

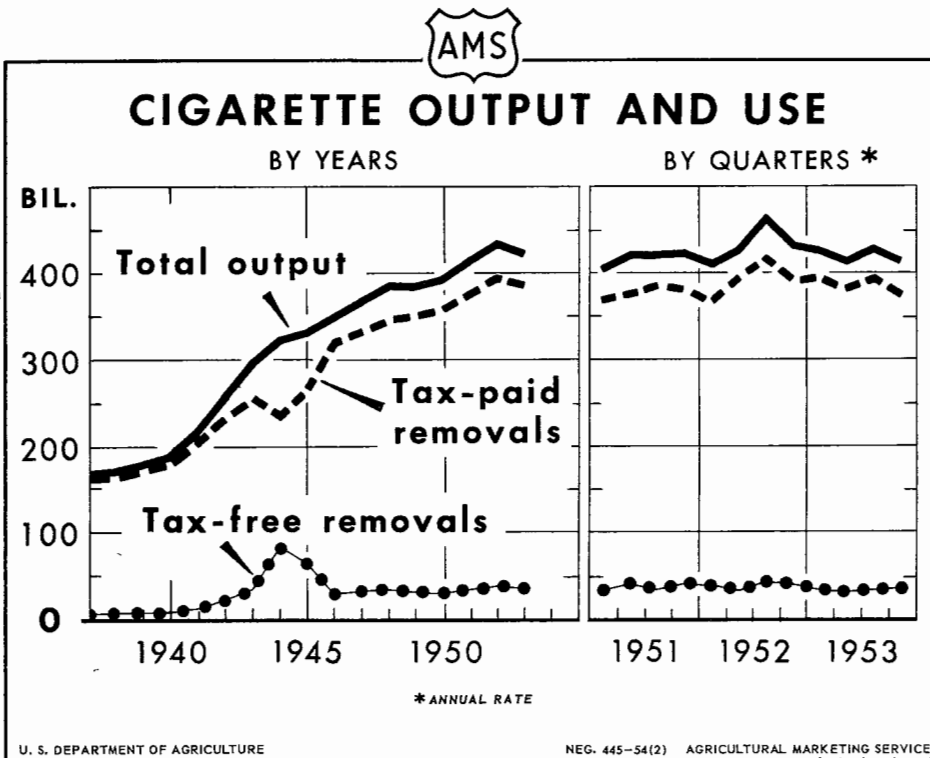
The TOBACCO SITUATION

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The 1953 output of cigarettes at 423 billion was 3 percent below the record 435½ billion in 1952. The number of cigarettes consumed in the United States (tax-paid removals) declined 2 percent but total pounds of tobacco changed even less because of the increase in the proportion of "king size" cigarettes. Except for the dip in domestic consumption from 1943 to 1944 the decline was the

first since the early 1930's. The number of cigarettes consumed in 1954 is expected to be nearly as large as last year and the proportion of "king size" seems likely to increase further.

Tax-free removals of cigarettes dropped 10 percent between 1952 and 1953. Shipments for overseas forces dropped fairly sharply but commercial exports were only slightly lower.

UNITED STATES DEPARTMENT OF AGRICULTURE
AGRICULTURAL MARKETING SERVICE

STATISTICAL SUMMARY

| Item | Unit or base period | 1952 | | | | 1953 | | | | Last data available as percentage of a year earlier | |
|---|---------------------|-----------------------|-------|--------------|--------|-------|-----------------------|-------|--------------|---|-----|
| | | Sept. | Oct. | Nov. | Dec. | Sept. | Oct. | Nov. | Dec. | | |
| Average prices at auctions | | | | | | | | | | | |
| Flue-cured | Cents per lb. | 50.6 | 51.3 | 47.2 | 42.2 | 57.8 | 53.4 | 41.5 | 33.2 | 79 | |
| Burley | Cents per lb. | C - 1 - o - s - e - d | | | | 51.4 | C-1-o-s-e-d | | | | 104 |
| Maryland | Cents per lb. | C - 1 - o - s - e - d | | | | | C - 1 - o - s - e - d | | | | |
| Fire-cured | Cents per lb. | C - 1 - o - s - e - d | | | | 35.2 | C-1-o-s-e-d | | | | 99 |
| Dark air-cured (35-36) | Cents per lb. | C - 1 - o - s - e - d | | | | 31.9 | C - 1 - o - s - e - d | | | | 85 |
| Virginia sun-cured (37) | Cents per lb. | C - 1 - o - s - e - d | | | | 30.9 | C - 1 - o - s - e - d | | | | 104 |
| Parity prices | | | | | | | | | | | |
| Flue-cured | Cents per lb. | 55.4 | 55.0 | 54.8 | 54.8 | 52.6 | 52.4 | 52.6 | 52.8 | 96 | |
| Burley | Cents per lb. | 54.2 | 53.9 | 53.7 | 53.7 | 51.2 | 51.1 | 51.2 | 51.4 | 96 | |
| Maryland | Cents per lb. | 58.5 | 58.1 | 57.9 | 57.9 | 55.4 | 55.2 | 55.4 | 55.6 | 96 | |
| Fire-cured | Cents per lb. | 34.4 | 34.1 | 34.0 | 34.0 | 34.1 | 33.9 | 34.1 | 34.2 | 101 | |
| Dark air-cured (35-36) | Cents per lb. | 30.1 | 29.9 | 29.8 | 29.8 | 29.9 | 29.8 | 29.9 | 30.0 | 101 | |
| Virginia sun-cured (37) | Cents per lb. | 37.2 | 36.9 | 36.8 | 36.8 | 35.2 | 35.1 | 35.2 | 35.3 | 96 | |
| Parity index 1/ | | | | | | | | | | | |
| | 1910-14=100 | 286 | 284 | 282 | 281 | 277 | 276 | 277 | 278 | 99 | |
| Tax-paid withdrawals | | | | | | | | | | | |
| Cigarettes, small | Billion | 35 | 37 | 30 | 30 | 34 | 35 | 30 | 29 | 97 | |
| Cigars, large | Million | 527 | 625 | 498 | 439 | 558 | 589 | 533 | 437 | 100 | |
| Chewing and smoking | Mil. lb. | 16 | 18 | 13 | 12 | 15 | 15 | 13 | 11 | 92 | |
| Snuff | Mil. lb. | 3.1 | 3.8 | 2.8 | 3.2 | 3.2 | 3.7 | 2.9 | 3.3 | 103 | |
| Accumulated from Jan. 1 | | | | | | | | | | | |
| Cigarettes, small | Billion | 297 | 335 | 365 | 395 | 292 | 328 | 358 | 386 | 98 | |
| Cigars, large | Million | 4,420 | 5,046 | 5,544 | 5,983 | 4,510 | 5,099 | 5,632 | 6,069 | 101 | |
| Chewing and smoking | Mil. lb. | 134 | 152 | 165 | 176 | 128 | 143 | 156 | 167 | 95 | |
| Snuff | Mil. lb. | 29 | 33 | 36 | 39 | 29 | 33 | 36 | 39 | 100 | |
| Tax-free removals | | | | | | | | | | | |
| Cigarettes, small | Billion | 4 | 4 | 3 | 3 | 4 | 3 | 4 | 4 | 133 | |
| Cigars, large | Million | 12 | 17 | 6 | 6 | 8 | 6 | 7 | 12 | 200 | |
| Chewing and smoking | Mil. lb. | .5 | .5 | .6 | .5 | .6 | .3 | .3 | .4 | 80 | |
| Accumulated from Jan. 1 | | | | | | | | | | | |
| Cigarettes, small | Billion | 30 | 35 | 38 | 41 | 27 | 30 | 33 | 37 | 90 | |
| Cigars, large | Million | 72 | 89 | 95 | 101 | 65 | 71 | 78 | 90 | 89 | |
| Chewing and smoking | Mil. lb. | 4.4 | 4.9 | 5.5 | 6.0 | 3.1 | 3.4 | 3.7 | 4.1 | 68 | |
| Personal income 2/ | | | | | | | | | | | |
| | Bill. dol. | 276 | 277 | 277 | 281 | 286 | 287 | 286 | 285 | 101 | |
| Index of industrial production, 1953 rev. F.R.B. 3/ | | | | | | | | | | | |
| | 1947-49=100 | 129 | 130 | 133 | 133 | 133 | 132 | 129 | 127 | 95 | |
| Employment | | | | | | | | | | | |
| Labor force employed | Million | 62.3 | 61.9 | 62.2 | 61.5 | 62.3 | 62.2 | 61.9 | 60.8 | 99 | |
| | Percent | 97.7 | 98.0 | 97.8 | 97.8 | 98.0 | 98.2 | 97.7 | 97.0 | 99 | |
| Exports (farm-sales wt.) | | | | | | | | | | | |
| Flue-cured | Mil. lb. | 47.7 | 40.6 | 41.6 | 31.9 | 61.8 | 56.0 | 53.2 | 67.3 | 211 | |
| Burley | Mil. lb. | 4.3 | 1.9 | 2.9 | 2.8 | 1.3 | 2.0 | 1.3 | 4.2 | 150 | |
| Maryland | Mil. lb. | 1.0 | .3 | .2 | .6 | .9 | .7 | .9 | .3 | 50 | |
| Fire-cured | Mil. lb. | 2.2 | 3.0 | 3.6 | 3.9 | 2.4 | 2.5 | 2.3 | 3.3 | 85 | |
| Dark air-cured | Mil. lb. | .3 | .5 | .2 | .7 | .6 | .8 | .2 | .8 | 114 | |
| Cigar | Mil. lb. | .9 | .7 | .7 | 1.1 | .5 | .6 | .7 | .7 | 64 | |
| Accumulated from beginning of marketing yr. 4/ | | | | | | | | | | | |
| Flue-cured | Mil. lb. | 102.5 | 143.1 | 184.7 | 216.6 | 121.9 | 177.9 | 231.0 | 298.3 | 138 | |
| Burley | Mil. lb. | 31.5 | 1.9 | 4.8 | 7.6 | 28.9 | 2.0 | 3.3 | 7.4 | 97 | |
| Maryland | Mil. lb. | 6.6 | .3 | .6 | 1.2 | 7.8 | .7 | 1.6 | 1.9 | 158 | |
| Fire-cured | Mil. lb. | 28.1 | 3.0 | 6.5 | 10.5 | 29.7 | 2.5 | 4.9 | 8.2 | 78 | |
| Dark air-cured | Mil. lb. | 8.2 | .5 | .7 | 1.4 | 6.1 | .8 | 1.0 | 1.8 | 129 | |
| Cigar filler and binder | Mil. lb. | 3.9 | .3 | .8 | 1.3 | 4.5 | .3 | .5 | .9 | 69 | |
| Cigar wrapper | Mil. lb. | .8 | 1.3 | 1.6 | 2.1 | 1.0 | 1.3 | 1.7 | 2.1 | 100 | |
| U.S. imports, all commodities | | | | | | | | | | | |
| Accumulated from Jan. 1 | Mil. dol. | 881 | 966 | 796 | 1,023 | 928 | 822 | 838 | 896 | 88 | |
| Sterling area gold and dollar reserves 5/ | Mil. dol. | 7,962 | 8,929 | 9,725 | 10,748 | 8,221 | 9,043 | 9,881 | 10,777 | 100 | |
| Stocks of domestic types (farm-sales weight) 6/ | | | | | | | | | | | |
| | | | | Jan. 1, 1953 | | | | | Jan. 1, 1954 | | |
| Flue-cured | Mil. lb. | | 2,054 | | 2,442 | | 2,240 | | 2,411 | 99 | |
| Burley | Mil. lb. | | 1,061 | | 1,241 | | 1,163 | | 1,308 | 105 | |
| Maryland | Mil. lb. | | 73 | | 65 | | 73 | | 65 | 100 | |
| Fire-cured | Mil. lb. | | 147 | | 136 | | 146 | | 135 | 99 | |
| Dark air-cured | Mil. lb. | | 73 | | 76 | | 78 | | 73 | 96 | |
| Cigar, filler | Mil. lb. | | 203 | | 183 | | 194 | | 167 | 91 | |
| Cigar, binder | Mil. lb. | | 135 | | 130 | | 124 | | 126 | 97 | |
| Cigar, wrapper | Mil. lb. | | 24 | | 28 | | 22 | | 26 | 93 | |

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

THE TOBACCO SITUATION

Approved by the Outlook and Situation Board, March 5, 1954

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SUMMARY

Demand for most kinds of tobacco is expected to be firm during the year ahead. Domestic consumption of cigarette tobacco is likely to be about as large as last year. The number of cigarettes consumed may be a little lower but with a continued trend to "king size," the leaf requirements may be nearly the same. Cigar and snuff consumption is expected to be about the same as in 1953. Use of chewing tobacco seems likely to continue its gradual drift downward while use of smoking tobacco, after dropping moderately in 1953, may level off in 1954. Exports of unmanufactured tobacco in calendar 1954 are expected to be a little less than in 1953 but favorable compared with most postwar years.

Cigarette manufacture at 423 billion in 1953 was the second highest on record. Although 3 percent fewer cigarettes were produced than a year earlier, the quantity of tobacco used was only slightly lower because of the increased proportion of "king size" cigarettes. The number consumed in the United States in 1953 was 2 percent less than in 1952 but tax-free removals (mostly for use of overseas forces and exports) declined 10 percent. Economic factors that may have tended to lower the number of cigarettes consumed in the United States from 1952 to 1953 are: the leveling off of total personal income in the last half of 1953 and the decline in income in farm areas, moderately higher retail prices than a year earlier, and the possibility that fewer cigarettes were smoked by those who shifted to "king size." Another influence that may have operated is the decline in the number of young adults since 1952 and the increase in the older age groups.

The 1953 output of cigars was about 6,130 million--2 percent above 1952 and the most in 23 years. Output of smoking tobacco (mainly for pipes and roll-your-own cigarettes) was 86 million pounds--11 percent below 1952 and the smallest during this century. Indications are that use of "roll-your-own" cigarettes continued to decline. The gradual downward

trend of chewing tobacco continued and 1953 output at 83 million pounds was 2 percent lower than in 1952. Output of snuff in 1953 was 38.6 million pounds, nearly as much as in 1952.

Total exports of unmanufactured tobacco in 1953 were 516 million pounds (export weight) valued at nearly 339 million dollars. The 30 percent rise from the relatively low 1952 figure of 396 million pounds was partly because British importers deferred shipments of substantial quantities of flue-cured tobacco from late 1952 to the spring of 1953. Flue-cured accounted for about 85 percent of total exports of unmanufactured tobacco.

Export prospects for 1954 appear fairly favorable. In many important importing countries, economic conditions improved during 1953. Sterling area gold and dollar reserves at the end of January were 29 percent larger than a year earlier. Tobacco consumption in many areas continues upward with Britain showing an increase of about 2 1/2 percent from 1952 to 1953. Stocks of United States tobacco in some countries are low relative to requirements. Procurement authorizations for tobacco under the Mutual Security Act of 1953 have been approved for the United Kingdom, West Germany, and Finland, thus far. The Act authorizes using limited funds for sale and exports of surplus agricultural commodities and the acceptance of payment in local currency under certain conditions.

The 1953-54 total supply of flue-cured tobacco at 3,109 million pounds is slightly larger than in 1952-53. The decrease in the 1953 crop was a little more than offset by an increase in carryover. Most individual farm allotments for flue-cured in 1954 are the same as last year and if yields are average, the crop may approximate 1,350 million pounds. A crop of this size plus the probable carryover would provide a total supply of flue-cured for 1954-55 about 3 percent above this year's level. The 1953 season average price for flue-cured was 52.7 cents although in the Old and Middle Belts, it was lower principally because of the effects of drought on quality.

The level of price support for the 1954 crops of flue-cured and Burley is 90 percent of parity.

The 1953-54 total supply of Burley, at 1,735 million pounds, is slightly larger than in 1952-53. The increase in carryover offset the decrease in 1953 production. The 1954 acreage allotments for most farms are about 8 percent lower than last year and if yields are average, production may approximate 530 million pounds. This plus the probable carryover would provide a total supply for 1954-55 near the 1953-54 level. The season average price for the 1953 crop is preliminarily estimated at 52 1/2 cents--about 4 percent above the 1952 average.

Supplies of Maryland tobacco are indicated to be about 2 percent below a year earlier. Domestic use was a record in 1952-53 and exports were above a year earlier. Acreage allotments are not in effect on the 1954 crop. If the 1954 crop is near the average of recent years, the total supply of Maryland tobacco at the beginning of 1955 probably will be about equal to that for the current year. Auctions for the 1953 crop are expected to begin around mid-May. The Government price support for the 1953 crop is 50.4 cents per pound but no support will be available for the 1954 crop.

The 1953-54 total supply of fire-cured at 198 million pounds and of dark air-cured at 105 million pounds are each a little lower than in 1952-53. For both kinds, drought reduced production and seriously lowered the quality in 1953. The substantial carryovers kept total supplies from being reduced much. Auction sales are virtually completed and prices for Kentucky-Tennessee fire-cured and dark air-cured averaged sharply lower than for the 1952 crops. In Virginia, the prices of the small fire-cured and sun-cured crops averaged almost the same as a year earlier. The 1954 acreage allotments announced last fall are below those of last year except of Virginia sun-cured. Disappearance (domestic use plus exports) was a little lower in 1952-53 than in 1951-52 for both kinds. The 1954 price supports for fire-cured and dark air-cured are at 75 and 66 2/3 percent of the Burley loan level.

The 1953-54 total supplies of continental cigar filler and binder are 9 1/2 and 6 percent lower than in 1952-53. Production of cigar filler in Pennsylvania in both 1953 and 1952 was much below that for many previous years.

Production of all binder types combined in 1953 was down slightly from 1952 and the smallest since 1936. Prices of Wisconsin and Connecticut Valley binder types have averaged higher than last season. Last fall, growers of cigar filler and binder types 42-44&51-55 approved marketing quotas and acreage allotments for the next three crops. Prices for the 1954 crop will be supported at 90 percent of parity. Pennsylvania filler (type 41) growers rejected marketing quotas and no price support will be available on the 1954 crop.

The 1953-54 total supply of shade-grown wrapper is 8 percent lower than the 1952-53 peak. The record 1952-53 disappearance reduced carryover and 1953 production in Georgia-Florida was lower than in the previous year.

TOBACCO PRODUCTS

Cigarettes

Cigarette manufacture at 423 billion in 1953 was the second highest on record. Although the number of cigarettes declined nearly 3 percent from 1952, the total poundage was down less (probably about 1 1/2 percent) because of the increased proportion of "king size" cigarettes. Domestic consumption in 1953 at nearly 387 billion was 2 percent smaller than in 1952. From 1946 to 1952, consumption rose on an average of 3 1/2 percent a year. The number of cigarettes consumed in 1954 as a whole is expected to be fairly near to the 1953 level, although tax-paid shipments in the first quarter of 1954 may fall below the very high first quarter of 1953. The 1953 tax-free removals (about 8 1/2 percent of total output) totaled 37 billion--10 percent less than in 1952. The shipments for overseas forces fell off considerably but commercial exports were only slightly less.

Most of the relatively small decline from 1952 to 1953 in the number of cigarettes consumed apparently occurred in the latter half of 1953. Tax-paid removals were a little higher during the first half of 1953 than in the same period of 1952, though some months showed declines. Tax-paid removals in the third and fourth quarters of 1953 were 6.3 and 3.7 percent

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

| Period | Total | Domestic | Tax-free removals 2/ | |
|--------------------|----------|----------------|----------------------|----------|
| | output | consumption: | Total | Exports |
| | Billions | 1/ Billions | Billions | 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 | 379.7 | 38.9 | 16.8 |
| 1952 | 435.5 | 394.1 | 40.9 | 16.4 |
| 1953 | 423.1 | 386.8 | 37.0 | 16.2 |
| July-December 1952 | 225.0 | 202.6 | 22.1 | 8.6 |
| July-December 1953 | 211.5 | 192.5 | 19.6 | 7.8 |

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.

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

less, respectively, than in the corresponding quarters of 1952. Although consumer demand for cigarettes is highly inelastic with respect to price, price increases may have had some effect on consumption in 1953. Following the price advance in late February, retail prices in the last 10 months of 1953 averaged 5 percent above 1952. For some "king size" brands, the retail price during the 10 months averaged around 10 percent above the 1952 price of regular size cigarettes. Although per capita disposable income was at a record high for 1953 as a whole, it leveled off during the last half and was very little different than during the last half of 1952. The income of the farm population was 9 percent lower in 1953 than in 1952. Data on wholesalers' sales of tobacco products indicate that the decline in volume in 1953 was probably mostly in the South Atlantic, West North Central, South Central, and Mountain areas, where farm income is an important part of total income.

The number of persons in the age brackets that include smokers is increasing around 1 percent a year. The number of young adults, 17 to 24, in 1953 and 1954 is estimated to be a little lower than in 1952 while the number in older age groups is increasing and those 60 and over are showing the most relative increase. This partly reflects the lower birth rate in the 1930's. To some extent, the decline in the number of younger adults

may be affecting current cigarette consumption. However, projections indicate that the number in the younger adult group will begin to rise significantly by 1957 and 1958.

Cigarettes have been taxed by the Federal Government at 8 cents per package of 20 since November 1951 and existing law provides for the rate to revert to 7 cents on April 1. The President has requested the Congress to rescind this reduction and continue the present rate in effect. Forty-one State governments, the District of Columbia, and the Territories of Alaska and Hawaii also tax cigarettes. The most common State tax rates are 3 or 4 cents per package. A substantial number of cities and municipalities also levy cigarette taxes. The gross tax receipts from the Federal and State cigarette taxes are estimated at 2.1 billion dollars in 1953. (See table 18 for receipts from Federal cigarette taxes.)

Exports of cigarettes continue to go to probably over 100 foreign countries and represent an equivalent of around 50 million pounds (farm-sales weight) of tobacco. The annual total has been quite stable over the past 3 years but during the last half of 1953, cigarette exports dropped about one-fifth below the corresponding period of a year earlier. The total value of the over 16 billion exported in 1953 was nearly 58 million dollars--5 2/3 percent above 1952. The average value per 1,000 in 1953 was \$3.57--about 6 1/2 percent higher than in 1952. Ten leading foreign destinations are shown in table 2.

Table 2.-Cigarette exports from the United States, average 1934-38, annual 1951-53, with percentages

| Country | Average | 1951 | 1952 | 1953 | 1953 |
|-----------------------|----------|----------|----------|----------|---------|
| | 1934-38 | 1/ | 1/ | 1/ | as per- |
| | Millions | Millions | Millions | Millions | centage |
| | | | | | of 1952 |
| | | | | | Percent |
| Tangier & Fr. Morocco | 12 | 1,850 | 2,271 | 1,986 | 87 |
| Venezuela | 39 | 1,700 | 1,570 | 1,411 | 90 |
| Belgium | 63 | 878 | 814 | 958 | 118 |
| Sweden | 80 | 600 | 654 | 838 | 128 |
| Panama & Canal Zone | 389 | 658 | 817 | 833 | 102 |
| Hong Kong | 22 | 1,199 | 710 | 807 | 114 |
| Netherlands Antilles | 1,221 | 769 | 846 | 743 | 88 |
| France | 307 | 739 | 852 | 691 | 81 |
| Canada | 12 | 372 | 533 | 554 | 104 |
| British Malaya | 3 | 1,154 | 639 | 501 | 78 |
| Other countries | 2,622 | 6,889 | 646 | 6,877 | 103 |
| Total all countries | 4,770 | 16,808 | 16,352 | 16,199 | 99 |

1/ Preliminary.

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

Table 3.- Tobacco products: Consumption per capita 15 years and over in the United States and by overseas forces, 1920-53.

| Year | Cigarettes 1/ Number | Cigars 2/ Number | Cigarettes 2/ Pounds | Cigars 2/ Pounds | Smoking, chewing, and snuff 2/ Pounds | Total tobacco products 2/ Pounds |
|--------------------|----------------------------|------------------------|----------------------------|------------------------|---|--|
| 1920 | 611 | 117.2 | 1.89 | 2.45 | 4.33 | 8.67 |
| 1921 | 682 | 94.0 | 2.08 | 2.00 | 4.14 | 8.22 |
| 1922 | 707 | 96.1 | 2.15 | 2.16 | 4.28 | 8.59 |
| 1923 | 836 | 96.4 | 2.51 | 2.21 | 4.26 | 8.98 |
| 1924 | 901 | 89.0 | 2.69 | 2.06 | 4.06 | 8.81 |
| 1925 | 996 | 86.7 | 2.96 | 1.99 | 4.03 | 8.98 |
| 1926 | 1,093 | 85.2 | 3.17 | 1.99 | 3.87 | 9.03 |
| 1927 | 1,174 | 82.9 | 3.42 | 1.93 | 3.61 | 8.96 |
| 1928 | 1,255 | 80.6 | 3.58 | 1.91 | 3.44 | 8.93 |
| 1929 | 1,381 | 79.9 | 3.91 | 1.86 | 3.44 | 9.21 |
| 1930 | 1,365 | 71.6 | 3.84 | 1.67 | 3.34 | 8.85 |
| 1931 | 1,287 | 64.3 | 3.63 | 1.53 | 3.29 | 8.45 |
| 1932 | 1,147 | 52.4 | 3.21 | 1.24 | 3.19 | 7.64 |
| 1933 | 1,230 | 50.8 | 3.49 | 1.23 | 3.07 | 7.79 |
| 1934 | 1,368 | 53.0 | 3.95 | 1.29 | 3.11 | 8.35 |
| 1935 | 1,442 | 53.8 | 4.11 | 1.30 | 2.80 | 8.21 |
| 1936 | 1,618 | 57.3 | 4.61 | 1.40 | 2.81 | 8.82 |
| 1937 | 1,704 | 57.8 | 4.81 | 1.40 | 2.74 | 8.95 |
| 1938 | 1,687 | 55.5 | 4.76 | 1.31 | 2.68 | 8.75 |
| 1939 | 1,754 | 56.0 | 4.94 | 1.32 | 2.56 | 8.82 |
| 1940 | 1,826 | 56.4 | 5.17 | 1.36 | 2.60 | 9.13 |
| 1941 | 2,076 | 59.1 | 5.98 | 1.43 | 2.42 | 9.83 |
| 1942 | 2,414 | 59.2 | 7.07 | 1.42 | 2.28 | 10.77 |
| 1943 | 2,777 | 53.0 | 8.08 | 1.30 | 2.21 | 11.59 |
| 1944 | 2,870 | 49.8 | 8.15 | 1.24 | 1.98 | 11.37 |
| 1945 | 3,270 | 53.0 | 9.29 | 1.28 | 2.07 | 12.64 |
| 1946 | 3,275 | 56.8 | 9.37 | 1.39 | 1.61 | 12.37 |
| 1947 | 3,238 | 52.9 | 9.26 | 1.31 | 1.52 | 12.09 |
| 1948 | 3,314 | 53.3 | 9.41 | 1.32 | 1.47 | 12.20 |
| 1949 | 3,283 | 51.0 | 9.36 | 1.17 | 1.44 | 11.97 |
| 1950 | 3,320 | 50.1 | 9.36 | 1.18 | 1.41 | 11.95 |
| 1951 | 3,527 | 51.3 | 9.98 | 1.19 | 1.31 | 12.48 |
| 1952 ^{3/} | 3,664 | 53.1 | 10.44 | 1.23 | 1.26 | 12.93 |
| 1953 ^{3/} | 3,561 | 53.4 | 10.29 | 1.24 | 1.18 | 12.71 |

1/ Weighing more than 3 pounds per 1,000, including cigarillos.

2/ Unstemmed-processing weight.

3/ Preliminary.

Note: Data are not available to adjust for quantities lost, destroyed, bartered, etc., under war and postwar conditions but such adjustments probably would be small in relation to totals.

Cigars

Total output of cigars from domestic factories and bonded manufacturing warehouses in 1953 was about 6,130 million--2 percent above 1952 and the most in 23 years. Cigar imports, mostly from Cuba and also the Philippine Republic, totaled nearly 17 million--14 1/2 percent above 1952 and above any year since 1946. The quantity shipped from Puerto Rico was increasing rapidly during the latter half of 1953 as the new factory there stepped up operations. Domestic consumption of cigars in 1954 is expected to continue near the 6 billion level.

Cigar consumption in the United States accounted for the overwhelming proportion of the output since the overseas shipments amounted to only about 1 1/2 percent of the total. The predominant share of the 90 million tax-free group was shipped for use of overseas forces. The 1953 commercial exports to foreign destinations totaled about 6.3 million with a declared value of \$320,000. Export volume was nearly double that of 1952 and was the largest since 1948.

Table 4. Cigars ^{1/}: Output and domestic consumption for specified periods

| Period | Domestic factories | | | | Imports for consumption | | | From Puerto Rico: Tax-paid with- |
|----------------|--------------------|-------------------|-------------------|-------------------|-------------------------|-------------------|-----------|----------------------------------|
| | Total output | Tax-paid removals | Tax-free removals | Tax-paid removals | Total | From Philip-pines | From Cuba | drawals in United States |
| | Millions | Millions | Millions | Millions | Millions | Millions | Millions | Millions |
| Average | | | | | | | | |
| 1935-39 | 5,075 | 5,060 | 13 | 66 | 192.4 | 139.2 | 3.0 | 27.4 |
| 1940-44 | 5,450 | 5,282 | 199 | 105 | 93.7 | 78.4 | 15.3 | 11.6 |
| 1945 | 5,275 | 4,774 | 469 | 82 | 60.0 | .0 | 59.8 | 85.3 |
| 1946 | 5,618 | 5,621 | 26 | 125 | 22.2 | 2.0 | 20.1 | 77.8 |
| 1947 | 5,488 | 5,460 | 41 | 124 | 12.5 | 3.2 | 9.1 | 6.2 |
| 1948 | 5,645 | 5,588 | 38 | 140 | 11.3 | 1.4 | 10.3 | 5.0 |
| 1949 | 5,453 | 5,399 | 46 | 142 | 10.9 | .6 | 10.2 | 4.6 |
| 1950 | 5,399 | 5,365 | 47 | 158 | 11.9 | .7 | 11.1 | .7 |
| 1951 | 5,594 | 5,518 | 85 | 171 | 14.3 | 1.3 | 13.0 | .7 |
| 1952 | 5,825 | 5,752 | 101 | 2/180 | 14.6 | 1.9 | 12.5 | 1.9 |
| 1953 | 5,945 | 5,817 | 90 | 2/185 | 16.8 | 2.9 | 13.4 | 9.9 |
| July-Dec. 1952 | 2,911 | 2,983 | 57 | 3/ | 8.7 | 1.3 | 7.3 | 1.6 |
| July-Dec. 1953 | 2,945 | 3,012 | 52 | 3/ | 9.9 | 1.5 | 8.0 | 8.2 |

^{1/} Weighing over 3 pounds per 1,000 and including cigarillos. ^{2/} Estimated.
^{3/} Not available.

Basic data but not estimates compiled from reports of the Internal Revenue Service and the United States Department of Commerce.

The number of cigars in the most popular price group (8.1 to 15.0 cents) gained only three-tenths of 1 percent between 1952 and 1953 while those in the second most popular group (4.1 to 6.0 cents) increased a little over 2 percent. These two price groups accounted for almost four-fifths of all cigars sold in 1953. In an intermediate-priced group (6.1 to 8.0 cents), comprising about 11 percent of all cigars, the number of cigars rose 2.6 percent between 1952 and 1953. The number of higher-priced cigars (over 15 cents), accounting for over 6 percent of the total, gained a little over 6 percent. A major share of these cigars are from bonded manufacturing warehouses, which use only imported tobacco. Also the higher-priced group includes the large bulk of imported Cuban cigars, many of which retail at over 20 cents.

Manufacturers' prices (excluding tax) of cigars were unchanged during the last half of 1953 following a small relative advance in the middle of the year in prices of the medium- and high-priced categories. According to the Bureau of Labor Statistics data, the January 1954 index of wholesale prices for cigars was three-fifths of 1 percent above January 1953 and 3 1/2 percent above the 1947-49 average.

Smoking Tobacco

The 1953 output of smoking tobacco, primarily for pipes and "roll-your-own" cigarettes, was a little over 86 million pounds--about 11 percent below 1952 and the smallest this century. Following the substantial drop from 1945 to 1946, output of smoking tobacco remained fairly stable until 1950 but has fallen off each year since. Domestic consumption accounted for about 98 percent of total output and the remainder was largely tax-free shipments. Domestic consumption dropped 9 percent and tax-free shipments declined about one-third, mostly because less went to overseas forces. Tax-paid cigarette papers for "roll-your-own" cigarettes fell another 6 percent in 1953 and were 29 percent below the 1950 figure. Probably 40 to 50 percent of total "roll-your-own" cigarettes are made with tax-paid papers. Data on tax-free papers (those which are distributed in packets--containing 25 or less) are not yet available for the period since the year ending June 30, 1952. The number of tax-free packets of cigarette papers in fiscal year 1951-52 was 9 percent lower than 3 years earlier.

Manufacturers' prices of smoking tobacco (excluding tax) in January 1954 were very slightly above a year earlier and about one-fifth higher than the 1947-49 average. Retail prices paid for smoking tobacco in rural areas were almost 2 percent higher in 1953 than in 1952 and 13 percent above the 1947-49 average.

Exports of packaged smoking tobacco in 1953 totaled about 638,000 pounds at a declared value of 684,000 dollars. Volume and value were 6 1/4 and 7 1/4 percent higher, respectively, than in 1952.

Exports of smoking tobacco in bulk in 1953 totaled about 4,700,000 pounds at a declared value of \$3,700,000. Export volume more than doubled that of 1952 and was the largest on record. Included in this classification are cigarette tobacco (especially prepared), cut or granulated tobacco, partially processed blended tobaccos, stripped or unstemmed, and shredded tobacco. Exports of bulk smoking tobacco to the Philippine Republic,

Spain, and Mexico in 1953 were sharply above each of the preceding 3 years. Other countries which took substantial quantities were Haiti, the Dominican Republic, and Bolivia.

Chewing Tobacco

The 1953 output of chewing tobacco was 83 million pounds--2 per cent lower than in 1952. This reflects principally the continuation of the gradual downward trend in domestic consumption, which has been going on for a long time. The only important interruption in this trend occurred during World War II, when the expanded employment in hazardous occupations where smoking was not allowed apparently resulted in some increase in consumption of chewing tobacco and snuff. It seems probable

Table 5.- Output of manufactured tobacco in the United States for specified periods

| Period | Chewing | | | | | | Total | Snuff |
|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|-------|
| | Smoking | Plug | Twist | Fine-cut | Scrap | Total | | |
| | 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 | 105.7 | 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 | |
| 1952 | 96.8 | 39.1 | 4.8 | 2.8 | 38.3 | 85.0 | 38.7 | |
| 1953 | 86.3 | 38.0 | 4.6 | 2.8 | 37.8 | 83.2 | 38.6 | |
| July-Dec. 1952 | 48.3 | 19.4 | 2.4 | 1.4 | 18.7 | 41.9 | 18.5 | |
| July-Dec. 1953 | 42.3 | 18.9 | 2.2 | 1.5 | 19.0 | 41.6 | 19.0 | |

Compiled from reports of the Internal Revenue Service.

that the consumption of chewing tobacco will decline slightly further in 1954. In 1953, scrap and plug chewing tobacco (accounting for 45.4 and 45.7 percent of total domestic consumption) declined about 1 and 3 percent, respectively, from a year earlier. Twist (5.5 percent of the total) dropped over 4 percent below 1952 while fine-cut chewing (3.4 percent of the total) was unchanged. In each of the last 2 years, domestic use of scrap chewing has exceeded that of plug chewing, just about reversing their relative positions of 5 years ago. The BLS index for manufacturers' prices (excluding tax) of plug chewing tobacco was unchanged from November 1951 through January 1954 at about one-eighth higher than the 1947-49 average.

Tax-free removals of chewing tobacco, mainly for commercial exports and also overseas forces, were lower in 1953 than in 1952 and accounted for about 2 percent of total output. Commercial exports of chewing tobacco in 1953 totaled 1,600,000 pounds with a declared value of \$1,300,000. Volume and value were 15 and 13 percent lower, respectively, than in 1952. A sharp decline occurred in shipments to the Philippine Republic. Other significant outlets were Australia and the French Pacific Islands.

Snuff

The 1953 output and consumption of snuff were both close to 38.6 million pounds--slightly less than in 1952. Practically all the snuff produced in the United States is consumed domestically, mostly in the South and in mining and lumbering areas. Total output of snuff, although quite stable over a long period, has dropped a little each year since the post-war peak in 1949. Little change from the 1953 level is expected in the year ahead. Manufacturers' prices (excluding tax) have remained the same for more than 2 years although the level through January 1954 was indicated to be 32 percent above the 1947-49 average.

EXPORTS OF UNMANUFACTURED TOBACCO FROM THE UNITED STATES 1/

Exports of unmanufactured tobacco in calendar 1954 probably will not total as much as in 1953 but seem likely to continue at a fairly favorable level. Last year, tobacco exports were raised substantially by the postponement until the spring of 1953 of shipments that normally would have occurred in the late months of 1952.

Total exports of unmanufactured tobacco in 1953 were 516 million pounds valued at nearly 339 million dollars compared with 396 million pounds valued at 246 million dollars in 1952. Volume and total value were 30 and 38 percent higher. Although the poundage total has been exceeded several times in the past, the aggregate value was the second largest on record. The average declared value per pound in 1953 was 65.7 cents--5.6 percent above that of the preceding year.

In 1953, flue-cured composed 85 1/2 percent of total unmanufactured tobacco exports and Burley and Kentucky-Tennessee fire-cured ranked second and third, accounting for about 5 and 4 percent, respectively. Exports of flue-cured, Maryland, Black Fat (a semiprocessed form of dark tobaccos), cigar wrapper, and cigar binder increased from 1952 to 1953 but exports of Burley, Virginia sun-cured, Virginia fire-cured, Kentucky-Tennessee fire-cured, One Sucker, Green River, and cigar filler declined. The big increase was in flue-cured, due to a considerable extent to the postponed 1952 British shipments. Maryland tobacco exports were the largest on record and cigar tobacco exports, the largest except for the unusual high in 1949. Exports of Burley, although the smallest since 1948, continued at substantially above prewar. Exports of fire-cured were the smallest since the lows of 1941-44 and exports of dark air-cured leaf, the second smallest since the lows of 1941-44.

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

Table 6.- United States exports of unmanufactured tobacco, to principal importing countries, by types, for specified periods

| Country and type | (Declared weight) | | | | | | |
|--------------------------------|--------------------|-------------------|-------------------|--------------------|-------------------|--------------|-------------------------------------|
| | Average 1934-38 | 1952 1/ | 1953 1/ | July-December | | | 1953 as percentage of 1952 |
| | | | | Average 1934-38 | 1952 1/ | 1953 1/ | |
| Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Percent | |
| Flue-cured | 324.9 | 319.3 | 442.0 | 216.6 | 191.5 | 264.8 | 138 |
| Burley | 11.6 | 27.0 | 25.0 | 5.5 | 16.7 | 12.6 | 75 |
| Maryland | 5.5 | 5.8 | 8.2 | 2.2 | 2.9 | 4.8 | 166 |
| Va. sun-cured | --- | .3 | 2/ | --- | .1 | 2/ | --- |
| Va. fire-cured | 9.7 | 4.9 | 4.3 | 4.7 | 3.3 | 2.6 | 79 |
| Ky. & Tenn." | 53.7 | 21.8 | 19.5 | 19.4 | 10.7 | 8.5 | 79 |
| One Sucker | .7 | 1.5 | 1.0 | .5 | .7 | .5 | 71 |
| Green River | 3.0 | 2.3 | 1.8 | .9 | .3 | .6 | 200 |
| Black Fat, etc. | 9.0 | 3.2 | 3.9 | 4.6 | 1.5 | 2.3 | 153 |
| Cigar wrapper |) | 3.1 | 3.9 |) | 1.9 | 1.8 | 95 |
| Cigar binder |) 1.3 | 2.8 | 3.1 |) .8 | 2.0 | 1.3 | 65 |
| Cigar filler |) | .8 | .6 |) | .4 | .4 | 100 |
| Perique | .1 | .1 | .1 | 2/ | 2/ | 2/ | --- |
| Stems, trimmings, and scrap | 17.8 | 3.6 | 3.0 | 9.5 | 2.0 | 1.8 | 90 |
| Total | 437.3 | 396.5 | 516.4 | 264.7 | 234.0 | 302.0 | 129 |
| Country of destination: | | | | | | | |
| United Kingdom | 213.9 | 54.7 | 177.4 | 159.9 | 36.6 | 108.8 | 297 |
| France | 21.0 | 6.7 | 5.1 | 1.4 | 5.2 | 2.6 | 50 |
| Belgium | 15.5 | 15.6 | 12.6 | 8.4 | 7.8 | 7.8 | 100 |
| Netherlands | 15.6 | 36.2 | 38.1 | 8.3 | 20.1 | 21.3 | 106 |
| Germany 3/ | 12.6 | 79.6 | 71.9 | 6.7 | 52.3 | 39.4 | 75 |
| Portugal | 4.8 | 5.0 | 6.9 | 2.3 | 1.9 | 2.0 | 105 |
| Denmark | 4.6 | 9.5 | 11.8 | 2.9 | 6.4 | 9.3 | 145 |
| Ireland | 7.4 | 16.4 | 17.5 | 4.8 | 8.7 | 14.9 | 171 |
| Switzerland | 3.8 | 10.7 | 11.5 | 2.0 | 6.1 | 6.1 | 100 |
| Norway | 4.7 | 7.8 | 7.4 | 2.9 | 5.0 | 4.3 | 86 |
| Sweden | 7.2 | 13.0 | 10.2 | 5.1 | 11.4 | 9.9 | 87 |
| Italy | 1.1 | 2.9 | 5.6 | .6 | .1 | .1 | 100 |
| China | 48.2 | .0 | .0 | 22.9 | .0 | .0 | --- |
| Australia | 18.4 | 24.0 | 26.7 | 8.8 | 16.6 | 20.9 | 126 |
| India-Pakistan | 2.6 | 5.8 | 2.9 | 1.5 | 2.0 | 1.4 | 70 |
| New Zealand | 2.5 | 5.4 | 5.8 | 1.5 | 2.9 | 2.4 | 83 |
| Philippine Rep. | 1.2 | 29.7 | 20.9 | .6 | 12.7 | 9.1 | 72 |
| Other countries | 52.2 | 73.5 | 84.1 | 24.1 | 38.2 | 41.7 | 109 |
| Total | 437.3 | 396.5 | 516.4 | 264.7 | 234.0 | 302.0 | 129 |

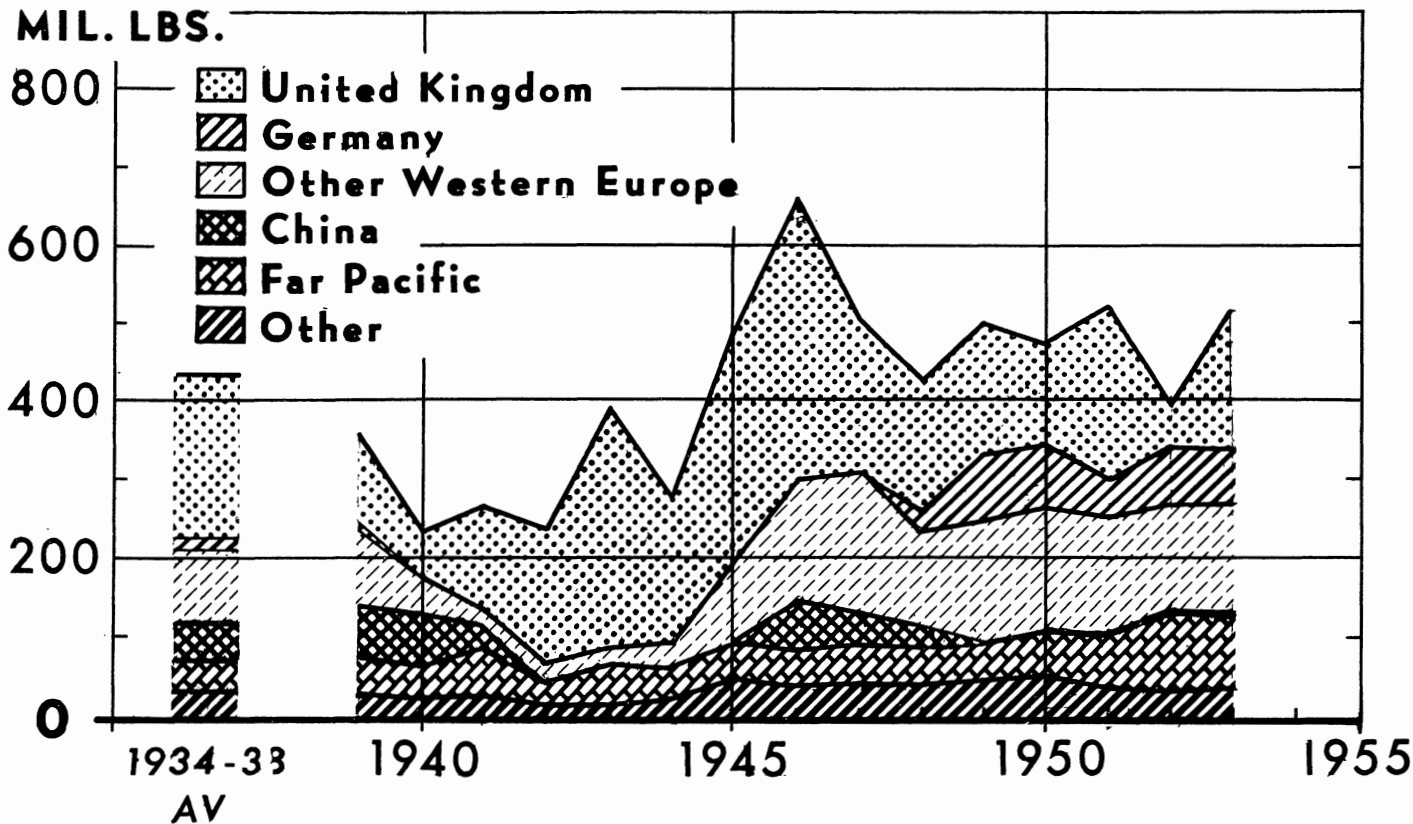
1/ Preliminary

2/ Less than 50,000 pounds.

3/ Includes .4 and 1.4 million pounds to East Germany in 1952 and 1953.

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

EXPORT MARKETS for U. S. TOBACCO



EXPORT WEIGHT OF UNMANUFACTURED TOBACCO

U. S. DEPARTMENT OF AGRICULTURE

NEG. 442-54.(2) AGRICULTURAL MARKETING SERVICE

Exports of unmanufactured tobacco from this country rose to 516 million pounds (export weight) in 1953—30 percent above the unusually low 1952 total. Most of the increase was due to the fact that British importers postponed taking substantial shipments of tobacco from late 1952 until the first half of 1953. Also, tobacco exports to Britain in late 1953 were heavy. Moderately less went to Germany but other Western European countries as a group got a little more in 1953 than in 1952.

Some less went to the Far Pacific countries mainly because of smaller shipments to the Philippine Republic.

In recent years, Germany and Other Western Europe have taken substantially more tobacco than in the pre-World War II period. China has been practically eliminated as a market but other countries of the Far Pacific have been taking considerably more than in 1934-38.

Among the major destinations, the United Kingdom, Netherlands, Australia, Ireland, Denmark, Switzerland, Portugal, and New Zealand took more tobacco in 1953 than in 1952 but less went to Germany, the Philippine Republic, Belgium, Indonesia, Sweden, and Norway.

Tobacco consumption in many areas continues to trend upward. Stocks of United States tobacco in some countries are low relative to requirements. In many of the important importing countries, economic conditions improved during 1953. The gold and dollar position of several countries were better by the fourth quarter of 1953 than in the previous year or two. By the end of November 1953, short term liabilities to foreigners (principally demand deposits and United States Government obligations in banks in the United States) were larger than at the end of 1952 for the United Kingdom, France, Netherlands, Belgium, Switzerland, Austria, Denmark, Finland, West Germany, Norway, Portugal, Sweden, Japan, and Australia. They were moderately lower for Thailand and the Philippine Republic and substantially lower for Mexico, Indonesia, and Egypt. Gold reserves at the end of 1953 were notably higher than at the end of 1952 in the United Kingdom, Netherlands, Belgium, Switzerland, Germany, Portugal, and Sweden but sharply lower in Indonesia. Sterling area gold and dollar reserves (held in London) at the end of January were equivalent to 2.5 billion dollars--29 percent larger than a year earlier. This level was reached even after interest and capital payments of 181 million dollars on United States and Canadian loans.

United States imports are the principal means by which foreign countries can earn the dollars to buy the products of this country. Total imports valued at nearly 11 billion dollars during 1953 were at the high level of the previous 2 years. Total United States exports, including shipments of grant aid military equipment and supplies, were a record 15.7 billion dollars over one-half billion above 1952. Excluding the military shipments, exports declined about 7 percent from 1952 to 1953.

In the Mutual Security Act of 1953, provision was made for using limited funds for the sale and export of surplus agricultural commodities and the acceptance of payment in local currency for the account of the United States. Such sales were not to be substitutions or displacements of usual marketings of the United States or friendly countries. Under this authorization, 20 million dollars was allocated to the United Kingdom for flue-cured tobacco in late October 1953 and 10 million dollars to Germany--8 million dollars for flue-cured and 2 million dollars for Burley--about mid-February 1954. Also in mid-February 1954, 3 million dollars was allocated to Finland for flue-cured tobacco. Tobacco thus acquired is to be over and above what would be normally taken by these countries. There are some prospects that additional allocations may be authorized affecting other countries and types of tobacco.

British Tobacco Situation

The United Kingdom took on the average about 32 percent of the unmanufactured tobacco exported from the United States in the last 3 years compared with 49 percent in the prewar period. Thus the tobacco situation in the United Kingdom is of particular interest to United States tobacco growers. (See table 7a)

Consumption of tobacco in the United Kingdom in 1953 is estimated at about 223 million pounds--2 1/3 percent above 1952 and the largest in 6 years. Consumption was 18 percent higher than in 1933 (last complete year before the outbreak of World War II) but 10 percent less than the 1946 peak. The proportion of tobacco consumed in Britain in 1953 that originated in Commonwealth areas with a duty preference was about 46 percent compared with 45 percent in 1952, 38 percent in 1950, 28 percent in 1943, and 24 percent in 1933.

In addition to her own needs, Britain's total leaf requirements include a substantial quantity to be manufactured (mainly cigarettes) for export. Around 20 percent of the tobacco used in exports appears to come from Commonwealth areas--substantially less than in the case of the home consumption. However, the trend to Commonwealth tobacco has been upward from about 15 percent 5 years ago and 11 percent in 1938. The 1953 exports of manufactured tobacco was nearly 45 million pounds--about 6 percent lower than in 1952. Cigarettes constituted about 94 percent of the total, a slightly smaller proportion than a year earlier. Exports of cigarettes to Malaya and Singapore accounted for about two-fifths of the total. Among leading destinations, less went to Malaya, Western Germany, Belgian Congo, Gold Coast, Hong Kong, Egypt, Burma, and Anglo-Egyptian Sudan but more went to Singapore, Aden, and Australia than in 1952. Although more went to Australia, usually the largest outlet except for Malaya and Singapore, the quantity was still substantially less than the 1949-51 average.

Re-exports of unmanufactured tobacco from the United Kingdom in 1953 totaled 8.9 million pounds compared with 11.3 million in 1952. Re-exports in both years were substantially higher than in most other postwar years, but the prewar average was around 12 million pounds. A substantial quantity of the 1952 and 1953 re-exports went to the Netherlands and was predominantly of nonflue-cured types.

On November 30, 1953, tobacco stocks in the United Kingdom totaled nearly 438 million pounds--practically the same as a year earlier but 56 million lower than the postwar November high of 2 years earlier. The November 1953 stocks were almost 50 million pounds higher than on March 31, 1953,--the low point in the past 2 1/3 years.

Britain imported 316 million pounds of tobacco in 1953--93 million more than in 1952. Most of the increase was accounted for by the heavy shipments of tobacco from the United States, which had been deferred from 1952 to the first half of 1953. The 1953 imports from Southern Rhodesia were slightly lower than in 1952 and substantially less was entered from India. Also, much less was entered from Canada than the record quantity in 1952. The predominant share of the tobacco from the United States, Southern Rhodesia, Canada, and India was flue-cured. In 1953 a smaller quantity of mostly dark-fired tobacco was imported from Nyasaland than in 1952. A significant quantity of nonflue-cured tobacco has come from the Netherlands to Britain in the past 2 years. Turkey shipped more to Britain in 1953 than the unusually small quantity of 1952 although it was still well below the previous 3 or 4 years.

Table 7.- United Kingdom: Imports of unmanufactured tobacco by principal sources for specified periods

| Period | Total imports | United States | Commonwealth countries | | | | Total 1/ | Turkey | Greece |
|----------|----------------|----------------|------------------------|-------------------|----------------|----------------|----------------|----------------|--------|
| | | | India | Southern Rhodesia | Nyasaland | Canada | | | |
| | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | |
| Average: | | | | | | | | | |
| 1935-39: | 269.2 | 200.8 | 19.6 | 15.7 | 12.4 | 14.3 | 63.6 | .6 | |
| 1940-44: | 240.8 | 168.0 | 17.8 | 20.3 | 13.3 | 7.9 | 61.5 | 1.2 | |
| 1945 | 368.8 | 309.8 | 10.1 | 20.6 | 11.6 | 12.1 | 56.0 | .0 | |
| 1946 | 432.7 | 365.8 | 17.6 | 23.0 | 10.9 | 9.2 | 62.3 | .6 | |
| 1947 | 295.6 | 201.2 | 22.9 | 23.0 | 11.9 | 22.2 | 82.1 | 10.5 | |
| 1948 | 280.8 | 172.4 | 22.8 | 43.9 | 14.1 | 12.7 | 97.3 | .1 | |
| 1949 | 301.2 | 154.1 | 38.4 | 46.4 | 17.8 | 13.0 | 119.0 | 5.8 | |
| 1950 | 305.8 | 143.7 | 48.1 | 61.1 | 17.4 | 15.8 | 146.4 | 1.0 | |
| 1951 | 354.9 | 212.0 | 40.1 | 50.4 | 16.1 | 21.6 | 131.4 | 1.3 | |
| 1952 2/ | 223.7 | 66.8 | 38.3 | 58.4 | 11.8 | 32.8 | 143.7 | 1.2 | |
| 1953 2/ | 316.3 | 174.3 | 31.4 | 57.3 | 10.9 | 24.1 | 127.0 | .8 | |

1/ Includes all Commonwealth countries. 2/ Preliminary.

Compiled from Annual Statement of Trade of the United Kingdom, 1925-48; and accounts Relating to Trade and Navigation, 1949-53.

The 1953 production of flue-cured in Canada was 128 million pounds--3 percent below 1952. Although harvested acreage was increased, yields per acre were smaller. The 1953 production of flue-cured in India was 68 million pounds--almost one-tenth below a year earlier due mainly to smaller acreage. The 1954 harvest is expected to be somewhat larger than 1953. The 1953 harvested acreage of flue-cured in Southern Rhodesia declined 5 percent from a year earlier but the increased yield per acre resulted in a crop of 105 million pounds--6 percent larger than in 1952. Early indications point to a crop of around 120 million pounds in 1954.

UNITED STATES IMPORTS AND STOCKS OF FOREIGN GROWN TOBACCO 2/

In 1953, tobacco imports into the United States for consumption totaled over 105 million pounds valued at 82 million dollars. The volume was 2 1/2 percent above 1952 and slightly above the previous record of 1951. The 1953 value was the fourth largest on record.

Cigarette leaf accounted for nearly three-fourths of the imported tobacco and the remainder was almost entirely tobacco used in cigars. The 1953 cigarette leaf imports were 2.7 percent above 1952 but 4.2 percent below the record 1951 figure. The main sources of imported cigarette leaf were Turkey, 73 percent, and Greece, 18 percent. The average declared

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 | Average 1934-38 | | 1952 | | 1953 | | Average 1934-38 | | July-December | | 1953 as per centage of 1952 |
|--------------------------------------|-----------------|----------------|----------------|----------------|----------------|----------------|-----------------|----------------|----------------|---------|-----------------------------|
| | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Percent | |
| Cigarette leaf | | | | | | | | | | | |
| Unstemmed | | | | | | | | | | | |
| Turkey | 18.2 | 55.0 | 56.9 | 9.7 | 28.3 | 28.9 | 102 | | | | |
| Greece | 18.8 | 14.5 | 14.3 | 9.2 | 7.8 | 6.9 | 88 | | | | |
| Syria | .5 | 3.7 | 3.3 | .3 | 1.8 | 1.6 | 89 | | | | |
| So. Rhodesia | 2/ | .6 | .3 | .0 | .2 | .2 | 100 | | | | |
| Yugoslavia | .0 | .8 | 1.4 | .0 | .5 | .6 | 120 | | | | |
| Total 3/ | 44.4 | 75.9 | 78.0 | 22.6 | 39.4 | 39.4 | 100 | | | | |
| Cigar leaf (filler) | | | | | | | | | | | |
| Cuba | | | | | | | | | | | |
| Stemmed | 7.1 | 9.9 | 9.7 | 3.8 | 4.4 | 4.6 | 105 | | | | |
| Unstemmed | 4.1 | 4.0 | 4.4 | 2.1 | 2.1 | 2.2 | 105 | | | | |
| Philippine, Rep. | | | | | | | | | | | |
| Stemmed | 4/ | 1.9 | .5 | 4/ | 1.2 | .3 | 25 | | | | |
| Unstemmed | 4/ | .2 | 2/ | 4/ | .1 | 2/ | 21 | | | | |
| Total 3/ | 11.3 | 16.0 | 14.7 | 5.9 | 7.8 | 7.2 | 92 | | | | |
| Scrap | | | | | | | | | | | |
| Cuba | 2.9 | 8.1 | 8.9 | 1.4 | 4.2 | 4.3 | 102 | | | | |
| Philippine, Rep. | 4/3.2 | 1.2 | 2.3 | 4/1.2 | 1.1 | 1.1 | 100 | | | | |
| Total 3/ | 6.1 | 9.4 | 11.2 | 2.6 | 5.4 | 5.4 | 100 | | | | |
| Cigarwrapper (unst.) | | | | | | | | | | | |
| Indonesia | 5/1.9 | .8 | .4 | 1.1 | .3 | .2 | 67 | | | | |
| Cuba | .2 | .3 | .4 | .1 | .2 | .2 | 100 | | | | |
| Total 3/ | 2.1 | 1.1 | .9 | 1.2 | .5 | .5 | 100 | | | | |
| Total imports 6/ | 66.3 | 102.9 | 105.4 | 33.5 | 53.3 | 52.8 | 99 | | | | |

1/ Preliminary. 2/ Less than 50,000 pounds. 3/ Includes relatively small quantities from other countries not separately listed. 4/ Reported as leaf in 1934 and 1935 and as scrap in 1936-38. 5/ Formerly shown as originating in Netherlands Indies or Netherlands. 6/ Includes tobacco stems, not cut, ground, or pulverized, and stemmed wrapper, not shown separately.

value of cigarette leaf from Turkey was 62.6 cents per pound--slightly above 1952--and from Greece was 86.4 cents--5 percent less than for 1952. Although still relatively small, the quantity from Yugoslavia increased sharply. The stocks of foreign grown cigarette and smoking tobacco on January 1, 1954, were a record 181 million pounds--nearly 7 percent above a year earlier and a little above the previous peak in mid-1951.

The 1953 imports of cigar filler and wrapper leaf declined from 1952 but imports of scrap (largely used as cigar filler) increased and were the second largest on record. From Cuba, stemmed filler was only a little less while unstemmed filler and scrap each increased about one-tenth from 1952. Much less stemmed and unstemmed filler came from the Philippine Republic than in 1952 but imports of scrap from that source were nearly twice as much as in 1952. The 1953 average values per pound for Cuban stemmed filler and scrap at \$1.49 and \$0.61 were a little higher than a year earlier but the value for unstemmed filler at \$1.22 was down 9 percent. The 1953 value per pound of Philippine scrap, the major classification from that source, was 26 cents compared with 29 cents in 1952. Cigar wrapper imports from Indonesia fell sharply in 1953 but increased some from Cuba. The 1953 average values per pound of Indonesia and Cuban wrapper were about \$5.04 and \$4.83--up 13 and 6 percent, respectively, compared with 1952.

The January 1, 1954, stocks of Cuban tobacco in the United States totaled 15.7 million pounds--6 percent less than a year earlier. The January 1, 1954, stocks of Philippine Islands tobacco at 1.4 million pounds were 15 percent below a year earlier. The January 1, 1954, holdings of Sumatra and Java tobacco, not including leaf held for sale in the Free Trade Zone, were 679,000 pounds (unstemmed equivalent) compared with 405,000 a year earlier and 656,000, 2 years earlier.

OUTLOOK AND SITUATION FOR TOBACCO LEAF

Flue-Cured, Types 11-14

Prices

The season average price received for the 1953 flue-cured crop was 52.7 cents per pound--4.8 percent higher than in 1952 and slightly above 1951. However, there was considerable disparity among average prices in the different belts as the result of pronounced effects of the drought in western North Carolina and Virginia. Both yields per acre and quality in the type 11 area were seriously affected. The average prices received in the Old Belt (type 11(a)) and Middle Belt (type 11(b)) markets were down 13 and 5 percent from the preceding season. Both types had the lowest price average in 6 years. The total type 11 crop was over one-fourth smaller in 1953 than in 1952. In contrast, the three other flue-cured producing areas each had a little larger production than a year earlier and prices averaged higher than in any previous season. In the Eastern Belt (type 12), the relative increase in average price, although 13 percent above 1952, was not nearly as far above the averages of 1951 and 1950. In the Border Belt (type 13), the 1953 average price was over 9 percent above each of the two preceding seasons but only 2 1/2 percent above 1950. In the Georgia-Florida Belt, the 1953 average price was 3 2/3 percent above the 1952 average, which was the previous high for that area.

Table 9.- Flue-cured tobacco: Average prices for gross sales (includes resales) by belt, 1947-53

| Crop year | Old Belt type 11(a) | Middle Belt type 11(b) | Eastern N. C. type 12 | Border Belt type 13 | Ga.-Fla. type 14 |
|-----------|---------------------|------------------------|-----------------------|---------------------|------------------|
| | Cents per pound | Cents per pound | Cents per pound | Cents per pound | Cents per pound |
| 1947 | 38.1 | 42.2 | 43.0 | 41.9 | 37.8 |
| 1948 | 49.2 | 50.1 | 49.3 | 50.5 | 47.2 |
| 1949 | 45.5 | 47.7 | 48.8 | 48.9 | 40.1 |
| 1950 | 53.4 | 56.2 | 56.5 | 55.4 | 48.1 |
| 1951 | 50.5 | 53.8 | 55.1 | 51.9 | 46.3 |
| 1952 | 48.4 | 49.4 | 50.5 | 51.9 | 49.2 |
| 1953 1/ | 42.1 | 47.0 | 57.1 | 56.8 | 51.0 |

1/ Preliminary.

The Government support level for the 1953 season was 47.9 cents per pound--about 5 percent lower than in the 2 preceding seasons. The 1954 support level will be 90 percent of the applicable parity price. The parity price is calculated as follows, using the February parity as an illustration:

1. The season average price for flue-cured for the most recent 10 years (1944-53) is divided by the average of the index (1910-14=100) of all prices received by farmers for the same 10 calendar years to give an "adjusted base price."

$$\frac{48.2}{256} = 18.8$$

2. The "adjusted base price" is multiplied by the February parity index (the index of prices paid by farmers including interest, taxes, and wage rates--1910-14=100).

$$18.8 \times 282 = 53.0 \text{ cents per pound February parity for flue-cured}$$

The "adjusted base price" remains constant during a particular calendar year (in this case, 1954) but the parity price will change each month if the parity index changes.

The support level for 1954 flue-cured will be either the minimum level announced prior to planting or 90 percent of the July 1 parity, whichever is higher. The February 1954 flue-cured parity is one-fifth of a cent lower than it was approximately a year ago when the minimum support level was determined, but four-fifths of a cent higher than it was as of July 1, 1953.

The flue-cured placed under Government loan in the 1953 season totaled 151.3 million pounds--about 12 percent of the crop. In the 1952 season, 165 million pounds (about the same proportion of the crop) were placed under loan. In addition, 78 million pounds acquired for British manufacturers under option to purchase were pledged to the Commodity Credit Corporation for loans. During the 1953 season, 64 percent of all flue-cured received under Government loan was in the Old Belt markets, a higher proportion than in any previous season. Moderately more than in 1952 was received for loans in the Middle Belt, but the loan quantity in the Eastern Belt was much smaller than a year earlier and the smallest since 1946. The loan quantities in the Border and Georgia-Florida Belts were well below those in each of the previous 2 years. The loan quantity as a percentage of the marketings in the 1953 season was about 39 percent for type 11 (a), 17 percent for type 11(b), and 3 percent each for types 12, 13, and 14.

All flue-cured in Government loan stocks at the end of January was probably about 333 million pounds (farm-sales weight). About 45 percent was 1953 crop tobacco; 41 percent, 1952 crop; and 14 percent 1951 crop.

Supplies

The 1953-54 total supply of flue-cured tobacco is 3,109 million pounds, slightly larger than in 1952-53. The 1953 production of 1,257 million pounds was 8 percent below 1952. Although acreage was reduced in all areas, the higher yields per acre in Eastern North Carolina, South Carolina, and Georgia-Florida raised production in those areas above that of 1952. On the other hand, yields per acre in the Old Belt averaged 18 percent below those of 1952 and production dropped 25 percent below that of a year earlier. Carryover last July 1 was 1,852 million pounds--a 7-percent increase above a year earlier and enough to hold total supply for 1953-54 slightly above the 1952-53 level.

The 1954 marketing quota announced in late November 1953 resulted in acreage for allotments (including reserves) totaling about 1,057,000 acres compared with 1,044,500 acres allotted in 1953. Most individual farm allotments remain unchanged. If the harvested acreage in 1954 comes within about 2 percent of the allotments and yields approximate the recent 3-year average (assuming more nearly normal yields in type 11), the 1954 crop would be about 1,350 million. Carryover on July 1, 1954, seems likely to be around 1,860 million pounds and if so, total supplies of flue-cured for 1954-55 may approximate 3,210 million pounds--3 percent above the current year's level.

Domestic Use and Exports

During the current marketing year (July 1953-June 1954), the domestic use of flue-cured seems likely to be around 810 million pounds--a little lower than the record 828 million of 1952-53. During the first half of 1953-54, the number of cigarettes manufactured domestically was below the same period of a year earlier. The decline is offset to some extent by the increasing share of "king size" cigarettes which use more tobacco per cigarette. The 1953-54 exports of flue-cured may be around 450 million pounds (farm-sales weight)--approximately 8 percent above 1952-53 and the second largest since 1946-47.

Table 10.- Flue-cured tobacco, types 11-14: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-53
(Farm-sales weight)

| Year | Production | Stocks July 1 | Supply | Disappearance 1/ | | Average price per pound |
|--------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------------------|
| | | | | Total | Exports | |
| | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Cents |
| Av. 1934-38: | 741 | 845 | 1,535 | 704 | 338 | 22.9 |
| 1939 | 1,171 | 946 | 2,117 | 707 | 417 | 14.9 |
| 1940 | 760 | 1,410 | 2,170 | 577 | 421 | 16.4 |
| 1941 | 650 | 1,593 | 2,243 | 783 | 492 | 28.1 |
| 1942 | 812 | 1,460 | 2,272 | 893 | 604 | 38.4 |
| 1943 | 790 | 1,379 | 2,169 | 980 | 625 | 40.2 |
| 1944 | 1,087 | 1,189 | 2,276 | 1,150 | 696 | 42.4 |
| 1945 | 1,173 | 1,126 | 2,299 | 1,152 | 667 | 43.6 |
| 1946 | 1,352 | 1,147 | 2,499 | 1,212 | 659 | 48.3 |
| 1947 | 1,317 | 1,287 | 2,604 | 1,054 | 695 | 41.2 |
| 1948 | 1,090 | 1,550 | 2,640 | 1,102 | 720 | 49.6 |
| 1949 | 1,115 | 1,538 | 2,653 | 1,168 | 729 | 47.2 |
| 1950 | 1,257 | 1,485 | 2,742 | 1,185 | 757 | 54.7 |
| 1951 | 1,453 | 1,557 | 3,010 | 1,279 | 777 | 52.4 |
| 1952 2/ | 1,365 | 1,731 | 3,096 | 1,244 | 828 | 50.3 |
| 1953 2/ | 1,257 | 1,852 | 3,109 | | | 52.7 |

1/ Year beginning July 1.

2/ Subject to revision.

During July-December 1953, flue-cured exports totaled 298 million pounds (farm-sales weight)--82 million pounds larger than in July-December 1952. This increase largely reflected the increase in British shipments above the unusually small quantity shipped in July-December 1952. For all other countries combined, the flue-cured exports in July-December 1953 were only very slightly above those in the same period of a year earlier. Increases to some countries a little more than offset decreases to others. Following the United Kingdom, the next five ranking export outlets in the recent half year were West Germany, Australia, Netherlands, Ireland, and the Philippine Republic. About 22 and 29 percent less flue-cured went to Germany and the Philippines in July-December 1953 than in July-December 1952, while increases of 25 and 11 percent occurred for Australia and Netherlands. The quantity to Ireland was 75 percent greater than the unusually small quantity of July-December 1952. Among the other important export destinations for flue-cured, more went to Denmark, Sweden, Indochina, Egypt, Finland, Hong Kong, and Portugal but less went to Belgium, Japan, New Zealand, France, Norway, Austria, India, and Ceylon. The July-December 1953 flue-cured exports to Indonesia, Thailand, Switzerland, and Parkistan were about the same as in the comparable period of a year earlier.

Burley, Type 31

Prices

Burley auction markets began on November 30 and practically all the crop had been marketed by mid-February. The final cleanup sale at Lexington, Kentucky, was on February 26. The season average price was a record 52.5 cents per pound, 4 percent above a year earlier, and about 1 1/4 cents above the previous record set in 1951. About 55 percent of the crop was sold prior to the holiday closing--about the same proportion as in the previous season when the crop was substantially larger. As in the previous season, the average price for pre-holiday sales averaged about 5 percent above that for the post-holiday sales. With few exceptions, prices by grades averaged 1 or 2 cents lower than in the 1952 crop season. The general average price being higher reflects the larger proportion of tobacco in the better grades than in the previous season.

The 1953 support price was 46.6 cents per pound--about 6 percent lower than in the 2 preceding seasons. The 1954 support level will be 90 percent of the applicable parity price. The parity price is calculated as follows, using the February parity as an example:

1. The season average price for Burley for the most recent 10 years (1944-53) is divided by the average of the index (1910-14=100) of all prices received by farmers for the same 10 calendar years to give an "adjusted base price."

$$\frac{46.6}{256} = 18.2$$

2. The "adjusted base price" is multiplied by the February parity index (the index of prices paid by farmers including interest, taxes, and wage rates--1910-14=100).

$$18.2 \times 282 = 51.3 \text{ cents per pound February parity for Burley}$$

The support level for 1954 Burley will be either the minimum level announced prior to planting or 90 percent of the October parity, whichever is higher. The February 1954 parity is one-half of a cent lower than it was approximately a year ago when the minimum support level was determined but one-tenth of a cent higher than it was in September 1953.

During the 1953 crop marketing season, Burley growers placed about 102 million pounds of tobacco under Government loan--approximately 18 percent of total deliveries. This compares with close to 104 million pounds--16 percent of the crop--in the 1952 crop marketing season. Burley tobacco in Government loan stocks reported at the end of January totaled about 281 million pounds (farm-sales-weight equivalent)--36 percent, 1953 crop; 34 percent, 1952 crop; 28 percent, 1951 crop; and the remaining 2 percent, 1950 crop.

Supplies

Total supplies of Burley for 1953-54 are about 1,735 million pounds --1.4 percent larger than for 1952-53. The 1953 crop at close to 572 million pounds was nearly one-eighth smaller than the record 1952 crop. However, carryover on October 1, 1953, was 1,163 million pounds--almost one-tenth above a year earlier.

The 1954 marketing quota, announced in late November, results in acreage allotments totaling 395,500 acres compared with 432,750 acres allotted for 1953. For most farms, acreage allotments will be about 8 percent less in 1954 than in 1953. Special provisions apply to small allotments.

If the 1954 harvested acreage is within 1 or 2 percent of the allotted acreage and yields per acre equal the most recent 3-year average, this year's crop would be around 530 million pounds--about 7 percent lower than last year's. Carryover next October 1 may approximate 1,195 million pounds and added to a crop of this size, would provide 1954-55 total supplies of 1,725 million pounds--slightly lower than the 1953-54 record level.

Table 11.- Burley tobacco, type 31: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-53

| Year | (Farm-sales weight) | | | | | | |
|--------------|---------------------|--------------------------|--------------|----------------------|------------------------|-----------------------|-------------------------------------|
| | : Production : | : Stocks : : Oct. 1 : | : Supply : | : Disappearance 1/ : | | | : Average : price per : pound |
| | | | | : Total : | : Domestic : : 2/ : | : Exports : : 2/ : | |
| : Mil. lb. : | : Mil. lb. : | : Mil. lb. : | : Mil. lb. : | : Mil. lb. : | : Mil. lb. : | : Ct. : | |
| 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 | 618 | 981 | 1,599 | 538 | 506 | 32 | 51.2 |
| 1952 2/ | 650 | 1,061 | 1,711 | 548 | 519 | 29 | 50.3 |
| 1953 2/ | 572 | 1,163 | 1,735 | | | | 52.5 |

1/ Year beginning October 1.

2/ Subject to revision.

Domestic Use and Exports

During the marketing year ending September 30, 1953, domestic use of Burley at 519 million pounds was nearly 2 1/2 percent above a year earlier and the largest in history. The number of cigarettes manufactured in the 1952-53 marketing year was 1.2 percent less than in 1951-52; output of smoking tobacco was down about 7 1/2 percent; and the output of plug, fine-cut, and scrap chewing was down about 2 percent. The increase in domestic use of Burley, despite these declines, is probably attributable mostly to the increased proportion of "king size" cigarettes in 1952-53, which absorb more tobacco per unit of output. The domestic use of Burley during the 1953-54 marketing year may be a little lower than in 1952-53.

Exports of Burley in 1952-53 totaled about 29 million pounds (farm-sales weight)--3 1/3 percent lower than a year earlier. The quantity to Germany, the leading outlet, dropped by one-half. Among the next four ranking outlets, more went to Portugal, Sweden, and Mexico but less to Belgium. Also, less went to Denmark, Austria, Norway, and France but increases occurred to the Philippine Republic, Switzerland, Netherlands, Finland, and Yugoslavia. Egypt got about the same amount in each of the last 2 marketing years.

In the first quarter of the 1953-54 marketing year (October-December 1953), Burley exports totaled about 7.4 million pounds--slightly lower than in the same period of a year earlier. German and Belgian takings were up sharply but that going to Sweden and Mexico were down sharply. Moderately more went to Portugal but much less went to Denmark.

Maryland, Type 32 3/

Prices

Maryland tobacco auctions generally begin before mid-May of the year following harvest. Approximately seven-eighths of Maryland tobacco is marketed at auction and the rest at the Baltimore hogshead market. For the 1953 calendar year, the preliminary average price received, principally for 1952 crop tobacco, was 49.1 cents per pound--nearly 10 percent more than a year earlier and the highest since 1949. The quality of the 1952 crop was not up to the 1951 crop, which was the best in several years. Government price supports were not available on the 1952 crop since growers had disapproved a marketing quota on that crop.

The 1953 crop will receive Government price support since a quota was approved for last year's crop. The support is 50.4 cents per pound--90 percent of parity at the time the minimum level was announced in

3/ In 1952 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 carryover 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 previously. 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.

March 1953. Ninety percent of parity as of the October 1, 1953 for Maryland tobacco was 49.9 cents per pound, so the previously announced minimum, being higher, becomes the actual support level as prescribed by law.

The 1954 crop of Maryland tobacco will be ineligible for Government price support. In the referendum held on October 29, 1953, 64.1 percent of the growers voting favored a quota, but this was a little short of the $66 \frac{2}{3}$ percent specified by law, which is necessary to place a quota into effect.

The quantity of Maryland tobacco in Government loan stocks from the 1948-50 crops at the end of January was about $7 \frac{3}{4}$ million pounds (farm-sales weight.)

Supplies

Manufacturers' and dealers' stocks of Maryland tobacco on October 1, 1953, totaled 72.4 million pounds--slightly below the peak October 1952 level. The 1953 crop at 37.1 million pounds was 7 percent smaller than the 1952 crop and the smallest in 5 years.

The 1953-54 total supply, according to the legal definition, is the 1953 crop plus the January 1, 1954, carryover. January 1 stocks were 65.4 million pounds and the total supply on this basis would be 102.5 million pounds--2.3 percent below the corresponding figure for a year earlier.

If 1954 acreage is about 50,000--the figure for 3 of the last 5 years--and yields per acre are equal to the recent 5-year average, this year's crop would approximate 40 million pounds--3 percent more than last year's. Carryover next January 1 may be slightly lower; but with a 40 million pound crop this year, total supply for 1955 would be a little above the current year's level.

Domestic Use and Exports

Domestic use of Maryland tobacco (largely in cigarettes) during October 1952-September 1953 totaled about 32.4 million pounds--one fifth more than a year earlier and the largest on record. It does not seem likely that the 1953-54 domestic use will equal the relatively high 1952-53 level.

The 1952-53 exports of Maryland tobacco at 7.8 million pounds (farm-sales weight) were about 18 percent higher than in 1951-52, when they were the smallest in 5 years. Switzerland (accounting for 70 percent of the export total) took one-eighth more than in 1951-52 and the most since 1948-49. Yugoslavia got a substantial quantity in 1952-53 in contrast to none a year earlier. Also, more Maryland tobacco went to Netherlands, West Germany, and Spain but less went to Belgium and French Morocco. None was reported as going to Tunisia in contrast to a sizable quantity in 1951-52.

During October-December 1953 (first quarter of 1953-54), exports of Maryland tobacco were sharply higher than in October-December 1952. Most of the increase was due to the sizable shipment to France. Other major destinations were Switzerland, Netherlands Spain, Gibraltar, Germany, and Belgium.

Table 12.- Maryland tobacco, type 32: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-53

(Farm-sales weight)

| Year | Production | Stocks | Production | Disappearance 1/ | | | Average | Stocks |
|---------|------------|---------|-------------|------------------|----------|---------|-----------|-----------|
| | Oct. 1 | Oct. 1 | plus Oct. 1 | Total | Domestic | Exports | price per | following |
| | Million | Million | Million | Million | Million | Million | Cents | Million |
| | pounds | pounds | pounds | pounds | pounds | pounds | | 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 | 37.8 | 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 | 41.6 | 64.3 | 105.9 | 33.3 | 26.7 | 6.6 | 44.8 | 59.3 |
| 1952 2/ | 40.0 | 72.6 | 112.6 | 40.2 | 32.4 | 7.8 | 49.1 | 64.9 |
| 1953 2/ | 37.1 | 72.4 | 109.5 | | | | | 65.4 |

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

Fire-cured, Types 21-23

Prices

Auctions for Virginia fire-cured (type 21) opened November 30 and closed February 4--earlier than usual. The 1953 crop was the smallest on record. The auction average price for type 21 at 35.6 cents per pound was very slightly above last season's although quality was poorer than a year earlier. Auctions for Kentucky-Tennessee fire-cured (types 22-23) opened in the last week in January--a few weeks later than usual. Farmers were delayed in their stripping by unfavorable weather conditions. During the growing season, the drought conditions made for much low quality tobacco, which is being reflected in general average prices. Through late February, the average price received for type 22 (Eastern District Kentucky-Tennessee) was 34.6 cents per pound--about 12 percent less than the comparable

season price of a year ago. The average price for type 23 (Western District--mostly Kentucky) was 27.4 cents--almost one-fourth less than the comparable season price of a year ago.

The 1953 price support level for fire-cured tobacco (computed at 75 percent of the Burley loan rate) is 35 cents per pound--2.1 cents less than in the 1952 crop season. Growers of Virginia fire-cured placed about 651,000 pounds--about 7 percent of the crop--under Government loan. This was much less than in each of the preceding 3 seasons when around 19 percent went into Government loan. Through late February, growers of Kentucky-Tennessee fire cured had placed about 5.2 million pounds under Government loan. Out of total deliveries of types 22 and 23, about 15 and 23 percent, respectively, went into Government loan. During last year's entire marketing season, the proportions tended to be the reverse with 20 percent of type 22 and 12 percent of type 23 going into Government loan.

Total fire-cured tobacco reported in Government loan stocks at the end of January amounted to about 51 million pounds (equivalent farm-sales weight). Only about 1 $\frac{1}{2}$ percent of this was 1953 crop tobacco. Because of the delayed marketing of Kentucky-Tennessee fire-cured most of the January 1953 loans were not recorded in time for the January report. About 20 percent of the total is 1952 crop tobacco, 11 percent from the 1951 crop, 19 percent from the 1950 crop, and 48 $\frac{1}{2}$ percent from the 1946-49 crops.

The 1954 crops of fire-cured will receive Government price support at 75 percent of the Burley loan level, which is based on 90 percent of the Burley parity price. The February 1954 Burley parity was slightly lower than a year earlier.

Supplies

Total supply of fire-cured tobacco for 1953-54 is nearly 198 million pounds--4 percent lower than for 1952-53 and the lowest since 1945-46. The drought reduced 1953 yields per acre substantially and total production at 51 million pounds was down nearly one-eighth from 1952 and the smallest on record for all three types. Carryover at a little over 146 million pounds, was almost the same as that of each of the 2 preceding years. Over the past few years, the carryover of Virginia fire-cured has tended to increase some while Kentucky-Tennessee (type 22) has been quite stable. However, carryover of Kentucky-Tennessee (type 23) has declined sharply since 1950.

The 1954 allotment for fire-cured tobacco is 50,400 acres. Allotments for most farms will be about 10 percent less in 1954 than in 1953. If 90 percent of the allotment acreage is planted and yields equal the 1950-52 average (1953 not included because unusually low), the 1954 production would be about 54 million pounds. Carryover next October 1 may be around 130 or 135 million pounds; and if the crop were approximately 54 million, the 1954-55 total supply of fire-cured may be around 187 million pounds. Such a supply would be 10 or 11 million pounds lower than for the current year.

Domestic Use and Exports

During the 1952-53 marketing year, domestic use of fire-cured at a little over 29 million pounds was 8 percent lower than a year earlier and the smallest since 1934. The output of snuff, the major domestic outlet, was only very slightly smaller (two-thirds of 1 percent). This suggests that some other kind of tobacco may be replacing fire-cured to some extent. Snuff manufacture is expected to remain fairly stable in 1953-54.

Table 13.- Fire-cured tobacco, types 21-24: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-53

| Year | (Farm-sales weight) | | | | | | Average price per pound |
|--------------------|---------------------|----------------|----------------|------------------|----------------|-------------------------|-------------------------|
| | Production | Stocks Oct. 1 | Supply | Disappearance 1/ | | Average price per pound | |
| | | | | Total | Domestic | | |
| | 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 | 36.0 |
| 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 | 59.5 | 147.3 | 206.8 | 59.9 | 31.8 | 28.1 | 40.0 |
| 1952 ^{2/} | 58.2 | 146.9 | 205.1 | 58.7 | 29.0 | 29.7 | 37.6 |
| 1953 ^{2/} | 51.2 | 146.4 | 197.6 | | | | 34.0 |

1/ Year beginning October 1.

2/ Subject to revision.

The 1952-53 exports of all fire-cured tobacco at nearly 30 million pounds (farm-sales weight) were almost 6 percent above 1951-52, when they were the lowest on record except for some World War II years. The 1952-53 exports of Kentucky-Tennessee fire-cured leaf increased a little less than 6 percent and of Virginia fire-cured, about 8 percent above 1951-52. Almost four-fifths of the total exports of fire-cured was Kentucky-Tennessee tobacco. Netherlands, the leading foreign outlet, took 13 percent less but Switzerland, ranking next, took substantially more than the small 1951-52

amount. Spain and France ranked third and fourth and got relatively substantial quantities of Kentucky-Tennessee fire-cured in contrast to none in 1951-52. Sweden took much more than the relatively small amount in 1951-52. Also, Denmark, Indonesia, Norway, Gold Coast, and French West Africa took more while much less than a year earlier went to the United Kingdom, Belgium, West Germany, and Ireland. Among the other countries taking less Kentucky-Tennessee fire-cured were Italy, Belgian Congo, Tunisia, and Algeria. During the first quarter of the 1953-54 marketing year (October-December 1953), exports of Kentucky-Tennessee fire-cured were about one-fourth below the same period of a year earlier. The major decreases occurred in leaf going to Switzerland, Sweden, and Norway while increases occurred in that going to Netherlands and West Germany.

The 1952-53 exports of Virginia fire-cured to Norway (accounting for over two-fifths of the total) were more than 75 percent higher than in 1951-52, when they were the lowest in many years. Increases also occurred in shipments to Sweden, United Kingdom, and Netherlands but Virginia fire-cured going to Switzerland, Austria, Germany, New Zealand, and Australia dropped below 1951-52. In the first quarter of 1953-54 (October-December 1953), exports of Virginia fire-cured tobacco were 14 percent lower than in the comparable quarter of a year earlier, with most destinations showing declines. Shipments to Norway were about one-tenth less than in October-December 1952.

An increase may occur in the exports of fire-cured tobacco to France during the 1953-54 marketing year as the result of the Mutual Security Act of 1953, which authorizes acceptance of foreign currency for exports of surplus agricultural commodities under certain conditions.

Dark Air-Cured, Types 35-37

Prices

Auctions for the dark air-cured types opened during the first half of December and sales were ended by February 18 of this year. Prices for the small crops of the Kentucky-Tennessee types 35 and 36 averaged 26.3 and 22.7 cents per pound--18 and 25 percent lower than the 1952 season averages. The declines in prices reflected the substantially lower quality of the 1953 crop resulting from the drought conditions during the growing season. The 1953 season average price for the small crop of Virginia sun-cured (type 37) was 31.5 cents per pound--very slightly above the previous season. There was little over-all change in quality from the preceding year.

The 1953 price support level for types 35-37 (computed at $66 \frac{2}{3}$ percent of the Burley loan rate) was 31.1 cents per pound--1.9 cents less than for the 1952 crop. Growers placed under Government loan about 5.9 million pounds of One Sucker (type 35), about 1.5 million pounds of Green River (type 36), and only minor quantities of Virginia sun-cured (type 37). These loan quantities represented over one-third of total deliveries of type 35 and over one-fifth of total deliveries of type 36, but these proportions were both some lower than in the previous season. The dark air-cured tobacco in Government loan stocks at the end of January totaled about 41 million pounds (equivalent farm-sales weight); about 12 percent

was 1953 crop tobacco, 22 percent from the 1952 crop, 16 percent from the 1951 crop, 11 percent from the 1950 crop, and 39 percent from the 1946-49 crops. About two-thirds of the 1953 crop loans were reported in time for inclusion in the above total.

The 1954 crops of dark air-cured will receive Government price support at 66 $\frac{2}{3}$ percent of the Burley loan level, which is based on 90 percent of the Burley parity price. The February 1954 Burley parity was slightly lower than a year earlier.

Supplies

The 1953-54 total supply of types 35-37 is a little over 105 million pounds--slightly lower than the 1952-53 level. Although acreage was a little larger than in 1952, the drought reduced yields per acre and production was down substantially for all three types. The One Sucker (type 35) crop was one of the smallest in the past 15 years, the Green River crop (type 36) was the smallest on record, and the Virginia sun-cured crop (type 37) was the smallest in 5 years. For all three types combined, the 1953 production at about 27 $\frac{3}{4}$ million pounds was 18 percent lower than 1952 and the lowest since 1936. Carryover of dark air-cured last October 1 at 77 $\frac{2}{3}$ million pounds was 6 percent larger than a year earlier. All the rise was due to the increase in the carryover of type 35 as stocks of type 36 were slightly less and of type 37, considerably less than a year earlier.

The 1954 acreage allotment for types 35-36 is 20,700 acres. Dark air-cured acreage allotments for most farms will be 20 percent less in 1954 than in 1953. The 1954 acreage allotment for type 37 is about 6,130 acres--an increase of nearly 1,200 acres over 1953. If yields per acre are more nearly normal in 1954 (about the average of 1949, 1951, and 1952) and growers plant nine-tenths of the types 35-36 allotments and seven-tenths of the type 37 allotment (roughly similar to the proportions in the last 2 years), the 1954 production of types 35-37 would be about 27 million pounds. This, together with a carryover next October that may be around 74 million pounds, would provide a total supply of a little over 100 million pounds for 1954-55. This would be a little lower than the current year's level.

Domestic Use and Exports

Domestic use of dark air-cured tobacco in the year ending September 30, 1953, was a little over 23 million pounds--a little larger than the record low of 1951-52. The output of the chewing tobacco, that is the major domestic outlet for these types, declined 2 percent from 1951-52 to 1952-53.

The 1952-53 exports of dark air-cured at 6.1 million pounds (farm-sales weight) were 23 percent below a year earlier and below any previous year except some of the World War II years. The 1952-53 exports of dark air-cured were about 55 percent as leaf and 45 percent as Black Fat--a semiprocessed form. Exports of One Sucker and Green River leaf declined

32 and 28 percent, respectively, and exports of Black Fat went down 18 percent between 1951-52 and 1952-53. Much less One Sucker went to Nigeria and Belgium. Also, much less Green River went to United Kingdom, Indonesia, Belgium, and Liberia. There was a marked increase in exports of Green River tobacco to Netherlands from 1951-52 to 1952-53 and during the first quarter of 1953-54 (October-December 1953), more Green River went to the Netherlands than in the entire 1952-53 marketing year.

The leading outlet for Black Fat is Nigeria, which took 18 percent more in 1952-53 than a year earlier. Gold Coast, the next ranking outlet, got 24 percent less and also much less went to French West and Equatorial Africa and other Portuguese Africa than in the previous year. In the first quarter of 1953-54 (October-December 1953), exports of Black Fat were considerably above those of the same period of a year earlier. Heaviest shipments were to Nigeria, Gold Coast, and French West Africa.

Some quantity of dark air-cured tobacco may be shipped to France during the 1953-54 marketing year as the result of the Mutual Security Act of 1953, which authorizes acceptance of foreign currency for exports of surplus agricultural commodities under certain conditions.

Table 14.- Dark air-cured tobacco, types 35-37: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-53

| (Farm-sales weight) | | | | | | | |
|---------------------|------------|------------------|---------|------------------|-------------------|-------------------------------|------|
| Year | Production | Stocks Oct. 1 | Supply | Disappearance 1/ | | Average price per pound | |
| | | | | Total | Domestic:Exports: | | |
| | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Ct. |
| 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 | 36.6 | 26.3 | 10.3 | 24.6 |
| 1951 | 31.7 | 71.8 | 103.5 | 30.3 | 22.4 | 7.9 | 34.3 |
| 1952 2/ | 33.8 | 73.2 | 107.0 | 29.3 | 23.2 | 6.1 | 31.6 |
| 1953 2/ | 27.7 | 77.7 | 105.4 | | | | 25.8 |

1/ Year beginning October 1.

2/ Subject to revision.

Cigar, Types 41-62

Prices

Most cigar tobacco is sold at the "barndoor" during the fall and winter. The 1953 Pennsylvania filler (type 41) sold at an average price of 27 1/2 cents per pound--9 percent above a year earlier and the highest since 1947. Connecticut Valley Broadleaf (type 51) in the bundle averaged around 57 cents per pound for injury-free crops--approximately one-tenth higher than in 1952. Sorted grade prices for Broadleaf were unchanged to 5 cents higher for some grades. The predominant share of Connecticut Valley Havana Seed (type 52) averaged around 58 cents per pound for injury-free crops--about 7 percent above the comparable price in 1952. Most type 52 Havana Seed was sold in late September. The above price information is based on contract prices which probably will be higher than the over-all crop averages to be published later. About 1.8 million pounds of the Havana Seed were placed under Government loan but practically no Broadleaf went under loan.

Marketing of the Wisconsin binder types has been under way since early January. For the Northern Wisconsin type 55, prices for the season's sales through February averaged around 33 cents per pound--roughly 10 percent above a year earlier. Binder grade tobacco in this type averaged near 49 cents compared with about 44 cents last season and about 48 cents 2 years ago. For the Southern Wisconsin type 54, prices for the season's sales through February averaged around 25 cents per pound--roughly one-third higher than the low 1952 season average. Binder grade tobacco in this type averaged around 37 cents compared with 33 cents last season and 34 2/3 cents 2 years ago. The largest volume of Southern Wisconsin was sold as straight stripped and crop lots, averaging around 22 cents per pound. This was nearly 17 percent above the comparable 1952 season price.

Government price support at 90 percent of parity was in effect for the 1953 crops of cigar filler and binder types, except Pennsylvania filler type 41, and will continue to be in effect for the 1954 crops.

The support level for the 1953 crop of Puerto Rican tobacco to be harvested and marketed mostly during the first half of 1954 is 32.4 cents per pound compared with the 33.1 cent support level of last season. The average price received during the 1952-53 season was 33 cents per pound.

The quantity of cigar tobacco under Government loan or in CCC inventories at the end of January was about 12 1/2 million pounds--6.6 million, type 54 (Southern Wisconsin); a little over 2 million, types 42-44 (Ohio filler); nearly 3 million, type 52 (Connecticut Valley Havana Seed); and about .9 million, type 51 (Connecticut Valley Broadleaf).

Supplies

Filler: The 1953-54 total supply of continental filler types 41-44 is 186 million pounds--9 1/2 percent below 1952-53 and the smallest in 6 years. The 1953 acreage was slightly above 1952, but both years were substantially below any previous year on record. Yields per acre averaged

Table 15.- Cigar tobacco, types 41-55: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-53

| Type and year | (Farm-sales weight) | | | | Disappearance : year beginning : Oct. 1 | Average price per pound |
|------------------------------|-----------------------------|-------------------------------------|-------------------------|--------------------------------|---|-------------------------|
| | Production : Million pounds | Stocks : Million pounds : October 1 | Supply : Million pounds | Disappearance : Million pounds | | |
| Filler types 41-44 <u>1/</u> | | | | | | |
| 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 | 52.1 | 25.2 | |
| 1951 | 63.0 | 157.4 | 220.4 | 59.4 | 19.6 | |
| 1952 <u>2/</u> | 44.5 | 161.0 | 205.5 | 59.0 | 25.2 | |
| 1953 <u>2/</u> | 39.5 | 146.5 | 186.0 | | | |
| Binder types 51-55 <u>3/</u> | | | | | | |
| 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 | 193.3 | 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 | 57.6 | 35.8 | |
| 1951 | 49.8 | 142.5 | 192.3 | 57.5 | 38.1 | |
| 1952 <u>2/</u> | 47.6 | 134.8 | 182.4 | 58.0 | 38.6 | |
| 1953 <u>2/</u> | 47.1 | 124.4 | 171.5 | | | |

1/ Includes small quantity of type 45 in 1934-38 average. 2/ Subject to revision. 3/ Includes small quantity of type 56 through 1948.

one-eighth lower than in 1952 and total production at 39 1/2 million pounds was down 11 percent. The Pennsylvania crop was the smallest since 1935 and the Ohio crop was the smallest since 1945. Carryover of filler on October 1, 1953, was 146 1/2 million pounds--9 percent less than a year earlier.

The 1952 crop of Puerto Rican filler (type 46), harvested mostly in the early months of 1953, was over 34 million pounds--over one-fifth larger than in the previous year. Acreage was up 5 percent and yields per acre increased around 15 percent. The 1953 crop acreage (for harvest in early 1954) has been forecast by the Puerto Rico Department of Agriculture and Commerce at about 5 percent above last year's. Stocks of Puerto Rican tobacco in the United States on January 1 were 23 1/2 million pounds (farm-sales weight)--12 percent lower than a year earlier. Stocks on the Island at 13.8 million pounds were about 5 million pounds above a year earlier but still the second lowest since 1945.

Table 16.- Shipments of tobacco from Puerto Rico to the United States, for specified periods

| Classification | Average 1934-38 | | | | | January-November | |
|----------------|--------------------|-------------------|-------------------|-------------------|-------------------|-------------------|--|
| | | 1950 | 1951 | 1952 | 1952 | 1953 | |
| | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | |
| Stemmed | 17.4 | 9.9 | 10.2 | 14.6 | 11.8 | 8.3 | |
| Unstemmed | .1 | 1/ | 3.5 | .6 | .5 | .9 | |
| Scrap | 5.0 | 9.3 | 3.1 | 6.5 | 5.9 | 3.6 | |
| Total | 22.5 | 19.2 | 16.8 | 21.7 | 18.2 | 12.8 | |

1/ Less than 50,000 pounds.

Compiled from publications and Records of the United States Department of Commerce.

Binder: The 1953-54 total supply of binder types 51-55 is 171 1/2 million pounds--6 percent lower than in 1952-53 and the smallest since 1945-46. The 1953 production of all binder types combined at a little over 47 million pounds, although only about 1 percent below 1952, was the smallest since 1936. Acreage of Connecticut Broadleaf (type 51) and Southern Wisconsin (type 54) declined and their crops were 7 and 13 percent lower, respectively. Acreage of Connecticut Valley Havana Seed (type 52) and Northern Wisconsin (type 55) increased some and their crops were 10 and 5 percent larger, respectively, than in 1952. Production of the relatively small New York and Pennsylvania Havana Seed (type 53) decreased 18 percent. The carryover of all binder types combined dropped to 124.4 million--8 percent below a year earlier. Stocks of each type at the beginning of the 1953-54 marketing year were less than a year earlier but the sharpest drops occurred in the Connecticut Valley Havana Seed and Northern Wisconsin types.

1954 Marketing Quota

On October 29, 1953, growers of continental cigar filler and binder tobacco, except Pennsylvania Seedleaf (type 41), approved a marketing quota on the next three crops--1954, 1955, and 1956. This was the first referendum for these types in which quotas for 3 years were approved. Of those voting, 77 percent favored quotas for 3 years, 12.6 percent were for 1 year only, and 10.4 percent voted against quotas. To place a quota into effect requires a favorable vote by at least two-thirds of the growers voting. In the Pennsylvania type 41 referendum, about three-fourths of the growers voting opposed quotas.

Based on the proclaimed quota, the resulting 1954 acreage allotment for types 42-44 (Ohio filler) and 51-55 (binder types principally in Connecticut, Massachusetts, and Wisconsin, and also some in New York, Pennsylvania, and Minnesota) is 48,452. The 1953 harvested acreage in these States is estimated at 34,700. The size of the 1954 crops in these States will depend on how fully the allotments are planted and average yields obtained per acre. Average prices for the 1953 crops were comparatively favorable and with the continuation of Government price support at 90 percent of parity (mandatory when quotas are in effect), some increase in harvested acreage may be expected in 1954. For Pennsylvania filler type 41, where no quota is in effect, an increase seems likely from the exceptionally low acreage of each of the last 2 years.

Wrapper: The 1953-54 total supply of cigar wrapper (types 61-62) is 32.9 million pounds--8 percent lower than the peak level of 1952-53. The 1953 production at 13.6 million pounds was down 7 percent due entirely to the drop of nearly one-fourth in the Georgia-Florida (type 62) crop. The Connecticut Valley (type 61) crop was a little larger than in 1952. Carry-over last July 1 (beginning of the 1953-54 marketing year for these types) was 19.3 million pounds--9 percent below a year earlier with all of the decline occurring in type 61. On January 1, dealers' and manufacturers' stocks of Connecticut Valley wrapper were only slightly lower than a year earlier but those of Georgia-Florida wrapper were 13 percent lower than on January 1, 1953.

Domestic Use and Exports

The total disappearance of Pennsylvania and Ohio cigar filler in the 1952-53 marketing year, 59 million pounds, was close to that of 1951-52. The great bulk was in domestic use, primarily cigars. Cigar output in domestic factories in 1952-53 was $2\frac{1}{2}$ percent more than in the previous year. Only about two-thirds of a million pounds (farm-sales weight) was exported --over 30 percent less than a year earlier. The principal destinations were Indochina, Algeria, Canada, and French Equatorial Africa.

The total disappearance of the combined binder types 51-55 in the 1952-53 marketing year was 58 million pounds--a little larger than in 1951-52. About 93 percent of the total was used domestically and the rest was exported. Domestic use was mainly in cigars and scrap chewing tobacco. Although cigar output was up $2\frac{1}{2}$ percent, output of scrap chewing declined a little between 1951-52 and 1952-53. The total disappearances of the Northern Wisconsin and Connecticut Valley types increased but there was a

sharp decrease in the disappearance of the Southern Wisconsin type compared with a year earlier. The 1952-53 exports of all binder types combined amounted to around 3.9 million pounds (farm-sales weight)--up about one-third above each of the 2 preceding years. The increase was mainly due to the exceptionally large shipment of type 54 tobacco, principally to East Germany. West Germany was the leading outlet for binder tobacco exports and got about one-third more than in 1951-52. Belgium, Sweden, and Denmark also got more but less went to Netherlands and Canada. None was recorded for Austria in contrast to around 400,000 pounds in 1951-52. During 1952-53, the cigar binder exports were made up of 45 percent, principally Wisconsin tobacco, 36 percent Connecticut Valley Havana Seed, and

Table 17.- Cigar tobacco, types 61-62: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-53

| (Farm-sales weight) | | | | | |
|---------------------|----------------|------------|------------|-------------------|-------------|
| Type and year | : Production : | : Stocks : | : Supply : | : Disappearance : | : Average |
| | : Million | : Million | : Million | : Million | : price per |
| | : pounds | : pounds | : pounds | : pounds | : pound |
| | | | | | : 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 | 22.8 | 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 | 14.9 | 20.0 | 34.9 | 13.7 | 194.0 |
| 1952 <u>1/</u> | 14.6 | 21.2 | 35.8 | 16.5 | 198.0 |
| 1953 <u>1/</u> | 13.6 | 19.3 | 32.9 | | |

1/ Subject to revision.

19 percent Connecticut Valley Broadleaf. In the previous year, exports of Wisconsin types made up only a very small proportion of the total binder exports. In the first quarter of 1953-54 (October-December 1953), exports of binder types were about one-third smaller than in the same period of a year earlier. The major drops were in binder to West Germany, East Germany, and Sweden. Belgium, Netherlands, and Canada took considerably more in the recent period than in October-December 1952.

The total disappearance of wrapper (types 61-62) during July 1952-June 1953 was 16 1/2 million pounds--one-fifth larger than in 1951-52 and the largest on record. Increases occurred in both domestic use and exports. The 1952-53 exports were 22 percent larger than in 1951-52 and accounted for more than one-fourth of total disappearance. West Germany, by far the leading export destination, Canada, Belgium, Netherlands, and East Germany took more but less went to Denmark, Brazil, and Austria. During the first half of the 1953-54 marketing year (July-December 1953), exports of cigar wrapper were nearly the same as in the corresponding period of a year earlier. Less went to West Germany and Netherlands but more went to Belgium, Canada, and Denmark.

Although there may be some variation by types, the total disappearance of cigar tobacco in 1953-54 seems likely to be near that of 1952-53, mainly because domestic cigar consumption is expected to be near last year's.

Table 18.- Internal Revenue collections from tobacco products for specified periods

| Period | Cigars 1/ | Cigarettes 2/ | Chewing and smoking | Snuff | Total 3/ |
|---------|--------------------|--------------------|---------------------------|--------------------|--------------------|
| | Million dollars | Million dollars | Million dollars | Million dollars | Million dollars |
| Average | | | | | |
| 1930-34 | 14.3 | 344.6 | 56.9 | 6.9 | 423.9 |
| 1935-39 | 12.8 | 472.0 | 54.9 | 6.7 | 547.6 |
| 1940-44 | 21.0 | 750.5 | 50.4 | 7.3 | 833.3 |
| 1945 | 38.2 | 937.2 | 48.6 | 7.9 | 1,034.2 |
| 1946 | 47.5 | 1,125.2 | 38.0 | 7.1 | 1,218.4 |
| 1947 | 47.1 | 1,175.9 | 35.9 | 7.1 | 1,266.7 |
| 1948 | 46.7 | 1,220.6 | 35.9 | 7.5 | 1,311.5 |
| 1949 | 43.6 | 1,233.1 | 34.9 | 7.4 | 1,320.0 |
| 1950 | 42.8 | 1,262.7 | 34.3 | 7.2 | 1,348.1 |
| 1951 | 44.0 | 1,359.9 | 30.7 | 6.4 | 1,445.8 |
| 1952 | 45.8 | 1,579.6 | 17.6 | 3.9 | 1,661.8 |
| 1953 | 46.4 | 1,546.0 | 16.7 | 3.9 | 1,613.6 |

1/ Includes small cigars.

2/ Includes large cigarettes.

3/ Total includes cigarette papers and tubes, cigarette and cigar floor taxes, and leaf dealer penalties not shown separately in this table.

Compiled from reports of the Internal Revenue Service.

Table 19.- Acreage of tobacco in the United States, by class and type, annual 1950-53, and percentages

| Class and type | 1950 | 1951 | 1952 | 1953 | Percent- |
|--|----------------|----------------|----------------|----------------|-------------------------|
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | age change 1952 to 1953 |
| Old and Middle Belt, type 11 | 348.0 | 399.0 | 397.0 | 359.0 | -9.6 |
| Eastern North Carolina, type 12 | 307.0 | 356.0 | 356.0 | 331.0 | -7.0 |
| South Carolina, type 13 | 193.0 | 224.0 | 224.0 | 207.0 | -7.6 |
| Georgia and Florida, type 14 | 110.4 | 134.1 | 134.3 | 124.8 | -7.1 |
| Total flue-cured, types 11-14 | 958.4 | 1,113.1 | 1,111.3 | 1,021.8 | -8.1 |
| Virginia, type 21 | 9.8 | 10.0 | 9.8 | 9.7 | -1.0 |
| Kentucky and Tennessee, type 22 | 29.8 | 28.2 | 28.2 | 28.3 | .4 |
| Kentucky and Tennessee, type 23 | 13.3 | 10.8 | 9.4 | 10.1 | 7.4 |
| Total fire-cured, types 21-23 | 52.9 | 49.0 | 47.4 | 48.1 | 1.5 |
| Burley, type 31 | 408.3 | 456.1 | 463.5 | 424.9 | -8.3 |
| Maryland, type 32 | 50.0 | 53.0 | 50.0 | 45.0 | -10.0 |
| One Sucker, type 35 | 16.2 | 15.0 | 14.9 | 15.1 | 1.3 |
| Green River, type 36 | 9.3 | 8.0 | 8.0 | 8.2 | 2.5 |
| Virginia sun-cured, type 37 | 3.2 | 3.5 | 3.4 | 3.7 | 8.8 |
| Total dark air-cured, types 35-37 | 28.7 | 26.5 | 26.3 | 27.0 | 2.7 |
| Pennsylvania Seedleaf, type 41 | 36.8 | 34.6 | 23.0 | 24.4 | 6.1 |
| Miami Valley, types 42-44 | 7.8 | 4.9 | 5.7 | 4.7 | -17.5 |
| Total cigar filler, types 41-44 | 44.6 | 39.5 | 28.7 | 29.1 | 1.4 |
| Connecticut Valley Broadleaf, type 51 | 10.1 | 8.7 | 9.3 | 8.3 | -10.8 |
| Conn. Valley, Havana Seed, type 52 | 8.8 | 6.6 | 5.9 | 6.3 | 6.8 |
| N. Y. and Pa. Havana Seed, type 53 | 1.0 | .6 | .5 | .4 | -20.0 |
| Southern Wisconsin, type 54 | 9.3 | 6.9 | 6.0 | 5.1 | -15.0 |
| Northern Wisconsin, type 55 | 12.8 | 8.9 | 9.4 | 9.9 | 5.3 |
| Total cigar binder, types 51-55 | 42.0 | 31.7 | 31.1 | 30.0 | -3.5 |
| Conn. Valley Shade-grown, type 61 | 8.3 | 8.4 | 7.9 | 7.6 | -3.8 |
| Ga. and Fla. Shade-grown, type 62 | 5.4 | 5.2 | 5.1 | 4.4 | -13.7 |
| Total cigar wrapper, types 61-62 | 13.7 | 13.6 | 13.0 | 12.0 | -7.7 |
| Louisiana Perique, type 72 | .4 | .4 | .4 | .2 | 2/-28.6 |
| Total all types | 1,599.0 | 1,782.9 | 1,771.7 | 1,638.1 | -7.5 |

1/ Preliminary. 2/ Based on unrounded acreage.

Table 20.- Tobacco: Yield per acre in the United States, by types for specified periods with percentages

| Period | Flue- | Fire- | Burley | Mary- | Dark | Cigar | | | United States |
|-------------------|--------|--------|--------|--------|--------|--------|--------|---------|---------------|
| | cured | cured | 31 | land | air- | Filler | Binder | Wrapper | |
| | 11-14 | 21-24 | | 32 | cured | 41-45 | 51-56 | 61-62 | |
| | | | | | 35-37 | 1/ | 1/ | | |
| | 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 | 1,309 | 1,215 | 1,355 | 785 | 1,197 | 1,594 | 1,572 | 1,098 | 1,310 |
| 1952 2/ | 1,229 | 1,228 | 1,403 | 800 | 1,286 | 1,550 | 1,532 | 1,125 | 1,273 |
| 1953 2/ | 1,230 | 1,064 | 1,347 | 825 | 1,027 | 1,359 | 1,570 | 1,132 | 1,249 |
| Percentage change | | | | | | | | | |
| | Pct. | Pct. | Pct. | Pct. | Pct. | Pct. | Pct. | Pct. | Pct. |
| Av. 1947- | | | | | | | | | |
| 49 to | | | | | | | | | |
| 1953 | 3.7 | -5.8 | 6.3 | 4.4 | -8.1 | -9.9 | 2.8 | 9.6 | 3.4 |
| 1952 to | | | | | | | | | |
| 1953 | .1 | -13.4 | -4.0 | 3.1 | -20.1 | -12.3 | 2.5 | .6 | -1.9 |

1/ Types 24, 45, and 56 ended in 1949, 1939, and 1948, respectively.

2/ Subject to revision.

Table 21.- Tobacco manufacturers: Net sales, net income, and profit ratios, annual 1947-52, by quarters 1952-53

| Year and quarter | Net sales | Net income | | Per dollar of sales | | Profit | |
|--------------------------|-----------------|--------------------|-------------------|---------------------|-------------------|--|-------------------|
| | | Before federal tax | After federal tax | Before federal tax | After federal tax | As percentage of stockholders' equity (annual basis) | |
| | | | | | | Before federal tax | After federal tax |
| | Million dollars | Million dollars | Million dollars | Cents | Cents | Percent | Percent |
| 1947 | 2,641 | 178 | 109 | 6.7 | 4.1 | 16.6 | 10.1 |
| 1948 | 3,081 | 257 | 159 | 8.3 | 5.2 | 22.0 | 13.7 |
| 1949 | 3,061 | 250 | 156 | 8.2 | 5.1 | 20.2 | 12.6 |
| 1950 | 3,129 | 281 | 152 | 9.0 | 4.9 | 21.3 | 11.5 |
| 1951 | 3,329 | 294 | 129 | 8.8 | 3.9 | 21.8 | 9.6 |
| New series ^{1/} | | | | | | | |
| 1951 | 3,378 | 295 | 129 | 8.7 | 3.8 | 21.7 | 9.5 |
| 1952 | 3,702 | 285 | 120 | 7.7 | 3.2 | 19.8 | 8.4 |
| 1952 | | | | | | | |
| 1 | 846 | 61 | 25 | 7.2 | 3.0 | 17.7 | 7.3 |
| 2 | 919 | 69 | 28 | 7.5 | 3.0 | 19.1 | 7.7 |
| 3 | 978 | 80 | 33 | 8.2 | 3.4 | 21.9 | 9.0 |
| 4 | 959 | 75 | 34 | 7.8 | 3.5 | 20.5 | 9.3 |
| 1953 | | | | | | | |
| 1 | 875 | 65 | 28 | 7.4 | 3.2 | 17.9 | 7.7 |
| 2 | 940 | 90 | 34 | 9.6 | 3.7 | 24.5 | 9.5 |
| 3 | 992 | 97 | 39 | 9.8 | 3.9 | 26.1 | 10.5 |

^{1/} Although not strictly comparable to the series previously published for the years 1947-51, the differences disclosed by comparing the new series with the old series for the year 1951 are relatively minor.

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