

THE

Tobacco

SITUATION

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

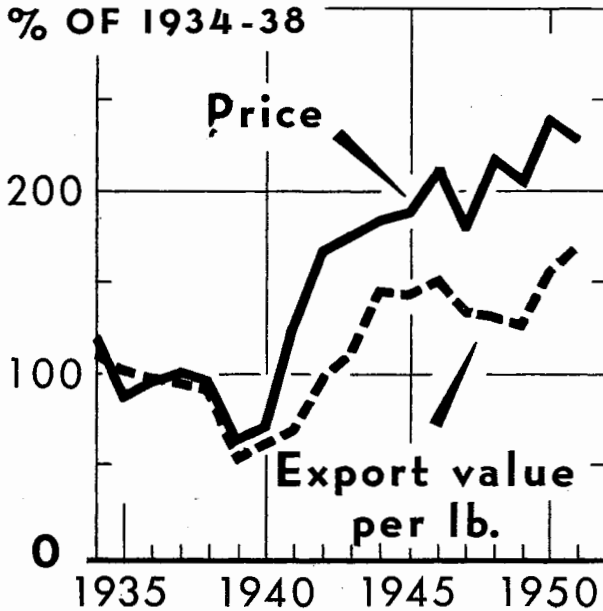


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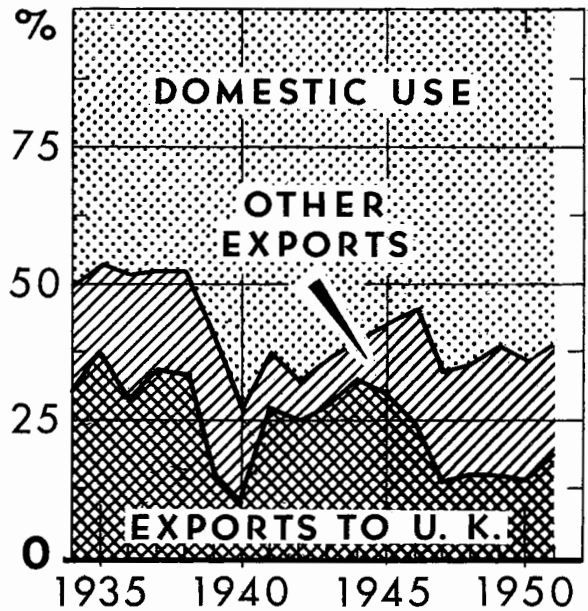
AUG - 1952

FLUE-CURED TOBACCO

SEASON AV. PRICE & EXPORT VALUE



% DISTRIBUTION OF DISAPPEARANCE



YEAR BEGINNING JULY

U. S. DEPARTMENT OF AGRICULTURE

NEG. 48264-XX BUREAU OF AGRICULTURAL ECONOMICS

The average price received by flue-cured tobacco growers for the 1951 crop was 4 percent less than the record of 1950. In fiscal 1951-52, the average declared value per pound of flue-cured exports reached a new high—about 8 percent above the 1950-51 average. However, prices paid for export quantities apparently have risen less above prewar than the average price paid for the crop as a whole. Since 1934-38 domestic consumption has risen much more than have exports. Even though flue-cured exports increased about one-sixth from 1950-51 to 1951-52

and were well above prewar, they still accounted for a smaller proportion of total disappearance than before the war.

The 1951-52 exports to the United Kingdom, the major export outlet, were sharply above those in each of the preceding 4 years and near their prewar level. Mostly because of reduced takings by the United Kingdom and some other Commonwealth countries, flue-cured exports in 1952-53 will be smaller than in 1951-52.

STATISTICAL SUMMARY

Item	Unit or base period	1951				1952				Last data available as percentage of a year earlier		
		April	May	June	July	April	May	June	July			
Average prices at auctions												
Flue-cured	Cents per lb.	C - 1 - o - s - e - d				51.0	C - 1 - o - s - e - d				52.2	102
Burley	Cents per lb.	C - 1 - o - s - e - d					C - 1 - o - s - e - d					
Maryland	Cents per lb.	Closed	50.9	49.4	48.3	Closed	44.0	43.5	46.9	97		
Fire-cured	Cents per lb.	C - 1 - o - s - e - d					C - 1 - o - s - e - d					
Dark air-cured (35-36)	Cents per lb.	C - 1 - o - s - e - d					C - 1 - o - s - e - d					
Virginia sun-cured (37)	Cents per lb.	C - 1 - o - s - e - d					C - 1 - o - s - e - d					
Parity prices												
Flue-cured	Cents per lb.	56.3	56.1	56.3	56.1	56.4	56.4	55.8	55.8	99		
Burley	Cents per lb.	55.5	55.3	55.5	55.3	55.2	55.2	54.6	54.6	99		
Maryland	Cents per lb.	60.8	60.6	60.8	60.6	59.5	59.5	58.9	58.9	97		
Fire-cured	Cents per lb.	33.7	33.6	33.7	33.6	35.0	35.0	34.6	34.6	103		
Dark air-cured (35-36)	Cents per lb.	29.7	29.6	29.7	29.6	30.6	30.6	30.3	30.3	102		
Virginia sun-cured (37)	Cents per lb.	37.6	37.5	37.6	37.5	37.9	37.9	37.5	37.5	100		
Parity index 1/	1910-14=100	283	283	282	282	289	289	286	286	101		
Tax-paid withdrawals												
Cigarettes, small	Billion	30	33	32	30	32	32	36	34	113		
Cigars, large	Million	444	479	503	422	492	497	496	504	119		
Chewing and smoking	Mill. lb.	15	16	16	12	15	15	15	14	117		
Snuff	Mill. lb.	3.5	3.3	3.1	4.0	3.5	3.2	3.1	2.1	52		
Accumulated from Jan. 1												
Cigarettes, small	Billion	122	155	187	217	125	157	192	226	104		
Cigars, large	Million	1,793	2,272	2,775	3,197	1,911	2,408	2,904	3,408	107		
Chewing and smoking	Mill. lb.	61	77	93	105	59	74	89	103	98		
Snuff	Mill. lb.	14	17	20	24	14	17	20	22	92		
Tax-free removals												
Cigarettes, small	Billion	3	4	3	2	3	3	2	2	67		
Cigars, large	Million	10	6	6	5	7	5	4	4	67		
Chewing and smoking	Mill. lb.	.7	.6	.5	.4	.4	.4	.5		100		
Accumulated from Jan. 1												
Cigarettes, small	Billion	12	16	20	22	13	16	19		95		
Cigars, large	Million	30	36	42	48	36	41	45		107		
Chewing and smoking	Mill. lb.	2.3	2.9	3.4	3.8	2.3	2.7	3.2		94		
Personal income 2/	Bil. dol.	250	251	254	254	262	264	266		105		
Index of industrial production 3/	1935-39=100	223	222	221	212	216	211	203	191	90		
Employment	Million	60.0	61.2	61.8	62.5	60.1	61.2	62.6	62.2	100		
Pct. labor force employed	Monthly	97.2	97.4	96.9	97.1	97.4	97.4	97.2	97.0	100		
Exports (farm-sales wt.)												
Flue-cured	Mill. lb.	24.0	17.9	19.1	22.9	13.9	24.7	25.4		133		
Burley	Mill. lb.	4.4	3.1	2.1	.8	2.5	2.8	1.5		71		
Maryland	Mill. lb.	1.6	1.3	1.3	.2	.8	.6	.3		23		
Fire-cured	Mill. lb.	4.5	5.2	4.7	2.2	1.9	1.3	2.4		51		
Dark air-cured	Mill. lb.	.9	.4	1.9	.4	1.0	.3	.9		47		
Cigar	Mill. lb.	.9	.6	.7	.5	.2	.8	.3		43		
Accumulated from beginning of marketing yr. 4/												
Flue-cured	Mill. lb.	390.6	408.6	427.7	422.9	451.9	476.6	502.0		117		
Burley	Mill. lb.	19.2	22.4	24.4	25.2	15.6	18.3	19.9		82		
Maryland	Mill. lb.	4.4	5.7	7.0	7.2	3.8	4.4	4.7		67		
Fire-cured	Mill. lb.	23.8	29.0	33.7	35.9	18.7	20.0	22.4		66		
Dark air-cured	Mill. lb.	4.8	5.2	7.1	7.5	5.7	6.0	6.9		97		
Cigar filler and binder	Mill. lb.	2.0	2.3	2.6	2.9	2.0	2.3	2.5		96		
Cigar wrapper	Mill. lb.	2.8	3.2	3.6	4.2	3.0	3.4	3.6		100		
U.S. imports, all commodities												
Accumulated from Jan. 1	Mill. dol.	3,930	4,876	5,791	6,678	3,724	4,567	5,424		94		
Sterling area gold and dollar reserves 5/	Mill. dol.			3,867				1,685	1,716	44		
Stocks of domestic types (farm-sales weight) 6/												
Flue-cured	Mill. lb.	1,796			1,558	1,990			1,731	111		
Burley	Mill. lb.	1,241			1,120	1,344			1,205	108		
Maryland	Mill. lb.	47			52	52			64	123		
Fire-cured	Mill. lb.	178			160	173			160	100		
Dark air-cured	Mill. lb.	90			80	87			80	100		
Cigar, filler	Mill. lb.	212			227	218			217	96		
Cigar, binder	Mill. lb.	163			157	159			147	94		
Cigar, wrapper	Mill. lb.	24			20	25			21	105		

1/ Prices paid, interest, taxes, and farm wage rates. 2/ Annual rate, seasonally adjusted. 3/ Adjusted for seasonal variation.

4/ July 1 for flue-cured and cigar wrapper, and October 1 for other types. 5/ Held in London as of the end of the month.

6/ Dealers' and manufacturers' holdings in United States and Puerto Rico on first day of quarter.

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 T H E T O B A C C O S I T U A T I O N
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Approved by the Outlook and Situation Board August 28, 1952

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SUMMARY

Domestic demand for the major cigarette tobaccos--flue-cured and Burley--is expected to continue strong but exports of unmanufactured tobacco during the 1952-53 fiscal year probably will be moderately lower than in 1951-52.

With prospects that employment and consumer income will continue high, cigarette production in the current fiscal year is expected to be at or a little above the 422 billion for 1951-52. The output last year included 38 billion tax-free cigarettes, most of which were exported or shipped for the use of overseas forces. Practically all of the remainder were consumed in the United States.

A reduction in exports of unmanufactured tobacco is expected mainly because the United Kingdom and probably some other countries will take less as a result of their efforts to restore gold and dollar reserves and to achieve a trade balance with the dollar area. In 1951-52, exports amounted to 517 million pounds (declared weight), 8 percent more than in 1950-51. Value of the exports was 325 million dollars, 19 percent more than a year earlier. Larger takings by Britain were mainly responsible for the increase in exports of unmanufactured tobacco over 1950-51. Flue-cured tobacco made up 86 percent of total exports.

Both the flue-cured and Burley acreage are estimated to be slightly above that of 1951, but hot, dry weather has been a major factor reducing the prospective sizes of both crops below last year's production. With the carry-overs of flue-cured and Burley larger than last year's however, total supplies for 1952-53 probably will be a little above those for 1951-52.

The domestic use of flue-cured in 1951-52 was above that of any previous year while exports were one-sixth larger than in 1950-51 and the second largest on record.

The flue-cured auctions began on July 21, and gross sales by the end of August totaled 374 million pounds at an average price of 50.9 cents per pound. This compares with 422 million pounds at 49.2 cents in the comparable period of the 1951 season. The Government price support level for the 1952 crop is 50.6 cents compared with 50.7 cents for last year's crop. Because of higher prices for most grades, growers have been placing less under Government loan this year than last.

The domestic use of Burley in the current marketing year which ends on September 30, is estimated at about 3 percent above 1950-51. Although most of the Burley is used in cigarette manufacture, a sizable quantity is used in the production of smoking tobacco. Output of smoking tobacco in the 1951-52 fiscal year was 98 million pounds--7 1/2 percent lower than in 1950-51 and the lowest since the early 1900's. Burley exports during the first 9 months of the marketing year, averaged 18 percent lower than in the same period of 1950-51. Burley marketings usually begin around December 1. The support price for the 1952 crop is likely to be near that for last year's crop.

The 1952 acreage and production of Maryland tobacco are indicated to be down 6 and 18 percent from 1951. However, carry-over is likely to be a record and the total supply for 1953 probably will be near that for 1952. Maryland auctions for the 1951 crop closed on August 8, and the season's average price was 43.8 cents per pound, 8 percent lower than in the previous season. Government price supports were not available because growers disapproved a marketing quota on the 1951 Maryland crop.

The fire-cured acreage is indicated at about 5 percent lower than in 1951. With the drought reducing yields, August 1 indications pointed to a crop about one-fifth below last year's. The October 1 carry-over probably will be lower and the total supply for 1952-53 may be about 9 percent below the 1951-52 level. Total disappearance of fire-cured in the year ending September 30 will be less than in 1950-51. Although domestic use probably will be nearly the same, exports may be as much as one-fourth lower. Snuff manufacture, the main domestic outlet, was 39.1 million pounds in the 1951-52 fiscal year, about 3 percent less than in 1950-51.

The August 1 prospect was for a dark air-cured tobacco crop 17 percent less than that of 1951. Drought conditions are mainly responsible for the reduction from last year. The October 1 carry-over probably will be nearly as large as a year earlier. Consequently, the 1952-53 total supply seems likely to be only about 7 percent lower than in 1951-52. The principal use of dark air-cured tobacco is in chewing tobacco. In the 1951-52 fiscal year, output of chewing tobacco was 86 million pounds--about 2 percent less than in 1951-52. About 45 percent of total chewing tobacco was scrap chewing--mainly an outlet for lower grades of the cigar binder types.

In the year ending June 30, cigar consumption in the United States and by overseas forces totaled about 5,900 million--nearly 3 percent more than in 1950-51. Domestic factories produced close to 97 percent of the total.

The 1952 indicated acreage of cigar filler is 23 percent lower than the 1951 harvested acreage. All of the drop occurred in Pennsylvania, where the crop may be one-third smaller than in 1951. Ohio filler acreage was indicated to be larger. The 1952-53 supply of the continental filler types--production plus carry-over--is expected to be about 7 percent below the 1951-52 level. July 1 stocks of Puerto Rican filler were approximately one-sixth lower than on July 1, 1951.

The indicated combined acreage of the binder types is nearly the same as last year's harvested acreage. The October 1 carry-over of the binder types is likely to be smaller than a year earlier, and the prospective 1952-53 total supply may be about 6 percent lower than the 1951-52 level.

The increase in the July 1 carry-over of shade-grown wrapper over that of July 1, 1951, about offsets the indicated decrease in this year's crop from last year's, and the 1952-53 supplies probably will be about the same as in 1951-52.

TOBACCO PRODUCTS

Cigarettes

Cigarette output during the fiscal year ending June 30, 1952, totaled 422 billion--15 billion above the preceding year and a new record. Tax-paid consumption in the United States was about 383 billion--nearly 4 percent higher than in 1950-51. The tax-free group accounted for 38 billion in 1951-52--about the same as in 1950-51. The great bulk of the tax-free group are shipped for use of overseas forces or exported to foreign countries. Cigarette consumption in the United States in the year ahead is expected to continue at a record or near record level. The prospects are for continued levels of high employment and personal incomes, and will tend to favor a large consumption of cigarettes.

Table 1.- Cigarettes: Output, domestic consumption and exports, for specified periods

Period	Total output	Domestic 1/ consumption	Tax-free removals 2/	
	Billions	Billions	Total Billions	Exports Billions
Average:				
1935-39	164.2	157.0	7.2	5.5
1940-44	256.9	223.5	33.3	5.8
1945	332.2	267.2	65.0	6.9
1946	350.0	321.7	30.7	24.1
1947	369.7	335.4	34.3	22.8
1948	386.8	348.5	38.7	25.2
1949	385.0	351.8	33.2	19.5
1950	392.0	360.2	31.8	14.3
1951	418.8	378.3	38.9	16.8
January-June 1951	207.3	187.3	19.6	8.1
January-June 1952	210.6	191.5	18.8	7.8
			<u>Fiscal year</u>	
July 1949-June 1950	383.3	354.7	28.6	16.3
July 1950-June 1951	407.3	369.2	38.1	15.5
July 1951-June 1952	422.1	383.0	38.2	16.5

1/ As indicated by tax-paid removals.

2/ In addition to exports, tax-free removals include principally shipments to forces overseas, to United States possessions, and ships' stores.

Bureau of Agricultural Economics. Compiled from reports of the United States Treasury and Commerce Departments.

Retail prices of cigarettes are about 10 percent higher than before the Korean conflict. Although manufacturers advanced cigarette prices in late July 1950, the 1950-51 cigarette consumption increased 4 percent over that of 1949-50. The last fiscal year showed about the same rate of increase despite another advance in cigarette prices on November 1 to reflect the higher Federal excise tax. The tax-paid removals during November 1951-June 1952 were about 3 percent above the same period of 1950-51. In July-October of the 1951-52 fiscal year before the tax increase went into effect, tax-paid removals were about 5 percent ahead of the same period of a year earlier. In some States, cigarette prices have advanced in the last 2 years because of increases in State taxes on cigarettes. Also, New York City put into effect a 1-cent tax per package of cigarettes in May of this year.

Cigarette exports to foreign countries during the year ending June 30, totaled 16 1/2 billion--about 6 percent more than in the preceding year. In the final quarter of the fiscal year, however, cigarette exports dropped about one-sixth below a year earlier.

Table 2.- Cigarette exports from the United States to leading countries for specified periods

Country	Average 1934-38	1950 1/	1951 1/	1951 as per- centage of 1950	January-June		
					1951 1/	1952 1/	1952 as per- centage of 1951
	Million	Million	Million	Percent	Million	Million	Percent
Tangier & Fr. Morocco	12	1,394	1,850	133	807	903	112
Venezuela	39	1,055	1,700	161	785	861	110
Philippines, Rep. of	2,544	1,526	1,214	80	480	537	112
Hong Kong	22	1,143	1,199	105	575	309	54
British Malaya	3	434	1,154	266	499	277	56
Belgium	63	950	878	92	504	268	53
Switzerland	16	513	853	166	525	401	76
Netherlands Antilles	1,221	968	769	79	384	427	111
France	307	295	739	251	345	382	111
Panama & Canal Zone	389	616	658	107	342	384	112
Other countries	154	5,414	5,806	107	2,893	3,024	105
Total all countries	4,770	14,308	16,820	118	8,139	7,773	96

1/ Preliminary.

Bureau of Agricultural Economics. Compiled from publications and records of the United States Department of Commerce.

Cigars

In the year ending June 30, 1952, cigar consumption in the United States and by forces overseas totaled about 5,900 million--nearly 3 percent more than in 1950-51 and over 7 percent more than in 1949-50. Domestic factories accounted for nearly 97 percent of the total while bonded manufacturing warehouses and imports accounted for practically all of the remainder. Cigars originating in the Philippines and Puerto Rico accounted for 4 or 5 percent of total United States consumption in prewar years but have been negligible in recent years. The output of domestic factories in the past year was 12 percent above the 1935-39 average.

Table 3.- Large cigars: Output and domestic consumption for specified periods

Period	Domestic factories			Bonded manu- facturing warehouses	Imports for consumption			Shipments to United States from Puerto Rico
	Total output	Tax-paid removals	Tax-free removals	Tax-paid removals	Total	From Philip- pines	From Cuba	
	Million	Million	Million	Million	Million	Million	Million	Million
Average:								
1935-39:	5,075	5,060	13	66	192.4	189.2	3.0	28.8
1940-44:	5,450	5,282	199	105	93.7	78.4	15.3	9.8
1945	5,275	4,774	469	82	60.0	.0	59.8	96.7
1946	5,618	5,621	26	125	22.2	2.0	20.1	69.8
1947	5,488	5,460	41	124	12.5	3.2	9.1	7.8
1948	5,645	5,588	38	140	11.8	1.4	10.3	4.4
1949	5,453	5,399	46	142	10.9	.6	10.2	4.4
1950	5,399	5,365	47	158	11.9	.7	11.1	.4
1951	5,588	5,501	84	170	14.3	1.3	13.0	.4
Jan.-June:								
1951	2,818	2,650	42	1/	5.9	.8	5.2	.1
Jan.-June:								
1952	2,915	2,768	45	1/	6.0	.7	5.2	2/.1
					Fiscal year			
July 1949:								
June 1950:	5,435	5,298	39	148	10.7	.6	10.0	.9
July 1950:								
June 1951:	5,532	5,486	70	168	13.3	1.2	12.0	.4
July 1951:								
June 1952:	5,685	5,619	87	2/180	14.4	1.2	13.0	2/.3

1/ Data not available by months. 2/ Estimated.

Bureau of Agricultural Economics. Basic data compiled from reports of the Bureau of Internal Revenue and the United States Department of Commerce.

During the current year, continuation of personal income at a high level is expected to maintain cigar consumption near the 1951-52 level. Cigars selling for 8 cents or less comprised nearly 53 percent of the total in 1951-52. This was a slightly higher proportion than in each of the preceding 2 years. Most of the increase occurred in the 4-to-6 cent price bracket. The number of cigars in the 8-to-15-cent bracket declined a little from 1950-51 to 1951-52 but the July 1952 indication was sharply higher than July 1951.

Exports of cigars from the United States are minor. The great bulk of tax-free removals that are shipped abroad go to forces overseas. The 1951-52 tax-free removals of large cigars at 87 million was 24 percent above the preceding year and more than double those in the year prior to the Korean outbreak.

Smoking Tobacco

In the fiscal year ending June 30, 98 million pounds of smoking tobacco were produced in the United States--7 1/2 percent less than in 1950-51 and the least since the early 1900's. In the final third of 1951-52, the manufacture of smoking tobacco was 10 percent less than in the same period of a year earlier. It does not seem likely that smoking tobacco output will change much from the 1951-52 level in the current year. With personal incomes relatively high, smokers probably will not shift towards pipe smoking or "roll-your-own" cigarettes--forms of tobacco use which are generally the most economical.

In 1951-52, consumption in the United States accounted for about 96 percent of total output, and tax-free removals for exports to foreign countries and shipments for overseas forces, most of the remainder.

The 1951-52 exports of packaged smoking tobacco totaled 621,262 pounds compared with 663,599 pounds in 1950-51. Exports of bulk smoking tobacco at 1,926,175 pounds were up nearly 6 percent from 1950-51 and the third largest on record. Indications are that tax-free removals of smoking tobacco for the overseas forces were lower in 1951-52 than in 1950-51.

Table 4.-- Output of manufactured tobacco in the United States for specified periods

Period	Smoking		Chewing				Total	Snuff
	Plug	Twist	Fine-cut	Scrap				
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	
Average:								
1935-39	195.3	56.8	6.0	4.8	43.8	111.4	37.3	
1940-44	176.2	54.8	6.0	4.6	47.9	113.3	40.7	
1945	168.5	59.7	6.7	4.0	47.7	118.1	43.8	
1946	106.4	51.8	5.8	3.8	46.1	107.5	39.4	
1947	104.7	47.3	5.2	3.8	42.2	98.5	39.2	
1948	107.6	45.3	5.6	3.2	42.1	96.2	40.8	
1949	108.1	41.9	5.6	2.8	39.6	89.9	40.9	
1950	107.7	40.3	5.5	2.7	39.0	87.5	40.0	
1951	101.3	39.9	4.6	2.8	39.1	86.4	39.5	
Jan.-June 1951	51.8	20.1	2.4	1.4	19.7	43.6	20.6	
Jan.-June 1952	48.5	19.6	2.4	1.4	19.6	43.0	20.2	
Fiscal year								
July 1949-								
June 1950	108.7	41.3	5.5	2.8	39.5	89.1	40.7	
July 1950-								
June 1951	106.0	40.1	5.1	2.8	39.7	87.7	40.4	
July 1951-								
June 1952	98.0	39.8	4.5	2.8	39.0	86.1	39.1	

Bureau of Agricultural Economics. Compiled from reports of the Bureau of Internal Revenue.

Chewing Tobacco

During the fiscal year ending June 30, output of chewing tobacco in the United States totaled 86 million pounds--about 2 percent less than in 1950-51. Of the two major categories, plug accounted for 46 percent and scrap, 45 percent of the total. Twist accounted for a little over 5 percent and showed the sharpest drop--one-eighth less than in 1950-51. Fine-cut chewing, which has held steady during the last 3 years, accounted for the rest.

Comparatively little change is expected in chewing tobacco output in the year ahead. Over the longer term, it seems likely that it will continue to decline gradually.

In 1951-52, about 97 percent of the chewing tobacco output was consumed in this country and the remaining 3 percent was tax-free for exports to foreign countries and shipments to overseas forces. In 1951-52, over one-half of the tax-free removals of chewing tobacco was plug; nearly one-third, twist; and the rest, scrap. Tax-free plug gained a little over 1950-51 and tax-free scrap was up sharply, but tax-free twist has declined in each of the last 2 years.

Exports of chewing tobacco to foreign countries in 1951-52 totaled 1 1/2 million pounds--practically the same as in 1950-51.

Snuff

The output of snuff in this country during the year ending June 30 was 39.1 million pounds--about 3 percent less than in 1950-51. Practically all of the snuff produced is consumed domestically. Snuff consumption in this country has been highly stable for many years. Tax-paid withdrawals in 1951-52, although a little lower than for any fiscal year since the end of the war, were 5 percent higher than the fiscal year average of the latter half of the 1930's. The peak consumption was near 43 million pounds, which occurred in 1943-44 and again in 1944-45.

EXPORTS OF UNMANUFACTURED TOBACCO FROM THE UNITED STATES 1/

In the fiscal year ending June 30, exports of unmanufactured tobacco from the United States totaled 517 million pounds (declared weight) valued at 325 million dollars. The volume was up 8 percent and total value was up 19 percent from 1950-51. The average value per pound in 1951-52 was 62.8 cents--10 percent higher than the 57.2 cent average of 1950-51. Although the volume of tobacco exports was the largest in 5 years, it was exceeded in several years between the two World Wars. The total value of tobacco exports in 1951-52 was very near the record in 1946-47, when the quantity was almost 15 percent greater.

1/ Quantities of tobacco in this section are stated in terms of export weight, which is less than the equivalent farm-sales weight.

Table 5.- United States exports of unmanufactured tobacco, to principal importing countries, by types, for specified periods

(Declared weight)

Country and type	Year beginning July			1951 as a percentage of		January-June		
	Average: 1934-38	1950 1/2	1951 1/2	Average: 1935-39	1950	Average: 1935-39	1951	1952
	Million pounds	Million pounds	Million pounds	Percent	Percent	Million pounds	Million pounds	Million pounds
Flue-cured	318.9	377.2	444.2	139	118	102.3	117.1	127.5
Burley	11.3	33.2	22.2	196	67	5.7	13.3	10.3
Maryland	5.3	8.0	6.0	113	75	3.0	4.9	3.9
Va. sun-cured	.0	.0	.2	0	---	.0	.0	.2
Va. fire-cured	9.5	5.0	4.2	44	84	4.8	1.9	1.6
Ky. & Tenn. "	52.6	31.9	20.4	39	64	33.1	19.7	10.9
One Sucker	.8	2.2	3.2	400	145	.4	1.2	.8
Green River	3.1	2.4	2.1	68	88	2.2	1.6	1.8
Black Fat, etc.	8.9	4.0	4.7	53	118	4.4	1.9	1.7
Cigar	1.4	7.1	6.4	457	90	.6	3.0	2.5
Perique	.1	.1	.1	100	100	.1	2/	2/
Stems, trimmings, and scrap	19.7	6.3	3.7	19	59	10.2	1.9	1.6
Total	431.6	477.4	517.4	120	108	166.8	166.5	161.8
Country of destination:								
United Kingdom	210.2	150.3	219.5	104	146	50.3	21.5	17.6
France	20.7	11.8	3.9	19	33	19.3	7.6	1.5
Belgium	14.3	27.4	25.5	178	93	5.9	11.8	7.8
Netherlands	14.5	29.7	24.3	168	82	6.2	16.2	16.2
Germany	11.8	74.8	52.4	444	70	5.1	22.5	27.3
Portugal	4.8	6.1	5.8	121	95	2.5	3.3	3.1
Denmark	4.7	11.2	8.5	181	76	1.8	3.8	3.1
Ireland	7.2	18.6	19.5	271	105	2.4	5.8	7.7
Switzerland	3.8	15.5	9.9	261	64	1.8	7.0	4.5
Norway	5.0	7.4	6.7	134	91	2.1	2.7	2.8
Sweden	8.2	14.8	12.1	148	82	3.1	4.5	1.6
Italy	.9	2.5	2.9	322	116	.6	2.2	2.8
China	49.2	.2	.0	---	---	26.3	.0	.0
Australia	19.1	18.6	19.6	103	105	10.3	8.1	7.4
India-Pakistan	2.7	7.2	6.1	226	85	1.2	3.9	3.9
New Zealand	2.7	6.3	6.6	244	105	1.2	3.1	2.6
Philippine Rep.	1.2	5.5	22.8	3/	415	.6	3.6	17.0
Other countries	50.6	69.5	71.3	141	103	26.1	38.9	34.9
Total	431.6	477.4	517.4	120	108	166.8	166.5	161.8

1/ Preliminary. 2/ Less than 50,000 pounds. 3/ Nearly 19 times as much.

Bureau of Agricultural Economics. Compiled from publications and records of the United States Department of Commerce.

The major reason for the increase in United States exports between 1950-51 and 1951-52 was the 46 percent increase in British takings. Exports to Britain accounted for more than two-fifths of the total tobacco shipped abroad. The other major increase was exports to the Philippines, which amounted to over 4 times as much as in 1950-51 and approached the unusually large quantity of 1949-50. For comparisons of exports to other leading destinations for United States tobacco, see table 5.

During 1951-52, flue-cured gained 18 percent over 1950-51 and accounted for nearly 86 percent of the total unmanufactured exports. The next ranking classifications, Burley and Kentucky-Tennessee fire-cured, were down to around two-thirds of their 1950-51 volume. Of the other kinds, only Black Fat and One Sucker registered increases over those of the preceding year.

Table 6.- Value of United States agricultural exports and unmanufactured tobacco exports with percentage distribution by principal commodities for specified averages, annual 1946-51

Agricultural commodities	Average:	Average:	Average:	1946	1947	1948	1949	1950	1951
	:1920-29:	:1930-39:	:1941-45:	1946	1/	1/	1/	1/	1/
	Mil.	Mil.	Mil.	Mil.	Mil.	Mil.	Mil.	Mil.	Mil.
	dol.	dol.	dol.	dol.	dol.	dol.	dol.	dol.	dol.
Total	2,076	785	1,675	3,172	3,957	3,472	3,578	2,873	4,040
Unmfd. tobacco	164	117	138	351	271	215	252	251	326
	Percentage distribution								
	Pct.	Pct.	Pct.	Pct.	Pct.	Pct.	Pct.	Pct.	Pct.
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Cotton & linters	40.9	45.0	9.4	17.0	10.9	14.7	24.4	35.6	28.4
Wheat & flour	16.5	7.6	5.7	19.2	33.0	40.1	28.0	17.0	24.7
Unmfd. tobacco	7.9	14.9	8.1	11.1	6.9	6.2	7.0	8.7	8.1
Other grains ^{2/}	7.3	4.3	5.0	5.9	15.0	9.3	12.9	12.2	12.1
Fruit ^{2/}	4.7	11.1	5.9	5.3	4.6	3.7	2.9	3.9	2.9
Pork	5.1	2.6	11.3	2.2	.5	.4	.5	.5	.6
Lard	5.6	3.8	5.9	2.6	2.6	2.0	2.5	2.2	3.3
Dairy products	1.5	.9	11.2	9.3	6.9	6.0	4.9	3.0	3.0
Eggs & products	.4	.1	11.2	4.8	2.6	1.3	.7	.5	.8
Vegetables ^{2/}	1.1	1.7	4.9	4.5	4.8	4.5	2.4	2.1	2.0
Vegetable oils	.8	.6	2.6	1.2	1.5	1.6	3.0	3.2	3.9
Other	8.2	7.4	18.8	16.9	10.7	10.2	10.8	11.1	10.2

1/ Preliminary. 2/ Including preparations.

In 1952-53, exports of tobacco will be moderately lower than in 1951-52. The United Kingdom has announced a substantial cut in her proposed imports of tobacco from the dollar area, and some other countries also may take less. Gold and dollar reserves of the sterling area dropped sharply in the last half of 1951 and remained at a relatively low level during the first half of 1952. British authorities are expecting various

measures that have been adopted will result in increasing these reserves towards a more normal level during the next several months. Following the announced cut in prospective British imports of United States tobacco, an arrangement was worked out among growers' cooperative associations in this country, the Commodity Credit Corporation, and United Kingdom buyers, which provides for CCC-financing of a substantial amount of tobacco to be held here under option. This will make it possible to have tobacco available for shipment to British manufacturers at some later time.

The most important means by which foreign countries can earn dollars to buy products of the United States is by selling their own products to this country. The greater the imports into the United States, the more dollars that become available abroad to purchase tobacco and other export commodities of this country. The total value of imports into this country in 1951 was the highest in history. During the first half of 1952, the total value of imports for consumption dropped about 6 percent below that of the first half of 1951.

British Tobacco Situation

British home tobacco consumption is estimated at 218 million pounds for the year ending June 30--slightly above the 217 million in 1950-51. Tobacco from the Commonwealth areas made up about 42 percent of the total compared with 40 percent in 1950-51 and 36 percent in 1949-50.

During July 1951-June 1952, the United Kingdom exported about 52.6 million pounds of manufactured tobacco (principally cigarettes) compared with 45.4 million pounds in 1950-51. However, tobacco exports in the final quarter of 1951-52 were about 26 percent lower than the average of the 3 preceding quarters and 24 percent less than in the final quarter of 1950-51. Contributing to this decline, was a sharp drop in cigarette exports to Australia.

Total tobacco imports by the United Kingdom in July 1951-June 1952 were nearly 380 million pounds--over one-fourth larger than in 1950-51. For the relative increases of tobacco imports by country of origin and proportionate shares from each, see table 7.

Stocks of tobacco in the United Kingdom at the end of May 1952 totaled 463 million pounds. This was the highest May level in the past 12 or 13 years and compares with 387 million, a year earlier and 370 million, 2 years earlier. The higher level reflects to a considerable extent, the larger imports from the United States during 1951-52. British manufacturers will reduce stocks this year in order to maintain consumption levels. As a result, the ratio of British tobacco stocks to consumption and export requirements will again fall well below the level maintained in prewar years.

The 1951-52 crop of flue-cured in Southern Rhodesia is estimated at a record 107 1/2 million pounds--nearly 23 percent larger than the drought-reduced crop of a year earlier but only slightly above the previous high of 1949-50. Auctions began in early April, and for sales through July, the prices averaged 52.3 cents per pound--about 7 percent above the price in the corresponding period a year earlier (converted at \$2.80 = 1 British pound sterling).

Canadian flue-cured tobacco is grown to a very large extent in Ontario. The flue-cured Tobacco Marketing Board of Ontario limited acreage for its members to about 78,000 this year--27 percent below the 1951 acreage. The United Kingdom has indicated a sharp cut in imports of tobacco from Canada because of the lack of dollars.

Table 7.- Unmanufactured tobacco imports into the United Kingdom from major sources, average 1934-38, 1947-51

Year beginning July 1:	United States	Southern Rhodesia	India	Canada	Nyasa-land	Turkey	Greece	Other	Total
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Average 1934-38	210.6	15.9	18.1	12.3	12.5	0.6	0.6	4.5	275.1
1947	130.7	31.9	21.8	13.1	14.1	1.2	.1	2.7	215.5
1948	147.5	40.0	32.5	13.0	14.6	25.4	5.6	6.0	284.6
1949	162.4	47.4	46.6	15.0	16.1	13.7	1.3	6.7	309.2
1950 ^{1/}	146.7	66.5	42.1	20.2	14.3	1.9	1.0	8.9	301.6
1951 ^{1/}	223.4	44.7	43.8	36.3	16.6	1.9	1.2	11.7	379.6
Percentage change									
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent
Average 1934-38 to 1951	+6.1	+181.1	+142.0	+195.1	+32.8	+216.7	+100.0	+160.0	+38.0
1950 to 1951	+52.3	-32.8	+4.0	+79.7	+16.1	.0	+20.0	+31.5	+25.9
Percentage distribution									
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent
Average 1934-38	76.6	5.8	6.6	4.5	4.5	0.2	0.2	1.6	100.0
1947	60.6	14.8	10.1	6.1	6.5	.6	---	1.3	100.0
1948	51.8	14.1	11.4	4.6	5.1	8.9	2.0	2.1	100.0
1949	52.5	15.3	15.1	4.9	5.2	4.4	.4	2.2	100.0
1950	48.6	22.0	14.0	6.7	4.8	.6	.3	3.0	100.0
1951	58.8	11.8	11.5	9.6	4.4	.5	.3	3.1	100.0

^{1/} Preliminary.

IMPORTS AND UNITED STATES STOCKS OF FOREIGN GROWN TOBACCO ^{2/}

In the year ending June 30, 1952, tobacco imports into the United States totaled 105 million pounds valued at 85 million dollars, compared with 94 million pounds valued at 79 million dollars in 1950-51.

^{2/} Imports of tobacco for consumption are on a declared-weight basis and stocks are on an unstemmed-equivalent basis.

Table 8.- United States imports for consumption of unmanufactured tobacco, from principal supplying countries for specified periods

(Declared weight)

Classification and country of origin	Year beginning July		1951 as a		January-June			
	: Average: 1950		: 1951		: Average: 1950		: 1951	
	: 1934-38:	1/	: 1/	: 1934-38:	1950	: 1935-39:	1/	
	: Million	Million	Million	Percent	Percent	Million	Million	Million
	pounds	pounds	pounds			pounds	pounds	pounds
Total imports ^{2/}	67.2	94.0	105.4	157	112	33.8	48.7	49.3
Cigarette leaf								
Unstemmed	45.4	71.4	80.5	177	113	22.8	37.4	36.5
Turkey	19.3	50.9	52.9	274	104	9.6	26.7	26.7
Greece	19.0	10.7	13.4	71	125	9.7	5.8	6.8
Syria	.7	3.7	4.2	600	114	.4	1.7	1.9
Bulgaria	.9	.8	2.7	300	338	.6	.3	3/
U.S.S.R.	.2	2.8	5.2	4/	186	.2	1.4	3/
So. Rhodesia	.0	.9	.7	---	78	.0	.3	.3
Yugoslvaia	.0	.3	.4	---	133	.0	.2	.2
Cigar leaf (filler)								
Cuba	11.2	15.7	16.5	147	105	5.3	7.5	8.2
Stemmed	11.1	15.5	15.1	136	97	5.2	7.4	7.4
Unstemmed	7.2	11.3	11.0	153	97	3.4	5.4	5.5
Philippine Rep.	3.9	4.2	4.1	105	98	1.8	2.0	1.9
Stemmed	.0	.4	1.4	---	350	.0	.2	.8
Unstemmed	.0	.3	.7	---	233	.0	.1	.7
Philippine Rep.	.0	.1	.7	---	700	.0	.1	.1
Scrap								
Cuba	5.9	5.4	7.1	120	131	3.3	3.0	4.0
Philippine Rep.	2.9	5.3	6.9	238	130	1.5	2.9	3.9
Cigar wrapper	3.0	.0	.1	3	---	1.8	.0	.1
Indonesia	2.1	1.3	1.1	52	85	.9	.7	.6
Cuba	5/1.9	1.0	.8	42	80	5/.8	.6	.4
Cuba	.2	.3	.3	150	100	.1	.1	.2
Total from Cuba	14.2	21.1	22.3	157	106	6.8	10.4	11.5

1/ Preliminary. 2/ Includes tobacco stems, not cut, ground, or pulverized, not shown separately. 3/ Less than 50,000 pounds. 4/ Percentages over 999 not shown. 5/ Formerly shown as originating in Netherlands Indies or Netherlands.

Bureau of Agricultural Economics. Compiled from publications and records of the United States Department of Commerce.

Cigarette leaf imports accounted for 76 percent of the total in 1951-52. They were 13 percent above those in the preceding year and the largest on record. Turkey was, by far, the leading source and Greece ranked second. United States stocks of foreign grown cigarette and smoking tobacco on July 1 totaled 179 million pounds--slightly less than the record level of July 1, 1951.

Most of the United States imports of cigar tobacco come from Cuba, but the major source of imported wrapper is from Indonesia. Some filler and scrap come from the Philippine Republic. In 1951-52, the total from Cuba was up about 6 percent from 1950-51, with a larger amount of scrap offsetting small decreases in the stemmed and unstemmed cigar filler classifications. The July 1 stocks of Cuban tobacco in the United States totaled a little over 17 million pounds--8 percent more than on July 1, 1951. A significant amount of cigar filler was imported from the Philippine Republic in 1951-52, but scrap imports from there were very small and far less than in prewar. Cigar wrapper imports from Indonesia in 1951-52 were one-fifth lower than in 1950-51. Stocks of Sumatra and Java tobacco in the United States on July 1 (excluding that stored in the Free Trade Zone) totaled about 732,000 pounds compared with the relatively low level of 444,000 of a year earlier.

OUTLOOK AND SITUATION FOR TOBACCO LEAF

Flue-Cured, Types 11-14

Production and Carry-Over

The 1952 acreage of flue-cured is indicated at 1,125,600--1 percent above the 1951 harvested acreage. Production, according to August 1 indications, will be 1,286 million pounds--11 percent smaller than the record crop of last year. Yield prospects between July 1 and August 1 were lowered by the dry, hot weather. Even so, the crop, as estimated in August, would be the fourth largest on record. Some rains have occurred in the growing areas since August 1.

Carry-over of flue-cured tobacco on July 1 (beginning of the 1952-53 marketing year) was 1,731 million pounds--11 percent larger than a year earlier. Carry-over plus this year's crop, as estimated on August 1, adds to a total supply of 3,017 million pounds for 1951-52--very slightly more than for 1950-51.

Domestic Use and Exports

Total disappearance of flue-cured during the year ending June 30 was 1,279 million pounds--8 percent above 1950-51 and the largest in history. Domestic use at 777 million pounds was up 2.8 percent and was larger than in any previous year. The record cigarette manufacture probably absorbed around 95 percent of the flue-cured used domestically.

Exports, at 502 million pounds (farm-sales weight), rose about one-sixth above 1950-51 and accounted for about 39 percent of total disappearance--a little higher proportion than in other recent years. The United Kingdom took substantially more than in each of the 4 previous years and

accounted for almost one-half of the total flue-cured exports. Germany, the second ranking outlet, accounted for 9 percent of the total exports but took 31 percent less than a year earlier. The next 10 ranking foreign outlets for flue-cured in 1951-52, listed in order, are as follows: Philippine Republic, Australia, Belgium, Ireland, Netherlands, Indonesia, Sweden, Denmark, New Zealand, and Thailand. Takings by these countries ranged from 6 to 25 million pounds (farm-sales weight). The quantity going to the Philippines was sharply higher in 1951-52 than in 1950-51 and nearly equaled the unusually large total in 1949-50. Five more of these countries--Australia, Belgium, Ireland, New Zealand, and Thailand--took more than in the preceding year.

Table 9.- Flue-cured tobacco, types 11-14: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-52

Year	(Farm-sales weight)						
	Production	Stocks July 1	Supply	Disappearance 1/ Total	Domestic 2/	Exports 2/	Average price per pound
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Cents
Av. 1934-38:	741	845	1,586	704	338	366	22.9
1939	1,171	946	2,117	707	417	290	14.9
1940	760	1,410	2,170	577	421	156	16.4
1941	650	1,593	2,243	783	492	291	28.1
1942	812	1,460	2,272	893	604	289	38.4
1943	790	1,379	2,169	980	625	355	40.2
1944	1,087	1,189	2,276	1,150	696	454	42.4
1945	1,173	1,126	2,299	1,152	667	485	43.6
1946	1,352	1,147	2,499	1,212	659	553	48.3
1947	1,317	1,287	2,604	1,054	695	359	41.2
1948	1,090	1,550	2,640	1,102	720	382	49.6
1949	1,115	1,538	2,653	1,168	729	439	47.2
1950	1,257	1,485	2,742	1,184	756	428	54.7
1951 2/	1,452	1,558	3,010	1,279	777	502	52.4
1952 2/	1,286	1,731	3,017				

1/ Year beginning July 1. 2/ Subject to revision.

Note: Beginning 1944-45, domestic disappearance and exports data are revised.

The Netherlands, Indonesia, Sweden, and Denmark got less. Countries getting from about 1 to 6 million pounds in the recent year, included the following: Hong Kong, France, Egypt, Portugal, Taiwan, Nigeria, Pakistan, Malta, and Ceylon, which got more in 1951-52 than in 1950-51; and India, Switzerland, Finland, Austria, and French Indochina, which got less. There are numerous other countries that take some flue-cured tobacco each year.

Exports of flue-cured are expected to be smaller in 1952-53 than in 1951-52, when they were the second largest on record.

1952 Price Supports and Auction Prices

The Government price support for the 1952 crop is 50.6 cents per pound compared with 50.7 cents for the 1951 crop. The July 1 parity price for flue-cured was 55.8 cents, and 90 percent of this is 50.2 cents per pound. Prior to the planting season, the Department announced that the minimum level of support for 1952 flue-cured would be 50.6 cents per pound. When the level computed at the beginning of the marketing year is lower than the previously announced minimum, the law specifies that the announced minimum shall become the actual support level.

Loan rates are established by grades at a specified rate for each grade, with a 5 cents per pound differential between "tied" and "untied" tobacco. Georgia-Florida tobacco is generally sold "untied."

Auctions for the 1952 flue-cured crop began on July 21 in the Georgia-Florida, type 14, area. By the end of August, approximately 180 million pounds (including resales) were sold at an average price of 49.0 cents per pound. Last season, the average price was 46.3 cents for a total volume (including resales) of 192 million pounds in the type 14 markets.

In the Border Belt, type 13, the South Carolina markets opened on July 28 and the North Carolina markets, on August 4. By the end of August, 154 million pounds (including resales) had been sold at an average price of 53.2 cents per pound. This was about 2 percent above the average price in the comparable period of last season. Gross sales (including resales) in the type 13 markets in the 1951 season totaled nearly 357 million pounds and averaged 51.9 cents.

In the Eastern Belt of North Carolina, type 12, auctions opened August 21. Gross sales by the end of August amounted to 40 million pounds and averaged 50.2 cents per pound. This was practically the same as the early season average last season for this belt.

The "Sandhill" auction markets for type 11(b), the Middle Belt, were to have opened on September 4. The remaining Middle Belt markets begin on September 8. For type 11(a), the Old Belt--North Carolina and Virginia--markets open on September 22.

During the season through August, about 21 million pounds--6 percent of total deliveries were placed under Government loan compared with 11 percent in the same period of last season. Total flue-cured placed under loan in the 1951 season was 142 million pounds--almost 10 percent of the crop. From 1946 through 1951, a total of 728 million pounds was placed under Government loan by growers. On July 31, Government loan stocks of flue-cured were equivalent to about 173 million pounds (farm-sales weight). About 70 percent of this was 1951 crop tobacco and most of the rest was from the 1950 crop. The July 31 reported total included a substantial amount (about one-half) that had been committed for sale.

Flue-Cured Referendum on
1953, 1954, and 1955

On July 19, growers of flue-cured tobacco voted on whether to continue marketing quotas or not. Growers voted overwhelmingly in favor of quotas for the next three crops, 1953, 1954, and 1955. Growers are given the choice of voting for quotas for 1 year, 3 years, or to reject a quota. A two-thirds majority of those voting is necessary to place a quota in effect. Of the 260,163 growers voting, 97.8 percent voted 3 years, 1.0 percent favored a quota for 1 year, and 1.2 percent voted against quotas.

When quotas are in effect on flue-cured tobacco, Government price support is mandatory at 90 percent of parity.

: Marketing Research Report No. 9 :
 : Flue-Cured Tobacco: Price Differences :
 : Among Types 11(a)-13 :
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Burley, type 31

Production and Carry-Over

Burley acreage this year is indicated at 466,800--2.3 percent more than the 1951 harvested acreage. Most of the increase was in the two major Burley States, Kentucky and Tennessee. The 1952 crop, according to August 1 indications, is about 540 million pounds--one-eighth less than last year's record crop. The prospective production was lowered 10 percent between July and August 1 by the dry, hot weather.

The carry-over of Burley on October 1 (the beginning of the 1952-53 marketing year) is estimated at 1,065 million pounds--about 8 1/2 percent above that of October 1, 1951, and the largest on record. The carry-over plus the new crop will provide a total supply of about 1,605 million pounds for 1952-53--slightly more than the record 1951-52 supply.

Domestic Use and Exports

Total disappearance of Burley for the year ending September 30 is estimated at 533 million pounds--nearly 3 percent above that of 1950-51. Almost 95 percent, or about 505 million pounds, will be used domestically, about 3 1/2 percent more than in 1950-51. The increase is fairly well in line with the rise in output of cigarettes, the largest outlet for Burley. However, output of smoking tobacco in the first three-fourths of the 1951-52 marketing year fell off 8 percent from that in the same period of 1950-51. Exports of Burley during 1951-52 are estimated at 28 million pounds (farm-sales weight)--7 percent lower than in 1950-51 and the smallest since the war with the possible exception of 1947-48. However, the 1951-52 level is still 2 1/4 times the prewar average.

Table 10.- Burley tobacco, type 31: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-52

Year	(Farm-sales weight)						
	Production	Stocks Oct. 1	Supply	Disappearance 1/			Average price per pound
				Total	Domestic	Exports	
Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Cents
Av. 1934-38:	287	701	988	314	302	12	22.2
1939	395	684	1,079	317	305	12	17.3
1940	377	762	1,139	341	335	6	16.2
1941	337	798	1,135	380	374	6	29.2
1942	344	755	1,099	413	407	6	41.8
1943	392	686	1,078	427	418	9	45.6
1944	591	651	1,242	483	474	9	44.0
1945	577	759	1,336	483	448	35	39.4
1946	614	853	1,467	526	476	50	39.7
1947	485	941	1,426	524	496	28	48.5
1948	603	902	1,505	531	489	42	46.0
1949	561	974	1,535	535	494	41	45.2
1950	499	1,000	1,499	518	488	30	49.0
1951 2/	617	981	1,598	3/533	3/505	3/28	51.2
1952 2/	540	3/1,065	3/1,605				

1/ Year beginning October 1. 2/ Subject to revision. 3/ Estimated.

The 9 leading foreign outlets in 1950-51, each taking from 1 to 6 million pounds, were Germany, Portugal, Belgium, Sweden, Denmark, Mexico, Austria, Netherlands, and Norway. Of these countries, only Germany, Belgium, and Sweden took more Burley in the first three-quarters of the 1951-52 marketing year than in the same period of 1950-51. Exports to Portugal, Mexico, and Austria were 40 to 50 percent lower. Other countries taking less in October 1951-June 1952 than in the comparable period of a year earlier were Egypt, Switzerland, Philippine Republic, and Finland. The United Kingdom and Australia took more.

Prices and Price Support

The 1951 crop of Burley averaged 51.2 cents per pound--4½ percent above the 1950 crop average. A fairly strong demand is expected again in the 1952 season. Auctions usually begin around December 1.

The 1952 support level will be quite close to the 49.8 cents per pound for last season. In March the minimum support level for the 1952 crop was announced at 49.5 cents per pound. The actual level of support will be 49.5 cents or 90 percent of the October 1 parity price, whichever is higher. Ninety percent of the August parity for Burley was 49.3 cents per pound.

During the 1951 marketing season, about 97 million pounds of Burley (about 16 percent of the crop) were placed under Government loan. In the past 6 seasons, a total of 463 million pounds was delivered for Government loans by growers. Government loan stocks of Burley on July 31 of this year totaled about 138 million pounds (farm-sales-weight equivalent), of which about 70 percent was 1951 crop tobacco. These have been substantially reduced since then.

Maryland, Type 32 3/

Production and Stocks

The 1951 acreage indication for Maryland tobacco is 49,000--6 percent lower than the record 1951 acreage. The August 1 indication for production was a little over 34 million pounds--18 percent less than that harvested in 1951.

Manufacturer's and dealer's stocks of Maryland on October 1 seem likely to be around 71 million pounds--about 10 percent higher than a year earlier and the largest for that date on record. This stocks estimate plus the 1952 crop totals about 105 million pounds--almost as large as stocks plus production as of a year earlier.

Domestic Use and Exports

Total disappearance of Maryland tobacco in the year ending September 30 probably will approximate 35 million pounds--a little lower than in 1950-51. Domestic use, most of which is in cigarettes, may be a little larger while exports seem likely to be less than in 1950-51.

Switzerland, the major foreign outlet for Maryland tobacco, took 58 percent of the total exports of this type in October 1950-September 1951. However, this was 7 percent less than in 1949-50 and over 30 percent less than the large 1948-49 figure. During October 1951-June 1952, exports of Maryland tobacco to Switzerland were 27 percent lower than in the same period of a year earlier. France took the second largest quantity of Maryland tobacco in 1950-51 but only a negligible quantity went to France in October 1951-June 1952. Also, less went to French Morocco, Netherlands, Spain, and Germany but quantities going to Tunisia and Belgium were notably larger.

3/ This year the Congress amended the Agricultural Adjustment Act of 1938 to provide that for the purposes of marketing quotas and, when in effect, the sliding scale price supports, the carry-over and total supply of Maryland tobacco would be computed on the basis of January 1 following the beginning of the marketing year instead of on the basis of October 1, as heretofore. Inasmuch as the definition of the marketing year, itself, was not changed, the discussion and statistical table are in terms of the October-September period.

Table 11.- Maryland tobacco, type 32: Domestic, supplies, disappearance, and season average price, average 1934-38, annual 1939-52

(Farm-sales weight)

Year	Production : Million : pounds	Stocks : Oct. 1 : 1/ : Million : pounds	Production : plus Oct. 1 : stocks : Million : pounds	Disappearance 2/			Average : price per : pound : Cents	Stocks : following : Jan. 1 1/ : Million : pounds
				Total : Million : pounds	Domestic : 3/ : Million : pounds	Exports : 3/ : Million : pounds		
Average:								
1934-38 :	27.5	41.3	68.8	26.5	21.1	5.4	19.7	38.4
1939 :	32.8	41.4	74.2	26.5	22.6	3.9	21.1	36.3
1940 :	32.6	47.7	80.3	28.5	25.9	2.6	33.0	43.2
1941 :	31.2	51.8	83.0	27.2	26.1	1.1	30.1	45.0
1942 :	28.1	55.8	83.9	34.4	32.2	2.2	56.5	47.7
1943 :	20.8	49.5	70.3	25.1	23.8	1.3	45.3	43.8
1944 :	38.2	45.2	83.4	31.2	28.8	2.4	55.5	37.6
1945 :	18.4	52.2	70.6	30.3	24.2	6.1	57.0	46.5
1946 :	46.2	40.3	86.5	34.0	28.3	5.7	44.5	32.4
1947 :	37.0	52.5	90.3	34.3	27.0	7.3	42.8	44.8
1948 :	35.0	56.0	91.0	37.0	27.7	9.3	54.4	46.9
1949 :	41.2	54.0	95.2	35.4	28.0	7.4	48.3	45.5
1950 :	40.0	59.8	99.8	35.5	27.1	8.4	48.2	53.4
1951 3/ :	41.6	64.3	105.9	4/35.0	4/28.0	4/7.0	5/43.8	59.3
1952 3/ :	34.3	4/71.0	4/105.3					

1/ Public Law 464-82nd Congress (an amendment to previous Agricultural legislation) provides that for the purposes of marketing quotas and when in effect, the sliding-scale price support, the carry-over and total supply of Maryland tobacco shall be computed as of January 1 following the beginning of the marketing year-- defined as the October 1-September 30 period. 2/ Year beginning October 1. 3/ Subject to revision. 4/ Estimated. 5/ Auction market average.

1951 Crop Prices

Auction markets for the 1951 crop began on May 6 and closed on August 8. The quantity auctioned totaled 38.2 million pounds and prices averaged 43.8 cents per pound--72 percent of parity at the beginning of the marketing year. The volume was about 10 percent larger than a year earlier, while the price averaged 8 percent lower. The 1951 crop was of better quality than in several recent years. Demand was generally weaker than a year earlier but strengthened in the latter half of July. Probably contributing to this strength, was the smaller crop indicated for this year than last. The 1951 crop did not have Government price support because growers had rejected a marketing quota. When quotas are in effect, price support at 90 percent of parity at the beginning of the season is mandatory.

Price support operations were carried out on Maryland tobacco auctions for 1948, 1949, and 1950 crops. Government loan stocks of Maryland tobacco on July 31 totaled about 7.8 million pounds (farm-sales-weight equivalent). About 68 percent of this was 1950 crop tobacco; 13 percent, 1949 crop; and 19 percent, 1948 crop.

The 1952 crop of Maryland, which will be marketed next spring and summer, also will be without Government price support. Growers voted against a marketing quota on this crop in December 1951.

Fire-Cured, Types 21-23

Production and Carry-Over

The indicated acreage of fire-cured tobacco is 46,700--about 5 percent lower than the 1951 harvested acreage and the lowest on record. The drop from last year is in the Kentucky-Tennessee types 22-23 while Virginia type 21 acreage was indicated to be the same.

The August 1 prospect was for a total fire-cured crop of about 47 million pounds--more than one-fifth less than in 1951. According to the August 1 crop report the Virginia production may be as much as one-fourth below last year's. Drought hit both the Virginia and Kentucky-Tennessee fire-cured producing areas.

The carry-over of fire-cured on October 1 is estimated at 142 million pounds--about 4 percent less than on last October 1. Stocks of type 23 (Kentucky-Tennessee Western District) have been sharply reduced in the last 2 years. The 1952-53 total supply of fire-cured--carry-over plus this year's production--probably will be near 189 million pounds. This would be 9 percent less than the 1951-52 supply and the lowest on record.

Domestic Use and Exports

Total disappearance of fire-cured in the year ending September 30, 1952, is indicated at about 65 million pounds--more than one-eighth lower than in the preceding year. Domestic use of fire-cured is estimated at about 35 million pounds--2 to 3 percent less than in 1950-51. Snuff manufacture, the main outlet in this country, was down a little. Exports of fire-cured tobacco during the current marketing year seem likely to total about 30 million pounds--a drop of nearly one-fourth from the 1950-51 level.

In the first three-quarters of the 1951-52 marketing year, exports of Kentucky-Tennessee fire-cured were 37 percent less than in the same period of a year earlier. France, the leading outlet in 1950-51, got none in the 9 months ending June 30 but Netherlands, next ranking outlet, got 30 percent more. Switzerland and Belgium, third and fourth ranking outlets in 1950-51, got nearly 60 and 50 percent less in October 1951-June 1952 than in the same months of the preceding year. Among other important outlets, Sweden, Denmark, Italy, French West Africa, and Tunisia took less while the United Kingdom, Ireland, Germany, Norway, Portugal, Cameroon, French Equatorial Africa, and Algeria took more. Shipments to the Gold Coast held about even.

In the first 9 months of the 1951-52 marketing year, exports of Virginia fire-cured dropped 17 percent below the same months of 1950-51. The 5 leading outlets of the last marketing year were Norway, Switzerland, United Kingdom, Sweden, and New Zealand. In the first three-quarters of 1951-52, exports of each of these countries dropped lower than in the same period of 1950-51. Increases occurred in shipments of Virginia fire-cured to Austria, Germany, Australia, and Trinidad.

1952 Price Supports

The government price support level for fire-cured is computed at 75 percent of the Burley loan level. In March the Department announced the minimum support for 1952 fire-cured at 37.1 cents per pound--75 percent of the 49.5 cent minimum announced for Burley. If the Burley support level should be higher as of October 1, 1952, than when the minimum was determined, the actual support level for this year's fire-cured crops also would be higher, but if it is lower, the minimum will become the actual support level. Ninety percent of the August 15 parity for Burley is 49.3 cents per pound and 75 percent of this is 37.0 cents.

The support level for the 1951 crop of fire-cured was 37.4 cents per pound and the season average price for the combined fire-cured types was 40.0 cents. All three types sold at higher than their 1950 average prices.

Table 12.- Fire-cured tobacco, types 21-24: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-52

(Farm-sales weight)							
Year	Production	Stocks Oct. 1	Supply	Disappearance Total	Domestic	Exports	Average price per pound
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Cents
Av. 1934-38	110.2	194.2	304.4	123.0	53.2	69.8	10.2
1939	99.4	136.2	235.6	94.0	55.1	38.9	10.6
1940	106.5	141.6	248.1	64.2	45.6	18.6	9.5
1941	69.7	183.9	253.6	69.0	51.5	17.5	14.1
1942	71.5	184.6	256.1	76.3	60.7	15.6	17.1
1943	64.9	179.8	244.7	71.2	54.5	16.7	23.4
1944	66.1	173.5	239.6	107.8	43.9	63.9	24.5
1945	58.3	131.8	190.1	85.2	37.6	47.6	31.5
1946	108.9	104.9	213.8	70.4	36.0	34.4	26.0
1947	86.4	143.4	229.8	67.2	36.9	30.3	29.5
1948	73.2	162.6	235.8	78.6	35.4	43.2	31.9
1949	72.2	157.2	229.4	64.7	35.4	29.3	29.8
1950	58.3	164.7	223.0	75.7	35.9	39.8	31.2
1951 ^{2/}	59.5	147.3	206.8	^{3/} 65.0	^{3/} 35.0	^{3/} 30.0	40.0
1952 ^{2/}	46.8	^{3/} 142.0	^{3/} 188.8				

^{1/} Year beginning October 1. ^{2/} Subject to revision. ^{3/} Estimated.

During the 1951 marketing season, fire-cured growers placed 7 1/2 million pounds under Government loan. This was about one-eighth of the 1951 production, the smallest proportion in 6 years. In the past 6 seasons, a total of 138 million pounds was placed under loan. On July 31 Government loan stocks of fire-cured were equivalent to about 52 million pounds (farm-sales weight).

Dark Air-Cured, Typed 35-37

Production and Carry-Over

The indicated acreage of types 35-37 combined is 26,800--slightly larger than last year. One Sucker, type 35, is a little less but Green River, type 36, is slightly higher. The Virginia sun-cured, type 37, acreage is indicated at 3,900--11 percent higher than in 1951.

The August 1 production prospect for total dark air-cured was for about 26 million pounds--17 percent less than in 1951. Hot, dry weather in Virginia, Kentucky, and Tennessee has reduced yield prospects below last year for these types.

The carry-over of dark air-cured on October 1 is estimated at about 70 million pounds--a little less than on last October 1. Stocks of One Sucker on July 1 were a little larger, but stocks of Green River and Virginia sun-cured were a little less than a year earlier. The 1952-53 total supply of dark air-cured--carry-over plus this year's production--probably will be around 96 million pounds. This would be about 7 percent less than the 1951-52 supply and the lowest since 1943-44.

Domestic Use and Exports

Total disappearance of dark air-cured in the year ending September 30, 1952, is indicated at about 34 million pounds--about 7 percent less than in the preceding year. Domestic use of dark air-cured is expected to approximate 25 million pounds--a little lower than in 1950-51. The main domestic outlet is in chewing tobacco, production of which was down slightly during the first three-fourths of 1951-52.

Exports of dark air-cured tobacco during the current marketing year seem likely to approach 9 million pounds (farm-sales weight)--down about one-eighth from the 1950-51 level.

A significant proportion of dark air-cured exports go out as Black Fat, a semiprocessed form, and the remainder is One Sucker, Green River, and Virginia sun-cured leaf ⁴/₅. In the first three-quarters of the 1951-52 marketing year, exports of Black Fat were about one-eighth larger than in the same period of 1950-51. More went to Gold Coast, French West Africa, French Equatorial Africa, and Cameroon but a little less went to last year's leading foreign outlet, Nigeria. During October 1951-June 1952, exports of Green River and One Sucker were 10 and 24 percent lower, respectively,

⁴/₅ The Bureau of the Census tabulated Virginia sun-cured exports as a separate leaf classification for the first time in January 1952.

than in the same months of a year earlier. A larger quantity of Green River went to the United Kingdom but in contrast, none went to Spain, the top ranking outlet of a year earlier. Although Netherlands and Indonesia did not take any Green River in 1950-51, they got noteworthy amounts in the 1951-52 period. Shipments to Belgium held about even but were sharply smaller to Liberia. Nigeria, the leading outlet for One Sucker, got nearly one-fourth less in October 1951-June 1952 than in the comparable period of 1950-51. Also, much less went to Belgium and the Netherlands. A sizable export of nearly 200,000 pounds of Virginia sun-cured was reported as exported to Norway in June 1952.

1952 Price Supports

The Government price support level for dark air-cured is computed at $66 \frac{2}{3}$ percent of the Burley loan level. In March, the Department announced the minimum support for 1952 dark air-cured at 33.0 cents per pound-- $66 \frac{2}{3}$ percent of the 49.5 cent minimum announced for Burley. If the Burley support level should be higher as of October 1, 1952, than when the minimum was determined, the actual support level for this year's dark air-cured crops also would be higher, but if it is lower, the minimum will become the actual support level. Ninety percent of the August 15 parity for Burley is 49.3 cents per pound and $66 \frac{2}{3}$ percent of this is 32.9 cents.

Table 13.- Dark air-cured tobacco, types 35-37: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-52

Year	(Farm-sales weight)						
	: Production :	: Stocks :	: Supply :	: Disappearance 1/ :		: Average	
				: Oct. 1 :	: Total :		: Domestic :
: Million	: Million	: Million	: Million	: Million	: Million	: Cents	
: pounds	: pounds	: pounds	: pounds	: pounds	: pounds	: pounds	
Av. 1934-38:	35.5	62.8	98.3	39.0	27.0	12.0	9.4
1939	44.2	56.1	100.3	34.7	27.3	7.4	7.3
1940	42.5	65.6	108.1	33.7	29.0	4.7	7.7
1941	31.5	74.4	105.9	41.9	38.9	3.0	12.0
1942	35.2	64.0	99.2	33.9	29.8	4.1	15.0
1943	30.0	65.3	95.3	37.6	34.4	3.2	27.2
1944	44.9	57.7	102.6	42.2	35.9	6.3	23.3
1945	43.6	60.4	104.0	43.6	30.5	13.1	25.2
1946	49.6	60.4	110.0	37.3	29.7	7.6	22.5
1947	37.2	72.7	109.9	32.7	26.3	6.4	25.8
1948	34.8	77.2	112.0	37.9	23.1	14.8	28.7
1949	36.2	74.1	110.3	30.5	24.3	6.2	28.2
1950	28.6	79.8	108.4	36.7	26.4	10.3	24.6
1951 2/	31.7	71.7	103.4	3/34.0	3/25.0	3/9.0	34.3
1952 2/	26.2	3/70.0	3/96.2				

1/ Year beginning October 1. 2/ Subject to revision. 3/ Estimated.

The support level for the 1951 crop of dark air-cured was 33.2 cents per pound, and the season average price for the combined dark air-cured types was 34.3 cents.

During the 1951 season, dark air-cured growers placed 7.3 million pounds under Government loan--about 23 percent of the 1951 production. Only a negligible amount of this was Virginia sun-cured, type 37. In the past 6 seasons, a total of 54 1/2 million pounds of dark air-cured tobacco were placed under loan. On July 31, Government loan stocks of this tobacco were equivalent to about 31 million pounds (farm-sales weight).

Cigar, Types 41-62

Production and Carry-Over

Filler: The 1952 indicated acreage of Pennsylvania Seedleaf, type 41, is 24,900--down 28 percent--and of Ohio filler, types 42-44, is 5,700--up 16 percent. The reduction in Pennsylvania this year follows the sharp drop in the price average for the 1951 crop from the preceding year's. The August 1 indicated production of type 41 was about 38 million pounds--nearly one-third less than the 1951 harvestings and the smallest since the 1937 crop. The indicated production of types 42-44 was 7.4 million pounds--slightly exceeding last year's harvestings.

Carry-over of the combined filler types 41-44 on October 1 is estimated at about 160 million pounds--a little larger than on last October 1 and the largest for October since 1942. The 1952-53 total supply--this year's production plus the carry-over--seems likely to be about 205 million pounds--7 percent below the 1951-52 level which was the highest since 1942-43.

Puerto Rican tobacco, type 46, also is a cigar filler type. The 1951-52 Puerto Rican crop was about 28 million pounds--one-tenth larger than the previous year's. The 1951-52 acreage was slightly less than a year earlier. In the 11 months ending May 31, shipments of Puerto Rican tobacco to the United States totaled 17.2 million pounds (declared weight)--2.4 percent more than in the same period of the preceding year. A significantly larger quantity than a year earlier came in unstemmed. On July 1, the stocks of Puerto Rican tobacco in the United States were 13 1/2 million pounds and those on the Island were 28.9 million pounds--both about one-sixth lower than on July 1, 1951.

Table 14.- Shipments of tobacco from Puerto Rico to the United States for specified periods

Classification:	(Declared weight)					
	Year beginning July 1			January-May		
	Average 1934-38	1949	1950	1951 1/2	1951	1952
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Total	22.2	18.9	17.4	17.2	5.0	6.0
Stemmed	17.1	11.2	8.6	10.7	3.4	4.2
Unstemmed	.2	2/	.3	3.3	.2	.1
Scrap	4.9	7.7	8.5	3.2	1.4	1.7
1/ Eleven months.	2/ Less than 50,000 pounds.					

Table 15.- Cigar tobacco, types 41-55: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-52

Type and year	(Farm-sales weight)				Average price per pound
	Production	Stocks	Supply	Disappearance	
	October 1	October 1	October 1	October 1	1/
	Million pounds	Million pounds	Million pounds	Million pounds	Cents
Filler types 41-44 2/					
Average 1934-38	48.9	159.9	208.8	54.4	10.4
1939	63.1	141.9	205.0	54.0	11.7
1940	64.7	151.0	215.7	58.7	12.0
1941	71.2	157.0	228.2	61.4	12.5
1942	53.8	166.8	220.6	67.0	13.2
1943	47.0	153.6	200.6	55.2	18.6
1944	54.6	145.4	200.0	57.1	19.5
1945	45.4	142.9	188.3	59.5	34.0
1946	57.3	128.8	186.1	63.9	32.8
1947	60.6	122.2	182.8	59.1	30.6
1948	68.3	123.7	192.0	60.1	25.8
1949	65.4	131.9	197.3	53.5	26.2
1950	65.7	143.8	209.5	52.2	25.2
1951 3/	63.0	157.3	220.3	4/60.0	19.6
1952 3/	45.4	4/160.0	4/205.0		
Binder types 51-55 5/					
Average 1934-38	41.8	165.1	206.9	60.5	12.5
1939	63.3	116.6	179.9	45.0	16.6
1940	67.9	134.9	202.8	66.1	14.5
1941	61.6	136.7	198.3	60.4	16.9
1942	55.2	137.9	193.1	66.4	20.4
1943	51.0	126.7	177.7	69.2	30.3
1944	57.7	108.5	166.2	63.9	30.9
1945	63.5	102.3	165.8	62.3	47.7
1946	74.1	103.5	177.6	53.9	52.7
1947	69.4	123.7	193.1	67.3	43.4
1948	60.5	125.8	186.3	63.1	41.2
1949	61.7	123.2	184.9	49.8	36.0
1950	65.0	135.1	200.1	57.7	35.8
1951 3/	48.8	142.4	191.2	4/59.0	37.9
1952 3/	48.2	4/132.0	4/180.0		

1/ Year beginning October 1. 2/ Includes small quantity of type 45 in 1934-38 average. 3/ Subject to revision. 4/ Estimated. 5/ Includes small quantity of type 56 through 1948.

Binder: The indicated acreage for the combined binder types is 31,000--almost the same as in 1951. The increase in the Connecticut Broad-leaf, type 51, nearly offsets the decreases in Southern Wisconsin, type 54, Northern Wisconsin, type 55, and Connecticut Valley Havana Seed, type 52. The August 1 indications of production of binder was a little over 48 million pounds--very nearly the same as in 1951.

The total carry-over of the binder types on October 1 is expected to be near 132 million pounds--7 percent below that of October 1, 1951. The July 1 stocks of the Wisconsin types were below those of a year earlier but there was comparatively little change in the stocks levels of the other binder types.

The prospective 1952-53 total supply of all binder types combined is likely to be around 180 million pounds--6 percent lower than for 1951-52 and the lowest in 6 years.

Wrapper: Total shade-grown wrapper acreage was indicated at 13,000--about 4 1/2 percent less than last year's. In the Connecticut Valley, type 61, acreage was 7 percent lower but in Georgia-Florida, type 62, acreage held about even with last year's. The August 1 indicated production of the wrapper types was 13.9 million pounds--down 6 percent from last year's harvestings. The Connecticut Valley yields were indicated as being higher but in Georgia-Florida, they were lower. A marketing agreement and order is now in effect on Georgia-Florida shade-grown tobacco. This limits the marketings of some of the poorer qualities of this type.

Table 16.- Cigar tobacco, types 61-62: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-52

Type and year	(Farm-sales weight)				
	Production	Stocks July 1	Supply	Disappearance year beginning July 1/	Average price per pound
	Million pounds	Million pounds	Million pounds	Million pounds	Cents
Wrapper types 61-62					
Average 1934-38	8.4	11.8	20.2	9.3	78.3
1939	11.4	10.1	21.5	7.9	67.7
1940	9.5	13.6	23.1	10.4	77.6
1941	10.1	12.7	22.3	9.6	98.4
1942	9.2	13.2	22.4	9.4	132.1
1943	10.0	13.0	23.0	8.7	167.7
1944	11.3	14.3	25.6	10.9	196.1
1945	11.2	14.7	25.9	12.3	197.3
1946	12.5	13.6	26.1	12.7	234.0
1947	13.5	13.4	26.9	12.4	296.0
1948	15.1	14.5	29.6	13.0	274.0
1949	17.3	16.6	33.9	14.5	201.0
1950	15.5	19.4	34.9	14.9	203.0
1951 2/	14.8	20.0	34.8	13.6	193.0
1952 2/	13.9	21.2	35.1		

1/ Year beginning July 1. 2/ Subject to revision.

The carry-over of wrapper on July 1, 1952, was 21.4 million pounds--above any previous July figure. Stocks of type 61 were slightly lower than a year ago but stocks of type 62 were up by nearly one-fifth. The 1952-53 total supply of shade-grown wrapper--this year's indicated production plus carry-over--is about 35 million pounds--slightly more than in each of the previous 2 years.

Domestic Use and Exports

A large proportion of cigar tobacco is used in domestic cigar manufacture, but some grades, especially of the binder types, are used in scrap chewing. During the first three-fourths of the filler and binder marketing year, which began on October 1, 1951, cigar manufacturing averaged nearly 3 percent above that in the same period of 1950-51. In the first three-fourths of 1951-52, scrap chewing manufacture averaged about the same as in the comparable period of a year earlier.

For the year ending September 30, the total disappearance of cigar filler, types 41-44, may range between 55 and 60 million pounds compared with 52 million in 1950-51. Domestic usage should be larger. In the 9 months ending June 30, 1952, exports were lower than in the same period of a year earlier. Much less went to Algeria and Belgium, the leading 1950-51 outlets, but more went to Tunisia and Germany.

The 1951-52 disappearance of the combined binder types is expected to be around 59 million pounds--a little larger than in 1950-51. Exports during October 1951-June 1952 were about 6 percent larger than in the same period of 1950-51. The quantity going to Germany was more than doubled and also much more went to Austria, but notably smaller quantities went to Netherlands, Belgium, Denmark, and Sweden. Canada increased her takings of binder.

In the year ending June 30, the total disappearance of domestic cigar wrapper was 13.6 million pounds--9 percent less than in 1950-51. Exports of wrapper were only slightly lower in 1951-52 than in 1950-51. Germany took over two-thirds of the total wrapper exports from this country--getting a little more than a year earlier. Canada, the next ranking outlet, took only one-half as much as a year earlier.

Cigar Tobacco Price Support

The 1952 price support for Puerto Rican, type 46, will be announced on October 1. For the 1951 crop (planted in late 1951 and mostly harvested in early 1952), the price support was 32.6 cents per pound.

Government price supports are not available on the 1952 crops of the other types of cigar tobacco. Prices of these types cannot be supported because quotas on the 1952 crops were disapproved by growers.

On July 31, 1952, Government loan stocks and CCC inventories of cigar tobacco totaled about 20.0 million pounds--8.1 million, type 54 (Southern Wisconsin); 4.9 million, type 52 (Connecticut Valley Havana Seed); 2.3 million, type 41 (Pennsylvania Seedleaf); 2.1 million, types 42-44 (Ohio filler); 1.3 million, type 46 (Puerto Rican); and 1.2 million, type 51 (Connecticut Valley Broadleaf). Of the total, nearly 8 million pounds are 1951 crop tobacco--4.5 million, type 54; 1.7 million, type 52; 1.2 million, type 51; and .6 million, types 42-44.

Table 17.- Acreage of tobacco in the United States, by class and type, average 1934-38, annual 1950-52, and percentage changes

Class and type	Average 1934-38	1950	1951	1952	Percentage change	
					Average 1934-38	1951 to 1952
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	Percent	Percent
Old and Middle Belt, type 11	327.1	348.0	399.0	403.0	+23.2	+1.0
Eastern North Carolina, type 12	296.6	307.0	356.0	360.0	+21.4	+1.1
South Carolina, type 13	155.7	193.0	224.0	226.0	+45.2	+ .9
Georgia and Florida	83.7	110.4	134.1	136.6	+63.2	+1.9
Total flue-cured, types 11-14	863.1	958.4	1,113.1	1,125.6	+30.4	+1.1
Virginia, type 21	23.1	9.8	10.0	10.0	-56.7	.0
Kentucky and Tennessee, type 22	76.7	29.8	28.2	27.2	-64.5	-3.5
Kentucky and Tennessee, type 23	32.4	13.3	10.8	9.5	-70.7	-12.0
Total fire-cured, types 21-23	2/135.2	52.9	49.0	46.7	-65.5	-4.7
Burley, type 31	347.2	408.3	456.1	466.8	+34.4	+2.3
Maryland, type 32	36.7	50.0	52.0	49.0	+33.5	-5.8
One Sucker, type 35	19.9	16.2	15.0	14.7	-26.1	-2.0
Green River, type 36	18.8	9.3	8.0	8.2	-56.4	+2.5
Virginia sun-cured, type 37	3.3	3.2	3.5	3.9	+18.2	+11.4
Total dark air-cured, types 35-37	42.0	28.7	26.5	26.8	-36.2	+1.1
Pennsylvania Seedleaf, type 41	23.4	36.8	34.6	24.9	+6.4	-28.0
Miami Valley, types 42-44	14.6	7.8	4.9	5.7	-61.0	+16.3
Total cigar filler, types 41-44	38.0	44.6	39.5	30.6	-19.5	-22.5
Conn. Valley Broadleaf, type 51	7.2	10.1	8.2	8.9	+23.6	+8.5
Conn. Val. Havana Seed, type 52	5.4	8.8	6.6	6.5	+20.4	-1.5
N. Y.-Pa. Havana Seed, type 53	.7	1.0	.6	.5	-28.6	-16.7
Southern Wisconsin, type 54	8.9	9.3	6.9	6.6	-25.8	-4.3
Northern Wisconsin, type 55	6.7	12.8	8.9	8.5	+26.9	-4.5
Total cigar binder, types 51-55	3/29.9	42.0	31.2	31.0	+3.7	-.6
Conn. Val. shade-grown, type 61	6.3	8.3	8.4	7.8	+23.8	-7.1
Ga.-Fla. shade-grown, type 62	2.6	5.4	5.2	5.2	+100.0	.0
Total cigar wrapper, types 61-62	8.9	13.7	13.6	13.0	+46.1	-4.4
Louisiana Perique, type 72	.3	.4	.4	.3	.0	-25.0
Total all types	1,501.3	1,599.0	1,781.4	1,789.8	+19.2	+.5

1/ Preliminary. 2/ Includes relatively small acreage of type 24. 3/ Includes relatively small acreage of types 45 and 56.

Table 18.- Tobacco: Yield per acre in the United States, by types, for specified periods with percentages

Period	Cigar								All United States types
	Flue-cured 11-14	Fire-cured 21-24	Burley 31	Maryland 32	Dark air-cured 35-37	Filler 41-45 1/	Binder 51-56 1/	Wrapper 61-62	
	Pounds	Pounds	Pounds	Pounds	Pounds	Pounds	Pounds	Pounds	Pounds
Average:									
1924-28	676	767	807	781	784	1,340	1,256	1,041	765
1929-33	707	777	777	683	803	1,035	1,350	1,039	770
1934-38	856	811	819	749	837	1,266	1,465	954	865
1939	922	868	931	820	908	1,292	1,536	1,044	940
1940	1,025	888	1,045	850	905	1,337	1,530	922	1,036
1941	905	935	985	775	967	1,497	1,503	939	966
1942	1,024	982	980	740	1,037	1,249	1,520	963	1,023
1943	938	943	982	590	972	1,241	1,540	1,044	964
1944	1,069	1,022	1,189	850	1,116	1,440	1,548	1,075	1,115
1945	1,088	951	1,127	525	988	1,261	1,518	1,001	1,094
1946	1,137	1,189	1,256	925	1,215	1,469	1,519	1,000	1,181
1947	1,135	1,031	1,153	795	1,054	1,419	1,495	992	1,138
1948	1,233	1,170	1,396	750	1,165	1,566	1,524	998	1,274
1949	1,191	1,189	1,253	825	1,133	1,542	1,561	1,108	1,213
1950	1,312	1,102	1,222	800	998	1,474	1,547	1,130	1,269
1951 2/	1,304	1,215	1,352	800	1,197	1,594	1,565	1,091	1,307
1952 3/	1,142	1,003	1,156	700	979	1,483	1,553	1,066	1,140
Percentage change									
	Per-cent	Per-cent	Per-cent	Per-cent	Per-cent	Per-cent	Per-cent	Per-cent	Per-cent
Av. 1934-38 to:									
av. 1947-51	+44.3	+40.7	+55.7	+6.0	+32.5	+20.0	+5.0	+11.5	+43.4
1951 to 1952	-12.4	-17.4	-14.5	-12.5	-18.2	-7.0	-.8	-2.3	-12.8

1/ From 1936 to 1939, type 45 (filler) supplanted by type 56 (binder).

2/ Preliminary.

3/ Indicated as of August 1.

Table 19.- Cash receipts from tobacco compared with total cash receipts from all farm commodities, selected States and United States, average 1935-39, annual 1950-51

State	Average 1935-39			1950			1951		
	Cash receipts	Tobacco	Tobacco	Cash receipts	Tobacco	Tobacco	Cash receipts	Tobacco	Tobacco
	Total	Tobacco	centage of total	Total	Tobacco	centage of total	Total	Tobacco	centage of total
	Million dollars	Million dollars	Percent	Million dollars	Million dollars	Percent	Million dollars	Million dollars	Percent
N. C.	227	121	53.3	796	486	61.1	948	534	56.3
Ky.	146	52	35.6	518	180	34.7	613	222	36.2
S. C.	100	19	19.0	287	82	28.6	413	89	21.5
Va.	120	20	16.7	436	87	20.0	506	92	18.2
Tenn.	125	16	12.8	430	60	14.0	516	65	12.6
Ga.	146	15	10.3	519	51	9.8	619	64	10.3
Conn.	54	7	13.0	143	24	16.8	171	24	14.0
Md.	70	5	7.1	237	20	8.4	270	18	6.7
Fla.	119	4	3.4	498	19	3.8	507	23	4.5
Pa.	264	4	1.5	732	13	1.8	836	15	1.8
Mass.	75	2	2.7	174	9	4.6	211	8	3.8
Wis.	297	2	.7	969	8	.8	1,128	8	.7
Ohio	326	3	.9	903	10	1.1	1,070	11	1.0
Ind.	266	2	.8	976	7	.7	1,142	7	.6
Subtotal	2,335	272	11.6	7,618	1,056	13.9	8,950	1,180	13.2
U. S. 1/	7,954	274	3.4	28,773	1,061	3.7	32,751	1,187	3.6

1/ Other States with relatively small cash receipts from tobacco are Alabama, Kansas, Louisiana, Minnesota, Missouri, New York, and West Virginia.

Table 20.- Receipts from Federal taxes on tobacco products, selected averages, and fiscal years 1945-52

Fiscal	Cigarettes: 1/	Cigars: 2/	Chewing and smoking	Snuff	All other: 3/	Total
	Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars	Thousand dollars
Average:						
1925-29	280,594	30,576	64,727	7,033	1,666	384,596
1930-34	343,029	15,510	57,451	6,954	1,409	424,353
1935-39	456,908	12,677	54,712	6,677	1,214	532,188
1940-44	718,814	18,884	50,914	7,275	4,096	799,983
1945-49	1,099,186	43,766	40,108	7,362	1,095	1,191,517
1945	836,753	36,678	49,574	7,741	1,399	932,145
1946	1,072,971	41,454	41,961	7,373	1,760	1,165,519
1947	1,145,268	48,354	36,548	7,054	514	1,237,768
1948	1,208,204	46,752	37,024	7,372	928	1,300,280
1949	1,232,735	45,590	35,435	7,272	843	1,321,875
1950	1,242,851	42,170	35,070	7,389	985	1,328,465
1951	1,293,973	44,275	33,870	7,235	1,043	1,380,396
1952	1,474,072	44,810	22,817	4,796	4,18,667	1,565,162

1/ Includes large cigarettes.

2/ Includes small cigars.

3/ Leaf dealer penalties, floor taxes, cigarette papers and tubes, etc.

4/ The extremely sharp increase in this total largely represents the collections of floor taxes on cigarettes following the rate increase that became effective on November 1, 1952.

Bureau of Agricultural Economics. Compiled from reports of the Bureau of Internal Revenue.

Table 21.- Tobacco: Paid shipments under Economic Cooperation Administration programs, 1948-51

Country of destination and source of shipment	1948 ^{1/}		1949		1950		1951	
	Million pounds	Million dollars	Million pounds	Million dollars	Million pounds	Million dollars	Million pounds	Million dollars
Country of destination:								
United Kingdom	97.4	49.5	133.4	72.6	134.7	84.4	43.3	26.7
West Germany ^{2/}	6.9	1.5	111.8	34.3	58.8	23.5	24.0	13.7
Netherlands	1.0	.3	26.4	8.4	27.7	8.1	13.2	5.4
Ireland	---	---	25.6	13.8	22.3	13.0	14.0	8.9
France ^{3/}	4.0	1.3	25.7	7.7	12.3	5.9	13.1	5.6
Belgium-Lux.	---	---	23.2	7.3	19.3	6.1	6.3	2.3
Denmark	5.1	3.4	10.5	6.6	8.4	4.1	5.9	3.5
Norway	5.5	3.3	8.5	5.0	6.6	3.8	5.0	3.2
Austria	4.8	1.4	8.0	3.6	7.0	3.2	3.5	1.7
Italy	---	---	2.3	1.7	2.3	1.7	2.2	1.7
Formosa	---	---	---	---	.5	.3	---	---
Total	124.6	60.7	4/375.4	4/161.0	299.9	154.2	130.3	72.6
Source of shipments:								
United States	124.5	60.6	355.9	155.9	299.9	154.2	130.3	72.6
Latin America ^{5/}	.2	.1	19.1	4.5	---	---	---	---
Indonesia ^{6/}	---	---	.4	.6	---	---	---	---

^{1/} From beginning of ECA in April through December 1948. ^{2/} In 1950, includes tobacco financed under "Government and Relief in Occupied Areas." ^{3/} Includes 2.5 million pounds at .9 million dollars in 1950 and 3.2 million pounds at 1.3 million dollars in 1951 that went to French North Africa and dependent overseas territories. ^{4/} Total includes 131,800 pounds at 28,200 dollars to Iceland. ^{5/} About two-thirds to Germany and one-third to Netherlands. ^{6/} All to Denmark.

Note: Detail may not add to totals due to rounding.

Bureau of Agricultural Economics. Compiled from data furnished by the Mutual Security Agency, which superseded the Economic Cooperation Administration at the end of 1951.

