Tobacco Outlook

Tom Capehart

Leaf Production Rebounds

During the second season since the termination of the program, U.S. tobacco production recovered, gaining nearly 100 million pounds. From a low point of 647.3 million pounds in 2005, production for 2006 is projected at 743.1 million as of September 1. Sharp post-buyout declines, caused by an exodus of producers, have been overtaken by growers expanding acreage in light of favorable prices and by some expansion in nontraditional growing areas. The crop is expected to be 15 percent above last season's. As of September 1, 2006, acreage is projected at 334,150 acres, compared with 298,080 acres last season. Cigarette leaf production is expected to account for 92 percent of U.S. leaf output in 2006, slightly higher than last season. Cigar types comprised 1 percent, while dark-fired and air-cured leaf made up 7 percent of the total crop.

Production for 2006-07 is higher, but beginning stocks slipped by 250 million pounds, resulting in lower supplies for 2006. Supplies of U.S.-grown tobacco in 2006 are expected to slip 7 percent from last season. With production expected at 743.1 million pounds and stocks of 1,214.6 million, supplies are set at 1,957.7 million pounds.

Disappearance (use) of U.S.-grown leaf is expected to decline 6 percent by the end of the 2005/06 marketing year to about 892 million pounds. The 60-million-pound loss is primarily due to a 100-million-pound decline in domestic use due to lower cigarette production and competition from foreign leaf. Export disappearance in 2006 advanced 40 million pounds, largely due to higher flue-cured shipments.

Cigarette output in calendar 2005 continued long-term trends, slipping by 12 billion pieces to end at 489 billion cigarettes. Taxable removals ended the year at 363 billion. Domestic consumption for 2005 slid 12 billion pieces to 376 billion. For 2006, production is estimated at 496 billion pieces, up 1.5 percent from 2005 and the first production increase in 10 years. Taxable removals are expected to be close to 370 billion cigarettes and consumption is projected at 372 billion cigarettes. Based on January-June trends, exports are set to increase (for the first time since 1996) by 10 percent, to end at 119 billion pieces.
Imports are projected to slip for the third year in a row, ending at 17 billion pieces. During 2006, 12 States raised cigarette excise taxes an average increase of 58 cents per pack. Per capita consumption (18 years old and over) slid to 1,691 cigarettes in 2006 compared with 1,716 cigarettes the previous year.

With no quotas in effect, most of this season's flue-cured production, 454.7 million pounds, is expected to be sold under contract to leaf dealers and manufacturers. In addition, Flue-cured Stabilization is operating nine marketing centers where producers can market their tobacco.

Beginning flue-cured stocks on July 1, 2006 were 604.0 million pounds, compared with 796.0 million pounds on July 1, 2005. The total reported supply of U.S.-grown flue-cured in 2006 is about 1,060 million pounds, 10 percent below the supply available at the beginning of the 2005 marketing year.

As of September 1, burley production in 2006 is estimated at 224.6 million pounds compared with 203.4 million pounds last season. Acreage is 103,700 acres, 3,550 acres greater than last season. The 10-percent increase in production is largely due to excellent yields in the burley belts. Smaller beginning stocks in October 2006 are expected to result in supplies of 626.7 million pounds, nine percent below the previous season's 688.0 million pounds. Expected disappearance during the 2005-06 crop year will be between 285 and 290 million pounds. Domestic use slipped nearly 14 million pounds and export disappearance lost 27 million pounds.

According to the September 1 crop production forecast, smaller crops are forecast for Maryland, dark fire-cured, and cigar tobacco. Dark air-cured leaf production advanced 36 percent due to a larger Kentucky crop.

Exports during the calendar year-to-date rebounded 16 percent to reach 212.0 million pounds (311.5 million pounds farm sales weight), the highest January-June level since 2001. Flue-cured shipments nearly doubled for the period, stems advanced, and burley shipments, already at high levels, declined. Flue-cured shipments were 81.9 million pounds and burley shipments were 94.0 million. Germany, Switzerland, the Netherlands, and China were the top destinations. Japan, normally a major buyer, took only 11 percent of last year's shipment. The Bureau of the Census reported 72 countries as destinations for U.S. tobacco leaf during January-June 2006.

Imports for consumption advanced 47 percent during January-June 2006 compared with January-June 2005. The 92-million-pound-gain was slightly larger than the 83-million-pound decline the previous year. The period ended at 289.4 million pounds, compared with 196.5 million pounds last year. Value was $390.7 million, compared with $306.1 million the previous year.
Cigarette Consumption Slides 1 Percent in 2006 to 372 Billion

U.S. cigarette consumption in 2006 is estimated at 372 billion pieces, 1.1 percent below 2005’s 376 billion cigarettes, continuing a long-term declining trend. Output in 2005 totaled 489 billion pieces, which increased 1.5 percent in 2006 to reach 496.4 billion, the first gain in 10 years. From 363 billion in 2005, taxable removals are expected to advance 1 percent during 2006 to reach 368 billion. Per capita consumption (population 18 and older) was 1,691 cigarettes per person, compared with 1,716 in 2005. Cigarette exports during the first 6 months of 2006 reached 58.2 billion pieces, compared with 53.8 billion during the same 6-month period in 2005. Japan purchased 77 percent of U.S. cigarette exports (44.6 billion pieces) during the first 6 months of 2006. Saudi Arabia, Lebanon, and Iran all purchased more than a billion cigarettes. Hong Kong, United Arab Emirates, Israel, and Kuwait (in order of importance) were also major destinations. Imports for January-June 2006 totaled 7.2 billion cigarettes, 16 percent below the same 6-month period in 2005. Colombia, Canada, Brazil, and South Korea were major sources for U.S.-bound cigarettes. Cigarette imports are expected to decrease in 2006, for the fourth consecutive year.

During the 12 months ending June 30, 2006 (July 2005-June 2006), output was 494.4 billion cigarettes, 3 percent less than the previous 12-month period. Taxable removals were 366.1 billion, down 3.2 billion. During the same period exports increased (for the first time since 1996) by 10 percent to end at 117.6 billion pieces. Imports for July 2005-June 2006 slipped for the third year in a row, ending at 16.1 billion.

Cigarette Taxes

During 2006, four States have raised cigarette excise taxes (table 4). The average increase was 29 cents per pack. By the end of 2006, 20 states will have cigarette excise tax rates of $1.00 or greater, and 5 States (Maine, Michigan, New Jersey, Rhode Island, and Washington) will have tax rates of over $2.00 per pack. The projected consumption-weighted-average State cigarette excise tax rate for 2006 is 80.44 cents per pack of 20 cigarettes. For 2005, the revised consumption-weighted-average State cigarette excise tax rate is 78.59 cents per pack.

Wholesale Prices

Cigarette wholesale prices have not changed since they increased 12 cents per pack in April 2002. Including the Federal excise tax, the current wholesale price is $2.374 per pack. The Federal excise tax has been 39 cents per pack since January 1, 2002. Although wholesale prices have not changed, manufacturers have changed the cost to wholesalers by adjusting discounts, rebates, and other programs to effectively change the wholesale price. These changes, however, are not easily quantified at an industry level.

CPI for Cigarettes and Tobacco Products Up

The Consumer Price Index (CPI) for tobacco products (cigarettes, cigars, chewing, snuff, and smoking tobacco) is projected to increase from 502.8 in 2005 to an
estimated 519.0 during 2006, based on 6 months of data. The CPI for cigarettes advanced from 203.5 in 2005 to an estimated 209.6 in 2006. For tobacco products other than cigarettes, the CPI ended 2005 at 151.1 and is projected to finish 2006 at 155.0.

**Cigar Output Slips in 2005, but Expected To Regain Ground in 2006**

During calendar 2005, cigar output slipped 17 percent from the previous year to reach 3,674 million cigars. During the same period, taxable removals gained 3 percent to 4,432 million cigars. Exports for calendar year 2005 were 301 million cigars, nearly double the previous year. Imports during 2005 were 445 million cigars, down 28 percent from the previous year.

For the 12 months ending June 30, 2006 (July 2005 - June 2006), cigar output slid 5 percent to 4,832 million cigars. Taxable removals advanced 5 percent to 4,562 million. Exports fell to less than half the level of the previous 12-month period to 166 million cigars. Canada, Turkey, China, and Japan were major destinations.

Calendar year 2006 cigar output is projected at 3,977 million pieces, 8 percent over 2005. Taxable removals showed a similar gain to 4,690 million. During the first 6 months of 2006, exports were half the level of the previous year and are projected at 150 million for the year. Projected imports are 334 million cigars, 25 percent below the previous year, again based on 6 months of data. Imports for January-June 2006 were 339 million cigars, compared with 347 million during the same period a year earlier. The Dominican Republic, Honduras, Nicaragua, and India accounted for 94 percent of import volume. For the year ending June 2006, imports totaled 506 million cigars, 15 percent ahead of the same period a year earlier.

**Small Cigars**

Small cigars weigh less than 3 pounds per 1,000 cigars and must contain cigar-type wrapper and filler. Small cigar output in 2005 reached 4,665 million pieces, 39 percent above the previous year. Projected output in 2006 is 5,513 million, a gain of 18 percent. Taxable removals, as indicated by domestic invoices, reached 2,231 million pounds during 2005 and are projected to increase further to 2,690 million in 2006.

Exports of small cigars reached 110 thousand pieces during 2005 and are projected to continue increasing in 2006. Canada, Russia, and Japan were major destinations for small cigars. Imports were 198 thousand cigars during the same period. Trade accounts for a small part of U.S. small cigar disappearance. Imports for 2005 are expected to reach about 200 million pieces. India, Honduras, Brazil, Colombia, and the Netherlands were major sources for small cigars during the first half of 2006, accounting for 90 percent of U.S. imports.

**Other Tobacco Products**

Snuff output in 2005 continued long-term gains, ending nearly 10 percent higher at 84.5 million pounds. Taxable removals were 79.1 million pounds. During the first 6 months of 2006 output slipped 6 percent, the first half-year decline in over a decade. At this rate, year-end output is projected at 79.7 million pounds. Taxable
removals during the 6-month period gained 6 percent. During the past decade, snuff consumption has advanced 25 percent.

On a July-June basis, snuff output during the year ending June 30, 2006 slipped 2 percent from the previous 12-month period to end at 84.1 million pounds. During the same period, taxable removals advanced 4 percent, ending at 81.4 million pounds.

Chewing tobacco output in 2005 was nearly unchanged from the previous year at 39.2 million pounds, continuing long-term declines. During the first 6 months of 2006, chewing tobacco output slid 3 percent, less than in 2005. Output in 2006 is projected at 38.0 million pounds. Taxable removals in 2005 slipped less than 1 percent to end at 37.7 million pounds. For the year ending June 30, 2006 (July 2005 - June 2006, the latest full year of data available), output of chewing tobacco totaled 38.6 million pounds, 2 percent lower than a year earlier. Imports represent less than 1 percent of invoiced chewing tobacco. Exports are less than 1 percent of output.

After declining to less than 5 million pounds in the mid-1990s, smoking tobacco output has increased 3 out of the past 5 years. Output for 2005 reached 17.4 million pounds, and is projected down 4 percent during 2006. Both pipe and cut smoking tobacco slipped. However, last year, cut smoking tobacco advanced about 2 million pounds. Cut tobacco, also known as cut rag, is predominately used in roll-your-own (RYO) cigarettes. Higher cigarette taxes continue to boost cut tobacco consumption because of the resurgence in the RYO market. Taxable removals of smoking tobacco totaled 16.4 million pounds in 2005 and are projected to slip to 16.2 pounds in 2006.

During the 12-month period ending June 30, 2006, smoking tobacco output advanced 8 percent to 17.0 million pounds compared with the previous July-June period. Cut tobacco gained 14 percent to 13.0 million pounds. Pipe tobacco slipped 9 percent to 4.0 million pounds. Taxable removals for July 2005-June 2006 were steady at 16.2 million pounds.
Figure 1

**Consumer Price Index and tobacco products**

% of 1982-84


Figure 2

**Discount cigarette share of U.S. cigarette consumption**

Percent

Source: Economic Research Service, USDA.
### Table 1--Cigarettes: U.S. output, removals, and consumption, 1996-2006

<table>
<thead>
<tr>
<th>Year ending June 30</th>
<th>Total output</th>
<th>Taxable</th>
<th>Tax-exempt</th>
<th>Exports</th>
<th>Miscellaneous shipments 1/</th>
<th>Imports</th>
<th>Adjustment 2/</th>
<th>Total U.S. consumption 3/</th>
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<td>254.7</td>
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<td>15.2</td>
<td>2.6</td>
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<td>475.8</td>
<td>252.5</td>
<td>232.8</td>
<td>19.7</td>
<td>3.1</td>
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<td>465.2</td>
<td>229.0</td>
<td>215.5</td>
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<td>3.5</td>
<td>17.2</td>
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<td>190.3</td>
<td>176.8</td>
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<td>432.3</td>
<td>159.3</td>
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<td>17.9</td>
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<td>7.1</td>
<td>23.1</td>
<td>6.6</td>
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<td>2006 5/</td>
<td>494.4</td>
<td>366.1</td>
<td>123.6</td>
<td>117.6</td>
<td>6.0</td>
<td>17.0</td>
<td>16.1</td>
<td>373.0</td>
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1/ Includes overseas armed forces, ship stores, small tax-exempt categories, and shipments to Puerto Rico and other U.S. possessions. 2/ Inventory change and unaccounted for. 3/ Taxable removals, misc. shipments, adjustment, and imports. 4/ Estimate. 5/ Subject to revision.

Table 2--Per capita consumption of tobacco products in the United States (including overseas forces), 1996-2006

<table>
<thead>
<tr>
<th>Year</th>
<th>Per capita 16 years and over</th>
<th>Per capita 18 years and over</th>
<th>Per male 18 years and over</th>
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<tr>
<td></td>
<td>Number</td>
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</tr>
<tr>
<td></td>
<td>Pounds</td>
<td>Pounds</td>
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<td>2,445</td>
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<td>4.1</td>
<td>0.31</td>
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<td></td>
<td>4.83</td>
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<td></td>
<td>4.1</td>
<td>0.31</td>
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<tr>
<td></td>
<td>4.85</td>
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<td>2,275</td>
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<td>3.6</td>
<td>0.31</td>
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<td>0.12</td>
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<td></td>
<td>3.5</td>
<td>0.32</td>
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<td>2004</td>
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1/ Unstemmed processing weight.  2/ Finished product weight.  3/ Preliminary.

Table 3--U.S. cigarette exports to leading destinations, 2005-2006

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</tr>
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<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bilions</td>
<td></td>
<td></td>
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<tr>
<td>Japan</td>
<td>89.0</td>
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<td>Saudi Arabia</td>
<td>8.2</td>
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<td>Lebanon</td>
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<td>Iran</td>
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<tr>
<td>Hong Kong</td>
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<tr>
<td>Uruguay</td>
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<tr>
<td>Qatar</td>
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<tr>
<td>Oman</td>
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<td>Bermuda</td>
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<td>Yemen</td>
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</tr>
<tr>
<td>Micronesia</td>
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<td>*</td>
</tr>
<tr>
<td>Other countries</td>
<td>0.6</td>
<td>0.5</td>
<td>0.9</td>
</tr>
<tr>
<td>Total</td>
<td>117.6</td>
<td>53.8</td>
<td>58.2</td>
</tr>
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1/ Subject to revision.  * Indicates less than 50-million pieces.
Sources: Compiled from Bureau of the Census, Reports EM545 and IM146.
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<th>State:</th>
<th>Increase</th>
<th>New rate</th>
<th>Effective date</th>
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<td>$0.60</td>
<td>$1.42</td>
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<td>$1.11</td>
<td>04/03/02</td>
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<td>New York State</td>
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<td>Rhode Island</td>
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<td>$1.32</td>
<td>05/01/02</td>
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<td>Utah</td>
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<td>07/01/05</td>
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<td>07/01/05</td>
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<td>07/01/05</td>
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<td>07/01/05</td>
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<td>07/01/06</td>
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<td>07/01/06</td>
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<td>$1.96</td>
<td>06/01/07</td>
</tr>
</tbody>
</table>

Source: Orzechowski & Walker - *Tax Burden on Tobacco*. 

*Tobacco Outlook/TBS-261/September 26, 2006*
Economic Research Service, USDA
### Table 5—Tobacco demand factors, 1996-2006

<table>
<thead>
<tr>
<th>Year</th>
<th>Population July 1 1/</th>
<th>Disposable personal income, per capita 2/</th>
<th>Consumer Price Indexes 3/</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Millions</td>
<td>Dollars</td>
<td>Current prices</td>
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<td>21,385</td>
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<tr>
<td>1997</td>
<td>198.2</td>
<td>21,969</td>
<td>21,838</td>
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<tr>
<td>1998</td>
<td>200.4</td>
<td>23,359</td>
<td>22,672</td>
</tr>
<tr>
<td>1999</td>
<td>202.5</td>
<td>24,314</td>
<td>23,191</td>
</tr>
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<td>2000</td>
<td>209.1</td>
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<td>23,501</td>
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<td>207.2</td>
<td>26,237</td>
<td>23,692</td>
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<td>209.4</td>
<td>27,157</td>
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<td>2003</td>
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<td>2005</td>
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<td>2006 5/</td>
<td>213.9</td>
<td>31,135</td>
<td>26,337 6/</td>
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</table>

---

1/ Eighteen years and older including forces overseas. 2/ Based on total population. 3/ All urban consumers. 4/ Bureau of Labor Statistics began to publish cigarette and other tobacco product CPI in January 1998. 5/ Subject to revision. 6/ Data through March.

Table 6--Wholesale premium brand cigarette price revisions, 1990-current 1/

<table>
<thead>
<tr>
<th>Approximate date of change 2/</th>
<th>Net price per 1,000</th>
<th></th>
<th>Net price per 1,000 excluding Federal excise tax</th>
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<td>King</td>
<td>Filter 100</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Dollar</td>
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<tr>
<td>June-1990</td>
<td>51.15</td>
<td>52.65</td>
<td>51.15</td>
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<tr>
<td>Dec.-1990</td>
<td>53.65</td>
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<tr>
<td>Jan.-Feb. 1991 3/</td>
<td>55.75</td>
<td>57.25</td>
<td>55.75</td>
</tr>
<tr>
<td>Mar.-1991</td>
<td>56.50</td>
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<tr>
<td>June-1991</td>
<td>58.25</td>
<td>59.75</td>
<td>58.25</td>
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<tr>
<td>Nov.-1991</td>
<td>61.00</td>
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<td>Apr.-1992</td>
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<tr>
<td>Nov.-1992</td>
<td>69.00</td>
<td>70.50</td>
<td>69.00</td>
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<tr>
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<td>71.10</td>
<td>72.60</td>
<td>71.10</td>
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<td>72.10</td>
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<td>53.95</td>
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<td>Nov.-1993</td>
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<td>57.45</td>
<td>55.95</td>
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<tr>
<td>May 1995 5/</td>
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<td>59.45</td>
<td>57.45</td>
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<tr>
<td>May 1996</td>
<td>59.45</td>
<td>61.45</td>
<td>59.45</td>
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<tr>
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<td>71.70</td>
<td>74.70</td>
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<td>77.70</td>
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<td>109.20</td>
<td>106.20</td>
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<td>115.70</td>
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<td>Jan.-2002 7/</td>
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<td>135.20</td>
<td>132.20</td>
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<td>Apr.-2002 8/</td>
<td>138.20</td>
<td>141.20</td>
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1/ Includes leading brands. A 3-percent discount is made for payment within 10 days or 2 percent within 14 days. 2/ For 1980-89 see TBS-243. April 1999. 3/ Effective January 1, 1991, the Federal excise tax increased to $10.00 per 1,000 cigarettes. 4/ Effective January 1, 1993, the Federal excise tax increased to $12.00 per 1,000 cigarettes. 5/ No changes in 1994. 6/ Effective Jan. 1, 2000, Federal excise tax increased to $17 per 1,000 cigarettes. 7/ Effective January 1, 2002, Federal excise tax increased to $19.50 per 1,000 cigarettes. 8/ Last price change.

Note: The prices in this table apply to cigarettes manufactured for domestic sales by U.S. manufacturers only. Cigarettes manufactured for export are not included. These prices do not include rebates, discounts, and other adjustments to the wholesale list price.

Sources: News reports and miscellaneous sources.
<table>
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<th>Approximate date of change</th>
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<th>Discounts</th>
<th>Deep discounts</th>
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<td>Regular 100s Regular 100s</td>
<td>Regular 100s Regular 100s</td>
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<td>31.60</td>
<td>32.85</td>
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<tr>
<td>November 1991</td>
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<td>32.85</td>
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<tr>
<td>April 1992</td>
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<td>34.10</td>
<td>35.35</td>
</tr>
<tr>
<td>July-August 1992</td>
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<td>35.35</td>
<td>36.60</td>
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<td>November 1992</td>
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<td>45.35</td>
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<td>62.80</td>
<td>64.05</td>
</tr>
</tbody>
</table>

1/ Typical prices. Prices for some brands higher and some lower. Includes Federal excise tax. 2/ No change in 1994. 3/ Last price change.

Note: The prices in this table apply to cigarettes manufactured for domestic sales by U.S. manufacturers only. Cigarettes manufactured for export are not included. These prices do not include rebates, discounts, and other adjustments to the wholesale list price.

Sources: News reports and miscellaneous sources.
### Table 8—Cigars and smoking tobacco: Output, removals, and consumption, 2002-06

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<tr>
<th>Year and item</th>
<th>Output</th>
<th>Taxable 1/</th>
<th>Tax-exempt</th>
<th>Imports</th>
<th>Exports</th>
<th>Total U.S. consumption 2/</th>
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<td></td>
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<td>500</td>
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<tr>
<td>Year ending June 30</td>
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<td>2.0</td>
<td>0.2</td>
<td>16.9</td>
</tr>
<tr>
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<td>2.0</td>
<td>3.2</td>
<td>0.2</td>
<td>19.4</td>
</tr>
</tbody>
</table>

1/ Includes United States and Puerto Rico combined.  2/ Total removals (or sales) from U.S. factories plus those from Puerto Rico, and imports minus exports.  3/ Estimated.

<table>
<thead>
<tr>
<th>Period</th>
<th>Plug-firm</th>
<th>Plug-moist</th>
<th>Twist</th>
<th>Loose leaf</th>
<th>Total 1/</th>
<th>Snuff dry</th>
<th>Snuff moist</th>
<th>Small cigars 2/ in bulk (exports)</th>
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<tbody>
<tr>
<td>Million pounds</td>
<td>Millions</td>
<td>Million pounds</td>
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<td></td>
<td></td>
<td></td>
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<td>2.6</td>
<td>0.9</td>
<td>1.0</td>
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Year ending June 30

<table>
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<th>Period</th>
<th>Plug-firm</th>
<th>Plug-moist</th>
<th>Twist</th>
<th>Loose leaf</th>
<th>Total 1/</th>
<th>Snuff dry</th>
<th>Snuff moist</th>
<th>Small cigars 2/ in bulk (exports)</th>
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</thead>
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<tr>
<td>Million pounds</td>
<td>Millions</td>
<td>Million pounds</td>
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<td></td>
<td></td>
<td></td>
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1/ Details may not add to total due to rounding. 2/ Weight not more than 3 pounds per thousand. 3/ Preliminary.
Table 10--Tobacco products: Domestic invoices by category, 1997-2006

<table>
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<th>Period</th>
<th>Chewing tobacco</th>
<th>Smoking tobacco</th>
<th>Year ending June 30</th>
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<td>Million pounds</td>
<td></td>
<td>Millions</td>
</tr>
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<td>0.7</td>
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<tr>
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<td>0.6</td>
</tr>
<tr>
<td>2006 3/</td>
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<td>0.6</td>
</tr>
<tr>
<td>Year ending June 30</td>
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<tr>
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<td>0.4</td>
<td>0.8</td>
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<tr>
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<td>0.3</td>
<td>0.7</td>
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<tr>
<td>2004</td>
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<tr>
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<td>0.6</td>
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<tr>
<td>2006</td>
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<td>0.2</td>
<td>0.6</td>
</tr>
</tbody>
</table>

** not applicable. 1/ Detail may not add to total due to rounding. 2/ Weight not more than 3 pounds per thousand. Taxable removals for small cigars. 3/ Preliminary.

January-June 2006 Exports Advance 16 Percent

Exports during the calendar year to-date rebounded 16 percent to reach 212.0 million pounds (311.5 million pounds farm sales weight), the highest January-June level since 2001. Flue-cured shipments nearly doubled for the period, stems advanced, and burley shipments, already at high levels, declined. Flue-cured shipments were 81.9 million pounds and burley shipments were 94.0 million. Germany, Switzerland, the Netherlands, and China were the top destinations. Japan, normally a major buyer, took only 11 percent of last year’s shipments. Switzerland purchased 4 times last year’s volume during the 6-month period. Germany boosted its takings by 51 percent and the Netherlands more than doubled its import volume. The Bureau of the Census reported 72 countries as destinations for U.S. tobacco leaf during January-June 2006.

January-June 2006 leaf export value reached $605.5 million compared with $536.0 million during the same period in 2005. Burley export value reached $289.7 million, $23 million less than the previous year, and flue-cured export value increased by nearly $100 million to end at $240 million. Other leaf types generally declined in value. During the first 6 months of 2006, flue-cured and burley made up 88 percent of total export value, compared with 85 percent last year. Cigar wrapper accounted for $16.8 billion, the value of stems and refuse shipments were $7.0 billion, and dark fired (Kentucky-Tennessee) shipments reached $6.7 billion.

July 2005-June 2006 Exports

For the 12 months ending June 2006, (July 2005-June 2006), unmanufactured export value advanced about 1 percent. Once again, exports just cleared the $1 billion mark. Value for the 12-month period was $1,055.3 million, compared with $1,044.3 million during the previous July-June period. Flue-cured increased by nearly $100 million but was offset by lower burley and “other leaf” values.

Total export volume from July 2005 through June 2006 was 367.7 million pounds (536.3 million pounds, farm sales weight). During the 12-month period, flue-cured shipments were 176.0 million pounds, with Germany, Switzerland, China, and the Netherlands the top destinations for flue-cured tobacco. Burley shipments of 127.4 million pounds were 24 million pounds slower, after high shipments last year. Top burley destinations were Germany, the Netherlands, Lithuania, the Ukraine, and Greece. Maryland and binder shipments advanced, while other types slowed during the 12-month period.

January-June Imports Regain Ground Lost Last Year

Imports for consumption advanced 47 percent during January-June 2006 compared with January-June 2005. The 92-million-pound gain was slightly larger than the 83-million-pound decline the previous year. The period ended at 289.4 million pounds, compared with 196.5 million pounds last year. Value was $390.7 million, compared with $306.1 million the previous year. For the 6-month period, Brazil Turkey, Argentina, Malawi, Indonesia, and Greece were the leading sources for leaf. Shipments from Brazil were 75.8 million pounds, compared with only 36.7 million pounds last year. Turkey and Greece ship Oriental tobacco, which is not
produced in the United States. Oriental leaf was the largest import category, edging out the “not specifically provided for” (NSPF) category by a few million pounds.

General imports (arrivals) for January-June 2006 were 239.5 million pounds valued at $330.7 million, compared with 248.5 million pounds valued at $363.1 million in 2005. Oriental leaf arrivals slipped 18 percent to end at 62.2 million pounds. Flue-cured (stemmed) arrivals gained 5.5 million pounds to end at 54.2 million pounds, while burley arrivals (other stemmed cigarette leaf) slipped 27 percent to end at 43.3 million pounds.

**July-June Imports**

Leaf import volume (consumption) advanced 26 percent to 632.3 million pounds during July 2005-June 2006 after slipping 31 percent during the previous July-June period. Stemmed flue-cured and stems were the most active categories. Oriental and burley (other stemmed cigarette leaf NSPF) showed slight gains. During July 2005-June 2006, the value of unmanufactured leaf imports for consumption was $752 million, compared with $752 million a year earlier.

General imports (arrivals) during July 2005-June 2006 were within a million pounds of the previous period, ending at 568.0 million pounds, compared with 630.8 million pounds the previous year. The value of general imports was $720 million, compared with $712 million a year earlier.

**Figure 3**

**Export markets for U.S. tobacco**

Million pounds

Tariff-Rate Quota Update

The Tariff-Rate Quota (TRQ) for 2005-06 on cigarette tobacco leaf imports (excluding Oriental) was 78 percent filled as of September 11, 2006 (with 1 day left in the TRQ year) at 258.6 million pounds. This is one of the highest fill rates since the implementation of the TRQ. Given the lower tobacco use by the domestic tobacco industry, tobacco imported under the TRQ is becoming a more significant source of leaf. The tobacco TRQ year begins on September 13 and runs through September 12 the following year. At this point last year, 235.7 million pounds, or 71 percent, of the quota had been filled. The total quantity allowed under the TRQ is 332.2 million pounds.
Table 11—U.S. imports of unmanufactured tobacco: Quantity and average value, by kinds, 2005/06 1/

<table>
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<tr>
<th>Kind</th>
<th>Quantity 2005/06</th>
<th>Change from 2004/05</th>
<th>Value per pound</th>
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<td>Million pounds</td>
<td>Percent</td>
<td>Dollars</td>
</tr>
<tr>
<td>Cigarette: 2/</td>
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</tr>
<tr>
<td>Unstemmed leaf</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Flue-cured leaf</td>
<td>2.0</td>
<td>-53</td>
<td>0.9</td>
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<tr>
<td>Burley leaf</td>
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</tr>
<tr>
<td>Other</td>
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<td>*</td>
<td>*</td>
</tr>
<tr>
<td>Oriental leaf</td>
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</tr>
<tr>
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<td>53</td>
<td>1.4</td>
</tr>
<tr>
<td>Scrap</td>
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<td>*</td>
<td>*</td>
</tr>
<tr>
<td>Manufactured or not mfd., NSPF</td>
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<td>Cigar:</td>
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</tr>
<tr>
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</tr>
<tr>
<td>Scrap</td>
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<tr>
<td>Other stemmed and unstemmed leaf</td>
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<td>18</td>
<td>1.6</td>
</tr>
<tr>
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<tr>
<td>Total</td>
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<td>1.3</td>
</tr>
</tbody>
</table>

General imports

| Cigarette: 2/ | | | |
| Unstemmed leaf | | | |
| Flue-cured leaf | 0.5 | -92 | 0.9 |
| Burley leaf | 1.4 | -20 | 1.3 |
| Other | * | * | * |
| Oriental leaf | 105.6 | -7 | 2.2 |
| Stemmed leaf | | | |
| Flue-cured | 108.5 | -6 | 1.5 |
| NSPF | 141.0 | -6 | 1.4 |
| Scrap | * | * | * |
| Manufactured or not mfd., NSPF | 1.1 | -42 | 1.9 |
| Cigar: | | | |
| Leaf | 75.1 | 5 | 1.2 |
| Scrap | 8.8 | 132 | 0.6 |
| Other stemmed and unstemmed leaf | 6.6 | 20 | 1.6 |
| Stems | 119.6 | 23 | 0.2 |
| Total | 568.0 | 0 | 1.3 |

1/ Year ending June 30, 2006. 2/ Includes minor quantities for smoking tobacco, chewing tobacco, and snuff. * = Negligible, less than 50,000 pounds. Sources: Compiled from Bureau of the Census, Reports EM545 and IM146.
### Table 12--U.S. imports of unmanufactured tobacco for consumption and general imports, principal categories, and countries of origin, 2005/2006 (declared-weight)

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* = Negligible.
1/ Preliminary.  2/ Includes tobacco, manufactured or not manufactured, except smoking tobacco in retail packages, flue-cured, and tobacco, manufactured or not manufactured, not specially provided for (other). 3/ January-June 2005 revised.

Due to aggregation, rounding errors may occur.

Sources: Compiled from Bureau of the Census, Reports EM545 and IM146.
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**Note:**
- **Million pounds:**
- July-June crop year for flue-cured and cigar wrapper; October-September crop year for all other types except October-June for 2005/06.
- Subject to revision.
- Data may not add to total because of rounding.

Sources: Compiled from Bureau of the Census, Reports EM545 and IM146.
**Tobacco Leaf**

**U.S. Tobacco Leaf Situation and Outlook**

U.S. tobacco production for the 2006 season was forecast at 743.1 million pounds as of September 1. The crop is expected to be 15 percent over last year’s 647.3 million pounds. Acreage in 2006 is projected at 334,150 acres, 12 percent greater than in the 2005 season. Those producers remaining in tobacco production are expanding operations to create more favorable economies of scale and responding to favorable prices. Cigarette leaf production is expected to account for 92 percent of U.S. output in 2006. Cigarette leaf production advanced 100 million pounds to 681.5 million pounds. Cigar types accounted for 1 percent of U.S. production, while dark-fired and air-cured leaf accounted for 7 percent.

**U.S. Leaf Supply Slips 7 percent in 2006**

Although production is higher, beginning stocks slipped by 250 million pounds, resulting in lower supplies for 2006. Supplies of U.S.-grown tobacco in 2006 are expected to slip 7 percent from last season. Although production increased 15 percent, lower beginning stocks resulted in a 150-million-pound slide in supplies. With production expected at 743.1 million pounds and stocks of 1,214.6 million, supplies are set at 1,957.7 million pounds.

**Disappearance Projected To Decline in 2005**

Disappearance (use) of U.S.-grown leaf is expected to retreat about 6 percent by the end of the 2005-06 marketing year to reach about 892 million pounds. The 60-million-pound decline is due to a 100-million-pound decline estimated for domestic use, and an increase in exports, especially flue-cured. Domestic use is expected to end at 422 million pounds, and export use is expected to be about 470 million pounds.

**Marketing Quota and Price Support in 2006**

The Fair and Equitable Tobacco Transition Act of 2004 eliminates price supports and marketing quotas for all tobacco beginning with the 2005 crop year (July 2005 for flue-cured and October 2005 for other types). Mandatory inspection and grading of domestic leaf is also eliminated, and USDA market news reporting is terminated.

---

1/ All quantities in this section are in farm-sales weight unless otherwise noted. Years refer to marketing years; for instance, the 2000 crop year is July 2000-June 2001 for flue-cured and cigar wrapper (type 61) and October 2000-September 2001 for all other types.
Table 15—All tobacco: Acreage, yield, and production, United States, 1965-2006

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1/ Indicated September 1, 2006.

Flue-Cured Acreage Up For 2006

According to the September 1 crop production estimate, flue-cured acreage increased by 32,600 acres to 208,100 acres. September 1 production estimates set flue-cured production at 454.7 million pounds, 72 million pounds greater than the previous year. The rebound in flue-cured production has been largely due to export prospects and grower adjustments to the post-buyout environment. Post buyout prices have been favorable to producers.

Beginning flue-cured stocks on July 1, 2006 were 604.0 million pounds, compared with 796.0 million pounds on July 1, 2005. The total reported supply of U.S.-grown flue-cured in 2006 is about 1.1 billion pounds, 10 percent below the supply available at the beginning of the 2005 marketing year.

Exports Spur Higher Disappearance in 2005

Disappearance of flue-cured tobacco in the 2005 marketing year (July 2005-June 2006) gained nearly 50 million pounds. Although domestic disappearance fell due to shrinking cigarette production and increased use of imported tobacco, exports were robust, advancing 70 million pounds. Germany, Switzerland, China, and the Netherlands, all major markets for flue-cured this season, increased purchases.
Figure 4
Flue-cured tobacco: Supply, price, and use

Trade stocks include those of manufacturers and dealers.
Source: Agricultural Marketing Service, USDA.
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1/ July 1 for flue-cured; October 1 for burley.  2/ Actual marketings in the marketing year.  3/ September 1 Crop Production estimate used for acreage, yield, and marketings.  4/ 1999 loan forgiveness stocks included (230 million pounds burley, 78 million pounds flue-cured).  5/ Estimated.  6/ Price supports terminated beginning in 2005.

As of September 1, burley production in 2006 is estimated at 224.6 million pounds, compared with 203.4 million pounds last season. Acreage is 103,700 acres, only 3,550 acres more than last season. World demand for U.S. burley has been lower than expected. During the first 10 months of the marketing season, export shipments were down 12 percent.

With beginning stocks less than 500 million pounds for the first time in the post war period and production hovering above 200 million pounds, 2006 supplies of burley are at a record-low of 625.0 million pounds.

**Disappearance in 2005-06 Expected To Slip 10 Percent**

Based on 9 months of data, burley disappearance during the 2005-06 year (October 2005-September 2006) is expected to slip 10 percent. Exports during the first 9 months of the season are 12 percent below the previous year’s level, after substantial gains the previous year. Expected disappearance will be between 285 and 290 million pounds. Domestic use slipped nearly 5 million pounds as export disappearance lost 27 million pounds.
Figure 5

**Burley tobacco: Supply, price, and use**

 Million lbs

Trade stocks include those of manufactures and dealers.
Source: Agricultural Marketing Service, USDA.

---

**Cents/lb**

Price
Support level

---

**Million lbs**

Exports
Use
Domestic
Maryland tobacco production is estimated at 2.2 million pounds for the 2006 crop year, not including production in the State of Maryland, where data is no longer being collected. With the demise of the tobacco program, producers in Pennsylvania are free to grow any type of tobacco and many have switched to burley production. Burley production in Pennsylvania is estimated at 12.1 million pounds for 2006, up from 4.8 million pounds in 2005.

Beginning stocks of Maryland leaf on January 1, 2006 were 2.6 million pounds, compared with 5.0 million pounds last season. Combined with this season’s marketings, the 2006 supply should be about 4.7 million pounds, compared with 5.6 million pounds last season. Ending stocks (January 1, 2007) are likely to be lower again due to lower production and greater export use.

Maryland-type leaf disappearance through June 2006 slipped 17 percent compared with the same 9-month period last season. Continuance of that trend would result in a 2005-06 disappearance of 3.1 million pounds, compared with 8.2 million the previous season. Year-end disappearance is likely to be slightly higher.
Table 17--Southern Maryland tobacco, type 32: Acreage, yield, production, carryover, supply, disappearance, season-average price, 1995-2006 (farm-sales weight)

<table>
<thead>
<tr>
<th>Marketing year 1/</th>
<th>Acreage harvested 1,000 acres</th>
<th>Yield per acre Pounds</th>
<th>Production</th>
<th>Stocks following Jan. 1 2/</th>
<th>Total</th>
<th>Total</th>
<th>Domestic</th>
<th>Exports</th>
<th>Avg. grower price per pound Cents</th>
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1/ Year beginning October 1.  2/ Adjusted to reflect calendar 1987-1996 sales of tobacco produced in Pennsylvania.  3/ September 1 crop estimate.

Fire-cured tobacco is mainly used in making snuff, plug chewing tobacco, and twist chewing tobacco. About half of the crop is usually exported. Production of fire-cured leaf in 2006-07 is projected at 37.2 million pounds based on September 1 estimates, about 0.4 million pounds short of last season. Acreage was set at 11,250 acres, compared with 11,840 the previous year. Yields improved over last season. Production of Kentucky-Tennessee fire-cured leaf (types 22-23) as of September 1 (2006 crop) is estimated at 36.4 million pounds compared with 36.9 million pounds in 2005. Production of Virginia fire-cured tobacco is estimated at 0.7 million pounds, 6 percent higher than the 2005 season.

**Fire-Cured Exports Fall**

Shipments of Kentucky-Tennessee fire-cured (types 22-23) slipped by 28 percent during the first 10 months of the 2005 crop year (October 2005-July 2006), losing a greater percentage than during the same period last year. Total year-end disappearance is projected at 40.8 million pounds. Domestic use advanced 36 percent during the first 9 months of the crop year and exports of types 22-23 slipped by 28 percent. Domestic disappearance is projected at 34.5 million pounds, while export use is expected to reach 6.3 million.

Virginia dark-fired tobacco disappearance is likely to increase by 1.3 million pounds as domestic use rises. Year-end disappearance is expected to reach 2.1 million pounds.
Table 18—Fire-cured tobacco, Kentucky-Tennessee, types 22-23, and Virginia fire-cured, type 21: Acreage, yield, production, carryover, supply, disappearance, season-average price, and price support operations, 1995-2006 (farm-sales weight)

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<th>Marketing year 1/</th>
<th>Acreage harvested</th>
<th>Yield per acre</th>
<th>Production and others</th>
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Virginia fire-cured, type 21

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1/ Marketing year beginning October 1. 2/ September 1 Crop Production estimate used for acreage, yield, and marketings. 3/ Estimate. 4/ Price supports terminated beginning in 2005.

Figure 6
Fire-cured tobacco: Supply, price, and use

Supply
Marketings
Trade stocks
Loan stocks

Trade stocks include those of manufacturers and dealers. Crop years beginning July 1. 2001 and 2002 are preliminary.
Source: Agricultural Marketing Service, USDA.

Cents/lb
Price
Support level

Exports
Use
Domestic

Source: Agricultural Marketing Service, USDA.
Dark air-cured tobacco (types 35-37) is used in plug and twist chewing tobacco, snuff, and, to some extent, in smoking tobacco. Production and use have declined by more than 50 percent over the last two decades. Exports traditionally account for 10-20 percent of total use, but have declined in the past decade as cigarettes have displaced traditional tobacco products in many countries that purchased dark air-cured leaf. The marketing year for dark air-cured tobacco runs from October to September. Acreage, yield, and production data is no longer collected for type 37, Virginia sun-cured tobacco.

**Acreage Gains in 2006**

Dark air-cured tobacco (types 35 and 36) acreage increased nearly 1,000 acres to 5,100 acres in 2006, a 23-percent gain from 4,150 acres in 2005. Yields are 3,076 pounds per acre, nearly 300 pounds greater than last season. Production of dark air-cured leaf is estimated at 15.7 million pounds, 36 percent greater than last season’s 11.5 million pounds. For the 2005 crop year, beginning stocks advanced almost 3.4 million pounds, resulting in supplies of 49.1 million pounds. For 2006, beginning supplies (as of October 1, 2006) are expected to be about 50.8 million pounds, greater by almost 2 million pounds than this time last season.

**2005 Disappearance Falls**

Air-cured disappearance for the first 9 months of the marketing year (October 2005-June 2006) slipped 1 percent to 9.0 million pounds. Based on past marketing patterns, total disappearance during the crop year is expected to be about 11.5 million pounds.

The National Agricultural Statistics Service no longer collects production data on Virginia sun-cured tobacco (type 37) because production has ended. In 2004, production had declined to 70 acres, producing 126,000 pounds. Disappearance during 2005-06 from remaining stocks is estimated to be 17,000 pounds, with virtually all going to the domestic market.
### Table 19--Dark air-cured tobacco, types 35-36, and sun-cured tobacco, type 37: Acreage, yield, production, carryover, supply, disappearance, season-average price, and price support operations, 1995-2006 (farm-sales weight)

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<tr>
<th>Marketing year</th>
<th>Acreage (1,000 acres)</th>
<th>Yield (Pounds)</th>
<th>Manufacturers and others</th>
<th>Under loan</th>
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|                |                       |               | Sun-cured, type 37      |            |       |              |
| 1995           | 0.1                   | 1,130.0       | 0.1                     | *          | 0.1   | 0.11         |
| 1996           | 0.1                   | 1,600.0       | 0.1                     | 0.0        | *     | 0.05         |
| 1997           | 0.1                   | 1,490.0       | 0.1                     | 0.0        | *     | 0.02         |
| 1998           | 0.1                   | 1,220.0       | 0.1                     | 0.0        | *     | 0.05         |
| 1999           | 0.1                   | 1,550.0       | 0.2                     | 0.1        | *     | 0.07         |
| 2000           | 0.1                   | 1,650.0       | 0.2                     | 0.1        | *     | 0.09         |
| 2001           | 0.1                   | 1,540.0       | 0.2                     | 0.2        | *     | 0.18         |
| 2002           | 0.1                   | 1,655.0       | 0.2                     | 0.1        | *     | 0.11         |
| 2003           | 0.1                   | 1,400.0       | 0.1                     | 0.1        | 0.0   | 0.10         |
| 2004           | 0.1                   | 1,770.0       | 0.1                     | 0.1        | 0.0   | 0.11         |
| 2005 5/        |                       |               |                         |            | 0.1   | 0.05         |

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<td>4/</td>
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</table>

| Sun-cured, type 37 |       |         |         |                      |                    |                   |
| 1995          | 0.14  | *       | 0.14    | 155.50               | 126.50             | 0.00              |
| 1996          | 0.08  | *       | 0.05    | 178.20               | 128.80             | 0.00              |
| 1997          | 0.10  | *       | 0.05    | 190.80               | 132.60             | 0.00              |
| 1998          | 0.10  | 0.06    | 0.04    | 170.90               | 136.00             | 8.70              |
| 1999          | 0.14  | 0.10    | 0.04    | 159.00               | 138.00             | 21.60             |
| 2000          | 0.07  | 0.02    | 0.05    | 180.00               | 138.00             | 4.00              |
| 2001          | 0.22  | 0.22    | 0.00    | 182.20               | 139.20             | 38.00             |
| 2002          | 0.13  | 0.13    | 0.00    | 206.10               | 142.90             | 1.20              |
| 2003          | 0.08  | 0.08    | 0.00    | 208.60               | 145.80             | 1.24              |
| 2004          | 0.18  | 0.18    | 0.00    | 210.20               | 145.80             | 25.99             |
| 2005 3/       | 0.02  | 0.02    | 0.00    | 210.20               | 145.80             | 20.64             |

* = Negligible. 1/ Marketing year beginning October 1. 2/ September 1 Crop Production estimate used for acreage, yield, and marketings. 3/ Estimate. 4/ Price supports terminated beginning in 2005. 5/ No Virginia sun-cured produced beginning in 2005.

Figure 7

Dark air-cured tobacco: Supply, price, and use

Trade stocks include those of manufacturers and dealers. Crop years beginning October 1, 2001 and 2002 are preliminary.
Source: Agricultural Marketing Service, USDA.
Cigar Tobacco

Cigar leaf (types 41-61) is classified according to its traditional use: filler, binder, and wrapper. Most cigar wrapper is exported for use in cigars, but loose leaf chewing tobacco takes most of the filler and binder. Some binder is also used in smoking tobacco. Exports of filler and binder are negligible.

**Cigar Leaf Production Slips in 2006**

Cigar leaf production in 2006 (September 1 crop estimate) is projected at 8.7 million pounds, about 50,000 pounds below last season. At 4,900 acres, cigar acreage is down slightly. Yield projections are within a few pounds of those from last season. Wrapper acreage slid by 220 acres down to 1,000 acres. Production is projected at 1.5 million pounds, about 0.3 million pounds below last season. Supplies of wrapper leaf are expected to reach 2.2 million pounds, about 200,000 pounds below last year’s supply. Filler tobacco remained steady at 2,000 acres, although lower yields this season will reduce production, by close to a quarter-million pounds. Even more growers of seedleaf filler in Pennsylvania have switched to burley this season, and filler production is expected to be about 2.6 million pounds. Connecticut Valley Binder acreage, which was up by 180 acres, increased this season to 2,600 acres. Expected higher yields should result in a crop of about 4.6 million pounds. Supplies are expected to be up by 0.6 million pounds, reaching 5.9 million.

**Filler Disappearance Projected To Advance in 2005**

During the first 9 months of the marketing year (October 2005-June 2006), disappearance of filler tobacco reached 0.6 million pounds, compared with 3.5 million during the same period last season. Stocks in July 2006 were at relatively high levels but are expected to be partially drawn down by year’s end, resulting in season disappearance of about 2.0 million pounds.

**Binder Disappearance Advances in 2005**

During the first 9 months of the 2005 season (October 2005-June 2006), disappearance of binder leaf is projected to gain 13 percent compared with last season. Both Connecticut Valley Binder and Wisconsin Binder disappearance decreased. For the 2005 season, disappearance of binder leaf is expected to exceed 4.5 million pounds. Connecticut Binder usually accounts for about a third of total binder disappearance. Production data for Wisconsin binder is no longer collected and is not included in the disappearance estimate.

**Wrapper Disappearance Recovers**

Estimated year-end disappearance for 2005 (July 2005-June 2006) is projected at 1.7 million pounds, 141,000 pounds up from the previous season. Export disappearance slipped, while domestic disappearance advanced nearly 200,000 pounds.
### Table 20—Cigar tobacco, types 41-61: Domestic supplies, disappearance, and season-average prices, 1995-2006 (farm-sales weight)

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<tr>
<th>Crop year</th>
<th>Acreage harvested (1,000 acres)</th>
<th>Yield per acre</th>
<th>Production harvested (Pounds)</th>
<th>Beginning stocks (Million pounds)</th>
<th>Total supply (Million pounds)</th>
<th>Total Disappearance (Million pounds)</th>
<th>Domestic exports</th>
<th>Avg. price per pound (Cents)</th>
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See footnotes at end of table. Continued—

### Footnotes

- *Continued—

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**Tobacco Outlook/TBS-261/September 26, 2006**

Economic Research Service, USDA
### Table 20--Cigar tobacco, types 41-61: Domestic supplies, disappearance, and season-average prices, 1995-2006 (farm-sales weight)

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<th>Yield per acre</th>
<th>Production (Pounds)</th>
<th>Beginning stocks (Million pounds)</th>
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#### Connecticut Valley shade-grown (type 61)

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#### Grand total cigar tobacco (types 41-61)

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* = Negligible. ** = Not applicable. -- = Not available. 1/ October 1 for types 41-55; July 1 for type 61. 2/ Subject to change. 3/ August 1 Crop Production Report. 4/ Growers of type 61 no longer provide price information. 5/ Subsequent years negligible. 6/ Does not include type 61. 7/ Ohio filler type 41 price not available as there is no production and stocks negligible. 8/ Data no longer reported in Crop Production Report.

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Production:

Exports:

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## Table 22—Estimated leaf used for cigarettes by kinds of tobacco, 1960-2005

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### Pounds per 1,000 cigarettes

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### Percent distribution

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1/ Subject to revision.

Sources: Alcohol and Tobacco Tax and Trade Bureau, Monthly Statistical Release - Tobacco Products, Bureau of the Census, Reports EM545 and IM146.
Recent Report

Trends in U.S. Tobacco Farming
http://www.ers.usda.gov/publications/tbs/nov04/tbs25702/
Provides a snapshot of tobacco farm characteristics as of 2002. The number of farms growing tobacco in the United States dropped from 512,000 in 1954 to 56,977 in 2002, with 37,013 classified as tobacco farms, (i.e., tobacco constituted at least 50 percent of their sales). All farms producing tobacco averaged about 7.5 acres in 2002, compared with 9 acres in 1997. Tobacco farms averaged only 62 acres of harvested cropland and 175 acres of total farmland in 2002.

The Changing Tobacco User's Dollar
http://www.ers.usda.gov/publications/tbs/OCT04/tbs25701/
Evaluates the components of a dollar spent on a pack of cigarettes. U.S. consumers spent $81.1 billion on tobacco products in 2003, about $1.8 billion less than in 2002. Future expenditures are expected to decline as lower consumption outweigh higher costs facing tobacco product users. For cigarettes, a larger part of the consumers' dollar went to taxes and manufacturers, while wholesalers, retailers, and farmers took less.

Related Websites

Articles, data, and reports on tobacco leaf and product markets, domestic and international.

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