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RESEARCH ARTICLE

REPUBLIC OF MACEDONIA, MOST FAVORABLE COUNTRY FOR THE PRODUCTION OF ORIENTAL TOBACCO

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ABSTRACT

Macedonia is a country where traditionally the best oriental tobaccos are grown, despite the known regions in Turkey, Izmir and the area of the Sea of Marmara, where there are environmental conditions for producing quality oriental tobaccos. Republic of Macedonia is a small continental country on the Balkans and it is a "golden triangle" in the production of oriental tobaccos and is a longtime relatively stable traditional producer compared to the countries that surround it and that are producers of this type of tobacco. After the rapid structural change in cigarette consumption, by accepting the American blend, 90% of the production of tobacco in the Republic of Macedonia is oriented towards external markets. The basic formula of the American blend of cigarettes is based on the formula of the cigarette company "R. J. Reynolds", first introduced in 1913 with the percentage participation of mixtures: 50% "Virginia light", 25% "Burley", 20% oriental tobaccos and 5% other types of tobacco. Today, this formula is the gravitational point around which the tobacco mixtures for the production of the American blend of cigarettes are made, depending on the taste of smoking of the customers from different countries. In that respect, the tobaccos in the R. Macedonia, according to the producers - processors and cigarette companies, are not of a second quality, but rather independent and unique in quality and flavor. During the transition period, after the independence of the Republic Macedonia, the production of oriental tobaccos oscillates compared to the previous period, and then become more stable in production of quantity. The introduction of stimulations in 2005 contributed to stabilize the production. After this period, the average production ranges from 25,000 - 30,000 tons of tobacco and approaches to the production of the pre-transition period. In the period from 1991-2005, in our country in the production of oriental tobacco were present quite oriental varieties of tobacco from the type of "Prilep". After this period the situation is changing, and today the leading type is "P-66", which stabilizes production and improves quality. We can say that the quality of the tobacco of the R. Macedonia compared to the tobacco of the neighboring Greece is at the same level, if not better. Soil and climatic conditions rarely allow larger oscillations in the production of tobacco, compared to the countries that surround us. This feature of relative stability of tobacco production, indicates that, the opportunities to replace tobacco with other alternative crops are marginal and without perspective. Poor and dry soils are best suited for tobacco culture in many aspects: social, economic and most profitable in respect of any other culture. Experts, therefore, support tobacco production. Periodic oscillations, in tobacco production, depend on the weather conditions that affect the quality and quantity. Purchased tobacco from producers (farmers) ranges from 2,5 - 3 Euros/ kg without stimulation that is 1 euro / kg. Tobacco production in 2011 included 33,234 households, 29,000 in 2012, and the harvest of 2013 included 42,386 households. Production in these years was: 15 677 hectares in 2011, 14 609 hectares in 2012 or 19 806 hectares in 2013. Average production per hectare is 1,550 kg and there are a lot of producers who produce 2,000 kg / hectare. Tobacco production is quite mechanical in the phases of planting and threading. These agro-technical measures largely compensate the reduced source of labor force that among the farmers is fairly reduced due to the demographic situation.

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INTRODUCTION

The production of raw tobacco in the Republic of Macedonia in the pre- transition period starting from the 1971-1975 year was around 30000 tonnes of raw tobacco, pointing to a long

years of stable production of tobacco. Characteristic to note is that at this time there is absolutely no stimulation by the state, but there were protective prices that were carried by the state bodies through an administrative way that the production prices of raw tobacco were upgraded. The lack of stimulations

of raw tobacco can be justified from the developed domestic market of the tobacco industry and the long existence of high inflation which ranged from 25-30%. Given that Macedonia was exporter of the convertible market and realized additional funding from the exchange differences due to the current inflation. Such production of raw tobacco in Macedonia with some oscillations during the transitional period achieved a production of raw tobacco of 29386 tons which is equal to the pre- transition period. Specifically in 1994 in this part of the transitional period the tobacco industry works in terms of changed social and political conditions and characteristic is that there are still no stimulations for the tobacco by the state. After 1994 it occurs a period of radicalism in the production of raw tobacco from different reasons, mainly the indiscipline in the variety in representation of tobacco, so that from 2001 to 2008, there is decreasing in the average production compared to 1994 which was 21000 tonnes. But with the introduction of order in the tobacco production and eliminating the varieties of tobacco from semi oriental character and the introduction of the stimulation from the period from 2009-2015, the production is stabilized again at an average of 24700 tonnes of oriental tobacco.

Positive trends in the production of raw tobacco in Macedonia

After 2001 in the production of raw tobacco in the variety structure of production are represented varieties of tobacco from the type Prilep with different quality and quantity. These varieties were put under the same regime of purchase prices of tobacco and all equated with the famous oriental types of tobacco P-12-2 / 1. This meant that production is more oriented on quantity rather than quality, reflecting on the possible realization of tobacco on the external market. Large number of the produced and fermented tobacco, due to the inability to be exported because of the small domestic realization, was taken by the Commodity Reserves Bureau of the Republic of Macedonia. These conditions were reflected in the size of tobacco production until 2008 that can be seen from the following table:

Movement of the production of raw tobacco (2001-2008)

Movement of the production of raw tobacco (2001-2008)

| Year | Production of raw tobacco | Subcontractors | Ha | Produc.kg/ha | Produc. by subcontractor |
|---------|---------------------------|----------------|-------|--------------|--------------------------|
| 2001 | 20094 | 33906 | 20074 | 1000 | 592 |
| 2002 | 22500 | 26971 | 20615 | 1091 | 832 |
| 2003 | 23000 | 27343 | 15017 | 1531 | 841 |
| 2004 | 19839 | 38498 | 15204 | 1304 | 515 |
| 2005 | 23196 | 29028 | 15808 | 1467 | 799 |
| 2006 | 23083 | 29230 | 15072 | 1531 | 789 |
| 2007 | 19680 | 29771 | 16870 | 1166 | 661 |
| 2008 | 16280 | 30519 | 17185 | 1775 | 533 |
| Average | 20959 | 30658 | 19090 | 1097 | 684 |

Source: Ministry of Agriculture, Forestry and Water Management

During the period of transition that is considered as very liberal, especially in the freedom of choice of types of tobacco averagely was produced 20959 tonnes of raw tobacco with the average number of subcontractors of 30658, it was received a raw tobacco per hectare from 1,097 kg and tobacco by subcontractor 684 kg. Of the conditions that are known at this time in the tobacco production, and that are that many subcontractors had contracted with more than one company for the purchase of tobacco, so the registered hectares for

production have found that there are statistically shortcomings, so it is assumed that the production of raw tobacco per hectare and subcontractor is greater. In the period after 2008 starting from 2009, the production of raw tobacco enters into stable period. The variety tobacco production is stabilizing, semi oriental types of tobacco are reducing, primarily from the market and from the buyers of tobacco because of the dominance of the American blend in the production of cigarettes which eliminates the semi oriental tobaccos not only here but also in neighboring countries (Greece, Turkey and Bulgaria). More than fifteen years in the production of tobacco in Macedonia the type P-66 is stabilizing which, with its features is the closest to the classic oriental tobaccos, it has a wide range of its adaptation that somewhat reflects on its quality. For the dominance of this type of tobacco which is represented almost 90% compared to other types of tobacco Jaka and Basmak, contributes significantly the stimulation of the primary production of tobacco from 60den. per kg which is applicable from 2006. In the production of raw tobacco after 2008 it is already present a certain stabilization despite the apparent oscillations in the production resulting primarily on weather conditions during this period. The production of raw tobacco after 2009 in sown areas, subcontractors, achieved production and production per unit area and the subcontractor is as follows:

Movement of production of raw tobacco (2009-2015)

| Year | Production of raw tobacco | Subcontractors | Ha | Produc.kg/ha | Produc. by subcontractor |
|---------|---------------------------|----------------|-------|--------------|--------------------------|
| 2009 | 23196 | 38710 | 16212 | 1430 | 599 |
| 2010 | 26393 | 40743 | 18846 | 1400 | 647 |
| 2011 | 21024 | 33234 | 15677 | 1340 | 632 |
| 2012 | 27993 | 29090 | 14609 | 1916 | 962 |
| 2013 | 30997 | 42367 | 19806 | 1565 | 732 |
| 2014 | 24857 | 34445 | 14030 | 1770 | 722 |
| 2015 | 19000 | 28454 | 13600 | 1397 | 667 |
| Average | 24780 | 35292 | 16112 | 1538 | 702 |

Source: Ministry of Agriculture, Forestry and Water Management

The results obtained for the production for the period from 2001-2008 and for the period from 2009-2015 per unit area has increased by 40% (1538: 1097), while the production per subcontractor has a minimum increase of 3% (702: 684). However, this shows that there are more registered subcontractors regarding the increased quantity per hectare. Based on a study conducted in 2012 where 19 tobacco producers were viewed, there was production per hectare of 2510 kg, while for the family of four 1320 kg. This is confirmed by the researches made in the Tobacco Institute-Prilep in the period from 1994 to 1996.

Variety structure of oriental tobacco for 2015 is:

Variety structure of purchased tobacco in 2015 in tonnes

| Types of tobacco | Purchased tobacco | Percent |
|------------------|-------------------|---------|
| Prilep-66 | 16684 | 88,3 |
| Jaka | 2150 | 11,3 |
| Basmak | 77 | 0,4 |
| Total | 18911 | 100 |

Source: Ministry of Agriculture, Forestry and Water Management

The production of raw tobacco in Macedonia is 90% of the type P-66, the Jaka 11% and 0.4% of Basmak although has the best purchase price. The main organizations that organize and purchase raw tobacco in Macedonia range from 9-10 licensed tobacco buyers. Leading purchasing companies and processors of tobacco are the branches subsidiaries of the multinational companies.

Purchase companies of raw tobacco in Macedonia in 2015

| Companies | Purchased tobacco in tons | Percent % |
|-----------------------|---------------------------|-----------|
| 1.Sokotab | 8700 | 45,2 |
| 2. Alijansa | 4988 | 26,0 |
| 3.Tut.Kom.-Prilep | 2387 | 12,4 |
| 4.Strumica Tabak | 1472 | 7,7 |
| 5.Pashoski | 540 | 2,8 |
| 6.Kaves Banka | 530 | 2,8 |
| 7.Centro tabak- Veles | 200 | 1,0 |
| 8.Orbita | 200 | 1,0 |
| 9.Dalija tabak | 211 | 1,1 |
| Total | 19228 | 100 |

Source: Association of the tobacco producers of the Republic of Macedonia

The purchased quantities of tobacco in 2015 almost 91.3% belong to the four companies for tobacco purchase from which 80% is on a foreign companies. The rest of the purchased tobacco of 12.4% is purchased from the domestic company Tobacco Combine-Prilep, and the remaining 8% belong to a small purchasing companies. These companies which include Tobacco Combine- Prilep, the processing of tobacco deviate to the companies which have larger quantities of tobacco and which have installed modern equipment for the processing of tobacco.

Conclusion

Based on the above mentioned analysis and research that support the fact that the Republic of Macedonia is the most favorable country for the production of oriental tobacco, can bring the following conclusions:

- In the first half of the second decade of the 21st century were produced an average of 25000 tons of raw oriental tobacco
- The tobacco production per unit area is growing from about 1097kg per hectare for the period from 2001 to 2008 to 1538kg for the period from 2009-2015.
- It increases the production of oriental tobacco by subcontractors, from 684kg to 702kg per subcontractor for the same period.
- On the productive tobacco fields it is stabilized the dominant variety of oriental tobacco, which is the type P-66, which provides homogeneous production.
- In the relationship of the tobacco producers and buyers of tobacco were established more stable relations and has less misunderstandings between them.

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