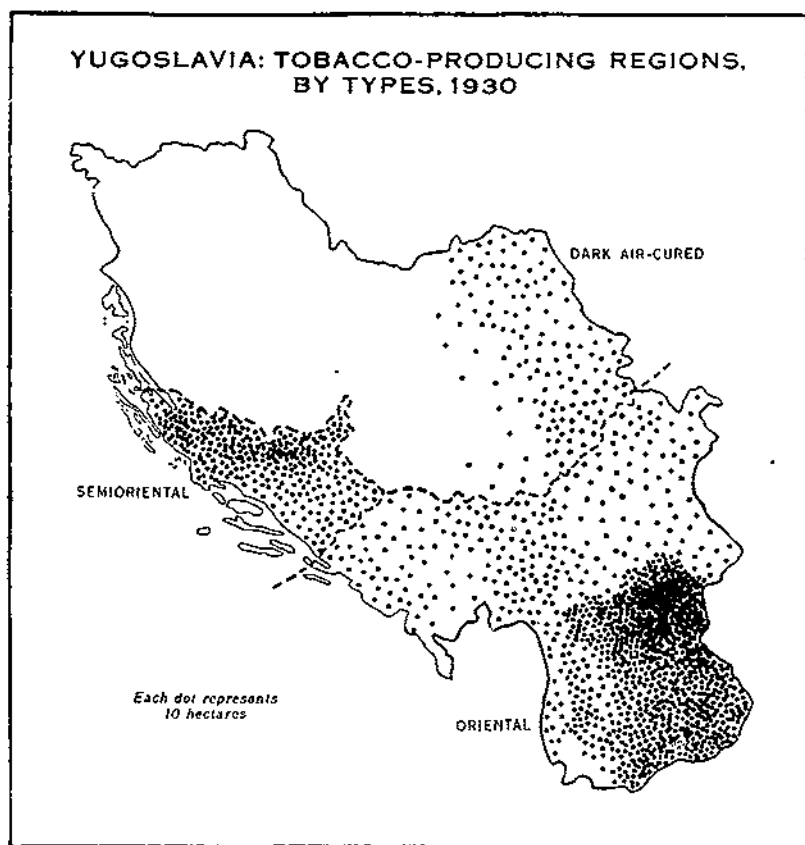


FIGURE 15.—The new territory acquired after the World War contained large producing areas. That in the southeast, acquired from Turkey, is now the center of oriental production, and is one of the most important tobacco-growing districts.

consumption, rarely amounting to more than 1.5 pounds; consumption in 1932 dropped to 1.2 pounds per person (table 3).

The tobacco-manufacturing industry depends almost entirely upon domestic producers for its raw leaf supply. There is a small and irregular import trade in leaf tobacco. Some United States cigar tobacco is bought on the Netherlands international market and some Turkish tobacco is imported for blending in high-grade cigarettes. Tobacco for export is produced in the districts of south Serbia, Dalmatia, Montenegro, and Herzegovina. The export trade usually

amounts to 5,000,000 or 6,000,000 pounds annually, but owing to favorable barter arrangements with Poland and Czechoslovakia, leaf exports almost doubled in 1932 (table 64). Poland, Czechoslovakia, and Italy are the principal buyers. There is no trade of any consequence in tobacco products.

TABLE 63.—Yugoslavia: Consumption of tobacco products, 1922-35

Year	Cigars	Cigarettes	Smoking mixtures	Chewing tobacco	Snuff	Total
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
1922	340	4,484	14,803	240	1	19,943
1923	437	4,824	13,309	359	1	19,020
1924	482	5,926	12,287	332	9	19,036
1925	489	6,318	12,546	287	14	19,654
1926	459	6,917	14,119	234	16	21,745
1927	469	7,635	14,226	100	14	22,444
1928	469	5,288	14,080	83	10	22,931
1929	465	8,811	13,255	76	7	22,604
1930	463	11,175	10,505	71	6	22,220
1931	438	12,043	8,226	66	8	20,781
1932	550	11,004	5,295	69	11	16,929
1933	690	10,616	5,255	60	14	16,635
1934	652	10,186	5,477	56	14	16,422
1935	629	9,684	5,598	47	13	16,181

TABLE 64.—Yugoslavia: Imports and exports of leaf tobacco, 1922-35

Year	Imports	Exports	Year	Imports	Exports	Year	Imports	Exports
	Pounds	Pounds		Pounds	Pounds		Pounds	Pounds
1922	2,977,420	10,251	1927		2,323,715	1932	369,240	12,820,551
1923	4,272,160	4,775	1928	2,633,463	6,218,568	1933	220,548	10,175,932
1924	40,965		1929	646,707	7,453,025	1934	622,923	1,659,376
1925	281,318	5,905,740	1930	602,080	2,656,473	1935	13,560	13,408,047
1926	235,808	3,068,325	1931	454,066	6,489,820			

HUNGARY

The tobacco industry of Hungary is under control of the Royal Hungarian Tobacco Monopoly subject to the Ministry of Finance. Production and export are permitted only by license, and the manufacture of tobacco products is carried on by the Monopoly itself. The crop is produced mainly on large estates.

From 1925 to 1932 the manufacturing plants used about 25,000,000 pounds of leaf tobacco annually. Approximately 75 percent of the requirement was taken from the Hungarian crop and the remainder was imported. Leaf consumption, declining since 1929, dropped to 18,000,000 pounds in 1933. Consumption of products since that time indicates no great rise in the factory consumption of leaf.

PRODUCTION OF LEAF TOBACCO

Hungary is the only European country in which a surplus of dark tobacco has been produced over a long period. Tobacco cultivation was introduced during the second half of the seventeenth century by emigrants from southwestern Germany; production expanded rapidly toward the end of that century. A surplus of tobacco has been produced during most years since that time. As large areas in which tobacco was produced prior to the World War were acquired through treaty by Czechoslovakia and Rumania, production decreased for several years after the war and ranged around 30,000,000 or

40,000,000 pounds. Expansion of the crop began again about 1926 and since that time has increased too rapidly for the welfare of the industry.

As in certain sections of the United States, the trend toward consumption of light tobaccos has unfavorably affected consumption of Hungarian tobacco, which is dark and suitable mainly for pipes or cigars. The domestic demand for such tobaccos declined during the depression and stocks accumulated. The high point of production was reached in 1932, with a crop of 87,000,000 pounds, and the Hungarian Government has been forced to restrict the crop since 1932 by reducing the area (table 65). Producing areas are shown in figure 16.

TABLE 65.—Hungary: Area and production of leaf tobacco, 1920-35

Year	Grow-ers	Area har-vested	Production	Year	Grow-ers	Area har-vested	Production
	<i>Number</i>	<i>Acres</i>	<i>Pounds</i>		<i>Number</i>	<i>Acres</i>	<i>Pounds</i>
1920.....	10,606	51,661	54,012,177	1928.....	5,192	55,795	63,689,753
1921.....	6,209	49,260	49,704,632	1929.....	4,347	56,352	71,744,077
1922.....	3,611	43,820	34,392,000	1930.....	4,483	58,523	75,353,069
1923.....	4,737	38,399	29,762,000	1931.....	5,586	62,237	80,323,049
1924.....	5,391	41,518	43,165,662	1932.....	4,509	60,908	87,072,882
1925.....	5,140	42,541	33,780,204	1933.....	4,773	45,578	53,387,035
1926.....	6,670	58,832	58,330,850	1934.....	.....	41,157	40,039,725
1927.....	6,707	55,914	74,927,740	1935.....	.....	41,152	40,313,757

Annuaire Statistique Hongrois.

TYPES GROWN

All the tobacco of Hungary is dark air-cured except the Kerti type, which belongs to the semi-oriental group (table 8). Debreceni is the most important type of tobacco grown in Hungary. This type is grown in several sections but principally in the extreme eastern part of the country. It is used largely in pipe mixtures and in low-priced cigarettes. During the period 1930-32 about 50 or 60 percent of the crop was of this type.

Tiszai is the second most important type. The largest producing area is in north-central Hungary. Tiszai is used in pipe mixtures and in low-priced cigarettes and small quantities are used in cigars. In recent years between 20 and 30 percent of the crop has been of this type.

Kerti is the next most important type; the principal producing area is in southwestern Hungary, but it is also grown in northwestern Hungary. Because of its good blending qualities this type is used with imported oriental tobacco in the medium and better grades of cigarettes. Kerti comprises between 5 and 10 percent of the crop.

Szegedi and Szuloki are minor types grown in northern Hungary. They resemble the Debreceni type and are used in pipe mixtures and in low-priced cigarettes. These types generally constitute about 5 percent of the crop. For several years a small quantity of Muskotály has been grown in northeastern Hungary. It is used in pipe mixtures and represents only about 1 percent of the total crop.

A *rustica* type, known as Kapa (hoe tobacco), is grown in north-eastern Hungary. This type is used in low-priced pipe mixtures; usually from 3 to 5 percent of the crop is Kapa.

TRADE

For many years Hungary has been one of the important sources of Europe for dark tobaccos. Hungarian tobacco was the main supply of Austrian factories before the war, and, excepting a few years following post-war treaties, consumption of Hungarian leaf in Austria has continued. Since 1929 France has been the most important buyer of Hungarian tobacco. Czechoslovakia and Poland were also important buyers until their recent expansion in domestic production. In volume the leaf exports average about 23,000,000 pounds annually (table 66). Debrececi is the leading export type, and in foreign countries this type is used mainly for smoking mixtures.

No aromatic cigarette type of tobacco is grown in Hungary. Consequently, these tobacco imports consist mainly of orientals. During the period 1924-32 annual imports were between 4,000,000 and 10,000,000 pounds, the bulk of which came from Turkey, Greece, and Bulgaria

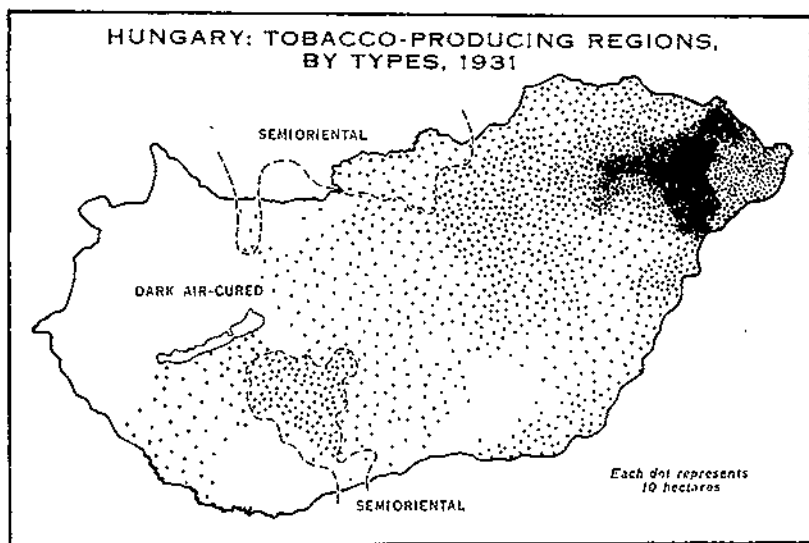


FIGURE 16.—Crop expansion beginning in 1926, and a decline in the consumption of dark air-cured tobacco, contributed toward a large surplus of that type in Hungary. The Monopoly began to reduce the area in 1932, thus cutting average production of the 3 following years to about half. Approximately 90 percent of the crop is dark air-cured.

for use in the medium and higher-priced grades of cigarettes. Imports from these countries were unimportant prior to the close of the war.

CONSUMPTION OF TOBACCO PRODUCTS

Smoking tobacco is the big item of tobacco consumption, accounting on the whole for three-fourths of the total. Following the close of the war, either the data used to measure total consumption were incomplete or consumption fluctuated widely. Apparently, an increase began in 1925 and continued through 1929. All classes of products shared in this increase; cigarettes particularly. In 1929-30, total consumption was 6 percent less than during the previous year and an even greater decline, sharpest in regard to cigars, continued throughout 1933. Then a gradual increase characterized the 2 years following (table 67).

TABLE 66.—Hungary: Trade in leaf tobacco, 1923-35

EXPORTS

Country of destination	1923	1924	1925	1926	1927	1928	1929
France.....	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
Netherlands.....				198	112	591	7, 116
Belgium.....		506		254	40	1, 553	1, 950
Germany.....		608		435	323	5, 147	7, 850
Austria.....		612	174	270	337	314	343
Poland.....				1, 247	3, 254	4, 873	3, 581
Algeria.....	1, 148	1, 987	800	784	2, 667	1, 780	3, 340
Czechoslovakia.....	4, 275	5, 363	3, 691	55	1, 950	408	1, 213
Other countries.....	315			1	00		4, 235
Total.....	5, 738	8, 966	4, 695	3, 240	8, 757	15, 186	30, 091
Total value.....	1,000 pengős (1)	1,000 pengős 2 5, 232	1,000 pengős 2 2, 092	1,000 pengős 1 1, 678	1,000 pengős 4, 687	1,000 pengős 12, 997	1,000 pengős 17, 937

Country of destination	1930	1931	1932	1933	1934	1935
France.....	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
Netherlands.....	0, 109	11, 819	14, 361	9, 117	0, 372	8, 215
Belgium.....	445	746	3, 065	226	644	627
Germany.....	5, 455	3, 960	1, 364	1, 848	4, 414	2, 604
Austria.....	266	324	131	518	550	719
Poland.....	4, 252	2, 947	4, 963	5, 941	6, 872	7, 109
Algeria.....	1, 718					
Czechoslovakia.....	1, 571	774	892	1, 807	797	427
Other countries.....	13					
Total.....	280	154	1, 965	738	565	1, 301
Total value.....	23, 229	20, 624	26, 711	20, 189	23, 214	21, 002
	1,000 pengős 14, 752	1,000 pengős 7, 484	1,000 pengős 7, 270	1,000 pengős 3, 892	1,000 pengős 4, 791	1,000 pengős 3, 351

IMPORTS

Country of origin	1923	1924	1925	1926	1927	1928	1929
Netherlands.....	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
Germany.....	1, 333	502	150	197	605	767	1, 288
Bulgaria.....	428	133	388	115	235		511
Greece.....	565	2, 878	3, 385	5, 024	4, 972	2, 492	2, 542
Turkey.....		1, 212		1, 118	146	1, 264	903
Italy.....			678	3, 465	1, 502	2, 880	976
Other countries.....	487			514		113	248
Total.....	2, 814	4, 725	4, 601	10, 433	7, 885	7, 522	6, 438
Total value.....	1,000 pengős (1)	1,000 pengős 2 9, 690	1,000 pengős 2 10, 012	1,000 pengős 2 22, 133	1,000 pengős 21, 438	1,000 pengős 18, 688	1,000 pengős 18, 750

Country of origin	1930	1931	1932	1933	1934	1935
Netherlands.....	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
Germany.....	1, 164	707	109			77
Bulgaria.....	44			223	4	
Greece.....	3, 063	2, 012	412	526	222	1, 542
Turkey.....	920	1, 303	346	840	190	598
Italy.....	1, 305	1, 504	357	653		
Other countries.....	451	670			791	
Total.....	409				23	198
Total value.....	6, 977	8, 605	1, 311	2, 142	1, 233	2, 385
	1,000 pengős 22, 746	1,000 pengős 18, 572	1,000 pengős 2, 063	1,000 pengős 4, 721	1,000 pengős 2, 261	1,000 pengős 3, 435

¹ Not reported.² Thousand gold crowns.

CONSUMPTION AND PRODUCTION OF TOBACCO IN EUROPE 107

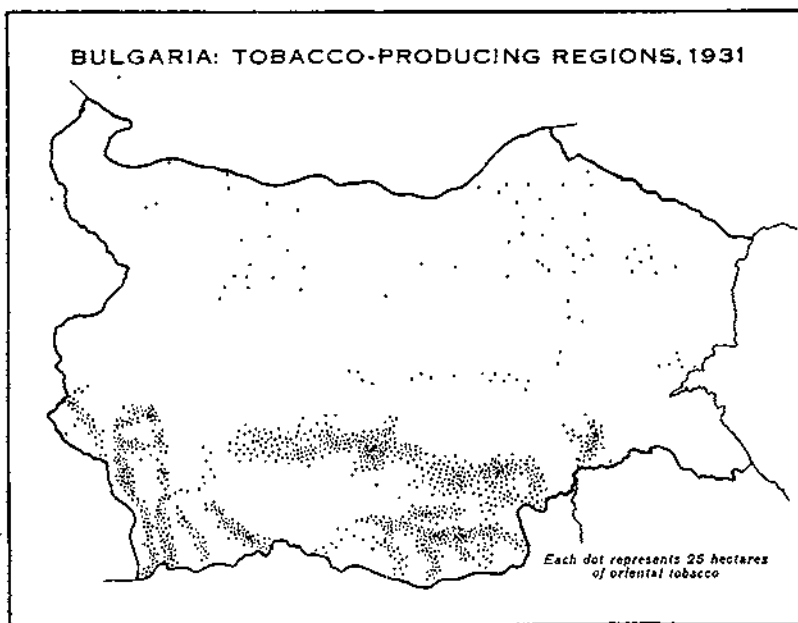
TABLE 67.—Hungary: Consumption of tobacco products, 1920-21 to 1934-35

Year beginning July—	Cigars	Cigarettes	Smoking mixtures	Snuff	Total	Year beginning July—	Cigars	Cigarettes	Smoking mixtures	Snuff	Total
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.		1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
1920-21	1,257	1,979	7,550	2	10,888	1928-29	1,041	5,168	10,937	3	26,749
1921-22	1,585	3,642	13,002	3	18,232	1929-30	1,109	4,847	10,124	3	25,173
1922-23	1,636	4,500	15,078	3	22,117	1930-31	901	4,410	17,439	2	22,752
1923-24	1,330	2,863	13,919	2	18,123	1931-32	696	4,027	16,547	2	21,272
1924-25	1,303	4,126	15,801	3	21,263	1932-33	571	3,952	14,346	2	18,871
1925-26	1,540	4,368	18,067	3	23,976	1933-34	523	4,345	14,525	2	19,395
1926-27	1,657	4,658	18,572	3	24,890	1934-35	569	4,316	14,071	2	19,498
1927-28	2,004	4,098	19,550	3	29,654						

Annuaire Statistique Hongrois.

PRICES OF TOBACCO PRODUCTS

From 1925 to 1932 the prices of tobacco products were increased substantially. Prices of most classes of products were advanced in December 1929 and again in July 1930. After the latter advance,



SAE 29213

FIGURE 17.—Following a declared policy of concentrating on the most suitable regions for tobacco production, the Bulgarian Monopoly Direction in 1935 took out of production much of the area in northern Bulgaria.

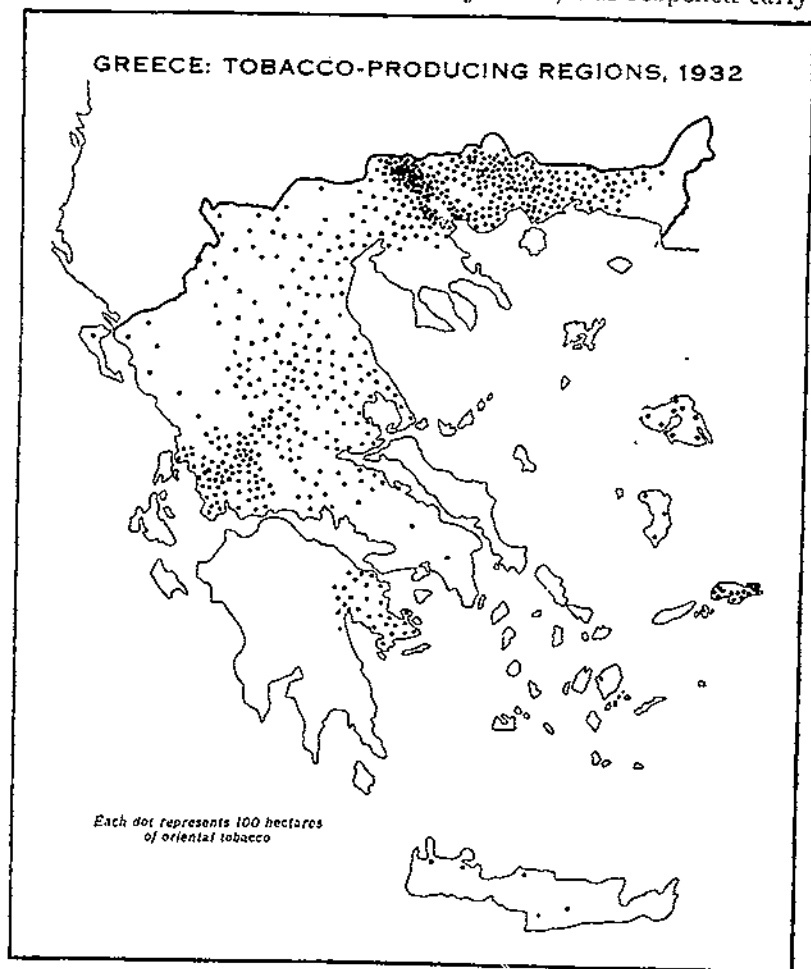
cigarette prices averaged about 11 cents for packages of 20; cigars, about 2 cents apiece; pipe mixtures, 57 cents per pound; and snuff, 35 cents per pound. Average prices of tobacco products are shown in table 5.

BULGARIA, GREECE, AND TURKEY

Bulgaria, Greece, and Turkey each produces a surplus of tobacco. This surplus constitutes the bulk of the world supply of oriental cigarette tobacco. In volume of production oriental tobacco ranks second to the flue-cured tobacco grown in the United States.

In Bulgaria the manufacture and sale of tobacco products have been controlled by a State Monopoly for several years, but the production of leaf tobacco was not monopoly-controlled until November 1934. Prior to that time growers were assisted in financing the crop by the Agricultural Bank of Bulgaria, and the local cooperatives were somewhat under the control of that institution.

In Greece the tobacco industry is free. The question of monopoly, which has been up for discussion many times, was reopened early in



DAE 29219

FIGURE 18.—The acquisition of western Thrace in 1920 and other changes brought about by wars, increased the annual tobacco crop of Greece by almost three-fourths. Over a recent period about two-fifths of the oriental supply (not including Union of Soviet Socialist Republics) was produced in Greece.

1934, and some kind of compromise between a monopoly and a directed, coordinated production seems pending.

In Turkey all phases of the tobacco industry are controlled by a State monopoly which has existed as such since 1925. For many years before that time the Turkish Monopoly was a concession operated by a French company.

PRODUCTION OF LEAF TOBACCO

The production of tobacco in these countries, which had been greatly reduced during the World War, was increased above pre-war levels in 1920. Production expanded greatly in 1923 and 1924, amounting during the latter year to 334,000,000 pounds, or almost twice the quantity produced in 1913. During most years from 1925 to 1930 oriental production was slightly in excess of 300,000,000 pounds. Owing to accumulated supplies, the crops were reduced moderately in 1931 and to a point below the pre-war level in 1932. All these countries had large crops in 1933, but the tendency for 1934 and 1935 was toward a reduced supply (table 8). Producing regions are outlined in figures 17, 18, and 19.

TRADE

Prior to the war large quantities of oriental tobacco were exported to countries in central and northern Europe and smaller quantities to the United States. A large part of this trade was abandoned during

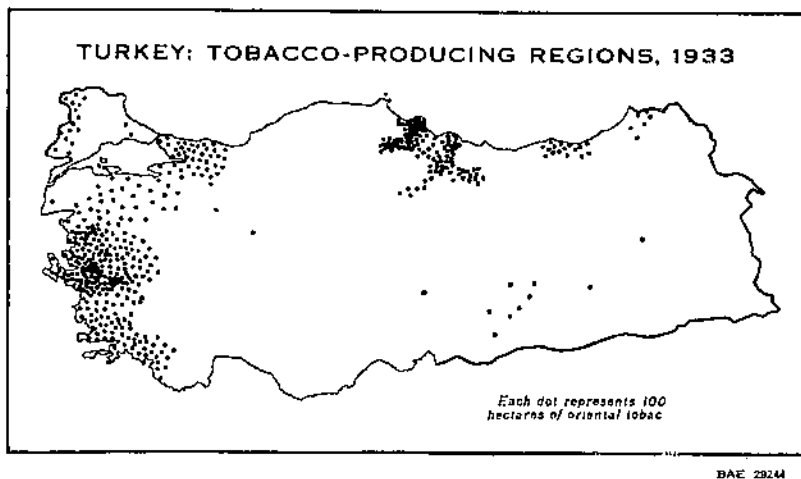


FIGURE 19.—Tobacco cultivation constitutes one of the principal branches of Turkish agriculture, although the crop since 1931 has been reduced materially. The vilayets of Samsun, Tokat, and Trabzon in the north and Izmir, Manisa, Muğla, Kocaeli, Bursa, and Bolu in the east are the most important producing centers.

the war because of difficulties in keeping up production and in keeping trade channels open. Following the close of the war and the subsequent increase in cigarette consumption, exports of oriental tobacco gradually expanded until the combined exports of Bulgaria, Greece, and Turkey in 1926 were approximately 272,000,000 pounds. Annual exports of the three countries averaged about 235,000,000 pounds from 1927 to 1930, after which the trade decreased considerably.

A large part of the better grades of oriental tobacco is exported to the United States, and is used in blended cigarettes. A portion of the better grades and most of the tobacco of the medium and lower grades are exported to continental European countries and used in oriental cigarettes. Bulgarian types are sold principally to Germany (table 68). Grecian tobaccos are exported mainly to the United States and Germany. During the decade before 1932, large quantities of Grecian tobacco were sent to Trieste for manipulation and further shipment to

the United States. Although this tobacco is reported in the Grecian statistics as exports to Italy, only small quantities were consumed there (table 58). Turkish types are marketed principally in the United States and Germany. Turkish tobaccos en route to the United States were also rehandled in Trieste at one time. Over a period of recent years the United States has afforded a market for 18.5 percent of the total leaf exports from Greece, and about 17.5 percent of the exports from Turkey.

The imports of tobacco into Bulgaria, Greece, and Turkey are not important.

TABLE 68.—Exports of leaf tobacco from Bulgaria, Greece, and Turkey, 1923-35

BULGARIA

Country of destination	1923	1924	1925	1926	1927	1928
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
United States.....	872	780	714	220	.....	44
United Kingdom.....	1	104	288	255	77	71
France.....	1	101	110	490	344	7
Italy.....	8,745	10,257	14,022	10,235	5,320	4,570
Netherlands.....	887	3,303	2,114	4,665	7,261	2,987
Belgium.....	311	2,038	2,230	2,228	2,538	5,114
Switzerland.....	11	.....	48	94	23	.....
Germany.....	0,666	24,000	20,388	20,089	20,552	18,335
Austria.....	14,242	7,087	9,703	2,100	8,802	0,469
Hungary.....	753	2,539	1,857	4,298	3,756	1,054
Czechoslovakia.....	5,182	13,973	9,910	10,235	7,031	1,748
Poland.....	8	4,538	5,770	4,105	1,558	5,207
Egypt.....	117	429	442	1,046	1,599	1,979
Other countries.....	12	701	484	453	532	300
Total.....	37,808	69,993	74,179	60,546	59,801	40,381
Total value.....	1,000 leva 1,094,766	1,000 leva 1,828,109	1,000 leva 2,329,023	1,000 leva 2,050,531	1,000 leva 2,100,801	1,000 leva 2,342,504

Country of destination	1929	1930	1931	1932	1933	1934
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
United States.....	.....	5	14	2	.....	20
United Kingdom.....	2	15	94	20	40	1,133
France.....	.....	6,777	1,856	1,091	1,464	634
Italy.....	3,858	3,285	1,416	3,636	2,085	3,259
Netherlands.....	534	342	1,424	2,583	1,490	887
Belgium.....	4,502	3,320	1,245	452	622	210
Switzerland.....	163	403	400	570	242	232
Germany.....	16,027	13,831	23,458	23,373	30,435	31,118
Austria.....	4,065	3,460	0,458	7,147	6,497	2,070
Hungary.....	2,145	2,505	1,774	366	531	161
Czechoslovakia.....	3,205	4,008	3,250	164	1,585	1,189
Poland.....	0,097	8,103	7,908	3,428	1,010	378
Egypt.....	1,858	2,600	997	924	1,237	2,851
Other countries.....	260	556	908	1,381	1,182	1,772
Total.....	44,582	49,400	51,205	45,176	49,620	45,923
Total value.....	1,000 leva 2,830,251	1,000 leva 2,654,238	1,000 leva 2,570,730	1,000 leva 1,078,049	1,000 leva 1,174,511	1,000 leva 981,982

CONSUMPTION AND PRODUCTION OF TOBACCO IN EUROPE 111

TABLE 68.—Exports of leaf tobacco from Bulgaria, Greece, and Turkey, 1923-35—Continued

GREECE

Country of destination	1923	1924	1925	1926	1927	1928	1929
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
United States.....	4,004	17,365	24,893	21,209	23,292	18,638	21,860
United Kingdom.....	633	1,230	1,721	1,415	710	675	604
France.....	162	450	620	736	895	401	353
Netherlands.....	4,005	0,000	3,670	3,172	1,658	4,399	4,420
Italy.....	6,384	16,046	18,064	32,344	31,140	19,528	23,270
Germany.....	19,303	40,539	31,810	48,309	42,693	47,725	35,002
Belgium.....	3,004	2,050	2,431	2,046	2,421	3,351	4,548
Austria.....	2,241	148	174	02	1,914	3,680	0,082
Finland.....	283	102	45	172	328	220	60
Sweden.....	70	65	306	072	470	328	4,164
Cyprus.....	236	484	411	558	590	618	434
Egypt.....	3,977	4,017	0,005	8,413	4,191	4,936	3,300
Other countries.....	1,002	1,870	1,402	1,050	0,350	3,001	6,204
Total.....	47,104	92,225	91,052	120,552	110,231	107,812	110,351
Total value.....	1,000 drachmas 985,670	1,000 drachmas 1,684,846	1,000 drachmas 2,257,000	1,000 drachmas 3,004,080	1,000 drachmas 3,117,649	1,000 drachmas 3,211,897	1,000 drachmas 3,948,553

Country of destination	1930	1931	1932	1933	1934	1935
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
United States.....	10,654	20,375	12,152	13,508	17,301	22,080
United Kingdom.....	423	300	401	134	256	1,340
France.....	631	5,020	2,246	7,275	183	5,873
Netherlands.....	0,823	6,684	9,191	1,258	2,008	1,976
Italy.....	10,717	13,874	5,890	4,070	2,390	3,144
Germany.....	38,232	18,845	25,088	32,172	33,836	48,069
Belgium.....	4,202	1,031	2,970	2,273	2,611	1,581
Austria.....	5,378	7,346	7,844	4,367	3,612	3,380
Finland.....	333	611	075	745	642	2,877
Sweden.....	1,894	1,404	1,592	2,101	2,657	4,378
Cyprus.....	428	431	401	600	302	011
Egypt.....	3,953	3,322	3,545	1,695	3,225	2,425
Other countries.....	10,692	112,830	5,922	5,781	12,193	18,030
Total.....	108,455	94,807	77,827	76,504	82,459	111,178
Total value.....	1,000 drachmas 3,382,004	1,000 drachmas 2,248,656	1,000 drachmas 1,821,806	1,000 drachmas 1,726,504	1,000 drachmas 2,027,365	1,000 drachmas 3,568,634

TURKEY

Country of destination	1923	1924	1925	1926	1927	1928
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
United States.....	4,370	7,127	11,647	14,189	15,495	16,105
Germany.....	0,343	13,750	19,705	18,655	8,585	12,754
Austria.....	—	—	—	—	549	2,072
Belgium.....	1,393	1,733	1,409	575	090	1,627
Czechoslovakia.....	—	90	—	—	6,014	11,076
France.....	75	864	725	518	607	194
United Kingdom.....	214	373	1,418	262	300	331
Netherlands.....	4,871	3,347	3,205	2,705	977	1,523
Sweden.....	—	—	—	—	044	203
Italy.....	—	28,488	33,700	45,203	22,471	25,046
Hungary.....	—	—	—	—	—	—
Egypt.....	282	701	708	5,070	046	7,840
Poland.....	—	—	9	—	—	35
Syria.....	670	1,574	664	1,850	3,713	1,400
Greece.....	324	481	300	723	2,440	3,010
Other countries.....	131,462	516	487	901	895	2,003
Total.....	53,864	59,644	74,346	91,370	64,693	87,763
Total value.....	1,000 £'s 20,339	1,000 £'s 46,354	1,000 £'s 60,244	1,000 £'s 67,467	1,000 £'s 43,837	1,000 £'s 54,028

1 Including Luxembourg subsequent to 1930.

2 To Union of Soviet Socialist Republics, Poland, and Czechoslovakia, principally.

3 To Trieste principally.

4 Stated in original as exported to Persia, mainly.

TABLE 68.—Exports of leaf tobacco from Bulgaria, Greece, and Turkey, 1928-35—Continued

TURKEY—Continued

Country of destination	1929	1930	1931	1932	1933
United States	1,000 lb. 5,203	1,000 lb. 13,785	1,000 lb. 10,269	1,000 lb. 14,059	1,000 lb. 11,027
Germany	18,502	16,495	6,106	16,805	23,470
Austria	1,680	2,749	2,258	3,031	2,432
Belgium	2,941	2,972	1,281	3,007	3,829
Czechoslovakia	5,079	2,092	4,319	1,018	6,111
France	1,005	350	85	37	375
United Kingdom	774	1,082	53	60	591
Netherlands	2,357	3,168	4,878	7,033	1,841
Sweden	534	421	359	1,142	309
Italy	21,252	20,070	14,952	9,237	3,064
Hungary	88	359	1,312	401	558
Egypt	6,180	4,599	2,634	2,410	1,728
Poland	2,147	919	90	194	-----
Syria	507	344	234	120	495
Greece	2,480	1,473	728	2,687	44
Other countries	835	705	570	1,520	1,295
Total quantity	71,971	72,201	48,969	63,589	57,170
Total value	1,000 £T. 40,087	1,000 £T. 42,681	1,000 £T. 28,752	1,000 £T. 26,940	1,000 £T. 21,086

Statistique du Commerce du Royaume de Bulgarie avec les Pays Étrangers.
Bulletin Mensuel du Commerce Spécial de la Grèce.
Republique Turque, Annuaire Statistique.

CONSUMPTION OF TOBACCO PRODUCTS

Practically all the tobacco consumed in Bulgaria, Greece, and Turkey is in the form of cigarettes or smoking mixtures. It is possible that actual consumption would include considerable quantities on which taxes are not paid, thus having been omitted from the official statements of sales. Several of the types grown in each of these countries may be consumed without being mixed with other types. Production is not entirely controlled, and it is not difficult for persons to cut tobacco for their own needs at home and escape the excise tax. In general, the consumption tendencies noted in other countries are true in Bulgaria, that is, consumption increased until 1929 and has since declined. With the exception of a slight break in 1932, consumption in Greece has remained around 10,000,000 pounds annually. The total quantity on which excise taxes were paid in 1935 in the three countries is estimated at approximately 43,000,000 pounds, over half of which was in Turkey (tables 69, 70, and 71).

TABLE 69.—Bulgaria: Consumption of tobacco products, 1913 and 1920-35¹

Year	Cigarettes	Smoking mixtures ²	Snuff	Total	Year	Cigarettes	Smoking mixtures ³	Snuff	Total
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.		1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
1913	559	4,991	4	5,554	1928	11,022	83	1	11,106
1920	2,355	5,170	0	7,517	1929	10,748	93	1	10,842
1921	4,108	5,439	4	9,549	1930	9,870	48	1	9,919
1922	5,880	3,095	4	8,919	1931	8,487	84	1	8,572
1923	6,834	3,584	2	10,420	1932	7,568	75	-----	7,641
1924	9,191	28	2	9,221	1933	6,463	115	-----	6,578
1925	11,455	38	2	11,495	1934	5,990	234	(C)	6,230
1926	10,280	58	2	10,340	1935	6,769	101	-----	6,870
1927	10,085	56	1	10,142					

¹ No consumption of cigars reported.

² Cigarette tobacco, formerly reported with smoking mixtures, included with cigarettes subsequent to 1923.

³ Less than 500 pounds.

CONSUMPTION AND PRODUCTION OF TOBACCO IN EUROPE 113

TABLE 70.—Greece: Consumption of tobacco products, 1926-35

Year	Cigars		Smoking mixtures ¹		Year	Cigars		Smoking mixtures ¹	
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.		1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
1926	19	10,611	167	10,797	1931	43	9,975	125	10,143
1927	20	10,389	166	10,575	1932	36	9,361	113	9,510
1928	28	10,131	151	10,310	1933	43	9,993	107	10,143
1929	38	10,438	131	10,667	1934	43	10,526	90	10,650
1930	40	10,135	142	10,320	1935	34	10,985	89	11,108

¹ Stated in original as Other tobacco.

TABLE 71.—Turkey: Consumption and prices of tobacco products, 1925-35

Year	Consumption	Value		Price per pound		Year	Consumption	Value		Price per pound	
	Pounds	£ T	£ T	Cents	Pounds		£ T	£ T	Cents		
1925	15,848,204	28,510,717	1,799	08.0	1931	19,400,370	36,277,813	1,870	88.2		
1926	20,742,222	35,550,547	1,714	89.6	1932	23,403,837	35,125,692	1,500	70.9		
1927	21,007,650	46,171,240	1,859	95.4	1933	21,515,028	33,247,743	1,356	81.9		
1928	22,262,723	42,473,830	1,908	97.3	1934	23,152,480	(?)	(?)	(?)		
1929	23,211,843	45,190,337	1,947	94.3	1935	21,988,920	(?)	(?)	(?)		
1930	21,952,196	42,025,097	1,914	90.1							

¹ All tobacco products; not available by separate types.

² Not available.

TOTAL IMPORTS OF LEAF TOBACCO INTO EUROPE

Europe is one of the great consuming centers of the world for leaf tobacco. Total leaf imports during the period 1928-35 averaged 855,900,000 pounds annually, supplied principally by the various producing regions outside of Europe. Hungary, Greece, Bulgaria, Yugoslavia, and Italy, produce a surplus of leaf tobacco, part of which they sell to other European countries. Thus, the data shown in table 72 contain some intercountry trade and cannot be used as an exact measure of European importation of foreign leaf.

TABLE 72.—Europe: Imports of leaf tobacco, average 1909-13, annual 1920-1935

Importing country	Average 1909-13	1920	1921	1922	1923	1924
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
Austria	7,494,084	9,909	24,108	31,556	33,910	39,540
Belgium	22,094	36,400	36,142	46,244	41,454	45,974
Czechoslovakia	(?)	23,010	39,668	57,702	39,480	44,106
Denmark	8,774	15,900	5,977	9,570	11,767	9,690
Estonia	(?)	(?)	633	1,416	1,823	1,758
Finland	9,590	4,947	2,984	4,569	6,339	7,259
France	63,914	77,249	85,027	128,797	65,019	58,537
Germany	168,438	196,160	248,550	175,323	146,575	230,093
Hungary	(?)	(?)	2,601	5,430	2,514	4,725
Italy	47,732	74,246	63,417	49,333	41,304	36,712
Latvia	(?)	(?)	(?)	(?)	2,286	2,803
Lithuania	(?)	(?)	(?)	(?)	1,514	1,571
Netherlands	57,218	86,797	64,322	59,643	62,847	65,898
Norway	3,001	6,874	4,750	6,236	5,944	6,457
Poland	(?)	14,376	(?)	23,030	26,263	28,016
Portugal	6,665	4,497	4,387	11,228	9,569	9,642
Rumania	715	9	200	1,800	217	7,755
Spain	51,026	73,059	42,766	29,263	71,200	72,355
Sweden	9,772	12,778	8,783	9,599	9,813	12,598
Switzerland	17,050	29,003	5,792	10,640	22,986	4,281
United Kingdom ⁶	127,499	209,721	211,500	173,722	158,404	162,947
Yugoslavia	(?)	566	4,159	2,977	4,272	47
Irish Free State	(?)	(?)	(?)	(?)	(?)	10,318
Total	645,271	876,107	855,760	826,985	765,814	853,753

¹ Includes stems, trimmings, and scrap.

² Data for Austria-Hungary.

³ Included with Austria-Hungary.

⁴ Included with the Union of Soviet Socialist Republics, which had no important import trade in leaf tobacco.

⁵ Not available.

⁶ Tobacco retained in the United Kingdom (imports minus exports of imported leaf).

⁷ Included with United Kingdom.

⁸ Incomplete.

TABLE 72.—Europe: Imports of leaf tobacco, average 1909-13, annual 1920-35—Continued

Importing country	1925	1926	1927	1928	1929	1930
	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>
Austria.....	26, 525	28, 094	39, 551	33, 025	39, 080	22, 048
Belgium.....	43, 248	41, 732	44, 555	45, 742	47, 748	48, 886
Czechoslovakia.....	45, 022	41, 528	37, 626	24, 918	48, 284	21, 967
Denmark.....	10, 354	12, 303	11, 714	12, 312	12, 523	14, 197
Estonia.....	1, 905	2, 072	1, 247	1, 087	1, 839	1, 804
Finland.....	0, 686	0, 557	7, 107	7, 379	7, 739	10, 286
France.....	119, 014	98, 090	91, 108	67, 825	85, 668	154, 960
Germany.....	270, 225	135, 346	210, 918	344, 290	228, 112	234, 058
Hungary.....	4, 601	10, 453	7, 885	7, 522	6, 438	6, 977
Italy.....	25, 639	12, 970	12, 383	13, 334	16, 531	12, 033
Latvia.....	2, 439	2, 854	2, 485	2, 639	3, 082	2, 684
Lithuania.....	1, 980	2, 262	2, 191	2, 368	2, 720	2, 065
Netherlands.....	67, 603	70, 952	68, 189	71, 206	72, 438	70, 564
Norway.....	4, 360	4, 981	5, 103	5, 210	5, 533	5, 457
Poland.....	49, 178	27, 434	33, 663	22, 508	36, 342	42, 342
Portugal.....	4, 412	5, 150	7, 993	4, 984	8, 246	6, 070
Rumania.....	0, 043	515	626	600	556	186
Spain.....	56, 448	25, 758	51, 826	68, 159	67, 417	57, 070
Sweden.....	0, 022	12, 830	12, 794	8, 788	17, 061	10, 415
Switzerland.....	0, 854	12, 795	13, 634	13, 890	15, 651	16, 573
United Kingdom.....	170, 398	186, 190	212, 538	206, 990	230, 023	223, 468
Yugoslavia.....	0, 281	230	—	2, 603	650	602
Irish Free State.....	0, 535	8, 083	10, 184	8, 277	9, 422	12, 564
Total.....	946, 171	740, 424	885, 260	876, 555	950, 609	979, 101

Importing country	1931	1932	1933	1934	1935
	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>	<i>1,000 lb.</i>
Austria.....	29, 160	23, 076	24, 500	29, 753	21, 769
Belgium.....	49, 645	49, 034	44, 066	43, 587	43, 785
Czechoslovakia.....	22, 800	22, 270	30, 064	10, 265	25, 251
Denmark.....	13, 480	14, 585	16, 516	17, 285	16, 287
Estonia.....	1, 658	1, 107	1, 075	1, 101	(3)
Finland.....	4, 665	5, 079	6, 053	7, 100	6, 590
France.....	111, 376	106, 583	85, 850	61, 363	73, 935
Germany.....	158, 258	179, 057	185, 662	201, 684	201, 261
Hungary.....	6, 065	1, 311	2, 142	1, 233	2, 385
Italy.....	6, 004	8, 833	6, 347	6, 416	(3)
Latvia.....	2, 520	2, 170	1, 995	2, 272	2, 037
Lithuania.....	2, 391	1, 712	1, 942	2, 065	731
Netherlands.....	74, 524	71, 925	76, 673	66, 121	61, 099
Norway.....	6, 655	5, 040	4, 927	5, 389	5, 772
Poland.....	22, 438	18, 792	15, 832	10, 015	17, 501
Portugal.....	6, 810	6, 788	5, 933	6, 336	6, 306
Rumania.....	230	267	343	189	(3)
Spain.....	65, 419	88, 211	63, 151	39, 810	59, 071
Sweden.....	12, 850	9, 730	15, 110	8, 857	14, 936
Switzerland.....	10, 692	16, 097	17, 853	14, 886	15, 318
United Kingdom.....	185, 997	166, 120	201, 300	220, 600	240, 400
Yugoslavia.....	454	369	221	923	14
Irish Free State.....	11, 385	7, 293	5, 563	19, 330	11, 229
Total.....	812, 526	806, 344	812, 972	776, 552	* 825, 607

¹ Not available.

² Tobacco retained in the United Kingdom (imports minus exports of imported leaf).

³ Incomplete.

The greatest leaf tobacco importers of Europe are the United Kingdom, Germany, France, Netherlands, and Spain. More than three-fourths of the total import supply is brought in by these five countries. Italy, once an important buyer of United States and oriental tobacco, began to reduce imports after the World War, and has been producing a surplus since 1928.

**ORGANIZATION OF THE UNITED STATES DEPARTMENT OF AGRICULTURE
WHEN THIS PUBLICATION WAS LAST PRINTED**

<i>Secretary of Agriculture</i>	HENRY A. WALLACE.
<i>Under Secretary</i>	M. L. WILSON.
<i>Assistant Secretary</i>	HARRY L. BROWN.
<i>Director of Extension Work</i>	C. W. WARBURTON.
<i>Director of Finance</i>	W. A. JUMP.
<i>Director of Information</i>	M. S. EISENHOWER.
<i>Director of Personnel</i>	W. W. STOCKBERGER.
<i>Director of Research</i>	JAMES T. JARDINE.
<i>Solicitor</i>	MARTIN G. WHITE.
<i>Agricultural Adjustment Administration</i>	H. R. TOLLEY, <i>Administrator</i> .
<i>Bureau of Agricultural Economics</i>	A. G. BLACK, <i>Chief</i> .
<i>Bureau of Agricultural Engineering</i>	S. H. McCRORY, <i>Chief</i> .
<i>Bureau of Animal Industry</i>	JOHN R. MOHLER, <i>Chief</i> .
<i>Bureau of Biological Survey</i>	IRA N. GABRIELSON, <i>Chief</i> .
<i>Bureau of Chemistry and Soils</i>	HENRY G. KNIGHT, <i>Chief</i> .
<i>Commodity Exchange Administration</i>	J. W. T. DUVEL, <i>Chief</i> .
<i>Bureau of Dairy Industry</i>	O. E. REED, <i>Chief</i> .
<i>Bureau of Entomology and Plant Quarantine</i>	LEE A. STRONG, <i>Chief</i> .
<i>Office of Experiment Stations</i>	JAMES T. JARDINE, <i>Chief</i> .
<i>Farm Security Administration</i>	W. W. ALEXANDER, <i>Administrator</i> .
<i>Food and Drug Administration</i>	WALTER G. CAMPBELL, <i>Chief</i> .
<i>Forest Service</i>	FERDINAND A. SILCOX, <i>Chief</i> .
<i>Bureau of Home Economics</i>	LOUISE STANLEY, <i>Chief</i> .
<i>Library</i>	CLARIBEL R. BARNETT, <i>Librarian</i> .
<i>Bureau of Plant Industry</i>	FREDERICK D. RICHEY, <i>Chief</i> .
<i>Bureau of Public Roads</i>	THOMAS H. MACDONALD, <i>Chief</i> .
<i>Soil Conservation Service</i>	H. H. BENNETT, <i>Chief</i> .
<i>Weather Bureau</i>	WILLIS R. GREGG, <i>Chief</i> .

This bulletin is a contribution from

Bureau of Agricultural Economics..... A. G. BLACK, *Chief*.

END