



World Production

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ITGA CEO

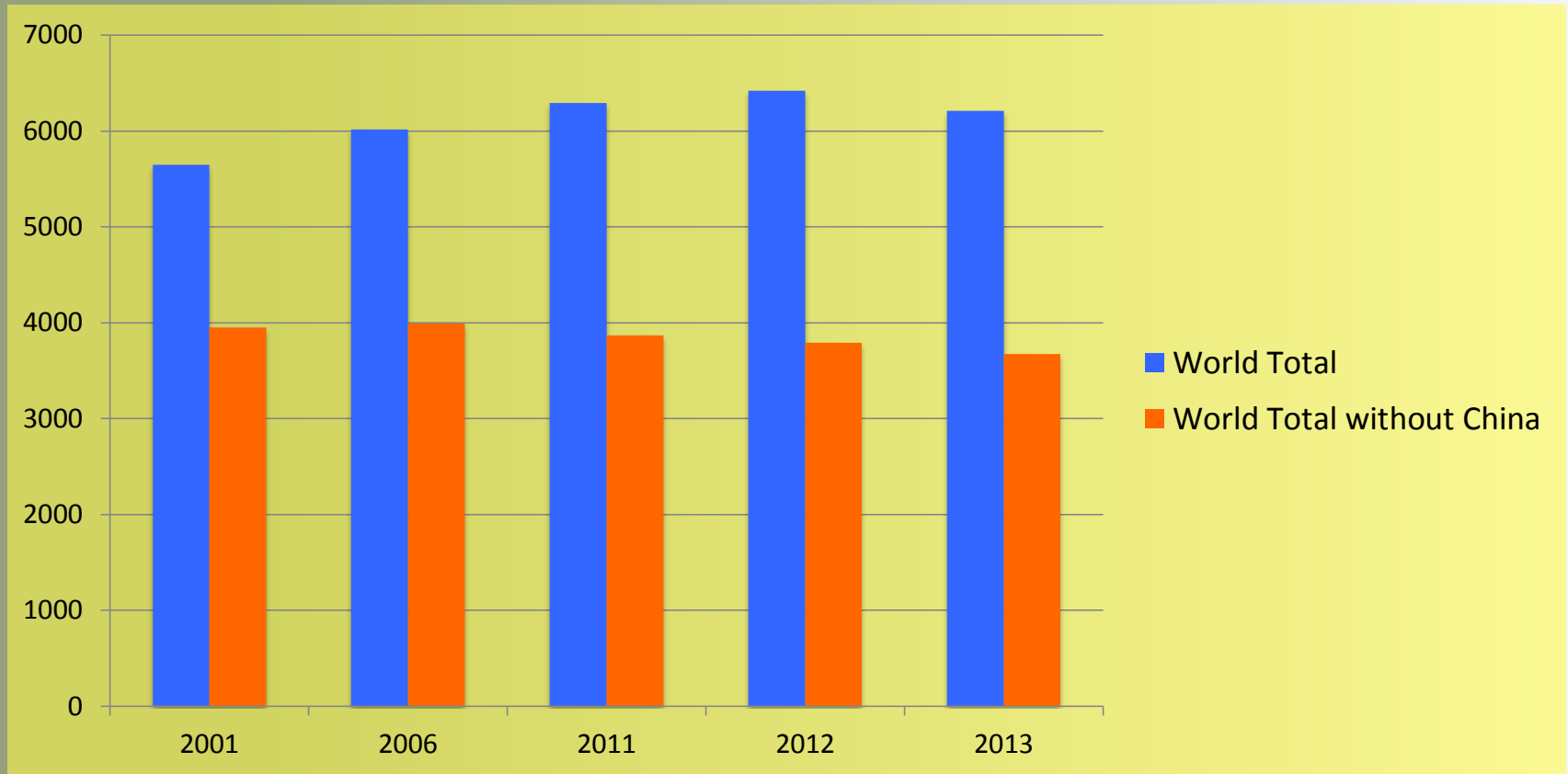
Lisbon 22nd September 2014



International Tobacco Growers' Association

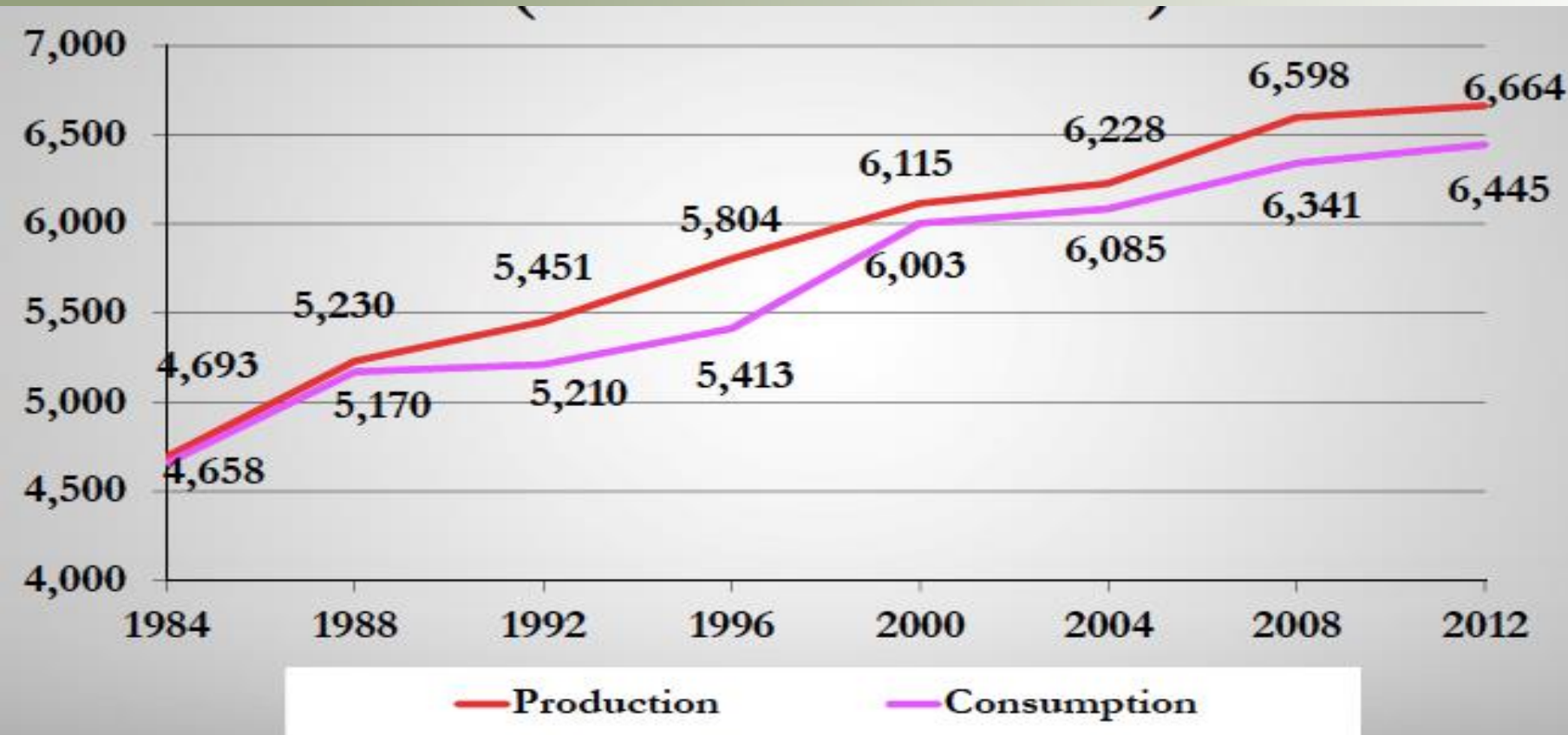
CONSUMPTION

CIGARETTES PRODUCTION BILLION STICKS





WORLD CIGARRETE 'TRUE' PRODUCTION VS CONSUMPTION (BILLION PIECES)

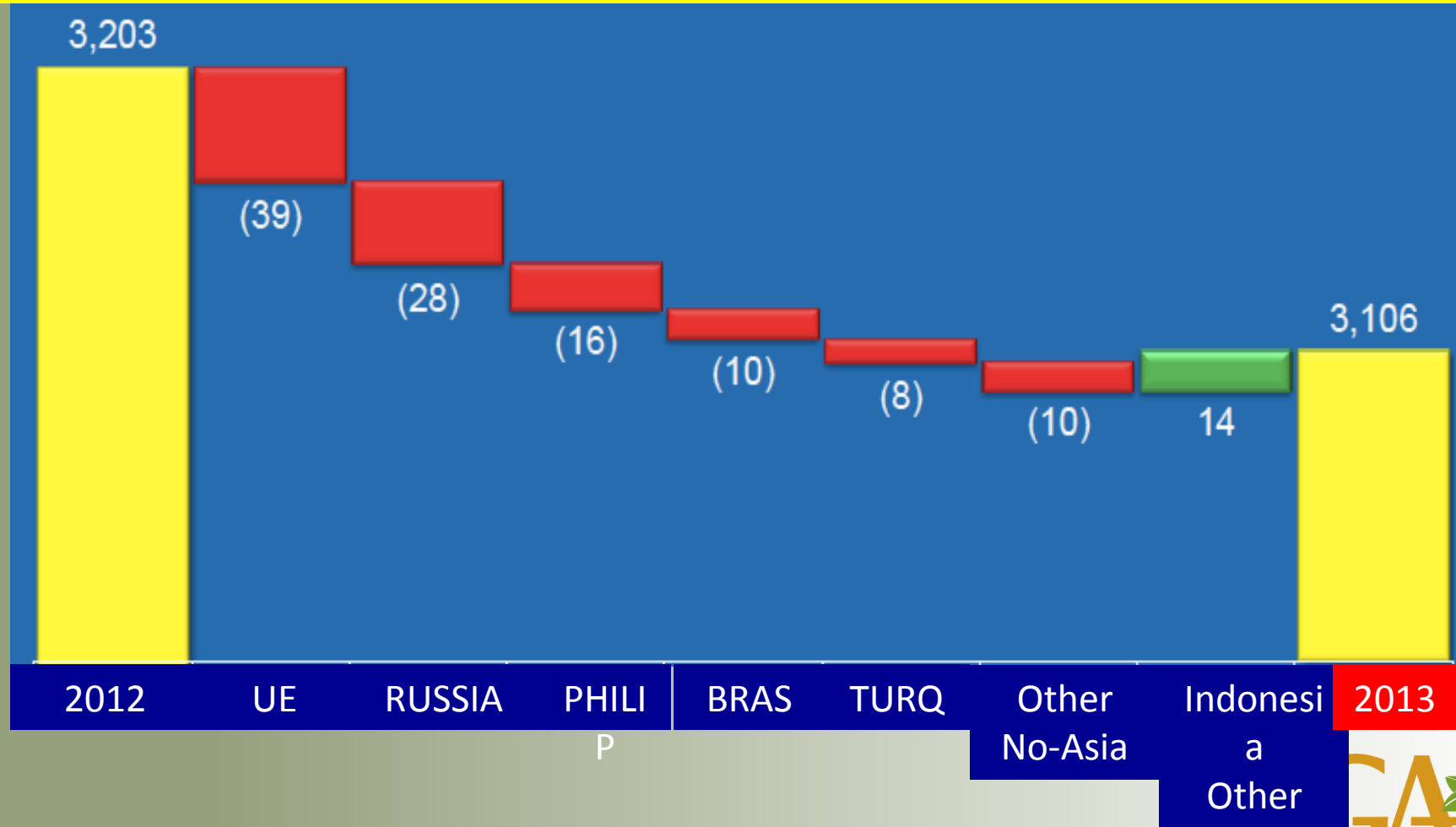


Sources: USDA-FAS (1984-2004), Various Sources (2005-12), TMA Estimate

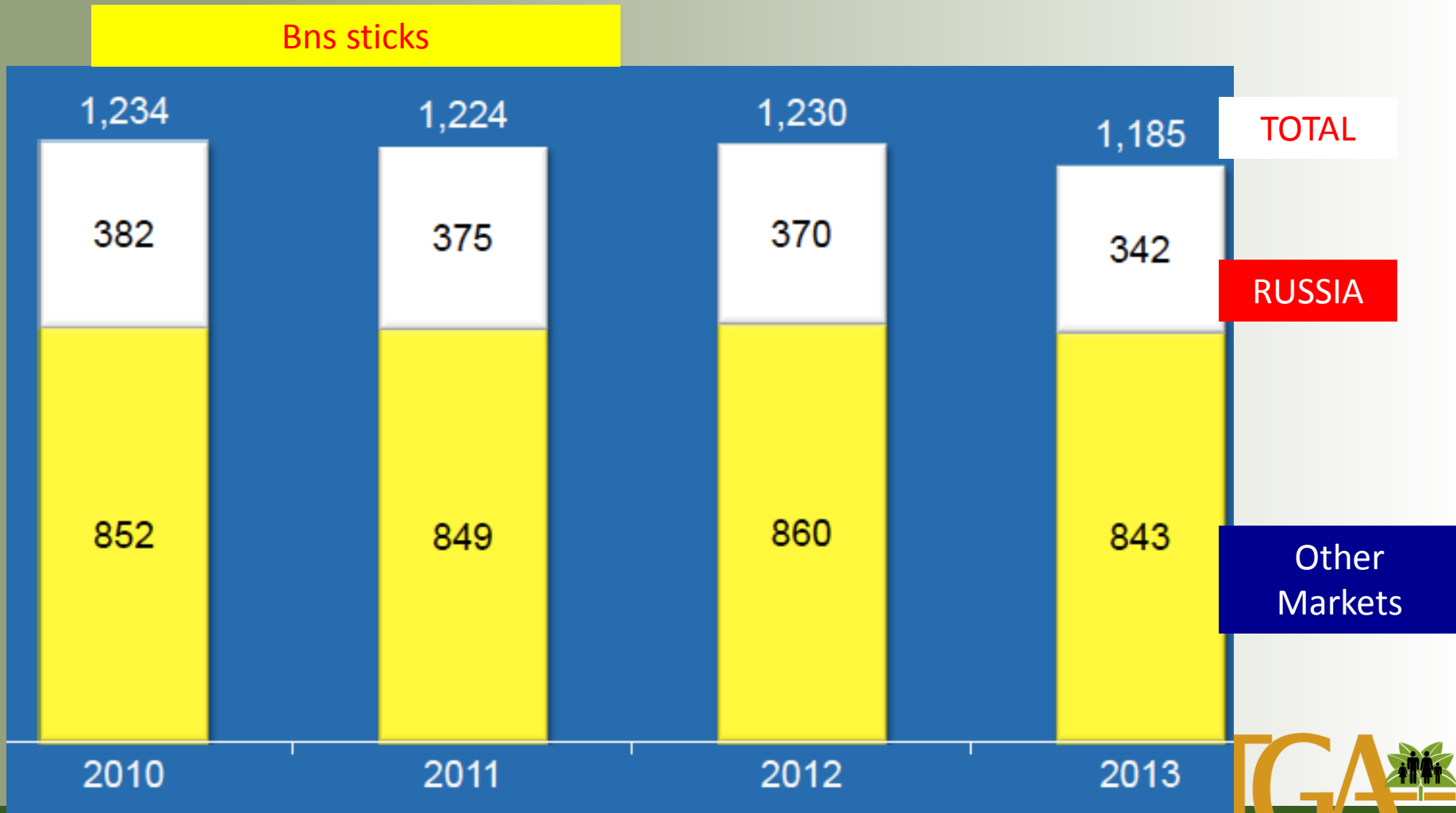
Cigarette consumption decrease = 2013



Cigarette consumption decrease = 2013 (bn sticks)

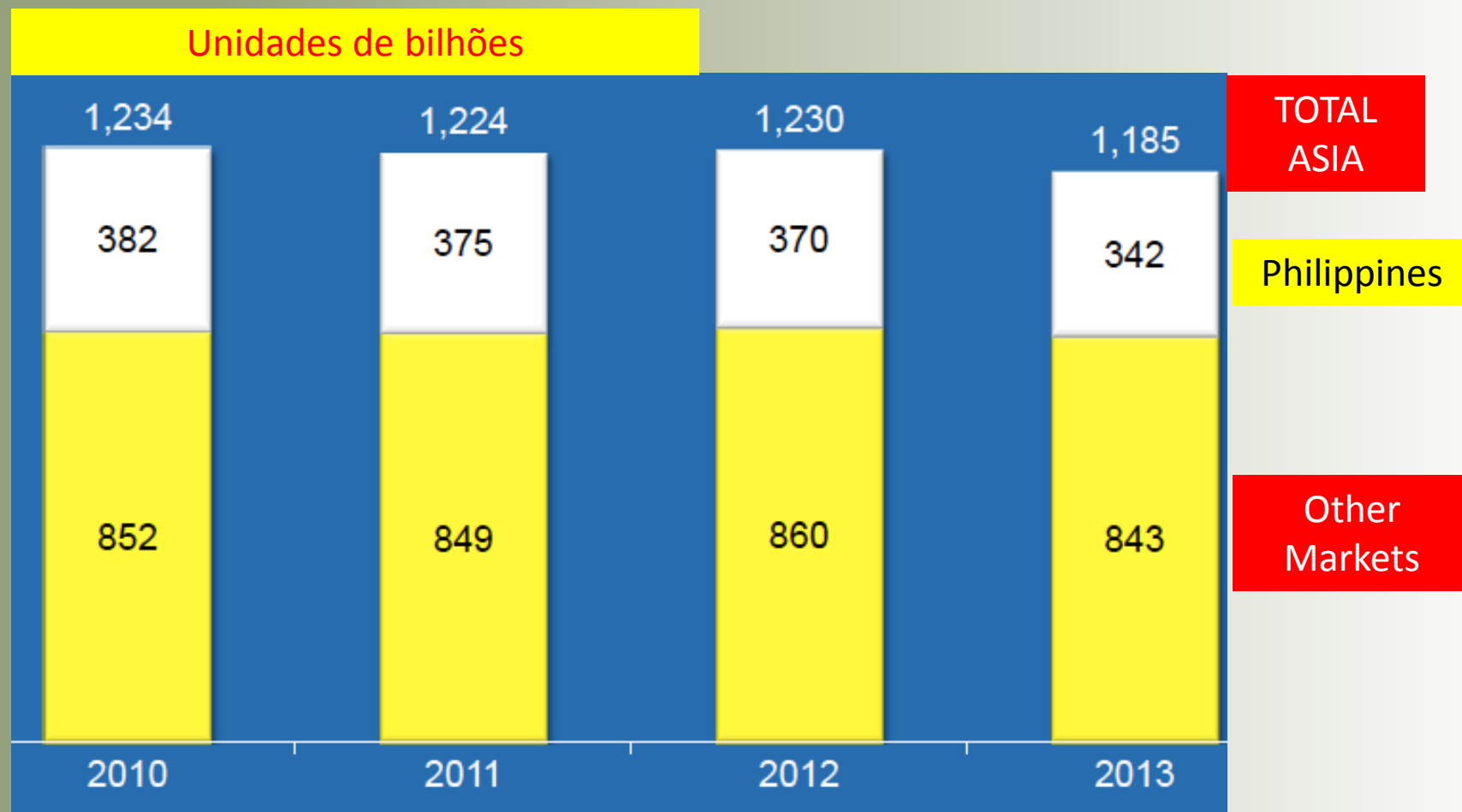


EEMA: Small decrease





ASIA: SMALL DECREASE



Cigarette production bns sticks:

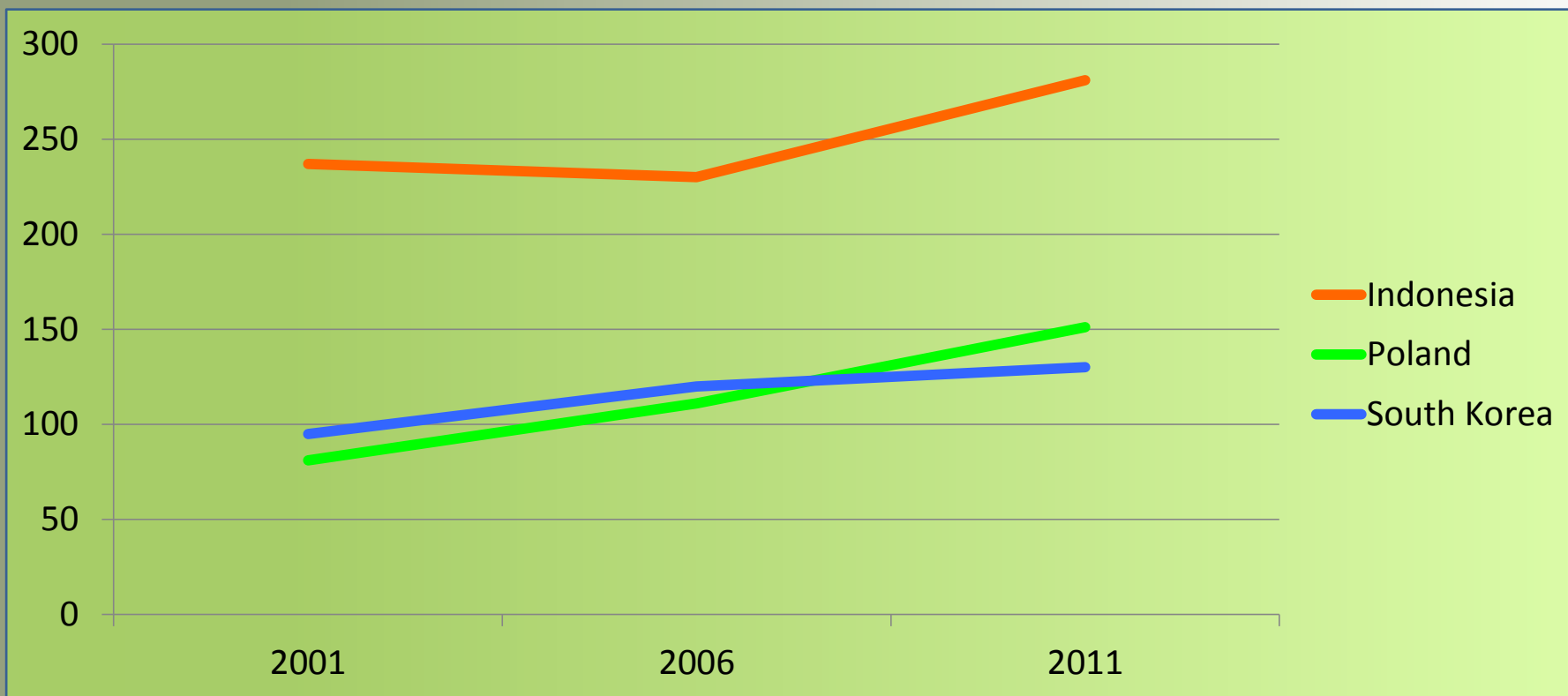
Philippines, Vietnam and Bangladesh



•Philippines: -16% in 2013

Cigarette production bns sticks:

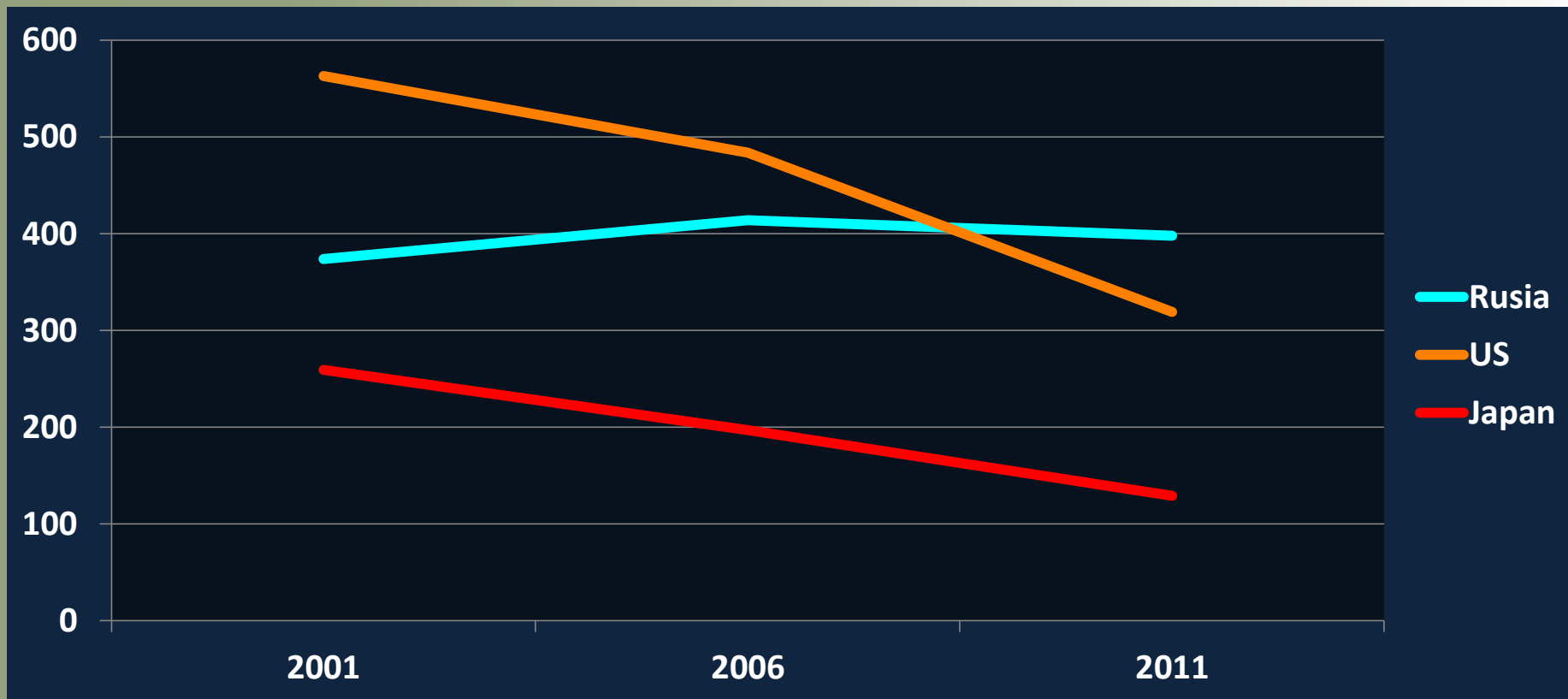
Indonesia, Poland and South Korea



- Indonesia: +1,9% in 2013
- Poland: -10,6% in 2013

Cigarette production bns sticks:

Russia, US and Japan



- USA: -4,6% in 2013
- Russia: -10,6% em 2013

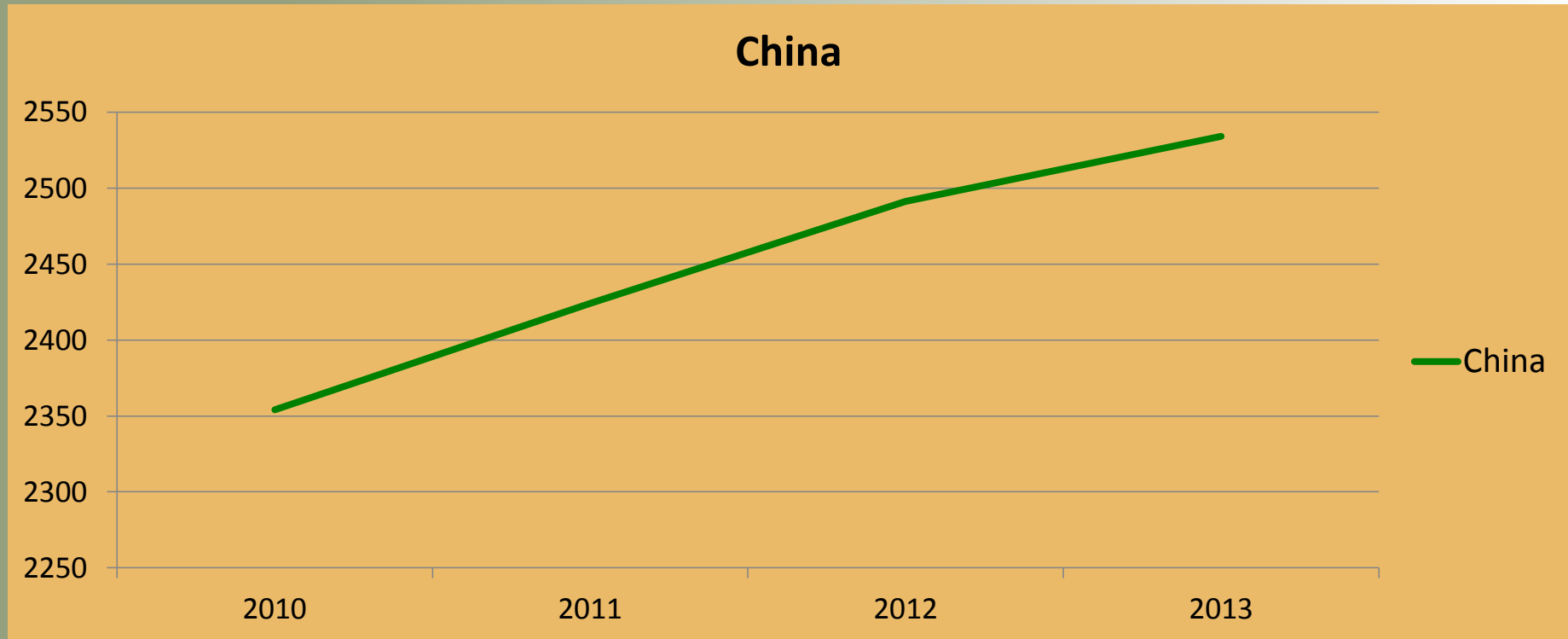
EVOLUTION IN 2013



- UE: -7,5%
- OCDE: -6%
- ASIA PACIFIC: -0,2% (+8,2% in 2012)
- LATIN AMERICA AND CANADA: -4% (Brazil -12%)
- WESTERN EUROPE, MIDDLE EAST AND AFRICA: -4%

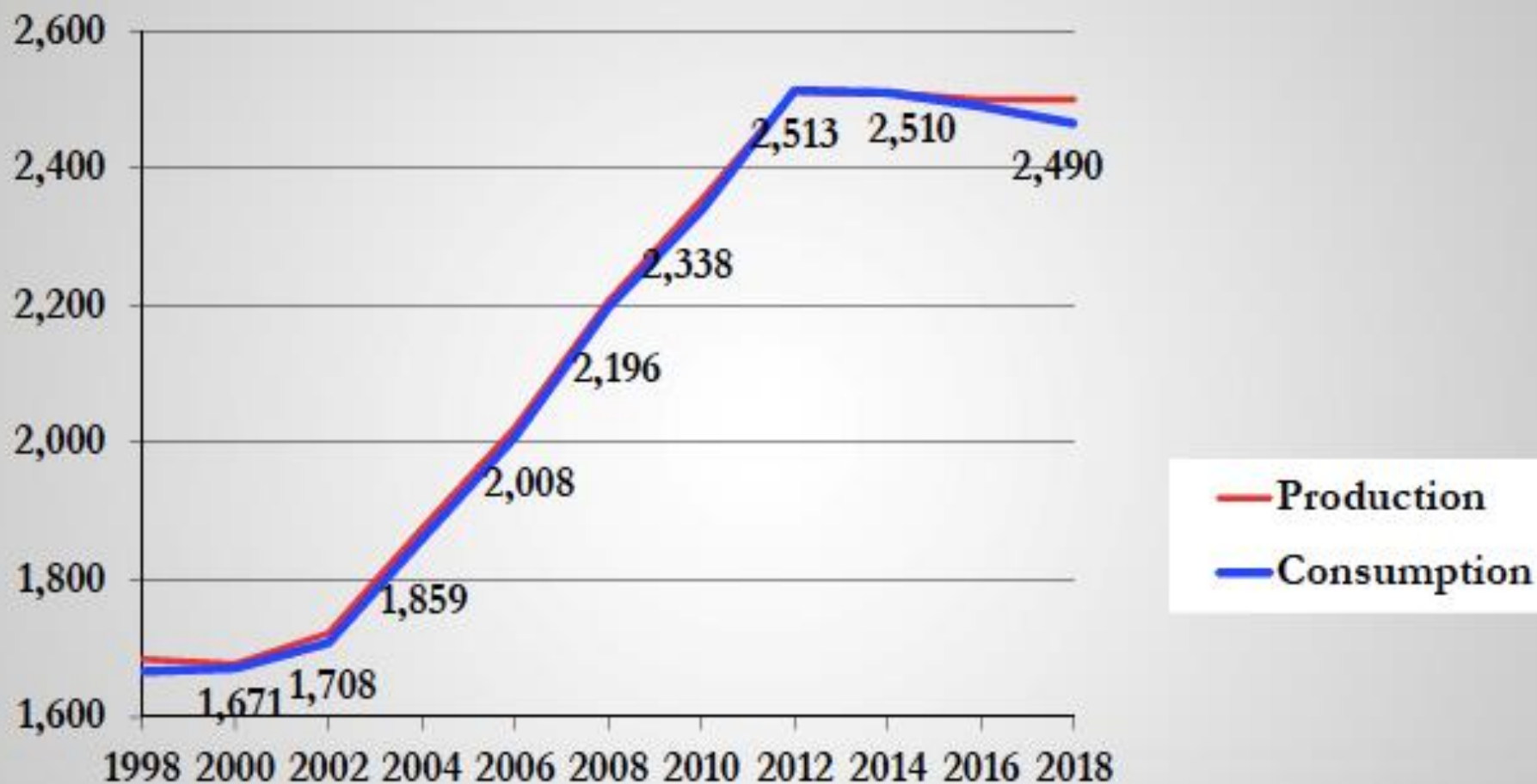
CIGARRETE PRODUCTION BNS STICKS:

China

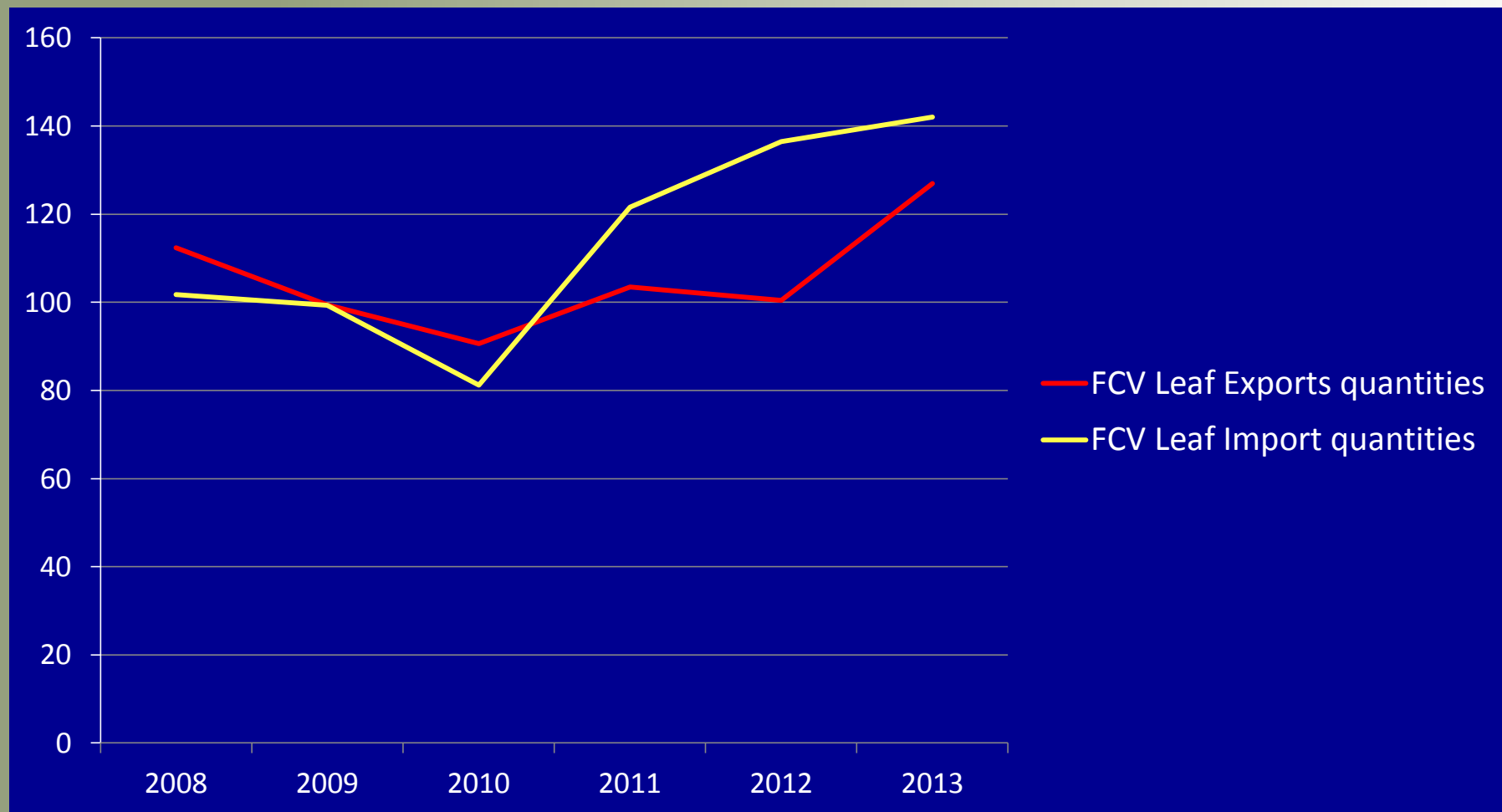


- +152% leaf deficit from 2010 to 2011
- Low tar cigarettes: +367% de 2010 a 2011
- + 5% bns sticks in inventories = 2013/12

china: cigarette market&forecast (billion pieces)

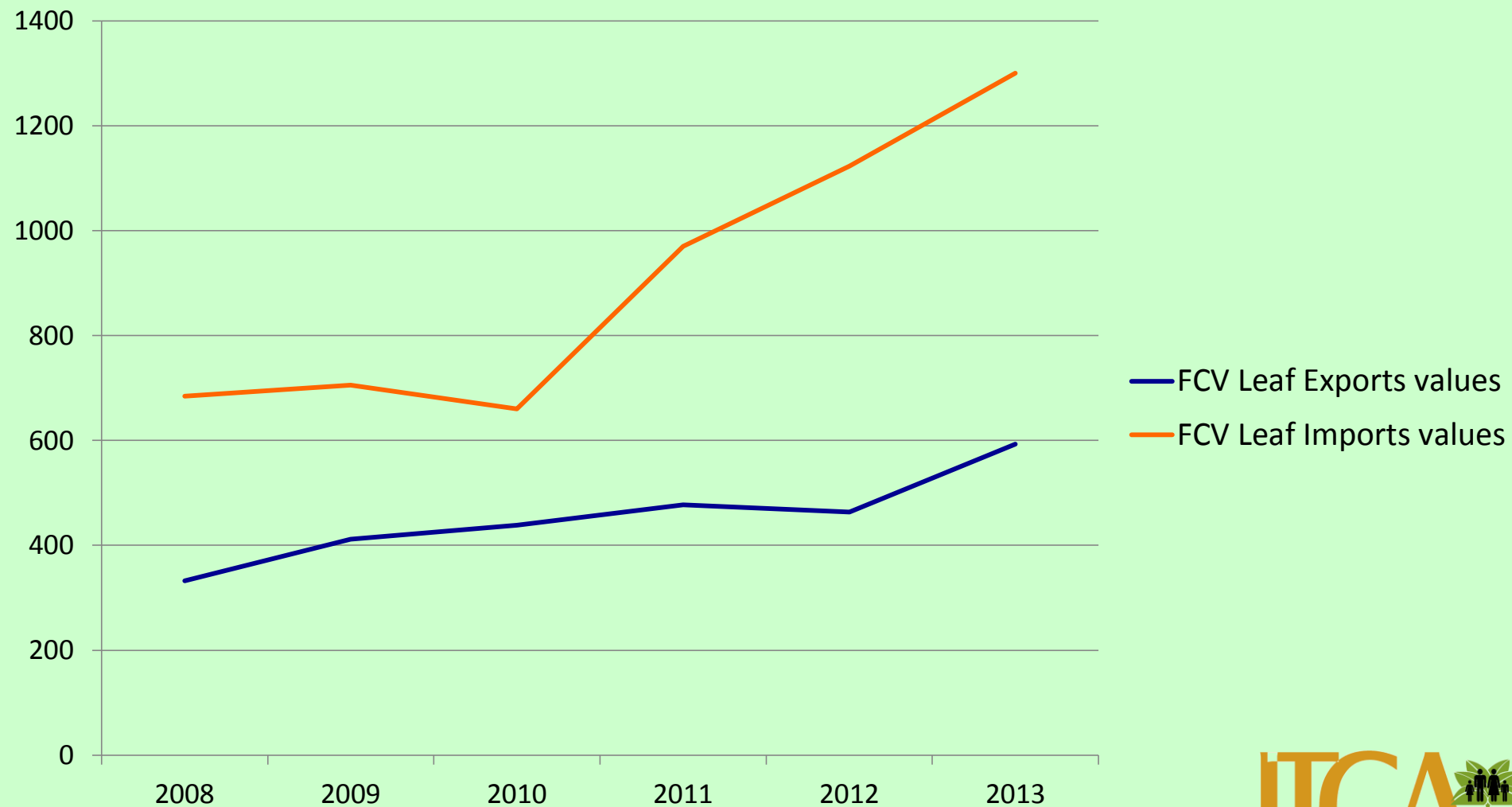


FCV LEAF Impor/export Volume 2008/13= China

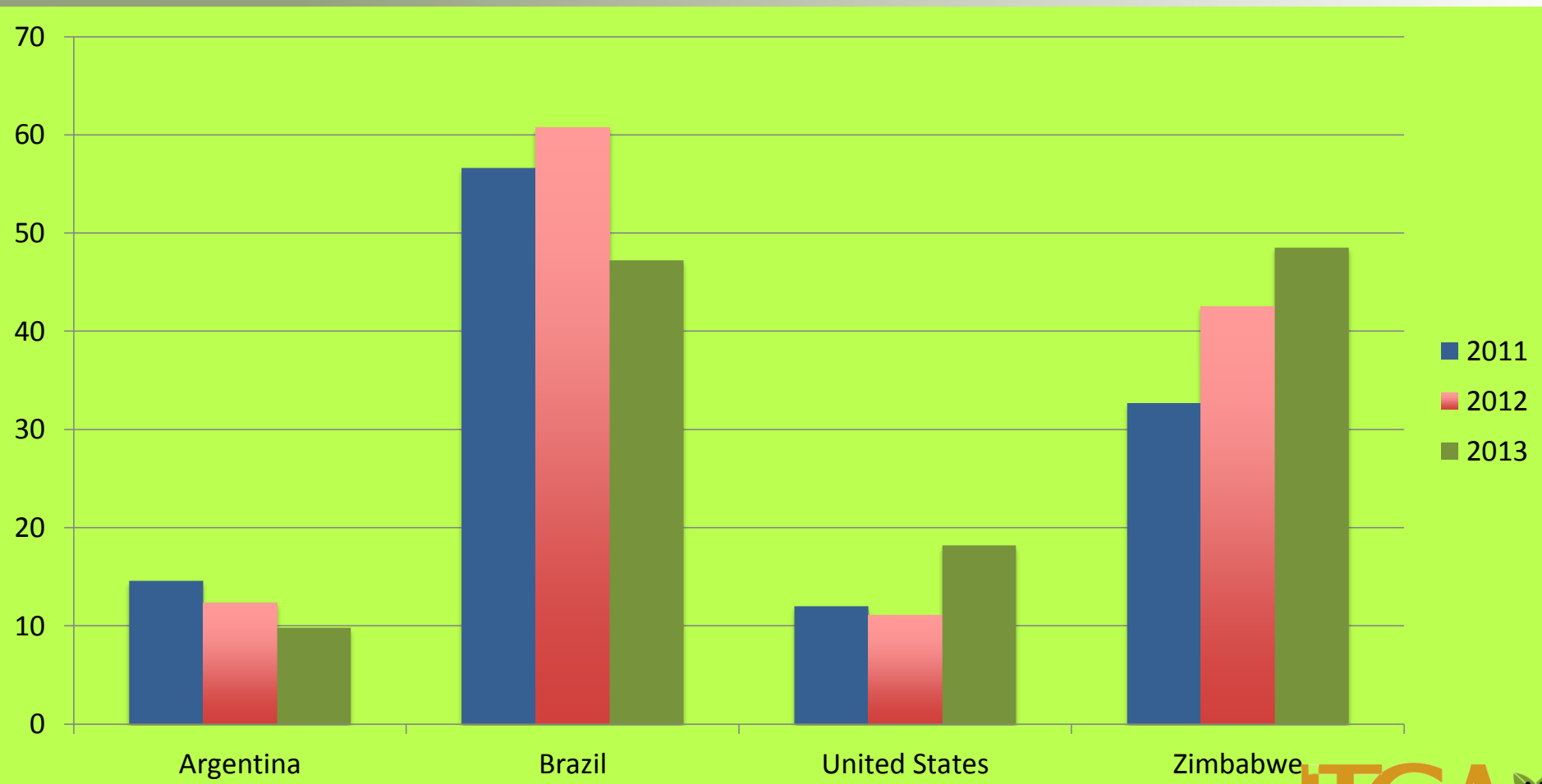


FCV LEAF import/export

Value 2008/13= **China**



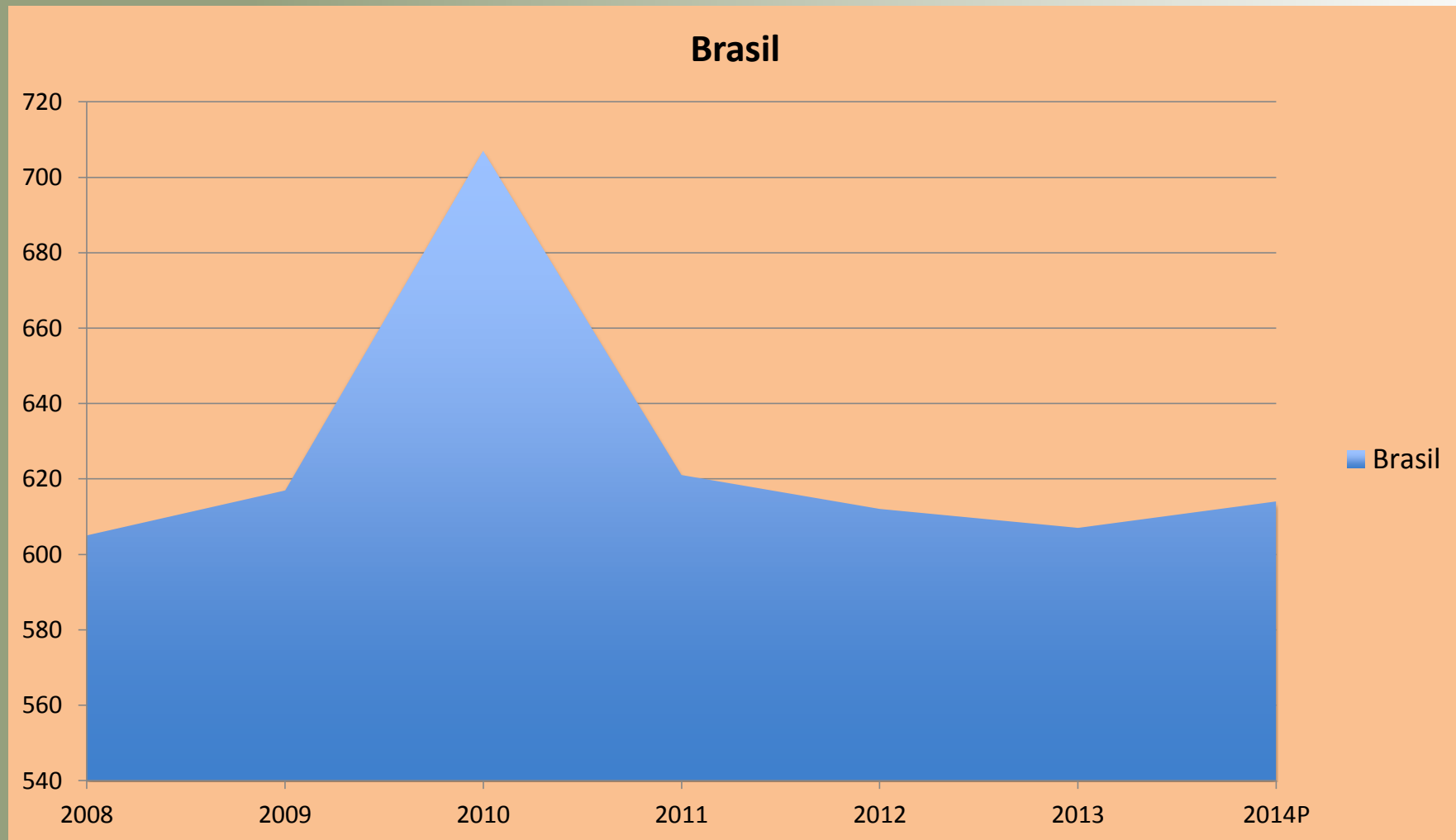
Flue Cured imports: China 2011/2013





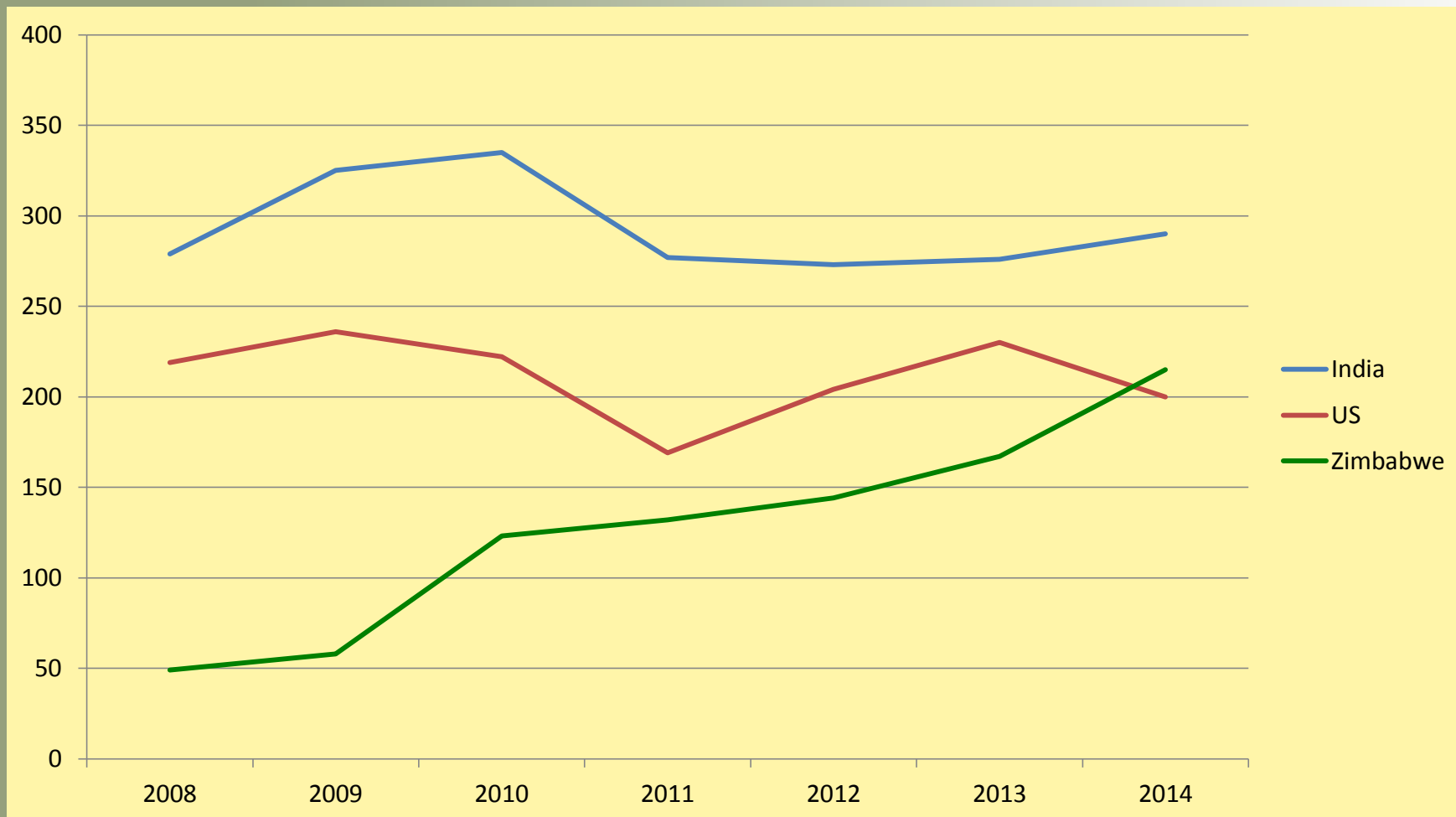
PRODUCTION

Virginia PRODUCTION MILLION TONS: Brazil



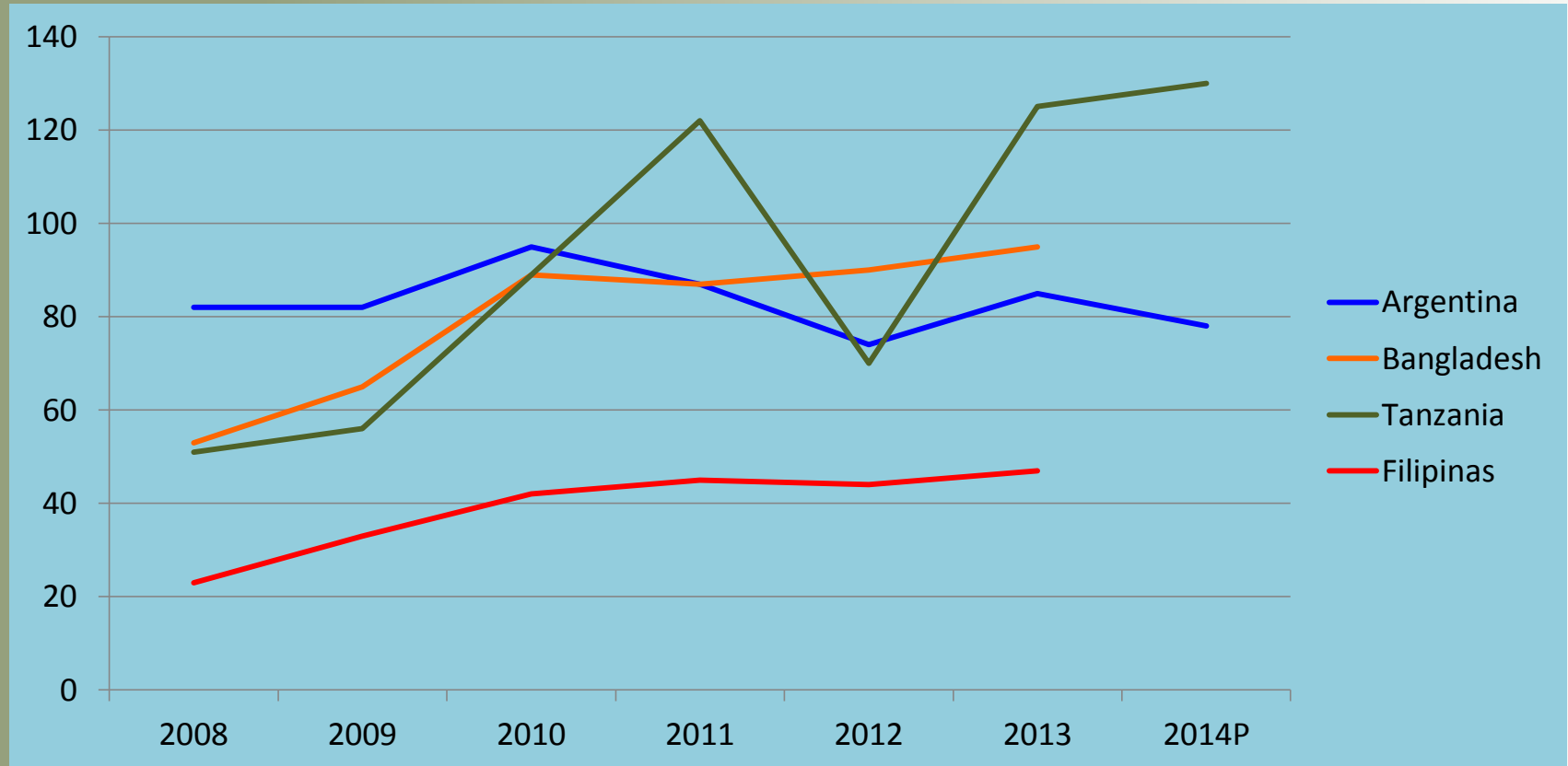
FCV PRODUCTION:

India, US, Zimbabwe



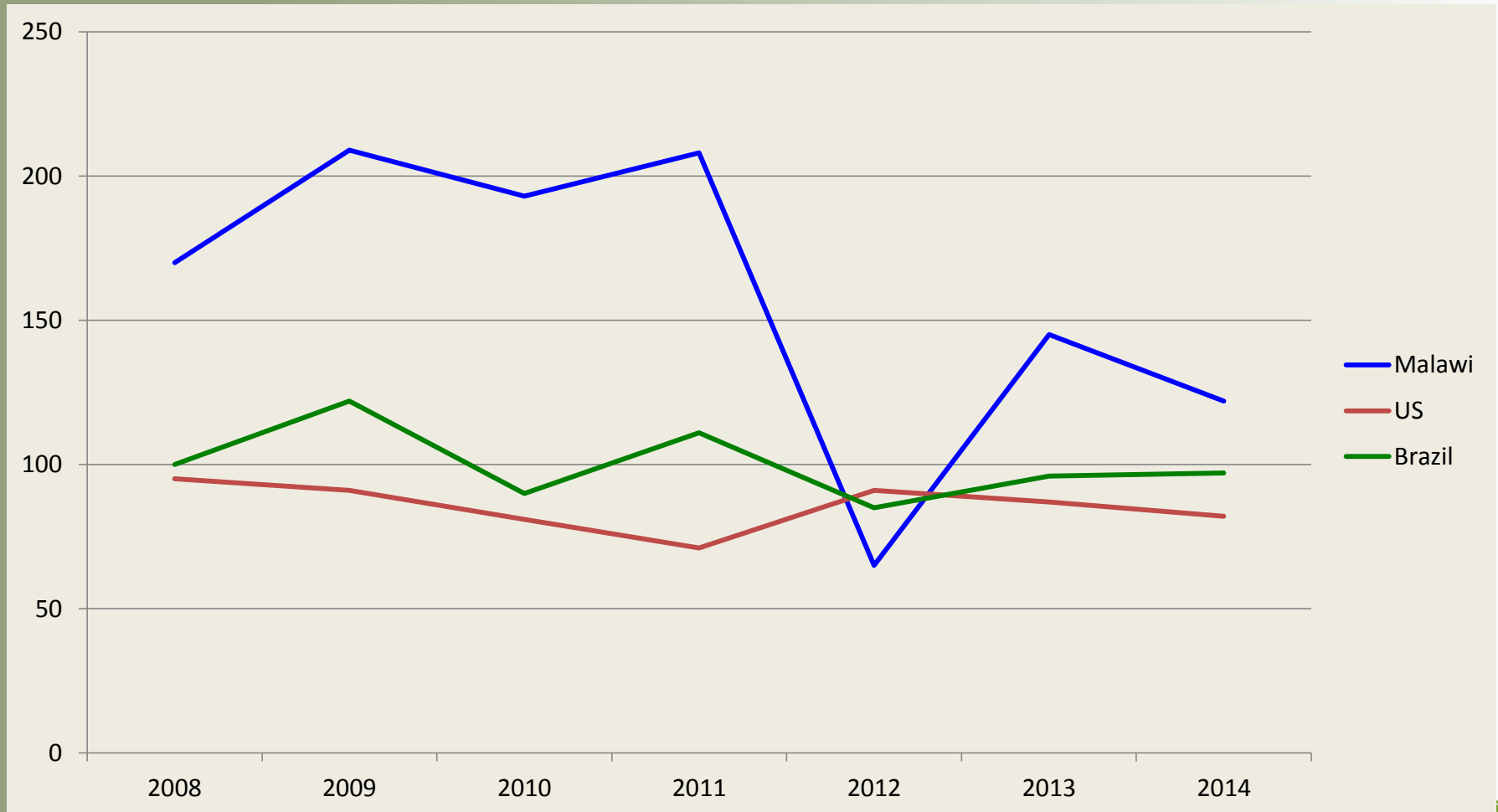
FCV Virginia Million Tons :

Argentina, Bangladesh, Tanzania, Philippines



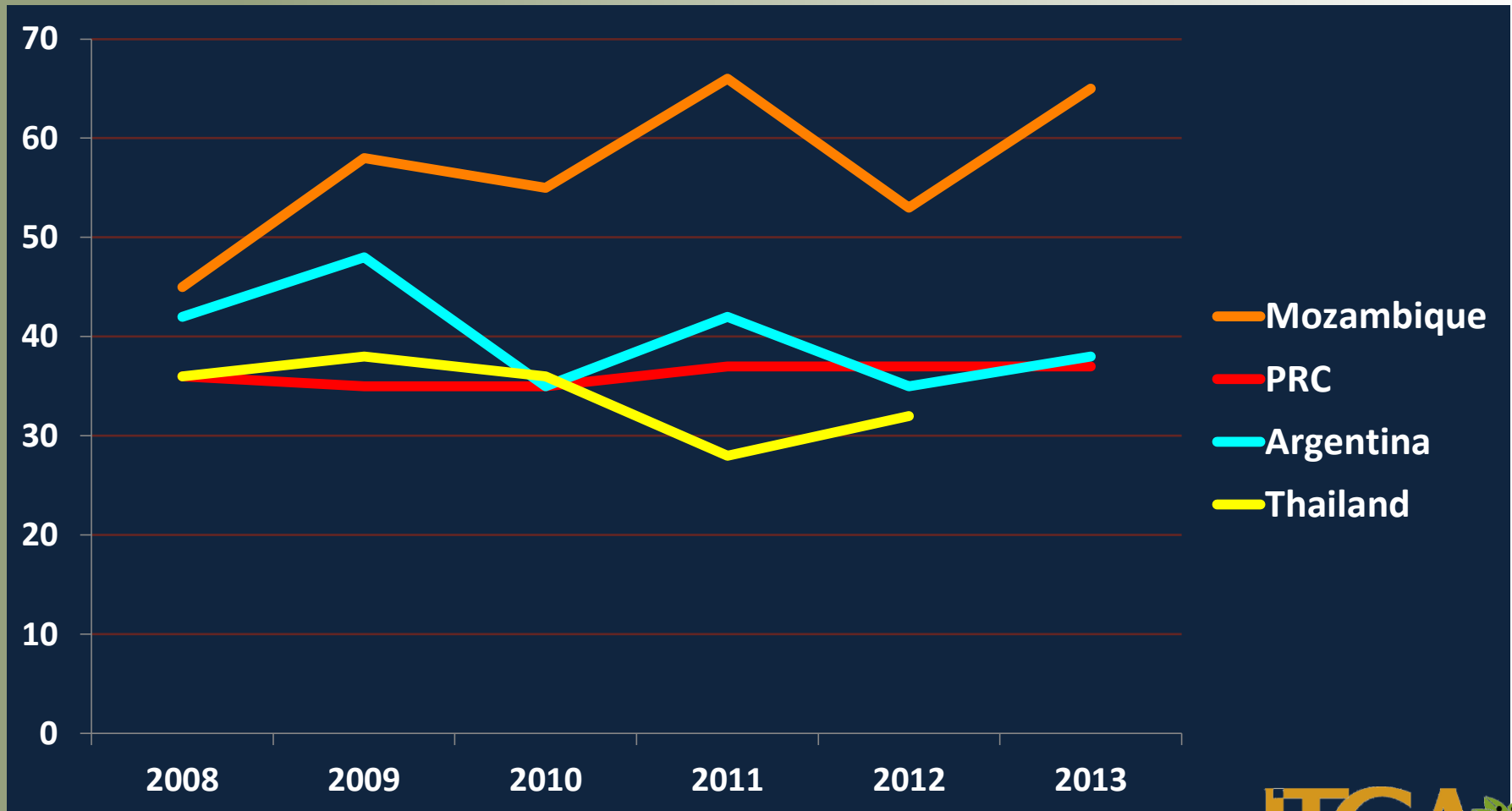
Burley Production million tons:

Malawi, US, Brazil



Burley Production millions tons:

Mozambique, RPC, Argentina, Thailand

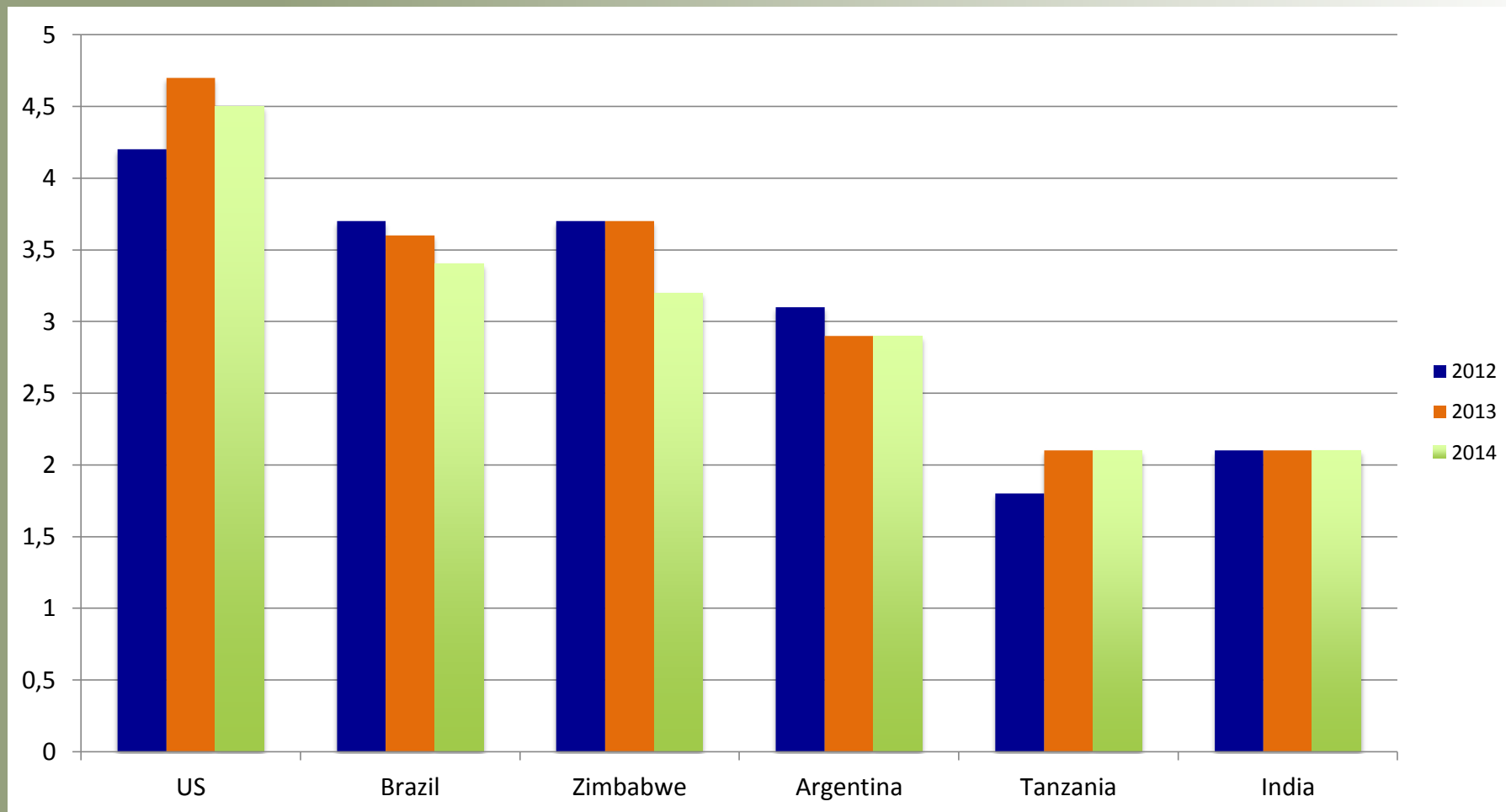




PRICES

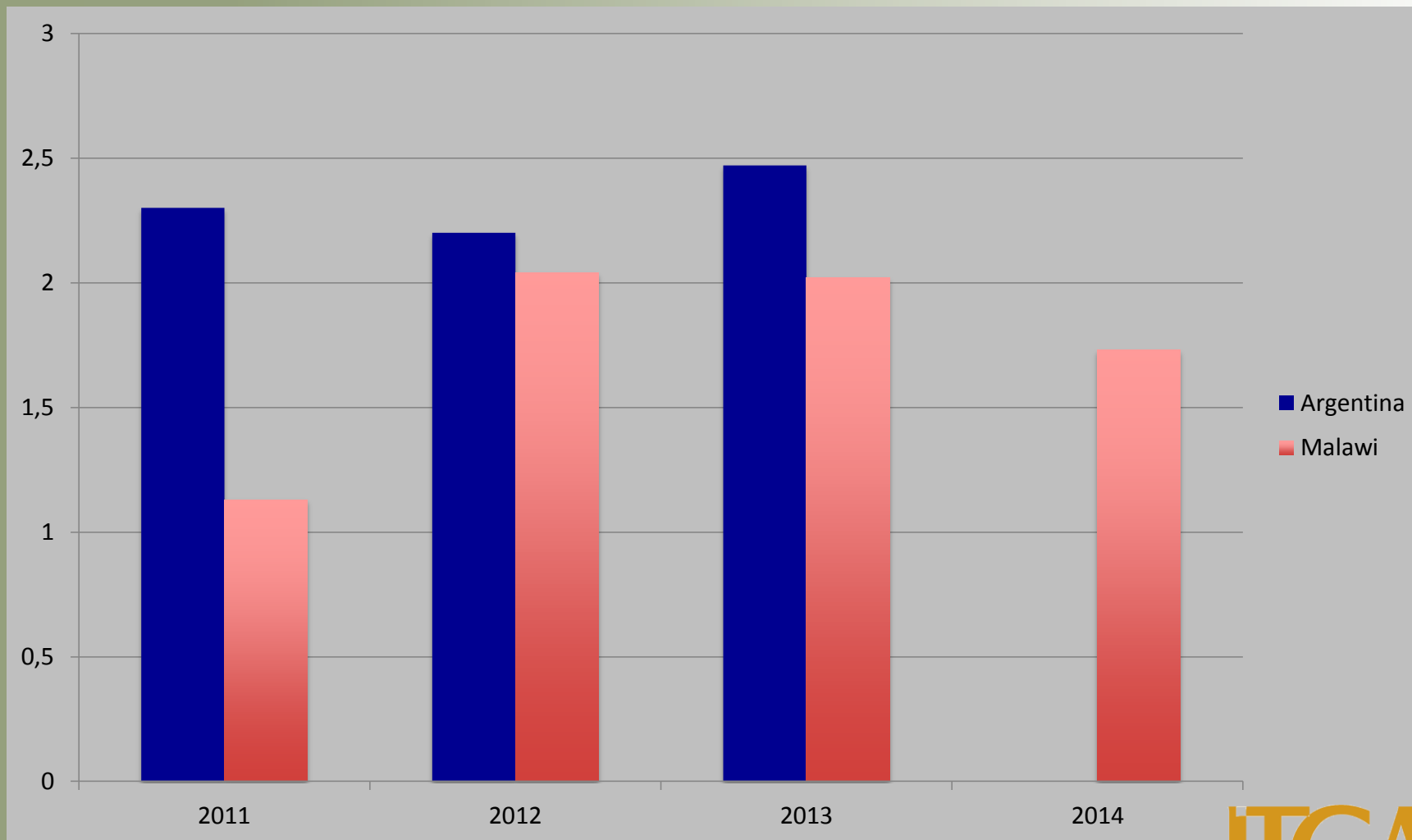
FCV PRICES:

Various Countries

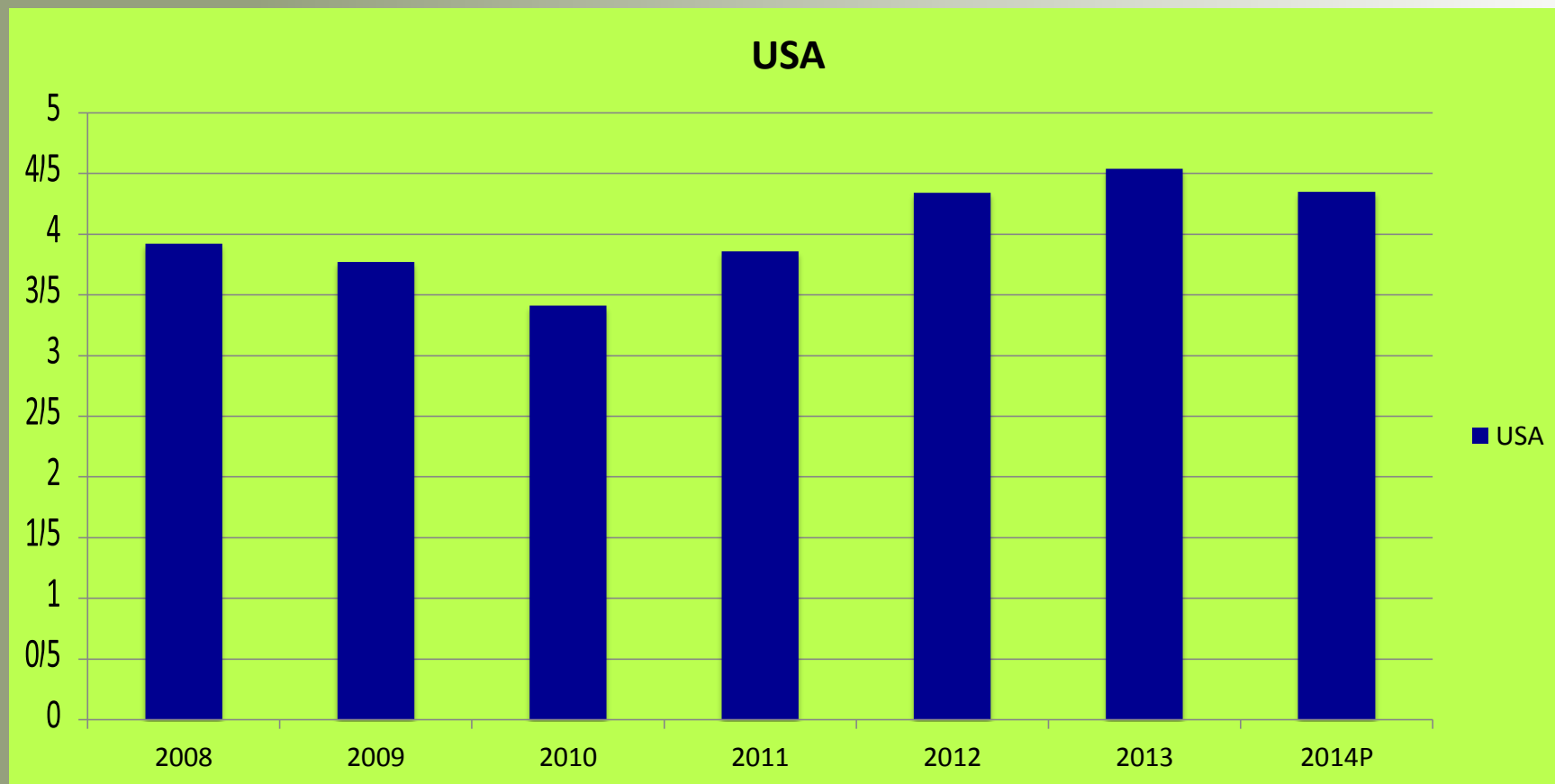


Prices Burley:

Malawi / Argentina



Prices Burley: USA





Thank you for the attention

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