

Una producción tabacalera trop importante en Turquía

La producción turca de tabaco bruto a estimada en 1990 a más de 300 millones de kg. La cantidad ideal sería de 170 a 180 millones de kg. En los cinco últimos años, 70 millones de kg. han debido ser destruidos. Se estima que los stocks de Tekel habrán crecido a la fin de 1991 a 450 millones de kg. De importantes subvenciones han conducido a esta alta producción. Desgraciadamente, Tekel está pensando en tomar medidas en vista de reducir la producción y los stocks.

Turquia produce demasiado tabaco

En 1990, la producción de tabaco en Turquía ascendió a casi 300 millones de kg. una cantidad de 170 a 180 millones de kg. habría sido ideal. En los cinco años pasados, 70 millones de kg. tenían que ser destruidos. A finales de 1991, las existencias en almacén de Tekel ascenderán a aproximadamente 450 millones de kg. Alas subvenciones fueron la causa de las grandes cantidades cosechadas. Ahora Tekel quiere tomar medidas para reducir la producción y las existencias en almacén.

Zu hohe Tabakerzeugung in der Türkei

Die türkische Rohabakproduktion betrug sich 1990 auf nahezu 300 Mill. kg. Ideal wäre eine Menge von 170 bis 180 Mill. kg. In den letzten fünf Jahren mussten 70 Mill. kg vernichtet werden. Die Lagerbestände von Tekel werden Ende 1991 voraussichtlich bei 450 Mill. kg liegen. Hohe Subventionen waren der Grund für die hohen Erntemengen. Tekel plant nun Maßnahmen um Produktion und Lagerbestände zu verringern.

Produzione di tabacco troppo alta in Turchia

Nel 1990 la produzione di tabacco grezzo in Turchia fu di circa 300 milioni di kg. la quantità ideale sarebbe di 170-180 milioni di kg. Negli ultimi cinque anni dovettero essere distrutti 70 milioni di kg. Alla fine del 1991 le scorte della Tekel si aggireranno probabilmente su 450 milioni di kg. Le grandi quantità raccolte vanno attribuite ai forti sussidi. La Tekel intende ora applicare dei provvedimenti atti a ridurre la produzione e le scorte.

Te hoge tabaksteelt in Turkije

In Turkije werd in 1990 ongeveer 300 miljoen kg. tabak geproduceerd. Ideaal zou zijn een hoeveelheid van 170 tot 180 miljoen kg. In de laatste vijf jaar moest 70 miljoen kg. vernietigd worden. De voorraad van Tekel zal eind 1991 vermoedelijk 450 miljoen kg. bedragen. De oorzaak van deze grote oogstoverschot zijn de hoge subsidies. Tekel denkt nu over maatregelen om de productie en de voorraden te verminderen.

Leaf Production Too High in Turkey

by Halûk Tanriverdi

The 1990 tobacco crop in Turkey totalled nearly 300 million kg; an ideal volume would be between 170 and 180 million. In the last five years, 70 million kg of leaf have had to be destroyed and Tekel stocks of leaf are expected to grow to 450 million kg by the end of 1991. High subsidies have led to the high production levels and Tekel now plans to implement economic measures to reduce stocks and production. The multinational companies and their domestic partners in Turkey have been unsuccessful in introducing know-how and capital to the market, but are beginning to control existing trade there.

Turkey produced the largest crop since 1976 in 1990. The only crops that declined were in Marmara, and Trebizond leaf in the Black Sea region.

A large number of varieties of leaf are cultivated in Turkey and the areas under cultivation are not controlled. Mr Reşit Kursun, Chairman of the Chamber of Agriculture in Izmir, told TJI that various measures would have to be taken soon to reduce production of tobacco leaf to an acceptable level. These include a strict control of the varieties grown and a limitation of land under leaf tobacco cultivation. He also envisaged the introduction of some sort of financial incentive for high quality tobacco.

At the beginning of 1991 higher leaf prices were announced. According to the growers' associations, the increases cover only half of the annual inflation

rate of 60 per cent and they are demanding premiums for the growers.

Because of the present agricultural policy, Tekel is expected to buy 65 per cent more leaf than it actually needs in the form of subventions. The financial straits in which Tekel now finds itself are caused by a record level of stocks. Half of the stocks are of Aegean leaf. For support purchases, Tekel should receive an estimated 700 million US\$ from the treasury. However, Tekel is also obliged to pay an approximate 825 million US\$ for improvements in sectors other than tobacco. Tekel purchases are targeted at 186 million kg — 126 million kg as support purchases, 60 million kg for its own needs. 80 million kg of the total purchases will be used for domestic consumption, 30 million kg will be exported and the remainder will be stocked. Tekel's high costs have caused two increases in the prices of

Table 1
Leaf Tobacco Production in Turkey
(Tonnes)

Crop Year	Producers	Area Hectares	Oriental and Semi Oriental Leaf	Others	Total
1988	465 796	237 068	217 142	1 921	219 063
1989*	535 375	284 768	267 563	2 325	269 888
1990**	569 749	309 448	291 400	2 100	293 500

* To be confirmed

** Estimated

Source: Turkish Ministry Finance and Customs



The growers' associations are demanding premiums for farmers as price increases do not cover the inflation rate.

Photo: HT

tobacco products equalling almost 50 per cent within a short period.

The new general manager of Tekel, a financial specialist, is planning to implement new measures to reduce the burden of Tekel. The new programme, announced in February 1991, will be carried out in co-ordination with the

Ministry of Finance and Customs to control production areas and varieties.

The target for production in 1992 has been set at 200 million kg.

Multinational companies have gained a strong presence in the Turkish market. Foreign companies operating in Turkey try to keep leaf tobacco prices

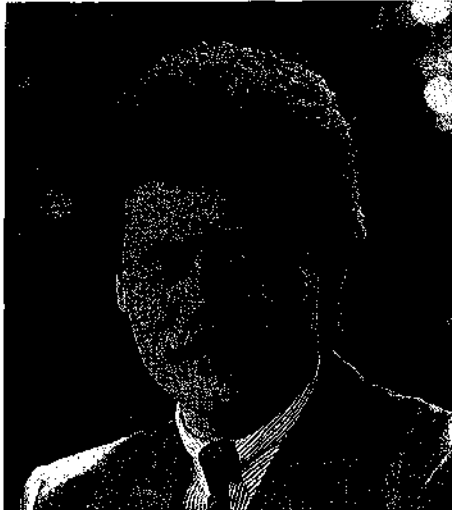
low to minimise production costs of cigarettes. According to Turkish merchants and specialists, the foreign companies do not bring capital or know-how into the tobacco industry; they do not try to improve tobacco exports and do not concern themselves with research and development. ■

Table 2

Turkish Leaf Exports in 1990

Destinations	Tekel		Private Sector		Total	
	Quantity (Tonnes)	Value (000 \$)	Quantity (Tonnes)	Value (000 \$)	Quantity (Tonnes)	Value (000 \$)
USA	5 790	22 448	49 331	240 727	55 121	263 175
W.Germany	2 357	8 769	7 702	37 805	10 059	46 574
Japan	1 562	4 327	5 995	22 028	7 557	26 355
Netherlands	1 211	4 631	3 787	18 419	4 998	23 050
France	1 219	2 941	2 768	8 142	3 987	11 083
Switzerland	294	1 318	1 608	7 286	1 902	8 604
Italy	—	—	1 704	5 264	1 704	5 264
Belgium	395	1 304	1 235	5 343	1 630	6 647
South Korea	350	1 358	1 030	4 079	1 380	5 437
Austria	495	1 664	580	2 887	1 075	4 551
Other	1 224	3 378	6 042	25 621	7 266	28 999
Total	14 897	52 138	81 782	377 601	96 679	429 739

Source: Turkish Ministry Finance and Customs



The realisation of the United States of Europe is the dream of many a politician in the countries of the EC. 1993

is the first mile stone on the road to creating a new state which, because of its size and economic strength will adopt a leading role in the world economy.

However, the way to European unity is full of pitfalls. The varying laws and regulations in the individual member states are not easily harmonised. A product marketing freely in one country may be prohibited in another and laws on such things as the environment differ from country to country.

Highly paid civil servants of the EC Commission in Brussels have the immense task of achieving some sort of uniformity.

Those who thought that these administrative experts, culled from all EC countries, would solve the problems one by one must be very disappointed.

At the moment one has the impression that the main task of the Commission is to introduce a total ban on advertising for tobacco products in the EC, and the phrase „Europe Against Cancer“ is used as justification by the civil servants.

Uniform maximum levels of condensate for cigarettes in the EC, a total ban on advertising for tobacco

products, and, last but not least, a labelling directive, are recommendations which are causing industry,

trade and the enlightened consumer to have second thoughts about a unified Europe.

The latest move in the fight against tobacco is the planned ban on the sale of oral snuff in Europe. The way in which this recommendation was concealed within the labelling directive cannot but alarm the vigilant observer. The directive is being "sold" as a necessary technical harmonisation of health warnings for tobacco products, but at the same time also contains a ban on oral snuff for health reasons. And this is where one must draw the line. Neither the EC Commission nor the EC parliament has been given the authority to act on matters of health policy. These are purely affairs for the individual states.

Klaus Unger, Director General of Procordia United Brands, sees the ban on oral snuff as the first step in a long line of future bans within the EC.

In the interview opening on page 48 he comments on the new tactics of the Commission as head of a company whose production of oral snuff would be directly affected by the ban.

H.G. Koenen
Hans-Gerd Koenen
Editor-in-Chief

Editorial	5
News and Names	6-14
Cultivation	
Modified Tobacco Cultivation Techniques in Poland	16-17
Leaf Tobacco	
Improved Outlook for South Africa	18-20
Turkish Leaf Production Too High	22-23
Hungarian Leaf Tobacco Cultivation Too Low	24
Reports	
Monopolies Will Remain Tenacious	26-29
Austria Tabak On Course for the EC	30-31
Israeli Government Would Prefer More Competitive Tobacco Industry	32-33
The Going is Tough for the Australian Tobacco Industry	34-35
A Lobby for the EC Smoking Tobacco Industry	36-40
Product Markets	
Light Fine-cut in Demand in France	42-44
Greek Cigarette Industry Succeeds With Domestic Blended Brands	46-47
Talking Tobacco	
A Dangerous Precedent	48-50
Paper Innerliner and the Environment	51-54
Technology	
Network for Detailed Production Planning and Quality Control	55-58
Investigating Combustion Products from Cigarette Paper	60-66
Departments	
Brands	67
Statistics	68-70
Leaf Tobacco Traders	71-79
Advertisers' Index	80

Our Cover Photo is published courtesy of Tabaknatie

IN THE PIPELINE

King Size

Smokers continued to show a preference for king-size cigarettes in Egypt during 1990. However, total sales of cigarettes dropped during the twelve months from June 1989 to June 1990 because of the third consecutive price increase in two years in April 1990. The cheaper tobacco products, especially moulassed tobacco for water pipes, rose as smokers sought an affordable alternative. **3/91**

The Right Dosage

Application of insecticide and fungicide sprays on tobacco is often inefficient, despite the use of high volumes, as deposition is poor at sites occupied by the pest or pathogen. The size, shape, position and growth of the tobacco leaves need to be considered in relation to the choice of spray equipment. Methods of application are reviewed, with particular reference to studies in Zimbabwe. **3/91**

Decline

Leaf tobacco production in Pakistan from July 1989 to June 1990 is esti-

mated to be 68 096 tonnes, compared to 73 947 tonnes in the previous twelve months — a decline of 7.9 per cent, according to figures published by the Ministry of Food, Agriculture and Cooperatives in March 1991. **3/91**

Statistics

We plan to publish global statistics on the production of leaf tobacco in the next issue of TJI.

We use the word plan, because we never know whether the figures will arrive in time; however, we always attempt to make the very rigid deadline set by the printers.

Heavy Metals

In 1987 the levels of various heavy metals were determined in the leaf and smoke of Polish Kentucky tobacco, and in 1988 also in flue-cured leaf. The material for research purposes came from experimental fields located in three regions of tobacco cultivation situated at various distances from the source of industrial dust emission. **3/91**

ADVERTISERS INDEX

AtiCarta, I-Rome	Page	53
Clofield Ltd, GB-Chesterfield	Page	35
Comas, I-Silea Treviso	Page	25
Consorzio Agrario Provinciale, I-Benevento	Page	29
Enterlein GmbH, D-Reinbek	Page	41
Groupe Lana, F-Levallois-Perret	Page	11
Japan Tobacco Foundation, J-Tokyo	Page	45
Körber AG, D-Hamburg	Page	2,3,4
Gebr. Kulenkampff, D-Bremen	Page	21
Lakson Tobacco, PAK-Karachi	Back Cover	
LTR Industries, F-Paris	Page	57
Jas. I. Miller, USA-Wilson	Page	39
National Tobacco Board of Greece, GR-Athens	Page	15
PFW Nederland, NL-Barneveld	Page	63
Philip Morris, USA-New York	Page	49
Schoeller & Hoesch, D-Gernsbach	Page	19
Socotab Leaf Tobacco, USA-New York	Page	37
Sodim, F-Fleury-les-Aubrais	Page	33
Souza Cruz, BR-Florianopolis	Inside Back Cover	
Tann Papier, A-Traun	Page	7
Tobacco Associates, USA-Washington	Page	59
Wattenspapier, A-Wattens	Page	7

TOBACCO JOURNAL

INTERNATIONAL

Printed in Germany, published bimonthly
Mainzer Verlagsanstalt und Druckerei
Will und Rothe GmbH & Co. KG
Directors: Eckart Helfferich,
Karlheinz Röthemeier

Editorial and Business Offices:
Pressehaus, Große Bleiche 44—50,
P.O.B. 3120, D-6500 Mainz
Phone: +49/61 31/144-0, Telex: 4187753 (azmz),
Telefax: +49/61 31-1444 15

Managing Director and Editor-in-Chief: Hans-Gerd Koenen; Deputy Editor-in-Chief: Folker Kling; Editors: Barbara Horne-Hilgers, Hans-Georg Pöhl, Herbert Steins; Editorial Secretary: Janine Mörixbauer; Statistics: Andrea Huster, Ingrid Wehren

Correspondents:

Australia:	E. A. Weiss
Austria:	Hans Dibold
Benelux:	Marius van Huystee
Brazil:	Ruy C. S. Crescenti
Cyprus:	Mimis S. Constantinidis
Dominican Rep.:	Siegfried Maruschke
EEC:	Paul Cattelain
Egypt:	M. Rifaat Naguib
France:	Liselotte Helleboid-Lalande
Great Britain:	Michael Barford
Greece:	John G. Stasinopoulos
India:	Seshagiri Rao
Italy:	Diana Seuss-Calandrelli
Pakistan:	S. M. Ahmad
Portugal:	Pierre Léon
Spain:	Dr Walter Frielingsdorf
Switzerland:	Ruedi Mäder
Turkey:	Haluk Tanriverdi
United States:	Anne Shelton, Dieter Neuber
Uruguay:	Dr Alphonse Max
Yugoslavia:	Juro Beljo

Special Correspondents: Helmut Schildwächter, Udo Krefter

Assistant Managing Director:
Manfred Thomas (Advertising and Subscriptions)

Representatives:

France: Liselotte Helleboid-Lalande, 13 rue Gracienne, 75005 Paris, Phone (1) 43 31 86 41
Great Britain: P. H. Ralph, 7 Sterling Court, Cheltenham, Glos. GL 51 8LY, Phone 0242-51 5590
Greece: John G. Stasinopoulos, 42, Kefallinias, 11257 Athens, Phone 881 2782, Telex 222 700 fimi gr.
India: Seshagiri Rao, Sithanagaram, Post Office, Via Rajahmundry, AP India; Telex 081 471-277 AB JLTC IN
Italy: Diana Seuss-Calandrelli, Viale Mellusi 141, 82100 Benevento, Phone (824) 24766, Telefax (824) 31 21 60
United States: Wordcraft Inc., 512 Brookfield Road, Raleigh, N. C. 27615, Phone (919) 847 7425

Translators:

I. J. Conrad (English), Dr S. Oehrlein (Spanish), M. van der Ven-Rijsemus (Dutch), Rino Giovanelli (Italian), TJI staff (German, French)

All rights reserved. No guarantee is offered for unrequested manuscripts which will only be returned if postage is prepaid. Signed or initialed articles always represent the opinion of the author. All articles published in the journal are copyrighted. No part of this publication may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopy, recording or any information storage and retrieval system, without written permission.

Subscription rates:

Europe DM 126.00, Overseas \$ 72.00 per year, post free. Single copy: DM 21.00 or \$ 12.00 incl. postage. By airmail additional charge. Library serial no: ISSN 0039-8627. For advertising, please request price list No. 22.

Bank account:

Deutsche Bank, Mainz 0202994 (BLZ 550 700 40)

TOBACCO JOURNAL

I N T E R N A T I O N A L

MARCH/APRIL

2/1991

TJI

In this issue:

**Improved Outlook for
South Africa**

**Monopolies Will Remain
Tenacious**

**Turkish Leaf Production
Too High**

**Domestic Blends Succeed
in Greece**

**Austria-Tabak on Course
for the EC**

**Addresses: Leaf Tobacco
Traders
Shipping and Storage**

