

# CTGR's 2010-2011 Online Agent Survey

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## **I. Overview**

The Center for Tobacco Grower Research (CTGR) conducted an extension agent online survey with extension agents in 143 counties in 14 States November 2010 to January 2011. The purpose of the survey was: (1) to collect basic information on the types of tobacco grown in each county, the number of acres allocated to each tobacco type in each county, the number of growers of each tobacco type, the age structure of tobacco growers in each county, the average yield per acre of each tobacco type in each county, the average price per pound for each tobacco type in each county, new investment in field structures and barns and (2) to assess the expected changes in tobacco production in 2011 relative to 2010 in terms of the change in number of growers, number of acres and level of production. In addition, it was aimed to collect information on the change in per-unit cost of production for each tobacco type between 2009 and 2010 along with the factors attributed to the change, the relative importance of production decision factors, marketing issues as well as extension support services provided to tobacco growers.

### **Sample Characteristics**

In the agent online survey, 143 counties located in 14 states participated. The majority of counties (68%) are from three major tobacco growing States (Kentucky 29%, Tennessee 29% and North Carolina 10%). Georgia and Virginia account for 8 percent and 6 percent, respectively. The remaining 9 states (Florida, Indiana, Maryland, Missouri, Ohio, Pennsylvania, South Carolina, West Virginia and Wisconsin) account for 18 percent of the counties represented in the agent online survey.

Of the 143 counties, response on the types of tobacco grown was given only for the 131 counties. It was reported that seven different types of tobacco are grown, including burley, flue-cured, dark air, dark-fired, Wisconsin, Maryland and cigar. Based on the 131 counties, 54 percent grow only burley in seven states and 21 percent grow only flue-cured in five states. Dark air and dark-fired tobacco are exclusively grown by less than one percent, each. The remaining counties grow a combination of two or more tobacco types.

An estimated 6,704 growers were reported to grow tobacco in 113 counties with more than one-third (36 percent) coming from 34 counties in Kentucky and one-quarter coming from one county in Pennsylvania. Over 10 percent and 15 percent of growers were estimated to be from 30 counties in Tennessee and 13 counties in North Carolina, respectively. The number of growers estimated to be from 9 counties in Virginia accounted for 6 percent of the total estimated number of growers in the 113 counties in 14 states.

Adjusting for the variation in the number of growers among counties, it was estimated that on average just 50 percent are between the age of 41 and 60 years. More than one-third (36 percent) are under the age of 40 years.

The total estimated number of acres in the reported counties in 2010 was 170,351 acres, covering 50 percent of the total number of acres of all classes of tobacco as estimated by NASS. According to NASS, the total number of acres allocated to all classes of tobacco in 2010 was 337,450 acres.

Flue-cured and burley acres account for 90 percent of the total number of acres covered in the agent survey. The estimated total acreage of burley production reported in the agent survey for 100 counties in 10 states is 54,332 acres with Kentucky and Tennessee accounting for nearly 60 percent and 25 percent, respectively. The estimated number of acres allocated to flue-cured production as estimated by agents in 37 counties in five states is 94,405 with North Carolina and Virginia accounting for nearly 75 percent and 12 percent of the total estimated flue-cured acres, respectively. The agent online survey has represented 45 percent of dark air, 47 percent of flue-cured, 56 percent of dark-fired, and 56 percent of burley acres estimated by NASS.

As in the case with the number of acres, the agent survey covers just over half of the total production of tobacco estimated by NASS. NASS reports that the total level of production of all classes of tobacco in 2010 was 719,786,000 lbs. The survey represented 39 percent of dark air, 50 percent of flue-cured, 55 percent of dark-fired, and 56 percent of burley production estimated by NASS.

### **Expected performance of the 2011 tobacco production relative to 2010**

County agents provided their expectation about tobacco production in 2011 compared to that in 2010 in terms of the number of growers, number of acres, and level of production.

In 26 percent of the counties where burley tobacco was reported to be grown, agents expect no change while they expect a 1 to 5 percent and 6 to 10 percent decline in 18 percent and 22 percent of the reported counties, respectively. The expected change in the number of growers varies by state. Agents expect no change in the number of growers in a relatively larger proportion of counties in Tennessee than in Kentucky. While they expect no change in nearly one-third of the counties in Tennessee, the respective county agents have a similar expectation in only 3 percent of the counties in Kentucky.

When it comes to flue-cured, 45 percent of the 33 counties where flue-cured tobacco was reported to be grown, they expect no change in number of growers.

However, a 1 to 5 percent decline is expected to occur in 30 percent of the reported counties. In North Carolina where the majority of flue-cured is grown, they expect a 1 to 5 percent decline in nearly 70 percent of the reported 13 counties. In contrast, no change is expected in four of the reported five counties in Virginia.

With regard to dark tobacco, agents in Kentucky expect no change in the number of dark air tobacco growers in two of the reported five counties and a 1 to 5 percent increase in the other two reported counties in Kentucky while agents in Tennessee expect no change in two of the four reported counties in Tennessee. Agents in Tennessee also expect no change in number of dark-fired tobacco growers in five of the seven reported counties in Tennessee.

A similar pattern is expected for number of acres as in the number of growers. Agents expect no change in number of acres in a relatively larger number of counties. However, a decline ranging from 1 to 10 percent is also expected in a good number of burley and flue-cured tobacco growing counties.

### **Future Tobacco Production**

Responding to the question about the future of tobacco production over the next five years, they expect a significantly less burley production in over two-fifths of the counties and slightly less burley production in nearly two-fifths of the reported counties. An increase of "slightly more" is expected in only one-tenth of the reported counties.

Flue-cured production is also expected to decline slightly in nearly two-fifths and be significantly less in over one-third of the reported counties over the next five years.

While it is expected that dark tobacco will also experience a decline in production in the next five years, an increase is expected in a relatively larger proportion of dark tobacco growing counties than in burley and flue-cured growing counties.

### **Cost of Production**

Comparing the per-unit cost of production between 2009 and 2010, a 1 to 10 percent increase was estimated to have occurred in the majority of the reported counties regardless of the type of tobacco grown. The major factors for the increase include labor, fertilizer, fuel and chemicals.

## Miscellaneous

In terms of factors that could potentially contributing to the increase in production in the future, higher price is selected by the majority of agents followed by guaranteed minimum returns per pound, long-term contracts and production incentives. On the other hand, not receiving a contract and uncertainty about future income from tobacco are selected as the two major factors in order of importance, contributing to the exit of growers from tobacco production.

According to county agents, the most common issue that growers discuss about marketing their tobacco is inconsistency in grading followed by inadequate communication from buying companies and the complicated pricing methods. Speaking of the relative importance of production decision factors in the 2011 production season, agents seem to suggest that factors on the revenue side are more important than those on the cost side. The price of tobacco, changes in contracts and uncertainty about future income from tobacco were selected as the three most important factors to growers' decisions of whether or not and how much tobacco to produce in 2011. Finally, agents reported that disease management, variety selection and marketing issues are among the top three extension support services they provide to tobacco growers.

## I. STATE AND COUNTIES

### 1. Number of agents in each State that returned a survey.

	Partial Responses	Complete Responses	Total Number of Counties that Responded	Percent of Total Response
Florida	1	4	5	3%
Georgia	2	10	12	8%
Indiana	1	5	6	4%
Kentucky	10	32	42	29%
Maryland	0	1	1	1%
Missouri	1	0	1	1%
North Carolina	2	12	14	10%
Ohio	1	2	3	2%
Pennsylvania	0	1	1	1%
South Carolina	1	2	3	2%
Tennessee	6	36	42	29%
Virginia	0	9	9	6%
West Virginia	0	2	2	1%
Wisconsin	0	2	2	1%
<b>Total</b>	<b>25</b>	<b>118</b>	<b>143</b>	<b>100%</b>

### 2. List of Counties in each State that were represented in survey.

State	County	Tobacco Grown in County
<b>Florida</b>	Alachua	Yes
	Columbia	Yes
	Gilchrist	Yes
	Lafayette	Yes
	Madison	No
<b>Georgia</b>	Atkinson	Yes
	Ben Hill	Yes
	Candler	Yes
	Colquitt	Yes
	Echols	Yes
	Jeff Davis	Yes
	Lanier	Yes

State	County	Tobacco Grown in County
	Lowndes	Yes
	Pierce	Yes
	Thomas	Yes
	Tift	Yes
	Wayne	Yes
<b>Indiana</b>	Clark	Yes
	Harrison	No
	Jefferson	Yes
	Jennings	Yes
	Ripley	Yes
	Switzerland	Yes
<b>Kentucky</b>	Adair	Yes
	Allen	Yes
	Anderson	Yes
	Ballard	Yes
	Barren	Yes
	Bourbon	Yes
	Breckinridge	Yes
	Calloway	Yes
	Campbell	Yes
	Carroll	Yes
	Casey	Yes
	Clark	Yes
	Cumberland	Yes
	Daviess	Yes
	Fleming	Yes
	Franklin	Yes
	Graves	Yes
	Hardin	Yes
	Harrison	Yes
	Hart	Yes
	Henderson	Yes
	Henry	Yes
	Jessamine	Yes
	Lewis	Yes
	Lincoln	Yes
	Lyon	Yes
	Madison	Yes
	Magoffin	Yes
	Mclean	Yes
	Meade	Yes

State	County	Tobacco Grown in County
	Muhlenberg	Yes
	Nelson	Yes
	Oldham	Yes
	Perry	No
	Pulaski	Yes
	Robertson	Yes
	Russell	Yes
	Scott	Yes
	Trimble	Yes
	Warren	Yes
	Wayne	Yes
	Webster	Yes
<b>Maryland</b>	St. Mary's	Yes
<b>Missouri</b>	Chariton	Yes
<b>North Carolina</b>	Alamance	Yes
	Bertie	Yes
	Columbus	Yes
	Cumberland	Yes
	Duplin	Yes
	Edgecombe	Yes
	Greene	Yes
	Guilford	Yes
	Lenoir	Yes
	Martin	Yes
	Nash	Yes
	Person	Yes
	Pitt	Yes
	Wilson	Yes
<b>Ohio</b>	Brown	Yes
	Highland	Yes
	Pike	Yes
<b>Pennsylvania</b>	Lancaster	Yes
<b>South Carolina</b>	Colleton	Yes
	Horry	Yes
	Sumter	Yes
<b>Tennessee</b>	Bedford	Yes
	Bledsoe	Yes
	Campbell	Yes
	Cannon	Yes

State	County	Tobacco Grown in County
	Cheatham	Yes
	Clay	Yes
	Cumberland	No
	DeKalb	Yes
	Dickson	Yes
	Franklin	No
	Gibson	No
	Grainger	Yes
	Hamblen	Yes
	Hancock	Yes
	Hawkins	Yes
	Hickman	Yes
	Jackson	Yes
	Jefferson	Yes
	Johnson	Yes
	Lewis	No
	Loudon	Yes
	Macon	Yes
	Marion	No
	Maury	Yes
	Montgomery	Yes
	Moore	Yes
	Obion	No
	Overton	Yes
	Polk	No
	Putnam	Yes
	Rhea	Yes
	Roane	Yes
	Robertson	Yes
	Smith	Yes
	Stewart	Yes
	Sullivan	Yes
	Trousdale	Yes
	Union	Yes
	Warren	Yes
	Washington	Yes
	Weakley	Yes
	Williamson	Yes
<b>Virginia</b>	Brunswick	Yes
	Charlotte	Yes
	Lee	Yes

State	County	Tobacco Grown in County
	Mecklenburg	Yes
	Patrick	Yes
	Pittsylvania	Yes
	Russell	Yes
	Scott	Yes
	Washington	Yes
<b>West Virginia</b>	Cabell	No
	Mason	Yes
<b>Wisconsin</b>	Dane	Yes
	Vernon	Yes

## II. TYPE OF TOBACCO GROWN

### 1. Number of counties reporting to grow tobacco in 2010 by State and Type

State	Burley	Flue-cured	Dark Air	Dark-fired	Maryland	Cigar	Wisconsin
Florida	-	4	-	-	-	-	-
Georgia	-	12	-	-	-	-	-
Indiana	5	-	-	-	-	-	-
Kentucky	41	-	9	5	-	-	-
Maryland	1	-	-	-	1	-	-
Missouri	-	-	1	-	-	-	-
North Carolina	7	14	1	1	-	-	-
Ohio	3	-	-	-	-	-	-
Pennsylvania	1	-	-	-	1	1	-
South Carolina	-	3		-	-	-	-
Tennessee	33	-	4	7	-	-	-
Virginia	8	5	-	5	-	-	-
West Virginia	1	-	-	-	-	-	-
Wisconsin	1	-	-	-	-	-	1
<b>Total</b>	<b>101</b>	<b>39</b>	<b>15</b>	<b>18</b>	<b>2</b>	<b>1</b>	<b>1</b>

### III. PRODUCTION

#### 1. Number of Acres Produced in each County in 2010

County	Burley	Flue-cured	Dark Air	Dark-fired	Maryland	Cigar	Wisconsin
<b>FL</b>							
Alachua	-	320	-	-	-	-	-
Columbia	-	32	-	-	-	-	-
Gilchrist	-	60	-	-	-	-	-
Lafayette	-	50	-	-	-	-	-
<b>GA</b>							
Atkinson	-	1200	-	-	-	-	-
Ben Hill	-	100	-	-	-	-	-
Candler	-	300	-	-	-	-	-
Colquitt	-	642	-	-	-	-	-
Echols	-	192	-	-	-	-	-
Jeff Davis	-	320	-	-	-	-	-
Lanier	-	620	-	-	-	-	-
Lowndes	-	890	-	-	-	-	-
Pierce	-	1000	-	-	-	-	-
Thomas	-	110	-	-	-	-	-
Wayne	-	600	-	-	-	-	-
<b>IN</b>							
Clark	450	-	-	-	-	-	-
Jefferson	285	-	-	-	-	-	-
Jennings	20	-	-	-	-	-	-
Ripley	240	-	-	-	-	-	-
Switzerland	650	-	-	-	-	-	-
<b>KY</b>							
Adair	1300	-	-	-	-	-	-
Allen	1200	-	-	-	-	-	-
Anderson	460	-	-	-	-	-	-
Ballard	125	-	-	15	-	-	-
Barren	2300	-	-	-	-	-	-
Bourbon	1800	-	-	-	-	-	-
Breckinridge	1200	-	-	-	-	-	-
Campbell	45	-	-	-	-	-	-
Carroll	400	-	-	-	-	-	-

County	Burley	Flue-cured	Dark Air	Dark-fired	Maryland	Cigar	Wisconsin
Casey	800	-	-	-	-	-	-
Clark	1100	-	-	-	-	-	-
Cumberland	25	-	-	-	-	-	-
Daviess	1500	-	300	-	-	-	-
Fleming	2300	-	-	-	-	-	-
Franklin	150	-	-	-	-	-	-
Graves	500	-	300	1800			
Hardin	500	-	-	-	-	-	-
Harrison	2000	-	-	-	-	-	-
Hart	2200	-	-	-	-	-	-
Henderson	300	-	225	-	-	-	-
Henry	2300	-	-	-	-	-	-
Jessamine	450	-	-	-	-	-	-
Lewis	2000	-	-	-	-	-	-
Lincoln	700	-	-	-	-	-	-
Lyon	40	-	25	180	-	-	-
Madison	550	-	-	-	-	-	-
Magoffin	50	-	-	-	-	-	-
Mclean	250	-	275	-	-	-	-
Meade	400	-	-	-	-	-	-
Muhlenberg	200	-	150	250	-	-	-
Nelson	850	-	-	-	-	-	-
Oldham	75	-	-	-	-	-	-
Pulaski	700	-	-	-	-	-	-
Robertson	450	-	-	-	-	-	-
Russell	400	-	-	-	-	-	-
Scott	500	-	-	-	-	-	-
Trimble	650	-	-	-	-	-	-
Warren	950	-	5	-	-	-	-
Wayne	400	-	-	-	-	-	-
Webster	20	-	85	-	-	-	-
<b>MD</b>							
St. Mary's	800	-	-	-	200	-	-
<b>MO</b>							
Chariton	-	-	100	-	-	-	-
<b>NC</b>							
Alamance	4	1300	-	-	-	-	-
Bertie	-	3852	-	-	-	-	-

County	Burley	Flue-cured	Dark Air	Dark-fired	Maryland	Cigar	Wisconsin
Columbus	40	4200	-	-	-	-	-
Cumberland	-	2770	-	-	-	-	-
Duplin	17	5342	-	-	-	-	-
Edgecombe	-	7310	-	-	-	-	-
Greene	-	6400	-	-	-	-	-
Guilford	10	2000	2	-	-	-	-
Lenoir	-	6500	-	-	-	-	-
Martin	-	5510	-	-	-	-	-
Nash	-	8660	-	-	-	-	-
Person	220	3450	-	-	-	-	-
Pitt	145	6106	-	6	-	-	-
Wilson	50	9400	-	-	-	-	-
<b>OH</b>							
Brown	1200	-	-	-	-	-	-
Highland	125	-	-	-	-	-	-
Pike	30	-	-	-	-	-	-
<b>PA</b>							
Lancaster	2100	-	-	-	2400	2000	-
<b>SC</b>							
Colleton	-	1000	-	-	-	-	-
Horry	-	7330	-	-	-	-	-
Sumter	-	275	-	-	-	-	-
<b>TN</b>							
Bedford	4	-	-	-	-	-	-
Bledsoe	4	-	-	-	-	-	-
Campbell	10	-	-	-	-	-	-
Cannon	6	-	-	-	-	-	-
Cheatham	80	-	175	700	-	-	-
Clay	60	-	-	-	-	-	-
DeKalb	40	-	-	-	-	-	-
Dickson	-	-	-	500	-	-	-
Grainger	125	-	-	-	-	-	-
Hamblen	300	-	-	-	-	-	-
Hancock	40	-	-	-	-	-	-
Hawkins	2200	-	-	-	-	-	-
Hickman	75	-	-	-	-	-	-
Jackson	50	-	-	-	-	-	-

County	Burley	Flue-cured	Dark Air	Dark-fired	Maryland	Cigar	Wisconsin
Jefferson	450	-	-	-	-	-	-
Johnson	90	-	-	-	-	-	-
Loudon	10	-	-	-	-	-	-
Macon	6500	-	-	-	-	-	-
Maury	100	-	-	-	-	-	-
Montgomery	160	-	80	1550	-	-	-
Moore	3	-	-	-	-	-	-
Overton	120	-	-	5	-	-	-
Putnam	-	-	-	-	-	-	-
Rhea	8	-	-	-	-	-	-
Roane	1	-	-	-	-	-	-
Robertson	1000	-	700	3000	-	-	-
Smith	1075	-	-	-	-	-	-
Stewart	25	-	50	500	-	-	-
Sullivan	100	-	-	-	-	-	-
Trousdale	400	-	-	-	-	-	-
Union	75	-	-	-	-	-	-
Warren	25	-	-	-	-	-	-
Washington	475	-	-	-	-	-	-
Weakley	100	-	-	100	-	-	-
Williamson	4	-	-	-	-	-	-
<b>VA</b>							
Brunswick	20	2050	-	51	-	-	-
Charlotte	13	794	-	171	-	-	-
Lee	600	-	-	-	-	-	-
Mecklenburg	18	3120	-	2	-	-	-
Patrick	-	300	-	-	-	-	-
Pittsylvania	300	5300	-	10	-	-	-
Russell	350	-	-	-	-	-	-
Scott	450	-	-	-	-	-	-
Washington	314	-	-	2	-	-	-
<b>WV</b>							
Mason	25	-	-	-	-	-	-
<b>WI</b>							
Dane	-	-	-	-	-	-	700
Vernon	1	-	-	-	-	-	-

County	Burley	Flue-cured	Dark Air	Dark-fired	Maryland	Cigar	Wisconsin
<b>Total</b>	<b>54,332</b>	<b>99,405</b>	<b>2,472</b>	<b>8,842</b>	<b>2,600</b>	<b>2,000</b>	<b>700</b>

## 2. Average Yield per Acre in each County in 2010

County	Burley	Flue-cured	Dark Air	Dark-fired	Maryland	Cigar	Wisconsin
<b>FL</b>							
Columbia	-	2200	-	-	-	-	-
Lafayette	-	3000	-	-	-	-	-
<b>GA</b>							
Atkinson	-	1800	-	-	-	-	-
Ben Hill	-	2100	-	-	-	-	-
Candler	-	2100	-	-	-	-	-
Colquitt	-	2200	-	-	-	-	-
Jeff Davis	-	2200	-	-	-	-	-
Lanier	-	2200	-	-	-	-	-
Lowndes	-	2800	-	-	-	-	-
Pierce	-	2500	-	-	-	-	-
Thomas	-	1800	-	-	-	-	-
Wayne	-	2600	-	-	-	-	-
<b>IN</b>							
Clark	2100	-	-	-	-	-	-
Jefferson	2100	-	-	-	-	-	-
Jennings	1600	-	-	-	-	-	-
Ripley	1700	-	-	-	-	-	-
<b>KY</b>							
Adair	2200	-	-	-	-	-	-
Allen	2250	-	-	-	-	-	-
Anderson	2350	-	-	-	-	-	-
Ballard	2100	-	-	2900	-	-	-
Barren	2250	-	-	-	-	-	-
Bourbon	2000	-	-	-	-	-	-
Breckinridge	2000	-	-	-	-	-	-
Campbell	2500	-	-	-	-	-	-
Carroll	1750	-	-	-	-	-	-
Casey	2200	-	-	-	-	-	-
Clark	2100	-	-	-	-	-	-

County	Burley	Flue-cured	Dark Air	Dark-fired	Maryland	Cigar	Wisconsin
Cumberland	1950	-	-	-	-	-	-
Daviess	2200	-	2900	-	-	-	-
Fleming	2200	-	-	-	-	-	-
Franklin	2800	-	-	-	-	-	-
Graves	2200	-	2800	3600	-	-	-
Hardin	2000	-	-	-	-	-	-
Harrison	2200	-	-	-	-	-	-
Hart	1900	-	-	-	-	-	-
Henderson	2300	-	2100	-	-	-	-
Henry	2200	-	-	-	-	-	-
Jessamine	2300	-	-	-	-	-	-
Lewis	1750	-	-	-	-	-	-
Lincoln	2300	-	-	-	-	-	-
Lyon	1800	-	2800	3000	-	-	-
Madison	2000	-	-	-	-	-	-
Magoffin	2000	-	-	-	-	-	-
McLean	2700	-	2900	-	-	-	-
Meade	2200	-	-	-	-	-	-
Muhlenberg	2400	-	2600	2800	-	-	-
Nelson	2400	-	-	-	-	-	-
Oldham	2000	-	-	-	-	-	-
Pulaski	2200	-	-	-	-	-	-
Robertson	2000	-	-	-	-	-	-
Russell	2400	-	-	-	-	-	-
Trimble	1900	-	-	-	-	-	-
Warren	2000	-	2200	-	-	-	-
Wayne	2200	-	-	-	-	-	-
<b>MD</b>							
St. Mary's	1750	-	-	-	1400	-	-
<b>NC</b>							
Alamance	1600	2100					
Bertie		2200					
Columbus	1800	2600					
Cumberland		2500					
Duplin	1800	2400					
Edgecombe		2000					
Greene		2800					
Guilford	1800	2400	2200				

County	Burley	Flue-cured	Dark Air	Dark-fired	Maryland	Cigar	Wisconsin
Lenoir	-	2400	-	-	-	-	-
Martin	-	2300	-	-	-	-	-
Nash	-	2200	-	-	-	-	-
Person	2230	1720	-	-	-	-	-
Pitt	2000	2100	-	2600	-	-	-
Wilson	2000	2500	-	-	-	-	-
<b>OH</b>							
Brown	1750	-	-	-	-	-	-
Highland	2100	-	-	-	-	-	-
Pike	2300	-	-	-	-	-	-
<b>PA</b>							
Lancaster	2000	-	-	-	2100	2200	-
<b>SC</b>							
Horry	-	2400	-	-	-	-	-
Sumter	-	2500	-	-	-	-	-
<b>TN</b>							
Bedford	1500	-	-	-	-	-	-
Bledsoe	1500	-	-	-	-	-	-
Campbell	2500	-	-	-	-	-	-
Cannon	1800	-	-	-	-	-	-
Cheatham	2400	-	2600	3100	-	-	-
Clay	1800	-	-	-	-	-	-
DeKalb	1800	-	-	-	-	-	-
Dickson	-	-	-	2800	-	-	-
Grainger	1850	-	-	-	-	-	-
Hamblen	1600	-	-	-	-	-	-
Hancock	2100	-	-	-	-	-	-
Hawkins	1900	-	-	-	-	-	-
Hickman	1800	-	-	-	-	-	-
Jackson	1900	-	-	-	-	-	-
Jefferson	2050	-	-	-	-	-	-
Johnson	1900	-	-	-	-	-	-
Loudon	1500	-	-	-	-	-	-
Macon	1400	-	-	-	-	-	-
Maury	1800	-	-	-	-	-	-
Montgomery	2400	-	2650	3100	-	-	-

County	Burley	Flue-cured	Dark Air	Dark-fired	Maryland	Cigar	Wisconsin
Moore	2000	-	-	-	-	-	-
Overton	2200	-	-	2500	-	-	-
Roane	1500	-	-	-	-	-	-
Robertson	2000	-	2400	2800	-	-	-
Smith	1250	-	-	-	-	-	-
Stewart	1800	-	2000	2400	-	-	-
Sullivan	1200	-	-	-	-	-	-
Trousdale	1900	-	-	-	-	-	-
Warren	1700	-	-	-	-	-	-
Washington	1650	-	-	-	-	-	-
Weakley	2100	-	-	1800	-	-	-
Williamson	2000	-	-	-	-	-	-
<b>VA</b>							
Brunswick	1700	2500	-	1750	-	-	-
Charlotte	1400	2200	-	1900	-	-	-
Lee	1900	-	-	-	-	-	-
Mecklenburg	1800	2500	-	1600	-	-	-
Patrick	-	2850	-	-	-	-	-
Pittsylvania	2000	2400	-	1600	-	-	-
Russell	2000	-	-	-	-	-	-
Scott	1900	-	-	-	-	-	-
Washington	2500	-	-	2800	-	-	-
<b>WV</b>							
Mason	2000	-	-	-	-	-	-
<b>WI</b>							
Dane	-	-	-	-	-	-	2500
<b>Total Survey Average</b>	<b>1988</b>	<b>2335</b>	<b>2513</b>	<b>2532</b>	<b>1750</b>	<b>2200</b>	<b>2500</b>

3. Average Yield for Burley Tobacco by State (weighted average and simple average)

State	Weighted†		Simple	
	N	Mean	N	Mean
Indiana	4	1993	4	1875
Kentucky	38	2128	38	2163
Maryland	1	1750	1	1750
North Carolina	7	2073	7	1890
Ohio	3	1794	3	2050
Pennsylvania	1	2000	1	2000
Tennessee	31	1609	31	1778
Virginia	8	2017	8	1900
West Virginia	1	2000	1	2000
<b>Total Survey Average</b>	<b>94</b>	<b>1968</b>	<b>94</b>	<b>1988</b>

†Weighted average is calculated by multiplying the yield of tobacco in each county by the county's share of burley acres in the respective state.

4. Average Yield for Flue-cured Tobacco by State (weighted average and simple average)

State	Weighted†		Simple	
	N	Mean	N	Mean
Florida	2	2688	2	2600
Georgia	10	2288	10	2230
North Carolina	14	2319	14	2301
South Carolina	2	2404	2	2450
Virginia	5	2443	5	2490
<b>Total Survey Average</b>	<b>33</b>	<b>2338</b>	<b>33</b>	<b>2335</b>

†Weighted average is calculated by multiplying the yield of tobacco in each county by the county's share of burley acres in the respective state.

5. Average Yield for Dark Air Tobacco by State (weighted average and simple average)

State	Weighted†		Simple	
	N	Mean	N	Mean
Kentucky	7	2696	7	2614
North Carolina	1	2200	1	2200
Tennessee	4	2435	4	2413
<b>Total Survey Average</b>	<b>12</b>	<b>2581</b>	<b>12</b>	<b>2513</b>

†Weighted average is calculated by multiplying the yield of tobacco in each county by the county's share of burley acres in the respective state.

6. Average Yield for Dark-fired Tobacco by State (weighted average and simple average)

State	Weighted†		Simple	
	N	Mean	N	Mean
Kentucky	7	2696	7	2614
North Carolina	1	2200	1	2200
Tennessee	4	2435	4	2413
Virginia	5	1860	5	1930
<b>Total Survey Average</b>	<b>17</b>	<b>2984</b>	<b>17</b>	<b>2532</b>

†Weighted average is calculated by multiplying the yield of tobacco in each county by the county's share of burley acres in the respective state.

IV. PRICE

1. 2010 Average Price per Pound of Burley by State

State	Weighted†		Simple	
	N	Average	N	Average
Indiana	4	1.75	4	1.59
Kentucky	32	1.58	32	1.60
Maryland	1	1.55	1	1.55
North Carolina	5	1.74	5	1.77
Ohio	2	1.80	2	1.80
Pennsylvania	1	1.75	1	1.75
Tennessee	28	1.74	28	1.69
Virginia	8	1.58	8	1.66
West Virginia	1	1.60	1	1.60
<b>Burley Total</b>	<b>82</b>	<b>1.63</b>	<b>82</b>	<b>1.65</b>

†Weighted average price of burley is computed by weighting the price of burley in each county by the county's share of burley production in the respective state.

## 2. 2010 Average Price per Pound of Flue-cured by State

State	Weighted†		Simple	
	N	Average	N	Average
Florida	2	1.79	4	1.80
Georgia	10	1.75	10	1.76
North Carolina	13	1.68	13	1.68
South Carolina	2	1.75	2	1.73
Virginia	5	1.73	5	1.73
<b>Flue-cured Total</b>	<b>32*</b>	<b>1.70</b>	<b>34</b>	<b>1.73</b>

† Weighted average price of flue-cured is computed by weighting the price of flue-cured in each county by the county's share of flue-cured production in the respective state.

\*Two agents did not report the production data. So, the number of observations used in the computation of the weighted average price is less than that used in the case of the simple average.

## 3. 2010 Average Price per Pound of Dark Air by State

State	Weighted†		Simple	
	N	Average	N	Average
Kentucky	5	2.25	5	2.28
North Carolina	1	2.10	1	2.10
Tennessee	4	2.21	4	2.23
<b>Dark Air Total</b>	<b>10</b>	<b>2.23</b>	<b>10</b>	<b>2.24</b>

† Weighted average price of dark air tobacco is computed by weighting the price of dark air tobacco in each county by the county's share of dark air tobacco production in the respective state.

## 4. 2010 Average Price per Pound of Dark-fired by State

State	Weighted†		Simple	
	N	Average	N	Average
Kentucky	4	2.46	4	2.44
North Carolina	1	2.80	1	2.80
Tennessee	6	2.59	6	2.48
Virginia	5	2.01	5	2.07
<b>Dark-fired Total</b>	<b>16</b>	<b>2.54</b>	<b>16</b>	<b>2.36</b>

† Weighted average price of dark-fired tobacco is computed by weighting the price of dark-fired tobacco in each county by the county's share of dark-fired tobacco production in the respective state.

## V. GROWERS

### 1. Total Number of Tobacco Growers by County and Type

County	Total	Burley	Flue-cured	Dark Air	Dark-fired	Maryland	Cigar	Wisconsin
<b>FL</b>	<b>9</b>	-	<b>9</b>	-	-	-	-	-
Alachua	3		3					
Columbia	2		2					
Gilchrist	2		2					
Lafayette	2		2					
<b>GA</b>	<b>49</b>	-	<b>49</b>	-	-	-	-	-
Atkinson	10		10					
Ben Hill	2		2					
Candler	5		5					
Colquitt	7		7					
Jeff Davis	3		3					
Lanier	4		4					
Lowndes	4		4					
Pierce	10		10					
Thomas	2		2					
Wayne	2		2					
<b>IN</b>	<b>63</b>	<b>63</b>	-	-	-	-	-	-
Clark	15	15						
Jefferson	12	12						
Jennings	5	5						
Ripley	31	31						
<b>KY</b>	<b>2394</b>	<b>2257</b>	-	<b>247</b>	<b>146</b>	-	-	-
Adair	60	60						
Allen	60	60						
Anderson	25	25						
Ballard	10	8			2			
Barren	200	200						
Bourbon	45	45						
Breckinridge	300	300						
Carroll	75	75						
Casey	15	15						
Cumberland	9	9						
Daviess	350	350		150				

County	Total	Burley	Flue-cured	Dark Air	Dark-fired	Maryland	Cigar	Wisconsin
Fleming	200	200						
Franklin	25	25						
Graves	150	30		50	120			
Hardin	50	50						
Harrison	125	125						
Hart	70	70						
Henderson	18	18		12				
Henry	70	70						
Jessamine	12	12						
Lewis	20	20						
Lincoln	70	70						
Lyon	25	10		8	14			
Madison	20	20						
Magoffin	10	10						
Meade	20	20						
Muhlenberg	32	32		27	10			
Nelson	100	100						
Oldham	3	3						
Pulaski	40	40						
Robertson	40	40						
Russell	35	35						
Trimble	35	35						
Wayne	75	75						
<b>MD</b>	<b>60</b>	<b>55</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>15</b>	<b>-</b>	<b>-</b>
St. Mary's	60	55				15		
<b>NC</b>	<b>752</b>	<b>25</b>	<b>751</b>	<b>2</b>	<b>2</b>	<b>-</b>	<b>-</b>	<b>-</b>
Alamance	36	1	36					
Bertie	25		25					
Columbus	60	1	60					
Cumberland	20		20					
Duplin	71	2	71					
Greene	37		37					
Guilford	35	3	35	2				
Lenoir	75		75					
Martin	76		76					
Nash	75		75					
Person	64	8	63					
Pitt	60	6	60		2			

County	Total	Burley	Flue-cured	Dark Air	Dark-fired	Maryland	Cigar	Wisconsin
Wilson	118	4	118					
<b>OH</b>	<b>75</b>	<b>75</b>	-	-	-	-	-	-
Highland	20	20						
Pike	55	55						
<b>PA</b>	<b>1700</b>	<b>1000</b>	-	-	-	<b>1000</b>	<b>800</b>	-
Lancaster	1700	1000				1000	800	
<b>SC</b>	<b>43</b>	-	<b>43</b>	-	-	-	-	-
Horry	40		40					
Sumter	3		3					
<b>TN</b>	<b>1000</b>	<b>659</b>	-	<b>210</b>	<b>413</b>	-	-	-
Bedford	3	3						
Bledsoe	2	2						
Campbell	3	3						
Cannon	3	3						
Cheatham	95	10		30	60			
Clay	10	10						
DeKalb	5	5						
Dickson	50				50			
Grainger	23	23						
Hamblen	50	50						
Hancock	10	10						
Hawkins	90	90						
Hickman	7	7						
Jefferson	15	15						
Johnson	15	15						
Loudon	2	2						
Macon	150	150						
Maury	15	15						
Montgomery	70	15		20	55			
Moore	2	2						
Overton	17	15			2			
Roane	1	1						
Robertson	225	100		150	220			
Smith	15	15						
Stewart	23	2		10	23			
Sullivan	15	15						
Trousdale	25	25						
Warren	4	4						

County	Total	Burley	Flue-cured	Dark Air	Dark-fired	Maryland	Cigar	Wisconsin
Washington	45	45						
Weakley	10	7			3			
<b>VA</b>	<b>398</b>	<b>146</b>	<b>244</b>	<b>-</b>	<b>33</b>	<b>-</b>	<b>-</b>	<b>-</b>
Brunswick	36	5	35		5			
Charlotte	35	8	10		15			
Lee	15	15						
Mecklenburg	60	5	60		1			
Patrick	9		9					
Pittsylvania	150	20	130		10			
Russell	40	40						
Scott	10	10						
Washington	43	43			2			
<b>WV</b>	<b>10</b>	<b>10</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
Mason	10	10						
<b>WI</b>	<b>151</b>	<b>1</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>150</b>
Dane	150							150
Vernon	1	1						
<b>Total</b>	<b>6704</b>	<b>4291</b>	<b>1096</b>	<b>459</b>	<b>594</b>	<b>1015</b>	<b>800</b>	<b>150</b>

## 2. Age of Growers by State: Percentage of Growers in each Age Category

State	Younger than 35	35 to 40	41 to 50	51 to 60	61 to 70	71 and older	
Florida	22.1%	0.0%	22.2%	44.6%	0.0%	11.1%	
Georgia	5.1	8.1	34.7	31.6	20.5	0.0	
Indiana	4.9	9.7	16.2	41.0	25.8	2.5	
Kentucky	11.1	20.6	26.4	26.8	12.6	1.8	
Maryland	25.0	20.0	20.0	25.0	5.0	5.0	
North Carolina	5.6	8.9	20.3	51.2	12.6	1.4	
Ohio	11.3	13.7	25.0	36.0	10.3	3.7	
Pennsylvania	45.0	20.0	20.0	10.0	5.0	0.0	
South Carolina	9.3	16.3	34.9	23.3	14.0	2.3	
Tennessee	10.2	17.2	26.4	25.1	15.0	4.3	
Virginia	10.4	11.2	27.4	32.2	16.5	2.2	
West Virginia	0.0	20.0	70.0	10.0	0.0	0.0	
Wisconsin	3.0	10.6	34.8	34.8	14.9	2.0	
<b>Total</b>	<b>Avg.</b>	<b>10.4%</b>	<b>13.5%</b>	<b>25.5%</b>	<b>30.4%</b>	<b>15.3%</b>	<b>3.5%</b>
	<b>Wt. Avg.†</b>	<b>18.7%</b>	<b>17.5%</b>	<b>24.3%</b>	<b>25.8%</b>	<b>11.4%</b>	<b>1.8%</b>

† The weighted average was calculated by weighting each agent's response by the share of total growers in their county.

## VI. 2011 VS 2010

**Note:** The following questions were asked with responses including one of the following 11 categories listed below. If the following tables do not list all of these 11 categories it because there were no agents chose the missing categories.

1	-21% or more	<b>DECREASE</b>
2	-16% to -20%	
3	-11% to -15%	
4	-6% to -10%	
5	-1% to -5%	
<b>6</b>	<b>No Change</b>	<b>NO CHANGE</b>
7	1% to 5%	
8	6% to 10%	<b>INCREASE</b>
9	11% to 15%	
10	16% to 20%	
11	21% or more	

1. **Burley:** How do you expect the number of growers in 2011 to compare to the number of growers in 2010?

State		<u>DECREASE</u>					<u>INCREASE</u>			TOTAL
		21% or more	16% to 20%	11% to 15%	6% to 10%	1% to 5%	NO CHANGE	1% to 5%	6% to 10%	
<b>IN</b>	N	0	0	0	1	1	2	0	0	4
	%	0.0%	0.0%	0.0%	25.0%	25.0%	50.0%	0.0%	0.0%	
<b>KY</b>	N	6	5	3	9	9	1	0	1	34
	%	17.7	14.7	8.8	26.5	26.5	2.9	0.0	2.9	
<b>MD</b>	N	0	0	0	0	0.0	1	0	0	1
	%	0.0	0.0	0.0	0.0	0.0	100.0	0.0	0.0	
<b>NC</b>	N	1	1	1	0	1	3	0	0	7
	%	14.3	14.3	14.3	0.0	14.3	42.9	0.0	0.0	

State		<u>DECREASE</u>					<u>INCREASE</u>			TOTAL
		21% or more	16% to 20%	11% to 15%	6% to 10%	1% to 5%	NO CHANGE	1% to 5%	6% to 10%	
<b>OH</b>	N	0	1	0	1	0	0	0	0	2
	%	0.0	50.0	0.0	50.0	0.0	0.0	0.0	0.0	
<b>PA</b>	N	0	0	0	0	0.0	1	0	0	1
	%	0.0	0.0	0.0	0.0	0.0	100.0	0.0	0.0	
<b>TN</b>	N	4	1	1	6	4.0	9	3	1	29
	%	13.8	3.5	3.5	20.7	13.8	31.0	10.3	3.5	
<b>VA</b>	N	0	0	0	2	1.0	5	0	0	8
	%	0.0	0.0	0.0	25.0	12.5	62.5	0.0	0.0	
<b>WV</b>	N	1	0	0	0	0.0	0	0	0	1
	%	100.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
<b>Total</b>	<b>N</b>	12	8	5	19	16	23	3	2	88
	<b>%</b>	13.6%	9.1%	5.7%	21.6%	18.2%	26.1%	3.4%	2.3%	100.0%

2. **Flue-cured:** How do you expect the number of growers in 2011 to compare to the number of growers in 2010?

State		<u>DECREASE</u>				NO CHANGE	TOTAL
		21% or more	11% to 15%	6% to 10%	1% to 5%		
<b>FL</b>	N	1	0	0	0	2	3
	%	33.3%	0.0%	0.0%	0.0%	66.7%	
<b>GA</b>	N	0	3	0	0	7	10
	%	0.0	30.0	0.0	0.0	70	
<b>NC</b>	N	0	2	1	9	1	13
	%	0	15.4	7.7	69.2	7.7	
<b>SC</b>	N	0	0	1	0	1	2
	%	0.0	0.0	50.0	0.0	50.0	

		<u>DECREASE</u>					
State		21% or more	11% to 15%	6% to 10%	1% to 5%	NO CHANGE	TOTAL
<b>VA</b>	N	0	0	0	1	4	5
	%	0.0	0.0	0.0	20.0	80.0	
<b>Total</b>	N	<b>1</b>	<b>5</b>	<b>2</b>	<b>10</b>	<b>15</b>	<b>33</b>
	%	<b>3.0%</b>	<b>15.1%</b>	<b>6.1%</b>	<b>30.3%</b>	<b>45.5%</b>	

3. **Dark Air:** How do you expect the number of growers in 2011 to compare to the number of growers in 2010?

		<u>DECREASE</u>		NO CHANGE	<u>INCREASE</u>	
STATE		6% to 10%	1% to 5%		1% to 5%	TOTAL
<b>KY</b>	N	0	1	2	2	5
	%	0.0%	20.0%	40.0%	40.0%	
<b>NC</b>	N	0	0	1	0	1
	%	0.0	0.0	100.0	0.0	
<b>TN</b>	N	1	1	2	0	4
	%	25.0	25.0	50.0	0.0	
<b>Total</b>	N	<b>1</b>	<b>2</b>	<b>5</b>	<b>2</b>	<b>10</b>
	%	<b>10.0%</b>	<b>20.0%</b>	<b>50.0%</b>	<b>20.0%</b>	

4. **Dark-fired:** How do you expect the number of growers in 2011 to compare to the number of growers in 2010?

		<u>DECREASE</u>			NO CHANGE	<u>INCREASE</u>	
STATE		21% or more	11% to 15%	1% to 5%		1% to 5%	TOTAL
<b>KY</b>	N	1	0	1	1	1	4
	%	25.0%	0.0%	25.0%	25.0%	25.0%	
<b>NC</b>	N	0	0	0	1	0	1

STATE		<u>DECREASE</u>			NO CHANGE	<u>INCREASE</u>		TOTAL
		21% or more	11% to 15%	1% to 5%		1% to 5%		
	%	0.0	0.0	0.0	100.0	0.0		
<b>TN</b>	N	0	1	1	5	0	7	
	%	0.0	14.3	14.3	71.4	0.0		
<b>VA</b>	N	0	0	0	4	1	5	
	%	0.0	0.0	0.0	80.0	20.0		
<b>Total</b>	N	<b>1</b>	<b>1</b>	<b>2</b>	<b>11</b>	<b>2</b>	<b>17</b>	
	%	<b>5.9%</b>	<b>5.9%</b>	<b>11.8%</b>	<b>64.7%</b>	<b>11.8%</b>		

5. **Burley:** How do you expect the number of tobacco acres in 2011 to compare to the number of tobacco acres in 2010?

STATE		<u>DECREASE</u>					NO CHANGE	<u>INCREASE</u>			TOTAL
		21% or more	16% to 20%	11% to 15%	6% to 10%	1% to 5%		1% to 5%	6% to 10%	21% or more	
<b>IN</b>	N	0	0	1	0	1	1	1	0	0	4
	%	0.0%	0.0%	25.0%	0.0%	25.0%	25.0%	25.0%	0.0%	0.0%	
<b>KY</b>	N	4	9	4	8	4	4	1	0	0	34
	%	11.8	26.5	12.0	23.5	12.0	12.0	2.9	0.0	0.0	
<b>MD</b>	N	0	0	0	0	0	1	0	0	0	1
	%	0.0	0.0	0.0	0.0	0.0	100.0	0.0	0.0	0.0	
<b>NC</b>	N	1	1	0	1	2	2	0	0	0	7
	%	14.3	14.3	0.0	14.3	29.0	29.0	0.0	0.0	0.0	
<b>OH</b>	N	0	0	1	1	0	0	0	0	0	2
	%	0.0	0.0	50.0	50.0	0.0	0.0	0.0	0.0	0.0	
<b>PA</b>	N	0	0	0	0	0	1	0	0	0	1
	%	0.0	0.0	0.0	0.0	0.0	100.0	0.0	0.0	0.0	
<b>TN</b>	N	3	2	2	5	3	9	3	1	1	29

STATE		<u>DECREASE</u>					<u>INCREASE</u>				TOTAL
		21% or more	16% to 20%	11% to 15%	6% to 10%	1% to 5%	NO CHANGE	1% to 5%	6% to 10%	21% or more	
	%	10.3	6.9	6.9	17.2	10.0	31.0	10.3	3.5	3.5	
VA	N	0	0	0	3	2	2	1	0	0	8
	%	0.0	0.0	0.0	37.5	25.0	25.0	12.5	0.0	0.0	
WV	N	1	0	0	0	0	0	0	0	0	1
	%	100.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Total	N	9	12	8	18	12	21	6	1	1	88
	%	10.2%	13.6%	9.1%	20.5%	14.0%	24.0%	6.8%	1.1%	1.1%	

6. **Flue-cured:** How do you expect the number of tobacco acres in 2011 to compare to the number of tobacco acres in 2010?

STATE		<u>DECREASE</u>					<u>INCREASE</u>		TOTAL
		21% or more	16% to 20%	11% to 15%	6% to 10%	1% to 5%	NO CHANGE	1% to 5%	
FL	N	0	1	0	0	0	1	1	3
	%	0.0%	33.3%	0.0%	0.0%	0.0%	33.0%	33.3%	
GA	N	1	2	0	1	1	5	0	10
	%	10.0	20.0	0.0	10.0	10.0	50.0	0.0	
NC	N	0	1	1	5	1	2	3	13
	%	0.0	7.7	7.7	38.5	7.7	15.0	23.1	
SC	N	0	0	0	0	0	2	0	2
	%	0.0	0.0	0.0	0.0	0.0	100.0	0.0	
VA	N	0	0	0	0	1	3	1	5
	%	0.0	0.0	0.0	0.0	20.0	60.0	20.0	
Total	N	1	4	1	6	3	13	5	33
	%	3.0%	12.1%	3.0%	18.2%	9.1%	39.0%	15.2%	

7. **Dark Air:** How do you expect the number of tobacco acres in 2011 to compare to the number of tobacco acres in 2010?

STATE		<u>DECREASE</u>		NO CHANGE	<u>INCREASE</u>		TOTAL
		6% to 10%	1% to 5%		1% to 5%	6% to 10%	
KY	N	1	0	3	1	0	5
	%	20.0%	0.0%	60.0%	20.0%	0.0%	
NC	N	0	0	0	0	1	1
	%	0.0	0.0	0.0	0.0	100.0	
TN	N	1	1	2	0	0	4
	%	25.0	25.0	50.0	0.0	0.0	
Total	N	2	1	5	1	1	10
	%	20.0%	10.0%	50.0%	10.0%	10.0%	

8. **Dark-fired:** How do you expect the number of tobacco acres in 2011 to compare to the number of tobacco acres in 2010?

STATE		<u>DECREASE</u>			NO CHANGE	<u>INCREASE</u>		TOTAL
		21% or more	6% to 10%	1% to 5%		1% to 5%	6% to 10%	
KY	N	1	0	1	1	0	1	4
	%	25.0%	0.0%	25.0%	25.0%	0.0%	25.0%	
NC	N	0	0	0	1	0	0	1
	%	0.0	0.0	0.0	100.0	0.0	0.0	
TN	N	0	1	1	5	0	0	7
	%	0.0	14.3	14.0	71.4	0.0	0.0	
VA	N	0	0	0	2	3	0	5

STATE		<u>DECREASE</u>			NO CHANGE	<u>INCREASE</u>		TOTAL
		21% or more	6% to 10%	1% to 5%		1% to 5%	6% to 10%	
	%	0.0	0.0	0.0	40.0	60.0	0.0	
<b>Total</b>	<b>N</b>	<b>1</b>	<b>1</b>	<b>2</b>	<b>9</b>	<b>3</b>	<b>1</b>	<b>17</b>
	%	5.9%	5.9%	12.0%	52.9%	18.0%	5.9%	

## VII. FUTURE PRODUCTION

1. **Burley:** Thinking out 5 years from now, how do you expect the amount of tobacco grown in your county to compare to this year?

STATE		Significantly less	Slightly less	Same	Slightly more	TOTAL
IN	N	0	3	1	0	4
	%	0.0%	75.0%	25.0%	0.0%	
KY	N	19	11	1	3	34
	%	55.9	32.4	2.9	8.8	
MD	N	0	0	0	1	1
	%	0.0	0.0	0.0	100.0	
NC	N	4	2	0	1	7
	%	57.1	28.6	0.0	14.3	
OH	N	1	1	0	0	2
	%	50.0	50.0	0.0	0.0	
PA	N	0	0	1	0	1
	%	0.0	0.0	100.0	0.0	
TN	N	10	12	3	4	29
	%	34.5	41.4	10.3	13.8	
VA	N	2	4	2	0	8
	%	25.0	50.0	25.0	0.0	
WV	N	1	0	0	0	1
	%	100.0	0.0	0.0	0.0	
Total	N	37	33	9	9	88
	%	42.1%	37.5%	10.2%	10.2%	

2. **Flue-cured:** Thinking out 5 years from now, how do you expect the amount of tobacco grown in your county to compare to this year?

STATE		Significantly less	Slightly less	Same	Slightly more	TOTAL
FL	N	2	1	0	0	3
	%	66.7%	33.3%	0.0%	0.0%	
GA	N	4	2	3	1	10
	%	40.0	20.0	30.0	10.0	
NC	N	6	4	1	2	13
	%	46.1	30.8	7.7	15.4	
SC	N	0	2	0	0	2
	%	0.0	100.0	0.0	0.0	
Total	N	12	13	5	3	33
	%	36.4%	39.4%	15.1%	9.1%	

3. **Dark Air:** Thinking out 5 years from now, how do you expect the amount of tobacco grown in your county to compare to this year?

STATE		Slightly less	Same	Slightly more	TOTAL
KY	N	2	1	2	5
	%	40.0%	20.0%	40.0%	
NC	N	0	0	1	1
	%	0.0	0.0	100.0	
TN	N	3	0	1	4
	%	75.0	0.0	25.0	
Total	N	5	1	4	10
	%	50.0%	10.0%	40.0%	

4. **Dark-FIRED:** Thinking out 5 years from now, how do you expect the amount of tobacco grown in your county to compare to this year?

STATE		Significantly less	Slightly less	Same	Slightly more	TOTAL
KY	N	1	1	1	1	4
	%	25.0%	25.0%	25.0%	25.0%	
NC	N	0	1	0	0	1

STATE		Significantly less	Slightly less	Same	Slightly more	TOTAL
	%	0.0	100.0	0.0	0.0	
TN	N	1	2	2	2	7
	%	14.3	28.6	28.6	28.5	
VA	N	1	0	2	2	5
	%	20.0	0.0	40.0	40.0	
Total	N	3	4	5	5	17
	%	17.7%	23.5%	29.4%	29.4%	

## VIII. COST OF PRODUCTION

**Note:** The following questions were asked with responses including one of the following 11 categories listed below. If the following tables do not list all of these 11 categories it because there were no agents chose the missing categories.

1	-21% or more	<b>DECREASE</b>  <b>NO CHANGE</b>  <b>INCREASE</b>
2	-16% to -20%	
3	-11% to -15%	
4	-6% to -10%	
5	-1% to -5%	
6	<b>No Change</b>	
7	1% to 5%	
8	6% to 10%	
9	11% to 15%	
10	16% to 20%	
11	21% or more	

1. **BURLEY:** By what percent do you estimate the total cost of producing an acre of tobacco has increased/decreased in 2010 compared to 2009?

STATE		Decrease by 11% to 15%	Decrease by 6% to 10%	Decrease by 1% to 5%	No change	Increase by 1% to 5%	Increase by 6% to 10%	Increase by 11% to 15%	Increase by 16% to 20%	Increase by 21% or more	TOTAL
IN	N	0	0	0	0	0	4	0	0	0	4
	%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	
KY	N	1	2	2	3	11	9	5	1	0	34
	%	2.9	5.9	5.9	8.8	32.4	26.5	14.7	2.9	0	
MD	N	0	0	0	0	0	0	1	0	0	1
	%	0.0	0.0	0.0	0.0	0.0	0.0	100.0	0.0	0.0	
NC	N	0	0	0	1	3	3	0	0	0	7

STATE		Decrease by 11% to 15%	Decrease by 6% to 10%	Decrease by 1% to 5%	No change	Increase by 1% to 5%	Increase by 6% to 10%	Increase by 11% to 15%	Increase by 16% to 20%	Increase by 21% or more	TOTAL
	%	0.0	0.0	0.0	14.2	42.9	42.9	0.0	0.0	0.0	
OH	N	0	0	0	0	1	0	0	0	1	2
	%	0.0	0.0	0.0	0.0	50.0	0.0	0.0	0.0	50.0	
PA	N	0	0	0	0	1	0	0	0	0	1
	%	0.0	0.0	0.0	0.0	100.0	0.0	0.0	0.0	0.0	
TN	N	0	0	1	3	10	7	6	2	0	29
	%	0.0	0.0	3.5	10.3	34.5	24.1	20.7	6.9	0.0	
VA	N	0	0	0	2	4	1	0	0	1	8
	%	0.0	0.0	0.0	25.0	50.0	12.5	0.0	0.0	12.5	
WV	N	0	0	1	0	0	0	0	0	0	1
	%	0.0	0.0	100.0	0.0	0.0	0.0	0.0	0.0	0.0	
<b>Total</b>	<b>N</b>	<b>1</b>	<b>2</b>	<b>4</b>	<b>9</b>	<b>30</b>	<b>25</b>	<b>12</b>	<b>3</b>	<b>2</b>	<b>88</b>
	<b>%</b>	<b>1.1%</b>	<b>2.3%</b>	<b>4.6%</b>	<b>10.2%</b>	<b>34.1%</b>	<b>28.4%</b>	<b>13.6%</b>	<b>3.4%</b>	<b>2.3%</b>	

2. **Flue-cured:** By what percent do you estimate the total cost of producing an acre of tobacco has increased/decreased in 2010 compared to 2009?

STATE		Decrease by 1% to 5%	No change	Increase by 1% to 5%	Increase by 6% to 10%	Increase by 11% to 15%	Increase by 21% or more	TOTAL
FL	N	0	0	1	2	0	0	3
	%	0.0%	0.0%	33.3%	66.7%	0.0%	0.0%	
GA	N	1	0	2	5	2	0	10
	%	10.0%	0.0	20.0%	50.0%	20.0%	0.0	
NC	N	1	1	5	5	1	0	13
	%	7.7%	7.7%	38.5%	38.5%	7.69	0	

STATE		Decrease by 1% to 5%	No change	Increase by 1% to 5%	Increase by 6% to 10%	Increase by 11% to 15%	Increase by 21% or more	TOTAL
SC	N	0	0	0	1	1	0	2
	%	0	0	0	50	50	0	
VA	N	0	0	0	3	1	1	5
	%	0	0	0	60	20	20	
Total	N	2	1	8	16	5	1	33
	%	6.1%	3.0%	24.2%	48.5%	15.2%	3.0%	

3. **Dark Air:** By what percent do you estimate the total cost of producing an acre of tobacco has increased/decreased in 2010 compared to 2009?

STATE		Decrease by 6% to 10%	Increase by 1% to 5%	Increase by 6% to 10%	TOTAL
KY	N	1	3	1	5
	%	20.0%	60.0%	20.0%	
NC	N	0	1	0	1
	%	0.0	100.0	0.0	
TN	N	0	3	1	4
	%	0.0	75.0	25.0	
Total	N	1	7	2	10
	%	10.0%	70.0%	20.0%	

4. **Dark-fired:** By what percent do you estimate the total cost of producing an acre of tobacco has increased/decreased in 2010 compared to 2009?

STATE		Decrease by 6% to 10%	No change	Increase by 1% to 5%	Increase by 6% to 10%	Increase by 11% to 15%	Increase by 21% or more	TOTAL
KY	N	1	0	2	1	0	0	4
	%	25.0	0.0	50.0	25.0	0.0	0.0	
NC	N	0	0	0	1	0	0	1
	%	0.0	0.0	0.0	100.0	0.0	0.0	
TN	N	0	1	3	2	1	0	7
	%	0.0	14.3	42.9	28.6	14.3	0.0	
VA	N	0	1	2	1	0	1	5
	%	0.0	20.0	40.0	20.0	0.0	20.0	
Total	N	1	2	7	5	1	1	17
	%	5.9%	11.8%	41.2%	29.4%	5.9%	5.9%	

5. Please indicate how much change in the cost of the following factors contributed to the increase/decrease in the total cost of producing an acre of tobacco in 2010.

- 1= No Impact at All
- 2 = Limited Impact
- 3=Moderate Impact
- 4=Strong Impact

Factor	No Impact %	Limited Impact %	Moderate Impact %	Strong Impact %	N	Mean
Barn Rent	57.7	34.2	8.1	0.0	111	1.5
Land Rent	27.9	48.7	20.7	2.7	111	2.0
Fertilizer	4.5	25.2	38.7	31.5	111	3.0
Fuel	6.3	19.8	48.7	25.2	111	2.9
Labor	4.5	20.7	43.2	31.5	111	3.0
Chemicals	5.4	27.9	50.5	16.2	111	2.8
Irrigation	45.1	29.7	15.3	9.9	111	1.9
Curing Inputs besides Fuel (Such as sawdust, slabs, etc.)	62.2	25.2	10.8	1.8	111	1.5

6. Please list any other factors not listed in the previous question that significantly contributed to the increase/decrease in the total cost of producing an acre of tobacco in 2010.

- Barn maintenance cost: heat exchangers, motors, other parts related to barn age.
- Distance to buying point (transportation cost)
- Dry season or drought increases cost per acre due to lost value and more trips across the field
- Reduction in pounds or crop rejection
- Transplant costs
- Big balers because of companies' requirement to strip into the large bales. Growers had to either take a cut for using the small bales or purchase a large bailer.
- Cost of corn or soybean alternatives

## IX. BURLEY INFRASTRUCTURE

1. Approximately how many acres capacity of curing structures/barns have been purchased or built in your county since January of 2010?

STATE	Field Structures (acres)		Barns (acres)	
	N	Total	N	Total
Indiana	4	0	4	0
Kentucky	33	686	33	936
Maryland	1	5	1	5
North Carolina	7	85	7	60
Ohio	2	0	2	0
Pennsylvania	1	50	1	50
Tennessee	29	361	29	12
Virginia	8	35	8	10
West Virginia	1	0	1	0
Wisconsin	1	0	1	0
<b>TOTAL</b>	<b>87</b>	<b>1222</b>	<b>87</b>	<b>1073</b>

2. Please estimate the percent of burley tobacco in your county that is marketed in big bales.

STATE	Big Bales%	
	N	Mean%
Indiana	4	75
Kentucky	32	57
Maryland	1	30
North Carolina	7	86
Ohio	2	15
Pennsylvania	1	50
Tennessee	29	38
Virginia	8	67
West Virginia	1	0
Wisconsin	1	0
<b>TOTAL &amp; AVG%</b>	<b>86</b>	<b>52%</b>

3. Please estimate the percent of burley tobacco in your county that has some form of mechanization involved in production or market prep (i.e. mechanical harvesters, stripping aids, mechanical stripper/grader)

STATE	Mechanization%	
	N	Mean%
Indiana	4	6
Kentucky	32	13
Maryland	1	25
North Carolina	7	49
Ohio	2	3
Pennsylvania	1	0
Tennessee	29	7
Virginia	8	19
West Virginia	1	25
Wisconsin	1	0
<b>TOTAL &amp; AVG%</b>	<b>86</b>	<b>14%</b>

## X. FLUE-CURED INFRASTRUCTURE

1. Approximately how many acres capacity of flue-cured bulk barns have been installed in your county since January of 2010?

STATE	Barns (acres)	
	N	Total
Florida	3	0
Georgia	10	290
North Carolina	13	1800
South Carolina	2	0
Virginia	5	440
<b>TOTAL</b>	<b>33</b>	<b>2530</b>

2. What percent of the flue-cured bulk barns installed since January of 2010 were purchased as new barns?

STATE	Barns (acres)	
	N	Mean%
Georgia	4	0
North Carolina	6	9
Virginia	4	5
<b>TOTAL &amp; AVG %</b>	<b>14</b>	<b>5%</b>

3. Please estimate the percent of flue-cured tobacco in your county that is mechanically harvested?

STATE	Barns (acres)	
	N	Mean%
Florida	3	67
Georgia	10	77
North Carolina	13	72
South Carolina	2	97
Virginia	5	62
<b>TOTAL &amp; AVG %</b>	<b>33</b>	<b>73%</b>

## XI. DARK INFRASTRUCTURE

1. Approximately how many acres capacity of dark tobacco barns have been installed in your county since January of 2010?

STATE	Dark Air Barns (acres)		Dark-fired Barns (acres)	
	N	Total	N	Total
Kentucky	6	0	6	20
North Carolina	2	0	2	0
Tennessee	7	25	7	168
Virginia	5	0	5	0
<b>TOTAL</b>	<b>20</b>	<b>25</b>	<b>20</b>	<b>188</b>

2. What percentage of dark tobacco growers in your county double-crop cure at least a percentage of their acreage?

STATE	Double-crop Cure (%)	
	N	Mean %
Kentucky	6	23
North Carolina	2	0
Tennessee	7	31
Virginia	5	0
<b>TOTAL &amp; AVG %</b>	<b>20</b>	<b>18%</b>

## XII. INCREASE or DECREASE PRODUCTION

### 1. How likely are the following items to cause an increase in tobacco production in your county?

- 1= Not likely at all
- 2= Somewhat likely
- 3= Not sure
- 4=Somewhat likely
- 5=Extremely likely

STATE	Adoption of mechanical harvesters		Cost-share programs for tobacco barns and equipment	Higher prices	Long-term contracts	Low-interest loans	Production contracts (similar to poultry)	Production incentive payment programs	Guaranteed minimum returns per pound
	N	Mean	Mean	Mean	Mean	Mean	Mean	Mean	Mean
FL	3	2.0	2.0	4.3	4.7	4.0	3.3	3.7	4.3
GA	10	1.8	2.3	4.5	4.6	3.1	4.0	3.8	4.1
IN	4	2.8	3.3	4.5	4.3	3.8	3.5	4.3	4.0
KY	32	1.9	3.2	4.6	4.5	3.0	3.6	3.8	4.3
MD	1	3.0	2.0	5.0	2.0	1.0	1.0	4.0	5.0
NC	13	1.2	2.8	4.6	4.4	2.4	2.6	4.1	4.5
OH	2	1.0	1.5	3.0	4.0	2.5	3.0	3.0	3.5
PA	1	1.0	4.0	5.0	5.0	4.0	4.0	3.0	4.0
SC	2	1.0	1.0	3.0	4.0	1.0	4.0	4.5	5.0
TN	30	2.3	3.4	4.6	3.8	2.5	3.3	3.9	4.4
VA	9	1.6	3.1	4.7	4.1	1.3	3.2	3.0	4.0
WV	1	1.0	4.0	4.0	5.0	2.0	4.0	4.0	4.0
WI	2	1.5	1.0	4.0	4.0	1.5	1.5	3.0	3.0
<b>TOTAL</b>	<b>110</b>	<b>1.9</b>	<b>3.0</b>	<b>4.5</b>	<b>4.2</b>	<b>2.6</b>	<b>3.3</b>	<b>3.8</b>	<b>4.3</b>

Factor	Not likely at all %	Somewhat unlikely %	Not sure %	Somewhat likely %	Extremely likely %	N	Mean
Adoption of mechanical harvesters	50.9	22.7	12.7	13.6	0.0	110	1.9
Cost-share programs for tobacco barns and equipment	20.9	20.9	8.2	40.9	9.1	110	3.0
Higher prices	0.9	0.9	0.0	40.9	57.3	110	4.5
Long-term contracts	0.9	2.7	11.8	41.8	42.7	110	4.2
Low-interest loans	24.6	20.9	23.6	27.3	3.6	110	2.6
Production contracts (similar to poultry	10.0	8.2	31.8	39.1	10.9	110	3.3
Production incentive payment programs	3.6	6.4	13.6	61.8	14.6	110	3.8
Guaranteed minimum returns per pound	0.9	2.7	5.5	50.0	40.9	110	4.3

2. Please list any other factors not listed in the previous question that could likely cause an increase in tobacco production in your county?

- A feeling of security that they are going to be able to sell their product.
- Better Company Buying Programs and contracts honored by the companies
- Better Company to grower relationships
- Better image of tobacco and tobacco companies
- Buying stations located closer to upper East TN, SW VA, or Western NC.
- Stable price/grade system, and let employees with direct tobacco growing experience be involved with contract and price negotiations.
- Consistency and stability within the companies' contracts.
- Fewer restrictions in the contract
- Access to a local auction market for growers in southern Wisconsin in Vernon County
- Less FDA rules and regulations on cigarette companies as well as less tax on cigarettes.
- Market stability and trust between buyers and growers
- Markets closer to home
- More readily available, dependable and experienced labor.
- Stable fuel prices
- A decline in corn and soybean prices

3. Consider the growers who quit or decreased tobacco production in 2010. Describe how important you think the following factors were to their decision.

- 1= Not important at all
- 2= Somewhat important
- 3= Extremely important

Factor	Not important at all %	Somewhat important %	Extremely important %	N	Mean
Not receiving a contract	5.6	17.6	76.8	108	<b>2.7</b>
Their current age	17.6	59.3	23.1	108	<b>2.1</b>
Labor not available	24.1	45.4	30.5	108	<b>2.1</b>
Cost of fuel	32.4	56.5	11.1	108	<b>1.8</b>
Cost of financing	48.1	45.4	6.5	108	<b>1.6</b>
Financing not available	56.5	33.3	10.2	108	<b>1.5</b>
Age of equipment or barns	37.0	51.9	11.1	108	<b>1.7</b>
Opportunity to grow other crops	48.1	42.6	9.3	108	<b>1.6</b>
Opportunity to raise livestock	55.6	39.8	4.6	108	<b>1.5</b>
Off-farm income opportunities	42.6	45.4	12.0	108	<b>1.7</b>
No one to manage the farm	53.7	40.7	5.6	108	<b>1.5</b>
Uncertainty about future income from tobacco	10.2	35.2	54.6	108	<b>2.4</b>

4. Please list any other factors not listed in the previous question that were important to their decision to quit or decrease production.

- Access to markets
- Companies decreasing quotas on the contracts.
- Even with a contract - when a company tells a grower they do not want their tobacco at any price.
- Just tired of the hassle, from contracts to GAP assessments.
- Price of peanuts, corn, cotton and soybeans.
- Burley price reduction on lower grades with no price increase for higher grades
- Inconsistent grading and mistrust of buying companies

### XIII. MARKETING

1. Think about the most common issues that growers discuss about marketing their tobacco. Please describe how often you hear statements similar to the following.

- 1= Never
- 2= Rarely
- 3= Occasionally
- 4= Regularly

#### Part 1

		Contract terms are too complicated	Pricing method is too complicated	Moisture testing equipment is not consistent	Moisture level allowed is too low	Too many stalk positions are required
STATE	N	Mean	Mean	Mean	Mean	Mean
FL	3	3.7	3.3	2.3	2.3	2.7
GA	10	2.4	2.4	2.1	1.8	2.8
IN	4	2.5	3.0	2.3	2.0	2.0
KY	31	3.1	3.1	3.3	3.0	2.9
MD	1	3.0	3.0	1.0	1.0	3.0
NC	13	2.3	2.7	2.6	1.9	3.0
OH	2	2.5	3.0	3.0	3.0	3.0
PA	1	2.0	3.0	2.0	3.0	2.0
SC	2	2.0	2.5	2.5	2.0	2.5
TN	29	2.8	2.7	2.9	2.8	2.2
VA	9	3.0	3.0	2.7	2.2	3.0
WV	1	3.0	3.0	3.0	2.0	3.0
WI	2	2.5	2.5	2.0	2.5	1.0
<b>TOTAL</b>	<b>108</b>	<b>2.8</b>	<b>2.9</b>	<b>2.8</b>	<b>2.5</b>	<b>2.6</b>

Part 2

		Grading is not consistent	Distance to the marketing station is too far	Wait times to unload at the marketing stations are too long	Storing tobacco prior to sale is a problem	Not enough communication from the buying company
STATE	N	Mean	Mean	Mean	Mean	Mean
FL	3	2.7	3.7	2.0	2.0	3.3
GA	10	3.1	2.3	2.1	1.7	2.2
IN	4	3.0	2.3	1.8	2.3	2.5
KY	31	3.5	2.5	2.1	2.4	3.2
MD	1	3.0	4.0	3.0	2.0	2.0
NC	13	3.8	1.9	1.7	1.9	3.2
OH	2	4.0	3.0	2.0	2.0	3.0
PA	1	3.0	1.0	2.0	2.0	3.0
SC	2	3.0	1.5	1.5	1.5	2.0
TN	29	2.7	2.9	2.1	2.3	2.9
VA	9	3.7	2.1	2.0	1.9	3.3
WV	1	3.0	3.0	2.0	2.0	2.0
WI	2	1.0	2.5	1.5	1.5	1.5
<b>TOTAL</b>	<b>108</b>	<b>3.2</b>	<b>2.5</b>	<b>2.0</b>	<b>2.1</b>	<b>2.9</b>

Factor	Never %	Rarely %	Occasionally %	Regularly %	N	Mean
Contract terms are too complicated	8.3	23.2	50.0	18.5	108	2.8
Pricing method is too complicated	5.6	22.2	53.7	18.5	108	2.9
Moisture testing equipment is not consistent	10.2	28.7	32.4	28.7	108	2.8
Moisture level allowed is too low	15.7	30.6	38.9	14.8	108	2.5
Too many stalk positions are required	10.2	32.4	40.7	16.7	108	2.6
Grading is not consistent	6.5	14.8	32.4	46.3	108	3.2
Distance to the marketing station is too far	16.7	36.1	27.8	19.4	108	2.5
Wait times to unload at the marketing stations are too long	26.9	50.9	16.7	5.5	108	2.0
Storing tobacco prior to sale is a problem	26.9	40.7	25.0	7.4	108	2.1
Not enough communication from the buying company	6.5	24.1	38.0	31.5	108	2.9

2. Please list any other concerns/issues not listed in the previous question related to marketing that you often hear about.

- Companies not adjusting grading in the event of drought conditions. Limiting pounds purchase of lower grading tobacco, offering very low prices for lower quality. Having quota for each grade of tobacco.
- Company representatives at the buying stations are inconsiderate and extremely rude to producers. Difference in price on the same tobacco from beginning to the end of the season.
- High contract labor (H2A) and intense farm inspections from companies may play roles next year.
- Irregular grading habits of buyers evident between farms and inconsistent grading between different buyers.
- Consistency in grading tobacco.
- Returns from investment are much too low. Risk is out of proportion with other alternatives. Unfair grading practices.

#### XIV. PRODUCTION IN 2011

1. Now considering 2011 production decisions. Describe how important the following factors will be to growers' decisions of whether or not and how much tobacco to produce in 2011.

- 1= Not important at all
- 2= Somewhat important
- 3= Extremely important

<b>Factor</b>	<b>Not important at all %</b>	<b>Somewhat important %</b>	<b>Extremely important %</b>	<b>N</b>	<b>Mean</b>
Availability of financing	36.1	52.8	11.1	108	<b>1.8</b>
Availability of labor	8.3	48.2	43.5	108	<b>2.4</b>
Cost of labor	1.8	38.9	59.3	108	<b>2.6</b>
Availability of curing barns/structures	38.0	54.6	7.4	108	<b>1.7</b>
Age of equipment and/or barns	30.6	58.3	11.1	108	<b>1.8</b>
Availability of land	41.7	45.4	12.9	108	<b>1.7</b>
Cost of inputs	2.8	39.8	57.4	108	<b>2.5</b>
Other crop or livestock opportunities	32.4	56.5	11.1	108	<b>1.8</b>
Off-farm income opportunities	35.2	50.9	13.9	108	<b>1.8</b>
Price of tobacco	0.9	10.2	88.9	108	<b>2.9</b>
Changes in contracts	0.9	17.6	81.5	108	<b>2.8</b>
Uncertainty about future income from tobacco	1.8	26.9	71.3	108	<b>2.7</b>

## XV. AGENT SUPPORT

1. Consider the support you provide to tobacco growers in your county. Indicate how often your work with growers on issues in the following areas.

		Financial Issues	Labor issues	Marketing issues	Disease management	Pest management	Variety selection	Policy issues
STATE	N	Mean	Mean	Mean	Mean	Mean	Mean	Mean
FL	3	2.0	2.3	2.3	4.0	4.0	3.3	3.0
GA	10	2.3	2.2	2.2	3.8	3.8	3.3	2.3
IN	4	1.8	2.0	1.8	3.0	3.0	2.0	1.5
KY	31	2.4	2.6	2.8	3.8	3.7	3.6	2.5
MD	1	2.0	2.0	3.0	4.0	4.0	3.0	2.0
NC	13	2.2	2.4	2.9	3.9	3.8	3.6	2.8
OH	2	2.5	2.5	3.0	3.0	3.0	2.5	2.0
PA	1	1.0	1.0	3.0	4.0	4.0	2.0	2.0
SC	2	1.0	1.0	1.5	3.5	3.5	3.5	2.0
TN	29	2.0	2.3	2.5	3.4	3.3	2.9	2.1
VA	9	2.6	3.0	2.9	3.9	3.9	3.8	2.8
WV	1	1.0	3.0	3.0	4.0	4.0	3.0	2.0
WI	2	1.5	1.5	2.5	3.5	3.5	2.0	2.5
<b>TOTAL</b>	<b>108</b>	<b>2.1</b>	<b>2.4</b>	<b>2.6</b>	<b>3.7</b>	<b>3.6</b>	<b>3.3</b>	<b>2.4</b>

Agent Support Issues	Never %	Rarely %	Occasionally %	Regularly %	N	Mean
Financial Issues	23.1	46.3	23.2	7.4	108	2.1
Labor issues	15.7	36.1	40.7	7.4	108	2.4
Marketing issues	13.0	29.6	40.7	16.7	108	2.6
Disease management	0.9	3.7	21.3	74.1	108	3.7
Pest management	0.9	6.5	21.3	71.3	108	3.6
Variety selection	5.6	15.7	26.9	51.9	108	3.3
Policy issues	13.9	44.4	31.5	10.2	108	2.4

2. Please list any other areas or issues not listed in the previous question that you spend a significant amount of time on working with tobacco growers.

- Economics of crop production and management t, nutrient and water management.
- Fertility, topping, suckering, barn maintenance.
- GAP requirements
- Greenhouse issues, disease identification, helping growers deal with insurance when they have claim.
- Compliance issues with NCDA and NCDOL

3. Please share additional comments

- Acceptable pricing, a consistent and dependable source of good labor, consistent grading practices, and long term contracts to make long term obligation/commitments are the key needs of our tobacco producers.
- If the economy is as bad as or worse than 2009-10, there may be an increase in tobacco grown.
- One of the problems we face in Extension is the lack of communication from the tobacco companies. We used to have regular communication from the industry and now if we hear anything it is always second hand. It is very hard to help growers accomplish what that they need.
- Outlook at present for tobacco in this area is marginal when compared to potential profit margins in corn, soybean, cotton and peanuts for 2011.
- Small growers are not wanted and that is what we have.
- The tobacco business in area is totally run by the tobacco companies. The growers either get a contract or they don't. Those who don't look for more land to farm other crops to provide an income from farming.
- We have gone from 1300 acres to 50. Almost did not bother to consider myself as a tobacco county anymore.
- When contracting started almost all my producers quit because of price.