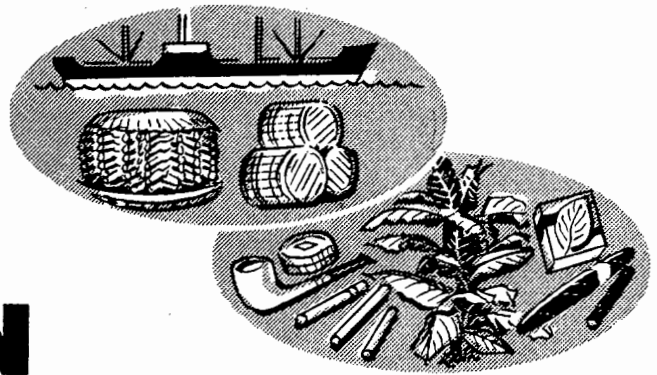


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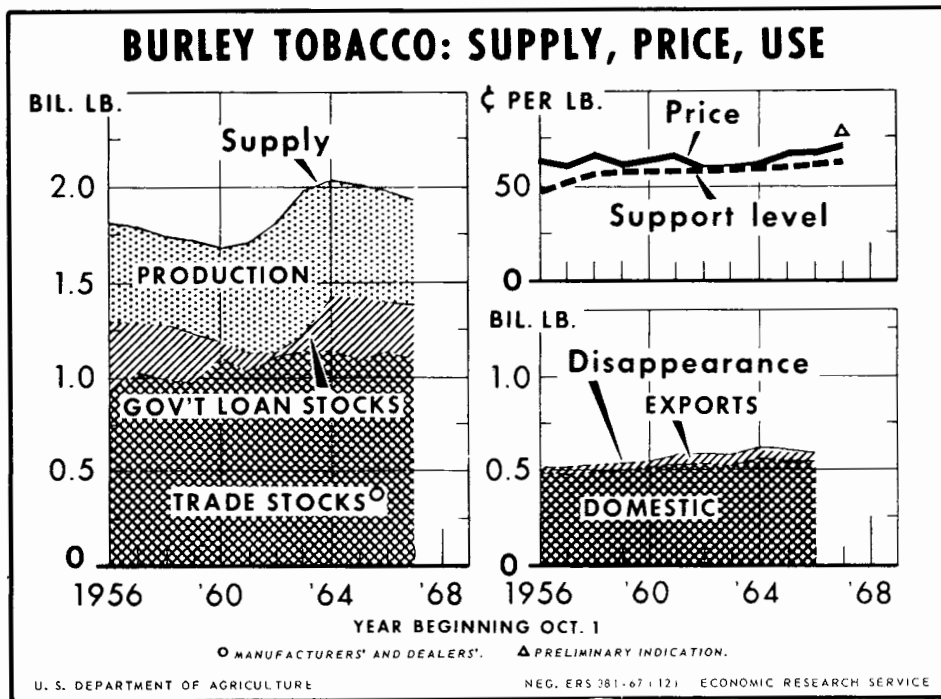
# TOBACCO SITUATION



Total supply of burley for 1967/68, at 1,941 million pounds, is 2 percent below 1966/67 and 4-1/2 percent below the 1964/65 peak. Both production and carryover in 1967 were lower than in 1966.

Through December 20, about 78 percent of the 1967 burley crop had been sold at a record price of near 62 cents a pound.

In the 1966/67 marketing year, estimated domestic use of burley dipped 1 percent. Exports equaled the previous year's comparatively high level.

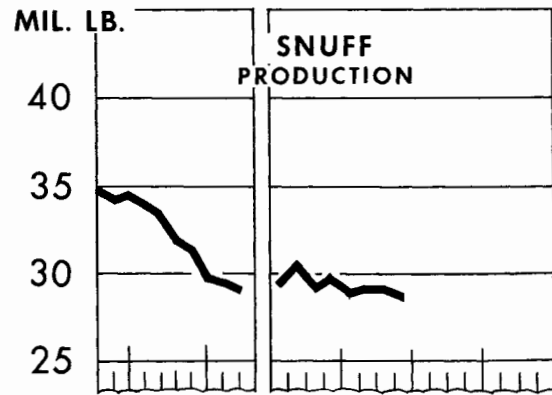
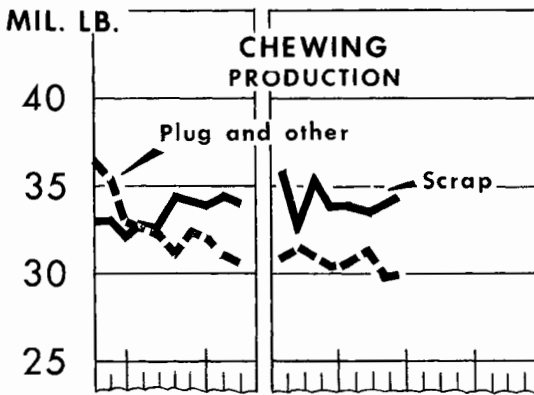
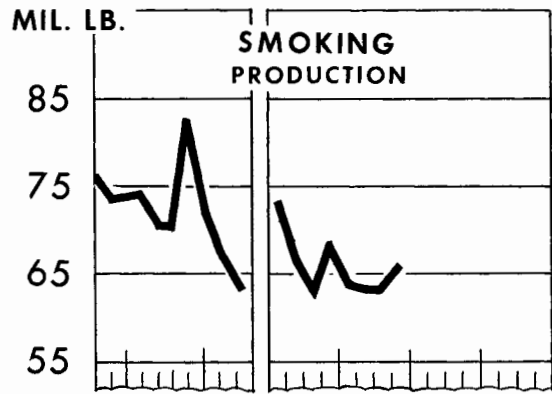
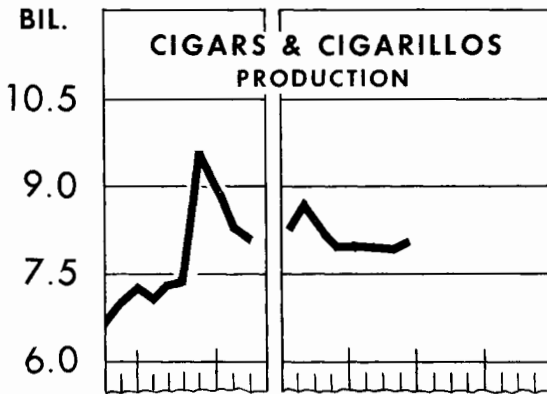
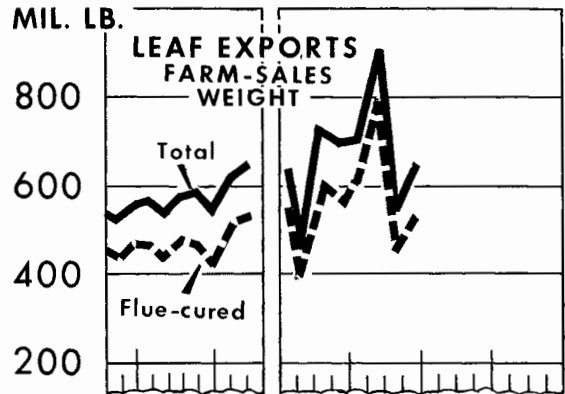
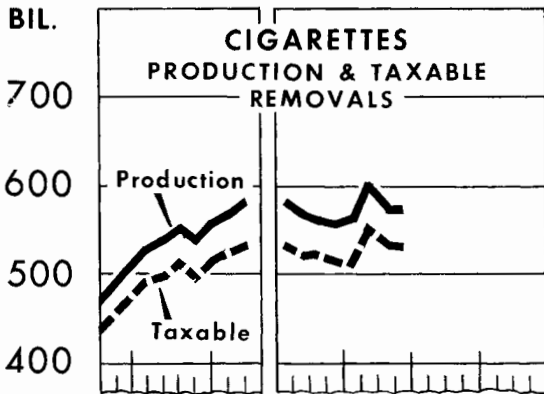


## IN THIS ISSUE

- Tobacco Products
- Exports and Foreign Tobacco
- Tobacco Imports
- Leaf Supplies and Use

# TOBACCO OUTLETS

## Recent Trends in Manufactured Products and Exports



1960 '65      66 '67 '68 '69

1960 '65      '66 '67 '68 '69

ANNUAL

QUARTERLY,  
SEASONALLY ADJUSTED,  
AT ANNUAL RATES

ANNUAL

QUARTERLY,  
SEASONALLY ADJUSTED,  
AT ANNUAL RATES

1967 ANNUAL AND LAST QUARTER, ESTIMATED.

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 T H E T O B A C C O S I T U A T I O N  
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Approved by the Outlook and Situation Board, December 20, 1967

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SUMMARY

Cigarette output and consumption in 1967 were above any previous year. Consumption of cigars and cigarillos in 1967 was below each of the previous 3 years, though otherwise the highest since 1920. The 1967 production of smoking tobacco for pipes and roll-your-own cigarettes was down moderately from 1966 and the lowest in many years. Output of chewing tobacco in 1967 probably was slightly less than in 1966, and output of snuff continued to drift downward.

The 1967/68 total supply of flue-cured tobacco--the leading cigarette and export tobacco--is about the same as in 1966/67, but 6 percent below the 1964/65 peak. Carryover stocks in mid-1967 were down 7 percent from a year earlier, but the 1967 crop was about 14 percent above the relatively small 1966 crop. Prices received by growers in all Belts combined averaged near 64½ cents for the 1967 crop--about 2½ cents below the previous season's record average. About 22 percent of the 1967 crop was placed under loan--compared with 7 percent in each of the 2 previous years. Carryover stocks in mid-1968 may be up a little from the year-earlier level. However, marketings in 1968 are likely to be moderately lower than in 1967. Though the 1968 national marketing quota (announced last July) is essentially unchanged from 1967, the 1968 farm quotas of growers who overmarketed in 1967 will be adjusted downward accordingly. In 1967, overmarketings exceeded undermarketings by a considerable margin.

The 1967/68 total supply of burley tobacco--the second-ranking cigarette tobacco--is 2 percent below 1966/67 and  $4\frac{1}{2}$  percent below the 1964/65 peak. Carryover on October 1, 1967 was 1 percent below a year earlier. The 1967 burley crop is estimated to be the smallest in 7 years--5 percent under both 1965 and 1966. Auctions for burley began November 28, and by December 20--when markets closed until after the holidays--about 78 percent of the crop had been sold. Prices averaged near 72 cents per pound--the highest on record. The 1968 burley marketing quota and acreage allotment (under the acreage allotment program in effect) will be announced by the Secretary of Agriculture by February 1, 1968. Shortly thereafter, burley growers will vote in a referendum on whether they favor continuation of marketing quotas on their 1968, 1969, and 1970 crops under the acreage allotment program.

Marketing quotas and acreage allotments for Maryland, fire-cured, dark air-cured, sun-cured, and certain cigar tobaccos also will be announced by February 1, 1968. Referendums will be held shortly thereafter for growers of Maryland, Virginia sun-cured, and Pennsylvania filler tobacco to decide whether they favor marketing quotas (on an acreage allotment basis) for their 1968, 1969, and 1970 crops. Growers of fire-cured, dark air-cured, and certain cigar tobaccos voted in previous referendums in favor of quotas applicable to their 1968 crops.

Government price support must be provided for the kinds of tobacco under marketing quotas. By law, Government price support cannot be offered when growers disapprove quotas. Price support levels for the 1968 crops will be established by raising the 1959 levels in accordance with the percentage rise in the parity index from 1959 to 1965-67 (its average for the 3 most recent calendar years). Over a period of time, the parity index measures average change in the prices of commodities and services commonly bought by farm families. Available data indicate that tobacco crop price supports will increase at least 3 percent from 1967 to 1968. In 1966 and 1967, the annual rise was 2 percent; and in 1962-65, it was 1 percent.

Compared with 1966/67, the 1967/68 total supplies are lower for Maryland, fire-cured, dark air-cured, sun-cured, cigar filler, Connecticut Valley binder, Southern Wisconsin binder, and Connecticut Valley wrapper tobaccos. The 1967/68 supply of Northern Wisconsin binder is close to the 1966/67 level, but the 1967/68 supply of Georgia-Florida cigar wrapper rose to a 5-year high.

Stocks of imported cigarette leaf on October 1, 1967, were well above a year earlier and above any previous October. Stocks of major imported cigar tobaccos declined further from the October highs of 1965.

U.S. cigarette output in 1967 is estimated at 580 billion--about 2 percent above 1966 and 4 percent above 1965. U.S. smokers (including those overseas) consumed about 552 billion--11 billion more than in 1966. In 1968, U.S. cigarette consumption seems likely to show a further modest rise due to an increased adult population and strong consumer buying power.

The 1967 consumption of cigars and cigarillos by U.S. smokers is estimated at about 8,150 million--2 percent below 1966. The downtrend in cigar consumption since the 1964 record high may level out in 1968. Total cigar and cigarillo consumption in 1968 may be near that of 1967.

The 1967 output of tobacco for pipes and roll-your-own cigarettes was probably about  $63\frac{1}{2}$  million pounds--about 6 percent below 1966. The increase in imports of smoking tobacco slowed in 1967. These imports likely accounted for around 5 percent of total U.S. consumption--the same proportion as in 1966.

The 1967 output of chewing tobacco is estimated at about  $64\frac{1}{2}$  million pounds--slightly less than in 1966. The 1967 output of snuff was probably about 29 million pounds--down 2 percent from 1966 to a long-time low.

In calendar 1967, U.S. exports of unmanufactured tobacco are estimated at about 575 million pounds (approximately 645 million pounds farm-sales weight). This would be about 4 percent above the long-time high of 1966 and the largest calendar year total since 1946. For the year ending June 30, 1968, total exports of unmanufactured tobacco may be moderately below the 47-year high of 1966/67. Trade sanctions against Rhodesian tobacco, the export payment program, and improved quality of recent flue-cured crops continue to favor U.S. exports. But increased supplies of tobacco are available from some foreign producing areas, and stocks of U.S. tobacco in several major importing countries are at relatively high levels.

## TOBACCO PRODUCTS

### Cigarettes

Cigarette output and consumption reached new highs in 1967. Output of cigarettes is estimated at 580 billion--about 2 percent above 1966 and 4 percent above 1965. Consumption by U.S. smokers accounted for 95 percent of the output, and exports to foreign markets and shipments to Puerto Rico accounted for nearly all the other 5 percent.

Consumption by U.S. smokers (including overseas forces) during 1967 is estimated at 552 billion--11 billion higher than in 1966. The 1967 increase is largely the result of more people of smoking age, high levels of consumer income, and heavier shipments to overseas armed forces. These factors appear likely to contribute to a further modest gain in total cigarette consumption in 1968.

According to consumer price indexes of the Bureau of Labor Statistics, prices of cigarettes (filter tip, king size) in September 1967 (latest index available) were 4.7 percent above September 1966 and about 8 percent above December 1965. The 1967 increase in cigarette prices reflects the advance in manufacturers' prices in early June this year and increases in State cigarette taxes.

In late November, the Chairman of the Consumer Subcommittee of the Senate Commerce Committee made public results of tests--conducted by the Federal Trade Commission's laboratory--on "tar" and nicotine content of smoke from 59 brands of cigarettes. The brands were ranked according to the "tar" content of the smoke as determined by the Commission's laboratory tests.

In the view of 2 of the 5 Commissioners, the value of the tests for comparison purposes was doubtful because of the varying lengths of the filters and the butt length to which cigarettes were smoked. In the tests, cigarettes were smoked to a butt length of 23 mm. or to the length of the filter and overwrap plus 3 mm. if in excess of 23 mm. In the view of the 2 Commissioners, for the tests to provide a meaningful basis for comparison, all of the cigarettes should have been smoked to a 30 mm. butt length except for the few that could not have been smoked shorter than 32 mm.

The FTC laboratory will continue to test cigarettes for "tar" and nicotine content of the smoke.

Under legislation enacted in 1965, reports to the Congress are required from the Department of Health, Education, and Welfare (concerning current information on smoking and health) and the Federal Trade Commission (on the effectiveness of cigarette labeling and on current practices and methods of cigarette advertising and promotion). Recom-

Table 1.--Cigarettes: Total output, domestic consumption, shipments and exports for specified periods

Period	Total output	Domestic consumption	Shipments to		Exports
			Overseas forces and other <u>1/</u>	Puerto Rico and U.S. islands <u>2/</u>	
	Billions	Billions	Billions	Billions	Billions
Average: 1950-54	414.2	377.9	18.4	1.9	15.8
1955	412.3	382.1	13.2	2.0	15.1
1956	424.2	393.2	13.3	2.0	15.7
1957	442.3	409.4	13.7	2.1	17.0
1958	470.1	436.4	13.4	2.2	18.1
1959	489.9	453.7	13.7	2.5	19.6
1960	506.9	470.1	14.3	2.5	20.2
1961	528.3	488.1	14.6	2.8	22.2
1962	535.5	494.5	13.9	3.1	24.1
1963	550.6	509.6	14.3	3.2	23.6
1964	539.9	497.4	13.8	3.7	25.1
1965	556.8	511.5	17.2	3.9	23.1
1966	567.3	522.5	18.7	3.9	23.4
1967 <u>3/</u>	580.0	530.0	22.0	3.9	23.5

1/ Also includes ship stores and small tax-exempt categories. 2/ Includes Virgin Islands, Guam, American Samoa, Wake, and Canton and Enderbury Islands. 3/ Estimated.

Basic data but not the estimates compiled from reports of the Internal Revenue Service and the Bureau of the Census.

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

Country	Calendar year average 1960-64	1965	1966 <u>1/</u>	January-October		1967 as a percentage of 1966
				1966 <u>1/</u>	1967 <u>1/</u>	
	Mil.	Mil.	Mil.	Mil.	Mil.	Pct.
Hong Kong	1,917	2,648	2,366	1,920	1,881	98
Spain	987	1,823	1,944	1,673	1,506	90
Netherlands Antilles	1,036	1,292	1,286	1,109	1,275	115
Paraguay	260	967	1,270	1,134	1,181	104
Kuwait	1,073	1,123	1,178	992	886	89
France	1,418	1,035	969	843	612	73
West Germany	562	523	653	590	630	107
Italy	716	645	622	559	603	108
Ecuador	448	712	626	509	486	95
Panama <u>2/</u>	629	651	624	528	627	119
Canary Islands	296	487	568	451	447	99
Lebanon	1,358	630	498	431	452	105
Other countries <u>3/</u>	12,357	10,514	10,848	9,199	9,193	100
Total all countries	23,057	23,050	23,452	19,938	19,779	99

1/ Subject to revision. 2/ Includes Canal Zone. 3/ Includes around 100 foreign destinations in recent years.

mendations for legislation are also to be reported. The next reports and recommendations are to be submitted by July 1, 1968.

During the first 10 months of 1967, cigarette exports were down slightly from those a year earlier. For the year as a whole, exports of cigarettes are estimated at about 23½ billion--about the same as in 1966. Cigarette exports have remained within a fairly narrow range in the past 6 years. A substantial increase in exports of manufactured bulk tobacco has occurred, however. A considerable portion of this goes into American-type cigarettes manufactured in foreign countries by subsidiaries of U.S. firms or companies that have licensing arrangements with them. During the first 10 months of 1967, reduced exports of cigarettes were made to Hong Kong, Spain, Kuwait, and France, but more than a year earlier went to the Netherlands Antilles, Paraguay, West Germany, Panama, and Italy. (See table 2).

#### Cigars, Cigarillos, and Small Cigars

U.S. smokers (including those overseas) smoked an estimated 8,150 million cigars and cigarillos in 1967--2 percent less than in 1966 and 6 percent less than in 1965. Cigar consumption, which has trended downward since the unusually high peak of 1964, is expected to level out in 1968. Total cigar and cigarillo consumption in 1968 may be near that of 1967.

Taxable removals of cigars and cigarillos priced to sell at 2.6 to 6 cents apiece (the price bracket that includes most cigarillos) during January-October 1967 were 4 percent lower than a year earlier. Cigars in the 6.1 to 8 cent bracket gained 1½ percent. The number of cigars selling for more than 8 cents apiece declined 3 percent from a year earlier.

The percentage distribution of cigar taxable removals by specified price ranges, compared with earlier periods follows:

Retail price range (cents per cigar)	1964	1965	1966	January-October	
	Pct.	Pct.	Pct.	1966	1967
2.5 or less	1.8	1.6	1.5	1.5	1.5
2.6 - 6.0	48.5	48.7	49.3	49.2	48.9
6.1 - 8.0	11.5	10.3	9.8	9.7	10.1
Over 8.0	38.2	39.4	39.4	39.6	39.5
Total	100.0	100.0	100.0	100.0	100.0

Based upon the Bureau of Labor Statistics index, consumer prices for regular-size cigars (domestic) in September 1967 were 1 percent higher than in September 1966 and 3 percent higher than December 1965.

The earlier sharp uptrend in number of cigars manufactured in Puerto Rico and shipped to the U.S. mainland leveled off in 1967. Cigars from Puerto Rico are estimated to have accounted for 13 percent of total U.S. consumption in 1967--about the same percentage as in 1966, but well above the 1959-63 average of 5 percent.

The 1967 imports of cigars for U.S. consumption are estimated at about 29 million--the most since 1960. Since the embargo on trade with Cuba, the main source of cigars imported into the United States has been the Philippine Republic. Other ranking sources in 1967 were the Netherlands, Canary Islands, Brazil, Mexico, and Jamaica.

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

Period	Factories in the United States <sup>1/</sup>			From Puerto Rico: taxable	Imports for consumption		Exports	Total consumption <sup>3/</sup>
	Total output	Removals Taxable	Removals Tax-exempt		Total <sup>2/</sup>	From Philippine Republic		
	Million	Million	Million	Million	Million	Million	Million	Million
Average: 1950-54	5,902	5,818	83	13	15	2	4	5,925
1955	6,004	5,915	82	84	20	5	6	6,095
1956	5,998	5,863	72	93	23	4	9	6,042
1957	6,145	5,995	79	124	26	5	9	6,215
1958	6,469	6,260	87	137	28	4	9	6,503
1959	6,857	6,717	103	148	31	5	4/10	6,989
1960	6,991	6,728	105	198	32	6	4/11	7,052
1961	6,642	6,558	118	354	24	8	4/16	7,038
1962	6,684	6,442	126	483	23	14	4/19	7,055
1963	6,716	6,621	144	526	24	15	33	7,282
1964	8,736	8,122	193	809	28	13	44	9,108
1965	7,899	7,577	180	911	25	9	55	8,638
1966	7,165	7,076	193	1,075	25	10	73	8,296
1967 <sup>5/</sup>	6,900	6,925	196	1,075	29	9	75	8,150

<sup>1/</sup> Includes output and removals of bonded manufacturing warehouses--a category in which no facilities have been classified since February 1964. <sup>2/</sup> Prior to the embargo on imports from Cuba (effective February 1962), the major share of imported cigars came from Cuba. <sup>3/</sup> Total removals from U.S. factories plus those from Puerto Rico, and imports, minus exports. <sup>4/</sup> Estimated--excludes little cigars. <sup>5/</sup> Estimated.

Basic data but not estimates compiled from reports of the Internal Revenue Service and the Bureau of the Census.

Table 4.--Small cigars (weighing not more than 3 pounds per thousand and approximately cigarette size): Output and removals for specified periods

Period	Output	Factory removals		
		Total	Taxable	Tax-exempt
	Millions	Millions	Millions	Millions
Average: 1950-54	64.9	65.0	64.2	0.8
1955	58.7	57.8	57.0	.8
1956	63.6	59.5	58.9	.6
1957	49.0	49.1	48.8	.3
1958	170.0	160.0	159.7	.3
1959	530.1	505.5	481.6	23.9
1960	148.7	158.7	141.9	16.8
1961	158.2	152.9	146.1	6.8
1962	164.0	162.9	155.8	7.1
1963	281.4	272.4	264.2	8.2
1964	973.9	973.8	939.7	34.1
1965	440.7	457.8	434.7	23.1
1966	445.3	452.6	435.7	16.9
1967 <sup>1/</sup>	425.0	431.0	420.0	11.0

<sup>1/</sup> Estimated.

Basic data but not the estimates compiled from reports of the Internal Revenue Service.



U.S. exports of cigars in 1967 are estimated at near 75 million, compared with the previous high of 73 million in 1966. Canada--the leading destination--took over twice as many in January-October 1967 as in the year-earlier period. Exports to France--ranking second--dropped 58 percent below the unusually large total of a year earlier. Other comparatively sizable export destinations included Japan, United Kingdom, Portugal, Bahrein, Panama, and Kuwait.

The 1967 taxable removals of small cigars (about cigarette-size--weighing not over 3 pounds per 1,000) may approximate 420 million-- $3\frac{1}{2}$  percent below each of the 2 preceding years. Consumption of small cigars in 1967 was less than half the unusually high 1964 figure, but was nearly 60 percent above the 1963 level.

### Smoking Tobacco

Production of smoking tobacco for pipes and roll-your-own cigarettes in 1967 is estimated at about  $63\frac{1}{2}$  million pounds--6 percent below a year earlier and lowest in many years.

Manufacturers' domestic sales of smoking tobacco in January-September 1967 were 6 percent below those a year earlier. For calendar 1967, they probably totaled about  $61\frac{1}{2}$  million pounds, nearly 4 million less than in 1966. (See table 5).

Separate statistics on imports of smoking tobacco are not reported by the Bureau of the Census, but such imports make up most of the total reported in the import classification covering manufactured tobacco. In January-October 1967, these imports were 8 percent larger than a year earlier, and for 1967 as a whole reached an estimated  $3\frac{1}{2}$  million pounds--a record high. Of the January-October 1967 total, the Netherlands furnished 76 percent, the United Kingdom 7 percent, and Denmark 6 percent. Imported smoking tobacco probably made up about 5 percent of total U.S. consumption of smoking tobacco in 1967, about the same percentage as in 1966, but above the proportion in 1965, when it was 3 percent.

Exports of packaged smoking tobacco in January-October 1967 were 42 percent above those a year earlier. Shipments to Panama rose sharply; increased exports also went to Denmark, the Netherlands, Australia, Italy, and Austria. Exports to Canada, Iceland, West Germany, and Switzerland declined.

### Smoking Tobacco in Bulk for Export

The smoking tobacco in bulk export category includes specially prepared tobacco, cut or granulated tobacco, partially processed blended tobacco, and shredded tobacco (see table 5, last column). It also includes processed sheet tobacco and "blended strips" (stemmed tobacco consisting of more than one kind--principally blended flue-cured and burley). These exports have trended upwards, and in 1967 are expected to reach a new peak of about 17 million pounds--15 percent above the preceding year. In January-October 1967, these exports were a fifth above those a year earlier. Peru, Italy, Spain, and the Dominican Republic accounted for half of the total, each taking substantially more than a year ago. Increased exports also went to Bolivia, Switzerland, West Germany, and France. Smaller shipments than a year ago went to the Netherlands (fifth-ranking market), Ecuador, Finland, Haiti, Australia, Panama, and Austria.

### Chewing Tobacco

Chewing tobacco output in 1967 probably totaled about  $64\frac{1}{2}$  million pounds--slightly less than in 1966. Production of scrap chewing, which made up 53 percent of all chewing, was fairly near the year-earlier level. Output of plug chewing, comprising about 37 percent, is estimated to have declined about 2 percent.

Table 5.--Smoking tobacco: Output, removals, foreign trade, and consumption, for specified periods

Period	Output	Removals <sup>1/</sup>		Imports <sup>2/</sup>	Exports, in packages	Total consumption <sup>3/</sup>	Exports, smoking tobacco in bulk <sup>4/</sup>
		Taxable <sup>1/</sup>	Tax-exempt <sup>1/</sup>				
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.
Average: 1950-54	95.2	92.0	3.2	0.1	0.6	94.7	3.0
1955	80.0	77.7	2.3	.1	.5	79.6	6.2
1956	71.5	69.9	1.7	.1	.6	71.1	5.7
1957	70.5	68.7	1.7	.2	.6	70.0	4.4
1958	76.0	74.0	2.0	.4	.7	75.7	7.5
1959	73.2	71.2	1.9	.7	.7	73.1	8.5
1960	73.8	71.3	2.3	.9	.9	73.6	7.7
1961	74.2	71.4	2.5	1.3	.8	74.4	9.0
1962	70.9	68.3	2.6	1.5	.9	71.5	8.6
1963	70.4	68.0	2.2	1.6	.9	70.9	9.8
1964	82.5	79.0	3.4	2.7	1.4	83.7	12.3
1965	71.8	67.3	3.0	2.1	1.0	71.4	13.6
1966	67.3	65.3	1.5	3.3	1.0	69.1	14.8
1967 <sup>5/</sup>	63.5	61.5	2.0	3.5	1.3	65.7	17.0

<sup>1/</sup> After December 1965, taxable removals data replaced by domestic sales, and tax-exempt removals data replaced by export sales. <sup>2/</sup> Prior to July 1962 and after December 1965, data are from Census import classification covering mainly smoking tobacco; from July 1962 through December 1965, data represent taxable removals of imported smoking tobacco reported by Internal Revenue Service. <sup>3/</sup> Total removals (or sales) plus imports minus exports in packages. <sup>4/</sup> Includes specially-prepared cigarette tobacco, cut or granulated tobacco, partially-processed blended tobacco and shredded tobacco. Virtually all of the smoking tobacco in this export class was not included in Internal Revenue Service output figures for smoking tobacco. <sup>5/</sup> Estimated.

Basic data but not the estimates compiled from reports of the Internal Revenue Service, Bureau of the Census, and Consumer and Marketing Service, USDA.

Table 6.--Chewing tobacco and snuff: Output by category for specified periods

Period	Chewing tobacco					Snuff
	Plug	Twist	Fine-cut	Scrap	Total	
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.
Average: 1950-54	38.9	4.9	2.8	38.2	84.8	39.2
1955	36.5	4.5	3.0	36.0	80.0	39.2
1956	33.0	4.3	2.9	35.5	75.7	37.7
1957	31.6	4.0	2.8	34.0	72.4	36.1
1958	29.6	3.8	2.9	33.0	69.3	34.8
1959	28.6	3.6	3.0	33.0	68.2	34.3
1960	26.4	3.4	3.1	32.0	64.9	34.6
1961	26.0	3.3	3.2	32.7	65.2	33.8
1962	26.0	2.9	3.3	32.5	64.7	33.2
1963	24.9	2.9	3.3	34.2	65.3	31.8
1964	25.9	2.8	3.5	34.0	66.2	31.4
1965	24.7	2.8	3.7	33.9	65.1	29.7
1966	24.3	2.7	3.9	34.3	65.2	29.5
1967 <sup>1/</sup>	23.8	2.5	4.1	34.0	64.4	29.0

<sup>1/</sup> Estimated.

Basic data but not the estimates compiled from reports of the Internal Revenue Service and Consumer and Marketing Service, USDA.

Twist and fine-cut made up the rest of chewing tobacco production in 1967. Production of twist declined moderately, but fine-cut output gained. Fine-cut chewing manufacture has trended upward, and the estimated output for 1967 is around 45 percent larger than 10 years earlier.

All except a small fraction of chewing tobacco output is consumed domestically. Exports, consisting mainly of twist and plug, declined steadily from 1957 to 1965, but turned upward in 1966. In January-October 1967, however, these exports were 17 percent below those a year ago, mainly due to a sharp drop in shipments to Australia--the leading U.S. outlet in 1966.

### Snuff

Snuff production in 1967 is estimated at about 29 million pounds--2 percent less than in 1966. Snuff production has trended downwards since 1956, in contrast with a relatively stable output in the preceding 10 years. The downward drift is expected to continue.

Practically the entire output of snuff is consumed in this country. In January-September 1967, manufacturers' domestic sales were 3 percent below those a year earlier.

### EXPORTS OF UNMANUFACTURED TOBACCO FROM THE UNITED STATES 1/

Exports of unmanufactured tobacco in calendar 1967 are estimated at about 575 million pounds (approximately 645 million farm-sales weight). This would be the largest calendar year total since 1946, and would top the long-time high of 1966 by 4 percent. Compared with the first 10 months of 1966, there were gains in exports to the United Kingdom, West Germany, the Netherlands, Thailand, Switzerland, Belgium, Denmark, and South Vietnam. Exports to Sweden, Ireland, and Australia declined; those to Egypt dropped sharply.

In the first 10 months of 1967, exports of flue-cured tobacco were 4 percent ahead of those a year earlier. Exports of burley rose a tenth, while those of Maryland tobacco jumped 48 percent. There were also gains in exports of fire- and sun-cured, Green River, One Sucker, and Black Fat. Shipments of cigar wrapper and binder dropped 22 and 11 percent, respectively, while those of cigar filler were less than half the relatively high year-earlier figure.

In the year ending June 30, 1968, total exports of unmanufactured tobacco may be moderately below the 627 million pounds of 1966/67--a 47-year high. The sanctions on Rhodesian tobacco trade, the export payment program, and the improved quality of recent flue-cured crops continue to favor U.S. exports. However, stocks levels in several major importing countries have increased. Also, larger supplies are available in some areas abroad, including several smaller tobacco producers that have expanded production since the ban on Rhodesian tobacco. The devaluation of the pound on November 18 by the United Kingdom--largest single market for U.S. tobacco--probably occurred too late in the flue-cured marketing season to appreciably affect our 1967/68 exports to that country. The devaluation, however, increases the purchase cost of U.S. tobacco to Britain by a sixth in terms of sterling. It is difficult to predict the effect of this on our exports to the U.K. in the longer-run. The state of Britain's general economy will be an important determining factor.

### Major Foreign Producers and Exporters of Tobacco

In Rhodesia, the flue-cured crop harvested in early 1967 and sold at closed auctions has been estimated at 190 million pounds. The announced target for the

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

Table 7.--United States exports of unmanufactured tobacco by types and to principal importing countries for specified periods

Country and type	(Declared weight)						
	Average 1959-63	1964	1965	1966 <u>1/</u>	January-October		1967 as a percentage of 1966
					1966 <u>1/</u>	1967 <u>1/</u>	
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Pct.
Flue-cured	392.8	395.6	351.1	422.6	310.4	321.3	104
Burley	37.3	53.0	45.3	45.7	36.5	40.0	110
Maryland	11.8	12.3	10.1	10.6	8.1	12.0	148
Fire- and sun-cured	23.5	25.4	27.6	23.4	18.0	21.2	118
Green River	.7	1.2	.6	.5	.5	.9	180
One Sucker	.9	.6	.9	.6	.1	.8	800
Black Fat, etc.	4.3	3.7	3.9	3.5	2.9	3.4	117
Cigar wrapper	4.2	5.2	3.9	4.5	4.1	3.2	78
Cigar binder	2.0	1.6	2.5	1.9	1.8	1.6	89
Cigar filler	.4	.6	.7	1.9	1.3	.6	46
Perique	.2	.2	.4	.4	.3	.1	33
Stems, trimmings, and scrap	9.3	15.1	21.1	35.6	24.7	31.5	128
<b>Total</b>	<b>487.4</b>	<b>514.5</b>	<b>468.1</b>	<b>551.2</b>	<b>408.7</b>	<b>436.6</b>	<b>107</b>
<b>Country of destination</b>							
United Kingdom	141.0	125.2	92.8	129.9	88.6	98.1	111
France	5.7	7.2	5.8	8.6	8.1	4.2	52
Belgium	17.9	17.5	18.8	17.5	12.8	13.5	105
Netherlands	30.6	33.1	37.2	28.8	24.2	34.2	141
West Germany	74.6	85.5	80.9	98.7	89.7	91.8	102
Portugal	7.0	8.0	3.7	3.8	2.9	4.2	145
Denmark	13.8	12.3	15.1	17.9	11.9	12.4	104
Ireland	14.6	11.2	10.6	13.5	11.3	10.8	96
Switzerland	12.2	15.0	12.6	16.9	12.3	18.4	150
Finland	7.6	5.5	6.1	4.7	4.2	4.8	114
Norway	7.6	7.2	6.0	9.3	8.2	7.1	87
Sweden	14.5	20.8	5.9	22.8	19.8	16.0	81
Italy	11.5	9.5	8.4	3.7	2.4	5.5	229
Spain	2.4	3.1	3.7	5.1	3.2	3.8	119
Thailand	9.4	11.1	11.8	17.7	16.0	18.8	118
S. Vietnam	4.9	10.1	7.3	12.4	8.9	11.6	130
Malaysia <u>2/</u>	4.4	5.7	6.6	7.3	6.1	7.3	120
Hong Kong	5.8	8.1	7.5	4.7	4.1	5.5	134
Japan	21.4	34.9	36.6	42.1	5.6	4.0	71
Australia	18.5	14.2	19.7	16.5	10.5	9.6	91
New Zealand	5.1	3.9	3.0	5.3	4.3	3.3	77
Egypt	11.7	15.2	18.4	12.0	12.0	.7	6
Other countries	45.2	50.2	49.6	52.0	41.6	51.0	123
<b>Total</b>	<b>487.4</b>	<b>514.5</b>	<b>468.1</b>	<b>551.2</b>	<b>408.7</b>	<b>436.6</b>	<b>107</b>

1/ Preliminary.2/ Malaysia and Singapore.

Compiled from publications and records of the Bureau of the Census.

flue-cured crop to be harvested in early 1968 is 132 million pounds--nearly a third less than estimated 1967 production. The average guaranteed price to growers is about 33 U.S. cents per pound--the same as in 1967. Current stocks of flue-cured leaf in Rhodesia have been estimated at over 300 million pounds.

A new tobacco pricing system for the 1968 Rhodesian flue-cured crop is designed to encourage production of tobacco considered to be presently in greatest demand and to discourage production of high-quality leaf purchased in large volume by the United Kingdom before imposition of trade sanctions. Growers have been advised that their aim should be the production of a thinner type of tobacco, with a maximum proportion of cutters, lugs, and primings.

The 1967 production of flue-cured tobacco in Canada is estimated at 222 million pounds--1 percent below the record 1966 crop, but larger than any other year. Production in Ontario--where most of the flue-cured crop is grown--was around a tenth below the 1967 goal, because of excessive early rainfall and some frost losses that lowered per acre yields. Auctions in Ontario began November 9. Through December 8, about 50 million pounds had been sold, at an average price of 70 Canadian cents per pound. A year earlier, 51 million pounds were sold, averaging  $71\frac{1}{2}$  Canadian cents per pound--highest on record.

Canadian exports of flue-cured tobacco in January-May 1967, at about 25 million pounds (dry weight) were 11 percent larger than a year earlier. Nearly 90 percent of the total was consigned to the United Kingdom. Some Canadian flue-cured was exported to Denmark, West Germany, and the Netherlands, all of which took more than a year earlier.

India's 1967 flue-cured crop is currently placed at around 200 million pounds--16 percent above the relatively small 1966 crop. The 1966 exports of flue-cured tobacco dropped to 62 million pounds from 115 million in the previous year. In January-July 1967, however, exports of flue-cured amounted to 61 million pounds--64 percent larger than a year earlier. The United Kingdom accounted for nearly three-fifths of the total, increasing its takings 60 percent. Substantially increased exports were also made to Japan, the Soviet Union, Hungary, Czechoslovakia, and Egypt. In the first 6 months of 1967, the average value per pound of exports to the United Kingdom was equivalent to 54 U.S. cents per pound, and to Japan, 53 cents. For all destinations combined, it was 45 cents.

In Turkey, the 1967 production of oriental tobacco is estimated at 364 million pounds--only slightly below the previous year's crop, which was second largest on record. Unmanufactured tobacco exports in January-August 1967, totaled 107 million pounds--5 percent less than a year earlier. Over two-thirds of the total was consigned to the United States, which increased takings 9 percent. Other important outlets included Hungary, Poland, West Germany, the Soviet Union, Italy, and East Germany.

The 1967 production of oriental tobacco in Greece, estimated at 227 million pounds, is 12 percent above 1966. Exports of unmanufactured tobacco in January-September 1967 totaled 95 million pounds--4 percent above a year earlier. More than a third was consigned to the United States, which increased takings 35 percent. Other countries taking more Greek leaf than a year ago included the Soviet Union, Egypt, and Czechoslovakia. A significant quantity was exported to Japan, in contrast with none a year earlier. West Germany halved its year-earlier takings, and reduced exports were also made to Poland, Italy, and East Germany.

British Use and Stocks of Tobacco

In the United Kingdom--the leading single foreign market for U.S. tobacco--gross clearances from bond are an approximate measure of total tobacco use in manufactured products for home consumption and export. During January-September 1967, gross clearances were 1 percent above a year earlier. Net clearances for home consumption were up a bit, while exports of unmanufactured products (chiefly cigarettes) rose 6 percent.

Flue-cured tobacco makes up over nine-tenths of total tobacco clearances in the United Kingdom. Chief suppliers of flue-cured to the U.K. have been the United States, India, Canada, and--prior to trade sanctions on its tobacco--Rhodesia. Flue-cured tobacco is also imported from lesser Commonwealth suppliers such as Zambia, Malawi, and Tanzania. Since the ban on Rhodesian tobacco, increased quantities have been imported from such countries as Union of South Africa and South Korea. Imports from Thailand and Taiwan, although still relatively small, have also increased.

Gross clearances of flue-cured increased slightly in January-September 1967 from a year earlier. Gross clearances of U.S. flue-cured, at 100 million pounds, were up 10 percent. Clearances of Rhodesian flue-cured, at 39 million, dropped 38 percent. Clearances of Indian and Canadian, at 30 million and 36 million pounds, increased 2 and 25 percent, respectively. Gross clearances from "other" Commonwealth countries (other than India, Canada, Zambia, and Malawi) and Union of South Africa, amounted to about  $7\frac{1}{2}$  million pounds; a year earlier, they amounted to 4 million pounds.

At the end of September 1967, U.K. stocks of unmanufactured tobacco totaled 418 million pounds--6 percent less than a year earlier. These were the smallest holdings for that date in many years. British manufacturers' stocks of U.S. flue-cured amounted to 192 million pounds--up 10 million pounds from the relatively low level a year earlier, but still 31 million pounds below the 1961-65 average. Stocks of Rhodesian flue-cured were down to 47 million pounds--less than half the year-earlier holdings. Use of Rhodesian flue-cured was about  $3\frac{3}{4}$  million pounds a month in July-September 1967, down from the monthly average of about  $6\frac{1}{2}$  million pounds in 1966 and about  $7\frac{1}{2}$  million pounds in 1965. Stocks of Canadian flue-cured--57 million pounds--were virtually unchanged; but those of Indian flue-cured--about 52 million pounds--rose nearly 5 million. British stocks of Malawi fire-cured and Indian air cured and sun-cured were substantially below a year earlier; those of air- and sun-cured from Malawi declined a little.

UNITED STATES IMPORTS AND STOCKS OF FOREIGN-GROWN TOBACCO 2/

In the first 10 months of 1967, U.S. imports for consumption of foreign-grown tobacco were 9 percent above a year earlier. Imports of the two major categories--cigarette leaf and scrap (small pieces of leaves used chiefly for cigars)--were up.

Imports of cigarette leaf for consumption (imports for immediate consumption plus withdrawals from bonded warehouses) during January-October 1967 were 11 percent above a year earlier. Imports from Turkey and Greece rose 11 and 6 percent, respectively, while those from Yugoslavia gained 20 percent. Total arrivals of cigarette leaf from abroad (general imports, which consist of imports for immediate consumption plus imports placed in bonded warehouses) increased 4 percent over January-October 1966, due to a substantial gain in arrivals from Greece that more than offset declines

2/ Imports of tobacco are on a declared-weight basis and stocks are on a farm-sales weight basis.

Table 8.--United Kingdom tobacco: Imports, stocks, clearances, and exports for specified periods

Period	Imports <sup>1/</sup>				Gross clearances from bond <sup>4/</sup>					Exports of manufactured tobacco	Re-exports of unmanufactured tobacco
	Total	From U. S. <sup>2/</sup>	From Commonwealth countries <sup>2/</sup>	Stocks Dec. 31 <sup>3/</sup>	Total	By duty preference		By form			
						Nonpreferential <sup>2/</sup>	Preferential <sup>2/</sup>	Stemmed	Unstemmed		
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	
Average:											
1950-54	303	151	137	459	282	174	108	47	235	45	7
1955	344	179	149	507	298	173	125	50	248	44	4
1956	318	160	146	523	300	173	127	59	241	45	3
1957	319	168	141	529	304	169	135	69	235	41	3
1958	316	164	145	529	310	172	138	74	236	41	2
1959	300	140	155	509	315	171	144	78	237	34	2
1960	365	178	180	538	319	167	152	88	231	31	5
1961	345	157	182	563	317	161	156	100	217	31	3
1962	280	106	168	540	307	153	154	107	200	28	4
1963	325	145	174	536	313	154	159	125	188	29	3
1964	313	123	181	541	308	146	162	157	151	26	4
1965	284	91	184	520	298	130	168	191	107	32	4
1966 <sup>5/</sup>	261	132	110	464	301	132	169	218	83	35	4
Jan.-Oct.											
1963	269	108	156	#501	*233	*115	*118	* 91	*142	24	3
1964	241	87	147	#501	*228	*108	*120	*112	*116	21	3
1965	220	62	150	#499	*222	* 98	*124	*140	* 82	26	4
1966	199	87	96	#446	*226	* 98	*128	*163	* 63	29	4
1967	219	95	106	#418	*229	*110	*119	*176	* 53	31	2

<sup>1/</sup> Unmanufactured tobacco. <sup>2/</sup> The full duty rate on tobacco from the United States and other non-preferential areas is about 2 percent above the preferential rate on tobacco from Commonwealth areas. <sup>3/</sup> Beginning with 1957, stocks not strictly comparable with prior years. <sup>4/</sup> Largely withdrawals for manufactures for home use and export. <sup>5/</sup> Subject to revision. # Stocks as of September 30.  
\* Jan.-Sept.

Compiled from official United Kingdom sources.

Table 9.--United States imports for consumption of unmanufactured tobacco, from principal supplying countries, for specified periods

Classification and country of origin	(Declared weight)						1967 as a percentage of 1966
	Average 1959-63	1964	1965	1966 1/	January-October		
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Pct.
<b>Cigarette leaf</b>							
Unstemmed:							
Turkey	77.9	72.3	83.6	84.3	71.1	78.9	111
Greece	31.8	30.9	36.0	36.6	30.9	32.8	106
Yugoslavia	6.7	10.2	12.9	11.4	9.4	11.3	120
Italy	1.7	1.6	1.4	.5	.4	.3	75
Cyprus	.8	.8	.8	.7	.6	.6	100
Syria	.7	.4	.2	.3	.1	.3	300
<b>Total 2/</b>	122.3	118.4	137.9	137.1	115.5	128.4	111
<b>Flue-cured and burley</b>	3/.3	.4	.3	1.0	1.0	1.0	100
<b>Cigar leaf (filler)</b>							
Cuba:							
Stemmed	5.0	.5	.2	.2	.1	.1	100
Unstemmed	3.4	1.5	.6	.2	.1	.2	200
Philippine Republic:							
Stemmed	.3	.4	4/	4/	4/	.1	---
Unstemmed	.1	4/	4/	.1	.1	.2	200
Colombia	.2	.3	.1	.6	.5	.4	80
Brazil	.3	.8	.6	.6	.6	.4	67
Paraguay	.1	.1	.4	.2	.2	4/	---
Dominican Republic	.3	.7	.8	.7	.6	1.0	167
Mexico	.1	.8	1.0	1.3	1.1	.7	64
<b>Total 2/</b>	10.2	5.9	4.3	5.0	4.3	4.2	98
<b>Scrap:</b>							
Cuba	10.4	2.3	1.6	1.4	1.2	.6	50
Philippine Republic	10.1	14.1	14.1	17.1	14.7	13.9	95
Peru	.5	4/	.3	.2	.2	.2	100
Colombia	2.0	8.0	5.5	3.9	3.4	2.6	76
Dominican Republic	2.0	9.3	7.6	3.3	2.9	3.6	124
Netherlands	.1	.1	4/	.2	.2	0	---
Indonesia	.4	2.1	1.3	.9	.7	.9	129
Brazil	.5	3.8	3.6	3.5	2.7	2.3	85
Argentina	.2	.5	.4	.3	.3	.6	200
Paraguay	.1	.6	.9	1.4	1.1	1.5	136
<b>Total 2/</b>	27.9	42.9	38.9	35.6	30.6	31.4	103
<b>Cigar wrapper (unstemmed):</b>							
Cuba	.5	.1	4/	4/	4/	4/	---
Cameroon Republic	4/	4/	.1	.1	.1	.1	100
Honduras	4/	4/	.1	.1	.1	.2	200
<b>Total 2/</b>	.5	.2	.2	.3	.3	.3	100
<b>Total imports 5/</b>	161.7	168.7	182.6	179.3	151.4	165.7	109

1/ Preliminary.

2/ Includes relatively small quantities from other countries not separately listed.

3/ 1960-63 average.

4/ Less than 50,000 pounds.

5/ Includes stems not cut, ground, or pulverized.

Compiled from publications and records of the Bureau of the Census.



Table 10.--United States general imports of tobacco from principal supplying countries, for specified periods

Classification and country of origin	(Declared weight)						
	Average 1959-63	1964	1965	1966	January-October		
					1966	1967	1967 as a percentage of 1966
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Pct.
<b>Cigarette leaf (unstemmed):</b>							
Turkey	92.1	68.1	79.8	124.6	108.2	107.0	99
Greece	33.0	46.4	35.7	34.1	31.7	40.8	129
Other countries	15.3	18.7	14.0	24.9	23.7	22.3	94
<b>Total</b>	<b>140.4</b>	<b>133.2</b>	<b>129.5</b>	<b>183.7</b>	<b>163.6</b>	<b>170.1</b>	<b>104</b>
<b>Scrap:</b>							
Turkey	1.1	.1	7.1	4.6	3.8	9.3	245
<b>Flue-cured and burley</b>	<b>1/3</b>	<b>.5</b>	<b>1.0</b>	<b>1.8</b>	<b>1.8</b>	<b>.7</b>	<b>39</b>
<b>Cigar wrapper (unstemmed):</b>							
Cuba 2/	.4	0	0	0	0	0	---
Cameroon Republic	3/	.1	.1	.1	.1	.1	100
Honduras	3/	.1	.1	.1	.1	.2	200
<b>Total 4/</b>	<b>.5</b>	<b>.2</b>	<b>.4</b>	<b>.3</b>	<b>.3</b>	<b>.6</b>	<b>200</b>
<b>Cigar filler (stemmed):</b>							
Cuba 2/	5.0	0	0	0	0	0	---
Philippine Republic	.6	1.2	2.2	3/	3/	.1	---
Brazil	.4	.2	.2	.5	.4	.3	75
Mexico	.1	.5	.5	.7	.7	.5	71
Dominican Republic	3/	.5	.9	.1	.1	.4	400
Honduras	3/	.2	.2	.3	.2	.3	150
<b>Total 4/</b>	<b>6.2</b>	<b>3.1</b>	<b>4.2</b>	<b>1.9</b>	<b>1.6</b>	<b>1.8</b>	<b>112</b>
<b>Cigar filler (unstemmed):</b>							
Cuba 2/	13.3	0	0	0	0	0	---
Philippine Republic	.7	1.2	.8	1.0	1.0	.4	40
Dominican Republic	4.4	22.1	2.5	.6	.5	4.8	960
Colombia	4.7	17.3	7.0	4.2	4.2	4.6	110
Brazil	1.1	10.2	9.3	1.3	1.2	2.1	175
Paraguay	.8	1.2	1.8	.5	.5	1.8	360
Indonesia	1.0	6.2	2.5	.1	.1	.5	500
Netherlands	.3	.2	0	3/	3/	.1	---
Peru	1.3	0	2.1	0	0	0	---
Argentina	.1	1.6	.2	.1	.1	3/	---
Mexico	.3	2.1	2.3	3.0	2.7	1.8	67
Jamaica	.1	0	3/	3/	3/	3/	---
<b>Total 4/</b>	<b>28.1</b>	<b>62.5</b>	<b>29.6</b>	<b>12.1</b>	<b>11.3</b>	<b>17.5</b>	<b>155</b>
<b>Scrap:</b>							
Cuba 2/	5.2	0	0	0	0	0	---
Philippine Republic	9.8	15.0	23.9	15.5	14.4	7.8	54
Dominican Republic	.2	1.1	1.0	.2	.1	.4	400
Colombia	3/	0	0	3/	3/	3/	---
Brazil	.1	.8	.1	.3	.3	0	---
Paraguay	.1	.1	.1	.4	.4	.1	25
Indonesia	3/	.3	3/	3/	3/	.7	---
Netherlands	.1	0	3/	3/	3/	0	---
Argentina	.2	.3	.1	.1	.1	3/	---
Honduras	3/	.1	.1	.1	.1	3/	---
Other countries	.9	.6	.6	.5	.4	2.3	575
<b>Total 4/</b>	<b>16.6</b>	<b>18.4</b>	<b>25.9</b>	<b>17.0</b>	<b>15.8</b>	<b>11.4</b>	<b>72</b>
<b>Total cigar tobacco</b>	<b>51.4</b>	<b>84.1</b>	<b>60.1</b>	<b>31.4</b>	<b>28.9</b>	<b>31.4</b>	<b>109</b>
<b>Grand total 5/</b>	<b>193.7</b>	<b>218.2</b>	<b>198.0</b>	<b>221.7</b>	<b>198.3</b>	<b>211.6</b>	<b>107</b>

1/ 1960-63 average. 2/ For 1959-61 (pre-embargo) years, average imports were wrapper, 0.7 million pounds; stemmed filler, 7.9 million; unstemmed filler, 20.9 million; and scrap, 8.1 million. 3/ Less than 50,000 pounds. 4/ Includes quantities from other countries not separately listed. 5/ Includes stems not cut, ground, or pulverized. Detail may not add to total, due to rounding.

Note: General imports include all arrivals in the United States as distinguished from "imports for consumption".

in arrivals from Turkey and other sources. (See table 10.) Stocks of foreign-grown cigarette and smoking tobacco in the United States on October 1, 1967, were the highest on record for that date, totaling 372 million pounds (farm-sales weight equivalent)--15 percent above a year earlier and 32 percent above 2 years earlier.

In January-October 1967, compared with a year earlier, there were increased imports for consumption of scrap from the Dominican Republic, Paraguay, Indonesia, and Argentina, but lower imports from the Philippine Republic, Colombia, and Brazil. Withdrawals of Cuban scrap from remaining stocks in the United States were only half of the already-reduced quantity a year earlier.

Total arrivals (general imports) of cigar tobacco during the first 10 months of 1967 were up 9 percent from a year earlier. Arrivals increased from the Dominican Republic, Colombia, Brazil, Paraguay, and Indonesia, but dropped from the Philippine Republic and Mexico. (See table 10.)

October 1, 1967, stocks of foreign-grown cigar tobacco, by country of origin, are shown on page 37.

## SITUATION AND OUTLOOK FOR TOBACCO LEAF

### Flue-Cured, Types 11-14

#### Prices and Price Support

In accordance with the legal formula, the overall price support level for the 1968 flue-cured crop will advance at least 3 percent above the 59.9 cents per pound level in effect for 1967. The 1968 support level will be calculated by raising the 1959 support level to reflect the percentage increase in the parity index from 1959 to 1965-67 (average of the 3 most recent calendar years). (Over a period of time, the parity index measures average change in the prices of commodities and services commonly bought by farm families.) Data available through November 1967 indicate a rise in the 1968 overall price supports of at least 3 percent over 1967 supports.

Marketing of the 1967 flue-cured crop was virtually completed by December 19. The season average price for gross sales (including resales) was 64.2 cents per pound--down 2.5 cents from the record 1966 average. (For price comparisons by individual Belts, see table 11.) Producers' sales (allowing for resales--duplicate sales) totaled about 1,245 million pounds--approximately 139 million more than in 1966, when they were second smallest in 7 years. Many growers made up their 1966 undermarketings in 1967. Also, a sizable number of growers marketed a greater quantity in 1967 than allocated under their poundage quotas. Under the program, a grower could market up to 10 percent more than his poundage quota and still receive price support. Overmarketings in 1967 exceeded undermarketings by a considerable margin. The quantity by which a grower's marketings exceeded his 1967 quota will be deducted from the farm's quota for 1968. A grower who marketed less than his 1967 quota will have the difference added to the farm's 1968 quota.

On the types 11-13 markets in 1967, price support was made available on all grades of untied tobacco during the first 95 hours of selling time scheduled in each market. (In 1966, price support on untied tobacco sold in these markets had been limited to the first 12 days--59 hours of selling time.) In 1967, as in the previous 2 years, price support for untied tobacco was 3 cents per pound lower than for tied tobacco of the corresponding grade.

Table 11.--Flue-cured tobacco: Average price per pound (gross sales) and percentage comparisons by Belt, 1955-67

Marketing season	Old Belt type 11 (a)	Middle Belt type 11 (b)	Eastern N. C. Belt type 12	N. C. Border and S. C. Belt type 13	Ga.-Fla. Belt type 14 1/	All Belts
	Cents per pound	Cents per pound	Cents per pound	Cents per pound	Cents per pound	Cents per pound
1955	53.8	52.4	52.3	53.7	46.5	52.2
1956	49.9	51.9	51.5	53.2	48.0	51.1
1957	52.3	53.1	54.3	59.1	55.9	55.0
1958	57.2	57.1	57.1	59.6	57.1	57.7
1959	53.2	56.4	57.9	62.1	57.8	57.7
1960	58.5	60.9	60.7	61.4	56.4	59.9
1961	62.9	64.5	64.9	65.4	58.9	63.7
1962	60.3	60.4	59.4	61.0	56.5	59.7
1963	55.2	57.0	58.2	59.9	56.9	57.7
1964	59.0	58.7	56.3	59.2	58.6	58.1
1965	64.7	63.0	63.0	65.3	66.0	64.4
1966	62.3	64.1	68.3	68.8	69.9	66.7
1967 2/	62.0	62.7	64.8	65.1	65.5	64.2
Price for each type as percentage of price for all types combined						
	Percent	Percent	Percent	Percent	Percent	Percent
1955	103.1	100.4	100.2	102.9	89.1	100.0
1956	97.7	101.6	100.8	104.1	93.9	100.0
1957	95.1	96.4	98.7	107.5	101.6	100.0
1958	99.1	99.0	99.0	103.1	99.1	100.0
1959	92.1	97.7	100.3	107.6	100.1	100.0
1960	97.7	101.7	101.3	102.5	94.2	100.0
1961	98.9	101.3	101.9	102.7	92.5	100.0
1962	101.0	101.2	99.5	102.2	94.6	100.0
1963	95.7	98.8	100.9	103.8	98.6	100.0
1964	101.5	101.0	97.1	101.9	100.9	100.0
1965	100.5	97.8	97.8	101.4	102.5	100.0
1966	93.4	96.1	102.4	103.1	104.8	100.0
1967 2/	96.6	97.7	100.9	101.4	102.0	100.0

1/ Type 14 tobacco is marketed untied; through 1961 all other types were marketed tied, but in 1962-65 certain grades, and in 1966 and 1967 all grades were sold untied during specified periods at the start of auction season. 2/ Preliminary.



Table 13.--Flue-cured tobacco: Receipts under government loan and percentage distribution by Belt, 1955-67

Marketing season	Old Belt	Middle Belt	Eastern N. C. Belt	N. C. Border and S. C. Belt	N. C. Ga.-Fla. Belt	All Belts
	type 11 (a)	type 11 (b)	type 12	type 13	type 14	
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
1955	30.7	23.0	124.9	89.1	31.2	298.9
1956	64.8	50.6	128.1	62.8	13.5	319.9
1957	58.2	18.2	21.4	8.9	1.1	107.8
1958	41.2	15.7	50.0	35.6	2.4	144.8
1959	27.6	7.2	7.5	11.3	1.8	55.3
1960	16.2	5.3	19.0	8.9	2.3	51.8
1961	17.4	6.2	31.3	8.2	7.2	70.3
1962	93.8	35.1	65.9	37.5	4.9	237.2
1963	128.8	38.5	63.0	41.4	5.5	277.2
1964	71.3	39.0	125.6	46.7	3.0	285.6
1965	21.2	9.6	19.4	18.9	2.4	71.5
1966	49.2	15.1	7.4	2.5	.4	74.6
1967 <u>1/</u>	<u>2/</u> 84.5	49.7	79.8	57.2	11.0	<u>2/</u> 282.1
Percentage distribution						
	Percent	Percent	Percent	Percent	Percent	Percent
1955	10.3	7.7	41.8	29.8	10.4	100.0
1956	20.3	15.8	40.0	19.6	4.3	100.0
1957	54.0	16.9	19.9	8.2	1.0	100.0
1958	28.5	10.8	34.5	24.5	1.7	100.0
1959	49.7	13.0	13.6	20.4	3.3	100.0
1960	31.3	10.2	36.9	17.2	4.4	100.0
1961	24.8	8.8	44.5	11.7	10.2	100.0
1962	39.5	14.8	27.8	15.8	2.1	100.0
1963	46.5	13.9	22.7	14.9	2.0	100.0
1964	24.9	13.7	43.9	16.4	1.1	100.0
1965	29.7	13.4	27.1	26.4	3.4	100.0
1966	65.8	20.4	9.9	3.4	.5	100.0
1967 <u>1/</u>	29.9	17.6	28.3	20.3	3.9	100.0

1/ Preliminary. 2/ Includes receipts through December 19, 1967.

In 1967, more than twice as much tobacco was sold untied in the types 11-13 markets than in the 1966 season. About 67 percent of the tobacco sold in the types 11-13 markets in 1967 was untied, compared with 34 percent in 1966. When the untied tobacco sold in type 14 Georgia-Florida markets--where traditionally all tobacco is sold untied--is added to that in types 11-13 markets, about 72 percent of the entire 1967 gross sales was untied, compared with 44 percent in 1966 and 24 percent in 1965. Last March, the U.S. Department of Agriculture had announced that by 1969 it would seek to make price support available on untied flue-cured tobacco throughout the entire marketing season on all markets.

Flue-cured tobacco placed under Government loan through December 19 totaled about 282 million pounds--about 22 percent of the crop. In both volume and proportion of the crop this is substantially above placements in 1965 and 1966. Sales of older crop loan stocks in the 12 months ending November 30, 1967, totaled 178 million pounds, compared with about 270 million a year earlier and 138 million 2 years earlier. As of November 30, 1967, Government loan stocks of flue-cured tobacco (including receipts from the 1967 crop) totaled about 788 million pounds--14 percent larger than a year ago.

By December 1 (final date for making application), about 410 loans--representing about 2.2 million pounds--were made under the advance price-support loan program for 1967-crop flue-cured stored on farms. This program, announced September 26, was established to enable farmers to get immediate cash and hold their tobacco on the farm for later marketing when congestion had lessened. The loan rate was 45 cents a pound for tobacco of average grade composition.

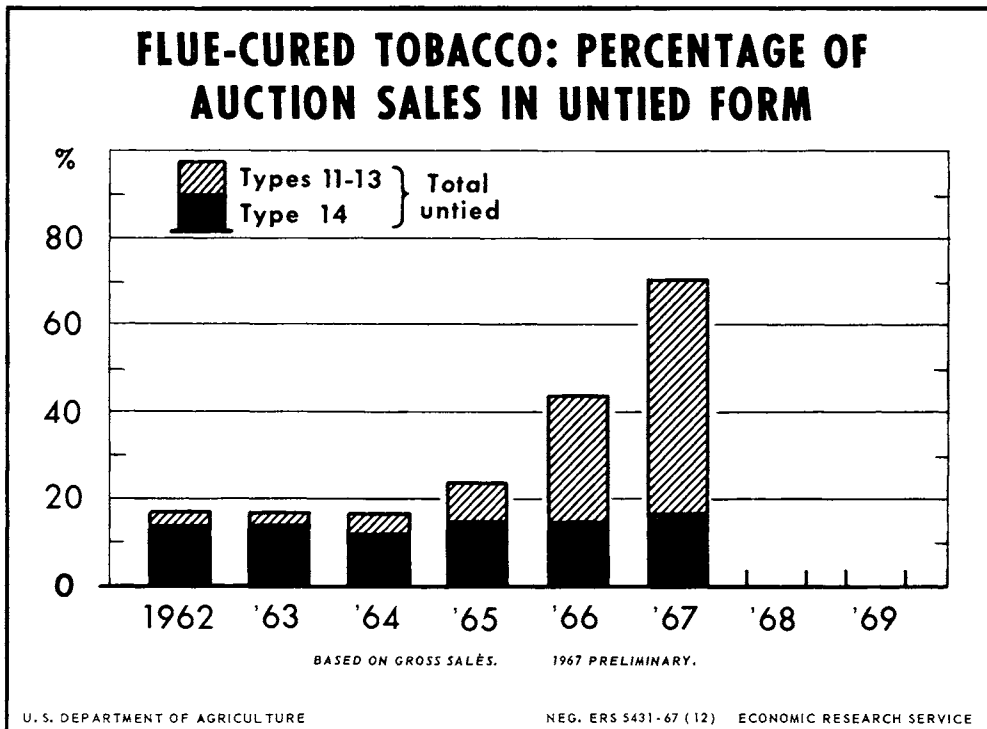


Table 14.--Quantities and prices of untied and tied flue-cured tobacco, types 11-13 in specified periods of 1967, 1966, and 1965 marketing seasons

Type	Quantity (gross sales)			Percent marketed untied in period of untied sales	Average price per lb.		Untied as percent of total season's marketings
	Untied plus tied	Tied	Untied		Tied	Untied	
	Mil. lb.	Mil. lb.	Mil. lb.	Pct.	Ct.	Ct.	Pct.
1967 season--first 95 hours selling time of price support for untied tobacco, all grades							
13	231.9	0.5	231.4	99.8	61.5	66.6	72.0
12	227.5	4.6	222.9	98.0	68.1	64.6	63.8
11-b	105.5	1.1	104.4	99.0	65.6	62.5	68.8
11-a	175.5	7.1	168.4	96.0	66.2	61.4	<u>2/65.6</u>
Total 11-13 <u>1/</u>	740.4	13.3	727.1	98.2	64.6	64.2	<u>2/66.7</u>
1966 season--first 12 days (59 hours selling time) of price support for untied tobacco, all grades							
13 <u>3/</u>	116.8	2.9	113.9	97.5	69.3	68.0	46.6
12	113.9	6.9	107.0	93.9	70.7	67.0	30.7
11-b	53.6	.6	53.0	98.9	67.5	64.4	34.3
11-a	80.0	6.2	73.8	92.2	67.6	64.6	27.0
Total 11-13	364.3	16.6	347.7	95.4	69.2	66.4	34.0
1965 season--first 7 days (38½ hours selling time) of price support for untied tobacco, lugs, primings, and nondescript grades thereof							
13	54.3	13.8	40.5	74.6	63.7	61.1	13.3
12	77.0	44.2	32.8	42.6	63.7	58.5	10.5
11-b	35.2	22.5	12.7	36.1	64.6	60.2	10.8
11-a	69.2	55.6	13.6	19.7	65.5	59.3	5.6
Total 11-13	235.7	136.1	99.6	42.3	64.6	59.9	8.6

1/ Including untied tobacco sold after the period of price support for untied tobacco, total gross sales of types 11-13 untied tobacco amounted to 727.8 million pounds.

2/ Not final; small additional marketings anticipated in January.

3/ About 370,000 pounds of additional untied type 13 tobacco was sold after the end of the 12-day period of price support for untied type 13 tobacco.

Table 15.--Flue-cured tobacco, types 11-14: Domestic supplies, disappearance, season average price, and price support operations for specified periods

(Farm-sales weight)						
Year	Production	Stocks, July 1	Supply	Disappearance <sup>1/</sup>		
				Total	Domestic	Exports
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.
1955	1,483	2,056	3,539	1,281	728	553
1956	1,423	2,258	3,681	1,170	705	465
1957	975	2,511	3,486	1,178	737	441
1958	1,081	2,308	3,389	1,179	736	443
1959	1,081	2,210	3,291	1,185	766	419
1960	1,251	2,106	3,357	1,267	792	475
1961	1,258	2,090	3,348	1,267	782	485
1962	1,408	2,081	3,489	1,208	777	431
1963	1,371	2,282	3,653	1,267	769	498
1964	1,388	2,386	3,774	1,219	775	444
1965	1,059	2,555	3,614	1,175	752	423
1966	1,108	2,439	3,547	1,274	*(687)	587
1967 <sup>2/</sup>	1,268	2,273	3,541			
				Placed under Government loan		
	Average price per pound	Price support level <sup>3/</sup>	Quantity	Percentage of crop	Remaining in Government loan stocks on November 30, 1967* <sup>4/</sup>	
	Ct.	Ct.	Mil. lb.	Pct.	Mil. lb.	
1955	52.7	48.3	298.9	20.2	0	
1956	51.5	48.9	319.9	22.5	0	
1957	55.4	50.8	107.8	11.1	0	
1958	58.2	54.6	144.8	13.4	0	
1959	58.3	55.5	55.3	5.1	0	
1960	60.4	55.5	51.8	4.1	0	
1961	64.1	55.5	70.3	5.6	2.1	
1962	60.1	56.1	237.2	16.8	38.5	
1963	58.0	56.6	277.2	20.2	162.3	
1964	58.4	57.2	285.6	20.7	202.7	
1965	64.6	57.7	71.5	6.8	41.6	
1966	66.9	58.8	74.6	6.8	72.4	
1967	<u>5/64.2</u>	59.9	*282.1	*22.2	*282.1	
Total			*2,277.0		*801.7	

<sup>1/</sup> Year beginning July 1. <sup>2/</sup> Subject to revision. <sup>3/</sup> Through 1959--90 percent of parity price; 1960 set at 1959 level; from 1961 on, adjusted to reflect relative change between 1959 parity index and average of parity index for 3 most recent calendar years. <sup>4/</sup> As reported by Flue-cured Tobacco Cooperative Stabilization Corp.; the unstemmed loan stocks on the packed-weight basis average about 11 percent less than their farm-sales weight figures. <sup>5/</sup> Gross sales auction average through December 19, 1967.

\* For the 1967 crop, includes receipts through December 19, 1967; small additional marketings expected in January.

# This figure appears unusually low, and the data from which it is derived are being studied.



### Supplies

The 1967/68 total supply of flue-cured is about 3,541 million pounds--approximately the same as in 1966/67, but 6 percent below the 1964/65 peak. Mid-1967 carryover was down 7 percent from a year earlier, but the 1967 crop was 14 percent above the 1966 crop--second smallest in 7 years. Harvested acreage in 1967 increased 3 percent over 1966, and the average yield per acre for all areas combined rose 11 percent.

In the 1966 season, undermarketings exceeded overmarketings by a sizable margin, and the difference was added to the total poundage allocated to farms for 1967. In the 1967 season, however, there were considerable net overmarketings. The 1968 flue-cured tobacco quota, announced last July, is essentially the same as in 1967 and the 2 prior years. However, the total poundage allocated to farms in 1967 will reflect the deduction of net overmarketings in 1967. If growing conditions are generally favorable in 1968, some overmarketings could result. (A grower can market and receive price support on any overmarketings up to 10 percent of his quota, but this would reduce his 1969 quota by an equivalent amount.) If there were net overmarketings in 1968, total marketings could approximate 1,150 million pounds--down around a tenth from 1967.

Carryover of flue-cured in mid-1968 seems likely to be around 2,300 million pounds--about 1 percent larger than in mid-1967. If 1968 marketings should approximate 1,150 million pounds, these added to carryover would provide a total supply of around 3,450 million pounds for 1968-69--about 3 percent less than for 1967/68.

### Domestic Use and Exports

Domestic use of flue-cured tobacco during 1966/67 was indicated to be 687 million pounds--9 percent below that of 1965/66. This estimated use--derived from production, stocks, and export data--is substantially lower than might have been expected, and the underlying statistics are being checked. One checking procedure has indicated that the decline in domestic use was 3 percent rather than the 9 percent obtained by the customary method of estimation. (See September 1967 Tobacco Situation, page 35.)

The 1966/67 exports of flue-cured--587 million pounds (farm-sales weight)--were record high. Exports in the 1967/68 marketing year will probably not be as high as in 1966/67, but are expected to remain well above most of the last several years. U.N. trade sanctions continue against tobacco from Rhodesia, normally the second largest exporter of flue-cured tobacco. Also, U.S. tobacco exports are assisted by the export payment program and improved quality of U.S. flue-cured.

During the first third of the current marketing year (July-October 1967), flue-cured exports (farm-sales weight) were 23 percent below the high level a year earlier, but 22 percent above 2 years earlier. Exports to the United Kingdom--leading destination--declined 14 percent; those to West Germany dropped 53 percent. Other countries taking less than a year earlier included Sweden, South Vietnam, Thailand, Belgium, Ireland, Denmark, Norway, and Australia. Countries taking more than a year ago included the Netherlands, Taiwan, Switzerland, Malaysia, Italy, Hong Kong, and Pakistan.

## Burley, Type 31

Prices and Price Support

Auction sales of 1967-crop burley began November 28. By December 20, when markets closed for the holidays until January 3, gross sales totaled 454 million pounds and averaged 71.8 cents a pound, highest on record. In 1966, pre-Christmas sales also ended December 20, and averaged 68.2 cents. Approximately 78 percent of the 1967 crop had been sold through December 20. (In 1966, 63 percent of the crop had been sold by the holiday shutdown.) Prices of most grades were higher than a year ago, around three-fourths of the grades increasing from 1 to 4 cents a pound, and the majority of the remainder by 5 to 7 cents. General quality of the crop is reported to be the best in years.

The Government overall price support level for 1967 burley is 61.8 cents a pound. Through December 20, about 45 million pounds or 10 percent of market deliveries had been placed under Government loan. In the full 1966 season, 62½ million pounds--nearly 11 percent of the crop--went under loan.

For the 1968 burley crop, the overall price support level will likely be at least 3 percent higher than the 61.8 cents a pound in effect for the current crop. (See page 18.)

Supplies

The 1967/68 burley supply is 1,941 million pounds--2 percent below 1966/67 and 4½ percent below the 1964/65 peak. The 1967 crop, estimated at 559 million pounds, was smallest in 7 years--5 percent under both 1965 and 1966. Harvested acreage in 1967 was down 1 percent from 1966; acreage allotments for most farms were unchanged from 1966. Although the indicated average yield per acre--2,345 pounds--was 4 percent below the peak 1966 yield, it was still the second highest on record.

October 1, 1967, carryover was 1,382 million pounds--down 1 percent from a year earlier. Included in the recent carryover were 277 million pounds (farm-sales weight) held under Government loan. These holdings amounted to 262 million pounds a year earlier and 316 million pounds 2 years earlier. As of November 30, 1967, the quantity of burley under Government loan remaining unsold totaled 268 million pounds (farm-sales weight).

The 1967/68 total supply is equal to about 3.2 times probable disappearance, compared with a ratio of 3.3 in 1966/67 and the peak of 3.5 in 1963/64. The "desirable ratio", based on the legislative formula, is 2.8. Carryover stocks on October 1, 1968, will likely show a sizable reduction from the year-earlier level.

The 1968 burley marketing quota and acreage allotment (under the acreage allotment program now in effect) will be announced by the Secretary of Agriculture by February 1, 1968. Shortly after the announcement, a referendum will be held for growers to decide whether they favor continuation of the acreage allotment program. Approval by at least two-thirds of the farmers voting is necessary before marketing quotas can continue in effect. In the last referendum on marketing quotas on an acreage allotment basis (February 1965), 99 percent of the growers voting approved quotas for their next 3 crops.

An acreage-poundage program was offered to burley growers in 1966 and again earlier this year, but in the referendums an insufficient majority favored the change. Under the law, an acreage-poundage program cannot be offered for the 1968 burley crop.

Table 16.--Burley tobacco, type 31: Domestic supplies, disappearance, season average price, and price support operations for specified periods

Year	(Farm-sales weight)					
	Production	Stocks, October 1	Supply	Disappearance <sup>1/</sup>		
				Total	Domestic	Exports
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.
1955	470	1,347	1,817	518	484	34
1956	506	1,299	1,805	510	482	28
1957	488	1,295	1,783	506	478	28
1958	465	1,277	1,742	518	483	35
1959	502	1,224	1,726	535	499	36
1960	485	1,191	1,676	549	508	41
1961	580	1,127	1,707	570	525	45
1962	675	1,137	1,812	584	531	53
1963	755	1,228	1,983	571	514	57
1964	620	1,412	2,032	616	560	56
1965	586	1,416	2,002	607	550	57
1966	587	1,395	1,982	600	543	57
1967 <sup>2/</sup>	559	1,382	1,941			
	Average price per pound	Price support level <sup>3/</sup>	Placed under Government loan Quantity	Percentage of crop	Remaining in Government loan stocks on November 30, 1967 <sup>4/</sup>	
	Ct.	Ct.	Mil. lb.	Pct.	Mil. lb.	
1955	58.6	46.2	73.1	15.6	0	
1956	63.6	48.1	6.0	1.2	0	
1957	60.3	51.7	16.6	3.4	0	
1958	66.1	55.4	11.2	2.4	0	
1959	60.6	57.2	13.2	2.6	0	
1960	64.3	57.2	8.4	1.7	0	
1961	66.5	57.2	10.3	1.8	0	
1962	58.6	57.8	63.5	9.4	22.2	
1963	59.2	58.3	202.3	26.8	80.7	
1964	60.3	58.9	110.4	17.8	72.0	
1965	67.0	59.5	42.2	7.2	40.4	
1966	66.9	60.6	62.5	10.6	61.6	
1967	*71.8	61.8	5/	5/	5/	
<b>Total</b>	---	---	619.7	---	6/276.9	

<sup>1/</sup> Year beginning October 1. <sup>2/</sup> Subject to revision. <sup>3/</sup> Through 1959--90 percent of parity price; 1960 set at 1959 level; from 1961 on, adjusted to reflect relative change between 1959 parity index and average of parity index for 3 most recent calendar years. <sup>4/</sup> Actual loan stocks on a packed-weight basis average about 11 percent less than these farm-sales weight figures. <sup>5/</sup> Through December 20 about 45 million pounds, 10 percent of deliveries, went under loan. <sup>6/</sup> About 9 million pounds of these holdings have been sold.

\* Auction average through December 20.

Domestic Use and Exports

During the year ended September 30, 1967, domestic use of burley--calculated from stocks, production, and export data--was 543 million pounds. This was 7 million pounds below the previous year. In the same period, cigarette manufacture--principal outlet for burley--rose nearly 2 percent. Output of other products using burley declined--smoking tobacco (down 6 percent) and plug, twist, and fine-cut chewing (1½ percent lower).

The 1966/67 domestic use was lower than expected on the basis of increased cigarette manufacture, even allowing for reduced use in the secondary outlets. Domestic disappearance, the measure of domestic use, is a derived figure and is calculated as follows: stocks at the end of a marketing year are subtracted from the total supply available for the year (stocks at the beginning of the marketing year plus the crop), and the resulting figure is "total disappearance". Exports are subtracted from "total disappearance" and the resulting figure is "domestic disappearance". While such a procedure provides fairly good approximations of domestic use, available data do not measure use precisely in a given 12-month period. Domestic use of burley in 1967/68 may show some increase over 1966/67.

Burley exports in the marketing year ended September 30, 1967, at 57 million pounds (farm-sales weight), were about equal to those of a year earlier. About 21 percent was shipped in stemmed form, compared with 20 percent in 1965/66 and 16 percent in 1964/65. West Germany, our leading foreign market for burley, increased takings 12 percent to the highest on record. Exports to Thailand more than doubled, and there were also substantial increases to Italy, the Netherlands, Denmark, Switzerland, Portugal, Finland, and Austria. Shipments to Chile were up moderately. On the other hand, significantly reduced exports were made to Sweden, Hong Kong, Philippine Republic, Belgium, Republic of the Congo, Australia, Mexico, France, and Tunisia. None was reported shipped to Egypt, which in 1965/66 took around 5 million pounds, farm-sales weight equivalent.

U.S. burley exports, which had been trending upwards, have remained at a plateau of 56-57 million pounds (farm-sales weight) for the past 4 marketing years. U.S. burley faces increased competition from expanded production abroad. Foreign exporters of burley include Japan, Italy, South Korea, Mexico, and Greece.

Maryland, Type 32 3/

Prices and Price Support

Auction markets for 1967-crop Maryland tobacco are scheduled to open April 16, 1968, and close June 28. The Baltimore hogshead market, where approximately an eighth of the crop has been sold in the past few years, also will be operating.

Since growers disapproved a marketing quota for the 1967 crop, it is not eligible for Government price support. If growers approve a marketing quota for the 1968 crop in a forthcoming referendum, price support will be in effect for that crop, with the overall price support level likely to be at least 7 percent above the 52.8 cents a pound that applied to the 1965 Maryland crop sold with price support.

The average price for the 1966 crop dropped 25 percent below the preceding season's record average. Auction sales volume declined a little. Due to a dry growing season, quality of offerings was poorer than the 1965 crop. Government price support was not in effect for the 1966 crop, since growers disapproved marketing quotas.

3/ For marketing quota purposes, the carryover and total supply of Maryland tobacco are calculated as of the January 1 falling within the marketing year, October 1 through September 30. Disappearance is calculated on the October-September basis.

Table 17.--Maryland tobacco, type 32: Domestic supplies, disappearance, season average price and price support operations for specified periods

(Farm-sales weight)						
Year	Production	Stocks following Jan. 1 <u>1/</u>	Supply	Disappearance <u>2/</u>		
				Total	Domestic	Exports
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.
1955	31.5	77.5	109.0	38.6	25.7	12.9
1956	36.5	69.7	106.2	34.9	21.4	13.5
1957	38.5	69.4	107.9	37.0	25.0	12.0
1958	31.1	70.9	102.0	39.4	24.1	15.3
1959	31.2	64.2	95.4	32.3	20.4	11.9
1960	34.7	61.7	96.4	35.6	23.6	12.0
1961	38.8	60.6	99.4	32.6	20.7	11.9
1962	40.6	67.3	107.9	30.7	19.5	11.2
1963	34.5	76.6	111.1	31.0	18.5	12.5
1964	42.3	82.0	124.3	32.9	23.3	9.6
1965	38.5	90.1	128.6	35.7	24.7	11.0
1966	35.7	89.7	125.4	39.9	23.4	16.5
1967 <u>3/</u>	38.0	*86.0	124.0			
Average price per pound	Price support level <u>4/</u>	Placed under Government loan		Remaining in Government loan stocks on November 30, 1967 <u>5/</u>		
Ct.	Ct.	Mil. lb.	Pct.	Mil. lb.		
1955	No price support	6/				
1956	47.0	3.3	9.0	0		
1957	48.0	5.9	15.3	1.4		
1958	50.8	1.1	3.6	.1		
1959	No price support	6/				
1960	50.8	1.6	4.6	.2		
1961	50.8	3.7	9.5	.7		
1962	51.3	6.0	14.8	2.3		
1963	51.8	10.4	30.1	9.3		
1964	52.3	4.2	10.1	2.9		
1965	52.8	2.7	7.0	1.5		
1966	No price support	6/				
1967	No price support	6/				
Total	---	38.9	---	18.4		

1/ For marketing quota purposes, the carryover and total supply of Maryland tobacco are calculated as of January 1 falling within the marketing year--October 1 through September 30. 2/ Year beginning October 1. 3/ Subject to revision. 4/ Through 1959--90 percent of parity price; 1960 set at 1959 level; from 1961 on, adjusted to reflect relative change between 1959 parity index and average of parity index for 3 most recent calendar years. 5/ Actual loan stocks on a packed-weight basis average about 2 percent less than these farm-sales weight figures. 6/ Marketing quota not in effect since over one-third of growers voting disapproved. \* Estimated.

### Supplies

The 1967 crop is estimated at 38.0 million pounds--2.3 million pounds above the previous year. This year's acreage is estimated to be down 6 percent from 1966, but the average yield is indicated to have equaled the 1965 record.

Carryover on January 1, 1968, is estimated at about 86 million pounds--down about 4 percent from the comparatively high level a year earlier. The 1967 crop added to estimated carryover will provide a total supply of about 124 million pounds--1 percent below a year earlier and about 3½ percent below the peak 2 years earlier.

The 1968 marketing quota and acreage allotment for Maryland tobacco will be announced by the Secretary of Agriculture by February 1, 1968. Shortly thereafter, a referendum will be held for Maryland growers to vote on whether or not they approve marketing quotas (on an acreage basis) for the 1968, 1969, and 1970 crops. Approval by at least two-thirds of the farmers voting is required by law for marketing quotas to be placed into effect. In the last 2 referendums, Maryland tobacco growers disapproved marketing quotas for their next 3 crops. In a February 1966 referendum, the favorable vote was about 42 percent; in February 1967, it was 61 percent--still short of the required two-thirds majority. In the last referendum in which marketing quotas were approved--February 1963--about 84 percent of those voting favored marketing quotas for their next 3 crops.

### Domestic Use and Exports

During the year ended September 30, 1967, domestic use of Maryland tobacco declined 5 percent below the relatively high 1965/66 level and about equaled use in 1964/65. Prior to 1964/65, domestic use of Maryland had trended downward, despite increased cigarette manufacture--chief domestic outlet for Maryland. Domestic use in the current marketing year may be near the level of 1966/67.

Exports of Maryland tobacco in 1966/67 jumped about 50 percent to 16½ million pounds, farm-sales weight--the most in about 40 years. Switzerland, accounting for over 60 percent of the total, boosted takings 71 percent. Exports to West Germany rose about a fourth, and those to Portugal more than tripled, to the largest since 1958/59. Other countries taking more than the previous year included Belgium, Spain, and South Vietnam. A significant quantity was shipped to Australia, in contrast with none the year before. But the Netherlands cut its taking sharply, and none was reported shipped to France, in contrast with a fairly sizable quantity in 1965/66.

### Fire-Cured, Types 21-23

### Prices and Price Support

Auction markets for Virginia fire-cured (type 21) opened December 4. For sales through December 14 (when markets closed for the holidays until January 15), prices averaged 42.6 cents a pound, compared with 42.5 cents a year earlier. Auctions for Kentucky-Tennessee fire-cured type 22 and 23 usually open around the middle of January.

The overall support level for the 1967 fire-cured crop is 41.9 cents a pound. In the Virginia fire-cured markets through December 14, about 4 percent of market deliveries had been placed under Government loan, compared with about 3 percent in the comparable period of last season.

For the 1968 crop, the overall support level will likely be at least 3 percent higher than the 41.9 cents in the effect for the current crop. (See page 18.)

Table 18.--Fire-cured tobacco, type 21: Domestic supplies, disappearance, season average price, and price support operations for specified periods

(Farm-sales weight)						
Year	Production	Stocks, October 1	Supply	Disappearance <sup>1/</sup>		
				Total	Domestic	Exports
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.
1955	10.5	26.6	37.1	12.7	6.7	6.0
1956	10.7	24.4	35.1	10.3	4.8	5.5
1957	8.6	24.8	33.4	9.6	4.2	5.4
1958	9.4	23.8	33.2	10.7	5.3	5.4
1959	10.0	22.5	32.5	10.3	4.9	5.4
1960	8.9	22.2	31.1	10.2	4.0	6.2
1961	9.8	20.9	30.7	10.8	5.5	5.3
1962	9.5	19.9	29.4	9.2	4.1	5.1
1963	6.2	20.2	26.4	9.6	3.0	6.6
1964	9.1	16.8	25.9	10.3	4.0	6.3
1965	9.6	15.6	25.2	8.3	3.0	5.3
1966	7.5	16.9	24.4	9.6	2.3	7.3
1967 <sup>2/</sup>	6.9	14.8	21.7			
Average price per pound	Price support level <sup>3/</sup>	Placed under Government loan		Remaining in Government loan stocks on November 30, 1967 <sup>4/</sup>		
Ct.	Ct.	Mil. lb.	Pct.	Mil. lb.		
1955	31.3	34.6	1.8	17.1	0	
1956	39.5	36.1	1.7	15.9	0	
1957	38.7	38.8	1.0	11.6	0	
1958	36.9	38.8	2.2	23.4	0	
1959	37.6	38.8	.8	8.1	5/	
1960	39.4	38.8	.3	3.3	5/	
1961	38.8	38.8	.9	9.8	.2	
1962	38.8	39.2	1.2	12.6	.1	
1963	35.5	39.6	.4	6.5	.4	
1964	43.1	40.0	.3	3.3	.2	
1965	39.9	40.4	1.0	10.4	.9	
1966	41.2	41.1	.6	8.0	.6	
1967		41.9	6/	6/	6/	
Total	---	---	12.2	---	2.4	

<sup>1/</sup> Year beginning October 1.

<sup>2/</sup> Subject to revision.

<sup>3/</sup> Through 1957--75 percent of burley support; 1958-60 legal basis changed; from 1961 on adjusted to reflect relative change between 1959 parity index and average of parity index for 3 most recent calendar years.

<sup>4/</sup> Actual loan stocks on a packed-weight basis are somewhat lower than these farm-sales weight figures.

<sup>5/</sup> Less than 50,000 pounds

<sup>6/</sup> Through December 14, about 4 percent of marketings were placed under loan.

Table 19.--Fire-cured tobacco, types 22-23: Domestic supplies, disappearance, season average price, and price support operations for specified periods

(Farm-sales weight)

Year	Production	Stocks, October 1	Supply	Disappearance <sup>1/</sup>		
				Total	Domestic	Exports
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.
1955	54.7	110.5	165.2	52.0	24.6	27.4
1956	59.9	113.2	173.1	52.3	27.5	24.8
1957	41.9	120.8	162.7	53.3	29.5	23.8
1958	33.9	109.4	143.3	44.1	24.6	19.5
1959	43.1	99.2	142.3	41.1	22.5	18.6
1960	36.5	101.2	137.7	44.9	23.9	21.0
1961	43.3	92.8	136.1	46.7	17.2	29.5
1962	44.6	89.4	134.0	40.8	21.1	19.7
1963	49.7	93.2	142.9	41.4	19.6	21.8
1964	46.0	101.5	147.5	42.7	21.7	21.0
1965	36.6	104.8	141.4	45.6	18.0	27.6
1966	40.2	95.8	136.0	44.7	21.0	23.7
1967 <sup>2/</sup>	33.4	91.3	124.7			
Year	Average price per pound	Price support level <sup>3/</sup>	Placed under Government loan		Remaining in Government loan stocks on November 30, 1967 <sup>4/</sup>	
			Quantity	Percentage of crop		
	Ct.	Ct.	Mil. lb.	Pct.	Mil. lb.	
1955	38.4	34.6	7.9	14.4	0	
1956	36.1	36.1	18.6	31.1	0	
1957	36.4	38.8	13.9	33.1	0	
1958	38.1	38.8	4.4	12.0	5/	
1959	38.3	38.8	5.3	12.3	.4	
1960	43.3	38.8	3.2	8.7	2.4	
1961	40.2	38.8	5.1	11.8	2.5	
1962	38.7	39.2	8.6	19.3	4.6	
1963	36.9	39.6	13.0	26.2	5.4	
1964	41.0	40.0	7.2	15.7	5.6	
1965	43.6	40.4	2.3	6.3	2.1	
1966	42.2	41.1	6.3	15.7	6.2	
1967		41.9				
Total	---	---	95.8	---	29.2	

<sup>1/</sup> Year beginning October 1.

<sup>2/</sup> Subject to revision.

<sup>3/</sup> Through 1957--75 percent of burley support; 1958-60 legal basis changed; from 1961 on adjusted to reflect relative change between 1959 parity index and average of parity index for 3 most recent calendar years.

<sup>4/</sup> Actual loan stocks on a packed-weight basis are somewhat lower than these farm-sales weight figures.

<sup>5/</sup> Less than 50,000 pounds.



Supplies

The 1967/68 supply of fire-cured tobacco totals about 146 million pounds--down about 9 percent from the previous year. The supply of Virginia fire-cured, at  $21\frac{3}{4}$  million pounds, declined more than a tenth to the lowest in many years. Both carryover and this year's crop were smaller than in 1966. The 1967 harvested acreage was down 10 percent; the average yield per acre increased some over 1966.

The 1967/68 supply of Kentucky-Tennessee fire-cured, at about 125 million pounds, is 8 percent below a year earlier. Carryover stocks declined 5 percent, and the 1967 crop was about a sixth smaller than in 1966, due to a reduction in harvested acreage and a lower average yield per acre.

The 1968 marketing quotas for Virginia fire-cured (type 21) and for Kentucky-Tennessee fire-cured (types 22-23) will be announced by the Secretary of Agriculture by February 1, 1968. Marketing quotas for the 1967, 1968, and 1969 crops had been approved by growers of the 3 types in a February 1967 referendum.

Domestic Use and Exports

In the marketing year ended September 30, 1967, total disappearance of the fire-cured types was a little over 54 million pounds--slightly more than in 1965/66.

Domestic use of Kentucky-Tennessee types 22-23 rose about a sixth above the relatively low figure calculated for 1965/66, but domestic use of Virginia type 21 fell nearly a fourth. The principal domestic outlet for the fire-cured types is in snuff manufacture. Another domestic outlet, which has gained in recent years, is use in Italian-type cigars.

Exports of Kentucky-Tennessee fire-cured in 1966/67 totaled about  $22\frac{3}{4}$  million pounds (farm-sales weight)--14 percent below the relatively large shipments in 1965/66, but still third highest in 9 years. The Netherlands, accounting for nearly half of the total, reduced its takings 6 percent, while exports to France--ranking second--dropped 38 percent. Less than in the previous marketing year also went to Republic of the Congo, Switzerland, Denmark, and West Germany. None was reported exported to Tunisia, in contrast with around a half-million pounds in the preceding year. Exports to Belgium--third ranking outlet--rose about a tenth, and more than a year earlier also was shipped to Sweden, South Vietnam, and Finland. A significant quantity was exported to Ghana; none was exported there in 1965/66.

The 1966/67 exports of Virginia fire-cured--7.3 million pounds (farm-sales weight)--jumped 38 percent from the previous year to the highest since 1947/48. More than a third of the total was shipped to Norway, which boosted its takings 37 percent. Other countries increasing their takings included Sweden, West Germany, United Kingdom, and Switzerland. Significant quantities were exported to South Vietnam and Tunisia, in contrast with none a year earlier. Exports to Austria and New Guinea declined.

## Dark Air-Cured and Sun-Cured, Types 35-37

Prices and Price Support

Auction markets for One Sucker and Green River (Kentucky-Tennessee dark air-cured types 35-36) opened December 7 and December 5, respectively. For sales through December 20, type 35 prices averaged 39.7 cents per pound, compared with 38.0 cents a year earlier; type 36 prices averaged 38.0 cents per pound, compared with 36.8 cents a year earlier.

Table 20.--Dark air-cured tobacco, types 35-36: Domestic supplies, disappearance, season average price, and price support operations for specified periods

(Farm-sales weight)						
Year	Production	Stocks, October 1	Supply	Disappearance <sup>1/</sup>		
				Total	Domestic	Exports
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.
1955	27.8	76.6	104.4	23.6	18.4	5.2
1956	30.7	80.8	111.5	34.0	23.4	10.6
1957	19.8	77.5	97.3	24.8	18.5	6.3
1958	16.1	72.5	88.6	25.0	17.5	7.5
1959	19.3	63.6	82.9	21.9	16.4	5.5
1960	18.2	61.0	79.2	22.0	17.3	4.7
1961	20.6	57.2	77.8	22.6	17.9	4.7
1962	22.5	55.2	77.7	19.5	16.5	3.0
1963	24.2	58.2	82.4	21.2	18.1	3.1
1964	22.7	61.2	83.9	22.0	18.0	4.0
1965	18.5	61.9	80.4	19.8	16.2	3.6
1966	21.3	60.6	81.9	21.4	17.0	4.4
1967 <sup>2/</sup>	18.7	60.5	79.2			
Average price per pound	Price support level <sup>3/</sup>	Placed under Government loan		Remaining in Government loan stocks on November 30, 1967 <sup>4/</sup>		
Ct.	Ct.	Mil. lb.	Percentage of crop	Mil. lb.		
1955	31.8	30.8	6.3	22.7	0	
1956	34.0	32.1	6.6	21.5	0	
1957	36.1	34.5	3.0	15.2	0	
1958	38.4	34.5	.5	2.7	0	
1959	34.5	34.5	3.7	19.2	0	
1960	37.4	34.5	2.2	12.2	0	
1961	37.8	34.5	1.9	9.2	1.3	
1962	36.2	34.8	4.1	18.2	3.0	
1963	33.3	35.2	8.3	34.3	6.5	
1964	37.0	35.5	3.7	16.3	3.4	
1965	37.0	35.9	3.2	17.3	2.8	
1966	37.3	36.6	4.7	22.1	4.7	
1967		37.3	5/	5/	5/	
Total	---	---	48.2	---	21.7	

<sup>1/</sup> Year beginning October 1.<sup>2/</sup> Subject to revision.<sup>3/</sup> Through 1957--66-2/3 percent of burley support; 1958-60 legal basis changed; from 1961 on adjusted to reflect relative change between 1959 parity index and average of parity index for 3 most recent years.<sup>4/</sup> Actual loan stocks on a packed-weight basis are somewhat lower than these farm-sales weight figures.<sup>5/</sup> Through mid-December, about 15 percent of marketings were placed under loan.

Table 21.--Sun-cured tobacco, type 37: Domestic supplies, disappearance, season average price, and price support operations for specified periods

(Farm-sales weight)							
Year	Production	Stocks, October 1	Supply	Disappearance <sup>1/</sup>			
				Total	Domestic	Exports	
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	
1955	3.3	4.2	7.5	2.9	2.1	0.8	
1956	3.2	4.6	7.8	2.5	1.9	.6	
1957	2.7	5.3	8.0	2.5	1.9	.6	
1958	1.9	5.5	7.4	2.5	2.2	.3	
1959	2.2	4.9	7.1	1.9	1.6	.3	
1960	1.8	5.2	7.0	2.0	1.7	.3	
1961	2.2	5.0	7.2	2.1	1.8	.3	
1962	2.3	5.1	7.4	2.3	2.0	.3	
1963	1.1	5.1	6.2	2.0	1.7	.3	
1964	1.8	4.2	6.0	1.7	1.4	.3	
1965	2.0	4.3	6.3	2.0	1.7	.3	
1966	1.5	4.3	5.8	1.6	1.2	.4	
1967 <sup>2/</sup>	1.3	4.2	5.5				
Year	Average price per pound	Price support level <sup>3/</sup>	Placed under Government loan		Remaining in Government loan stocks on November 30, 1967		
			Quantity	Percentage of crop			
	Ct.	Ct.	1,000 lb.	Pct.	1,000 lb.		
1955	25.3	30.8	72	2.2	0		
1956	35.7	32.1	103	3.2	0		
1957	34.0	34.5	11	.4	0		
1958	36.8	34.5	29	1.5	0		
1959	34.4	34.5	24	1.1	0		
1960	37.9	34.5	5	.3	0		
1961	39.8	34.5	7	.3	0		
1962	37.4	34.8	59	2.6	0		
1963	31.4	35.2	92	8.1	0		
1964	41.2	35.5	16	.9	0		
1965	39.2	35.9	75	3.8	0		
1966	42.3	36.6	26	1.7	0		
1967		37.3	<u>4/</u>	<u>4/</u>			
Total	---	---	519	---	0		

<sup>1/</sup> Year beginning October 1.

<sup>2/</sup> Subject to revision.

<sup>3/</sup> Through 1957--66-2/3 percent of burley support; 1958-60 legal basis changed; from 1961 on adjusted to reflect relative change between 1959 parity index and average of parity index for 3 most recent years.

<sup>4/</sup> Through mid-December, less than 2 percent of marketings were placed under loan.

Auctions at Richmond opened for Virginia sun-cured (type 37) on December 5. For all sun-cured sales through December 15, prices averaged 46.3 cents per pound, compared with 41.8 cents in the corresponding period of 1966.

The overall price support level for 1967 dark air-cured is 37.3 cents a pound. For the 1968 crop, available data indicate the support level will be at least 3 percent higher than for the current crop. (See page 18.)

Through mid-December, about 16 percent of 1967 auction market offerings of One Sucker and about 12 percent of Green River were placed under loan. In the corresponding period of 1966, about 17 percent of One Sucker and about 18 percent of Green River had been placed under loan. Loan receipts of Virginia sun-cured thus far this season amounted to less than 2 percent of sales.

### Supplies

The 1967/68 supply of dark air- and sun-cured tobacco, about 85 million pounds, is 3 percent less than for 1966/67. Total supply of dark air-cured types 35-36 is 3 percent below 1966/67, due to a drop of about an eighth in the 1967 crop; carryover on October 1, 1967, was about the same as a year earlier. The 1967 harvested acreage declined moderately, and the average yield per acre was 8 percent below the record high of 1966.

The 1967/68 total supply of Virginia sun-cured, type 37, is 5 percent smaller than the year before, due to smaller production and carryover.

Total stocks of dark air-cured tobacco are substantial, compared with annual disappearances. Government loan stocks on October 1, 1967--outset of the current marketing year--were moderately larger than year-earlier holdings and about equal to those held on October 1 in both 1964 and 1965.

By February 1, 1968, the Secretary of Agriculture will announce marketing quotas and acreage allotments for dark air-cured and Virginia sun-cured tobacco. Shortly thereafter, a referendum will be held for growers of Virginia sun-cured, type 37, to vote on whether they favor marketing quotas for their 1968, 1969, and 1970 crops. Approval by at least two-thirds of the growers voting will be required before marketing quotas can continue in effect. In the last referendum, held in February 1965, close to 98 percent of growers of type 37 who voted approved quotas for their next 3 crops. Producers of dark air-cured, types 35-36, approved marketing quotas for the 1967-69 crops in a February 1967 referendum.

### Domestic Use and Exports

Total disappearance of dark air-cured and sun-cured tobacco in 1966/67 was 23 million pounds--about 6 percent above the previous year. Both domestic use and exports of dark air-cured types 35-36 were up. Domestic use of these tobaccos rose 5 percent, the increase occurring principally in type 35. Domestic use of the much smaller-volume Virginia sun-cured type 37 dropped nearly 30 percent below the level of a year earlier and around 15 percent below the level 2 years earlier. The chief use of dark air-cured tobacco in this country is in the manufacture of plug, twist, and fine-cut chewing tobacco. In October 1966/September 1967, combined output of these products was  $1\frac{1}{2}$  percent below a year earlier.

Exports of dark air-cured and sun-cured in 1966/67 (including an allowance for Black Fat) were the largest in 5 years, totaling about  $4\frac{3}{4}$  million pounds (farm-sales weight)--more than a fifth about 1965/66. Exports of One Sucker leaf spurred 61 percent,

mainly due to a sizable shipment to Tunisia (none was consigned there in 1965/66), and a sharp rise in exports to South Vietnam. Exports to Belgium and Republic of the Congo--principal markets in 1965/66--declined 10 and 7 percent, respectively. The 1966/67 exports of Green River increased 43 percent from 1965/66, chiefly due to a substantial shipment to Ghana. Exports to Australia and Republic of the Congo dropped 32 and 56 percent, respectively, while those to the United Kingdom declined slightly.

Exports of Black Fat--a semiprocessed form of One Sucker and fire-cured tobacco especially for sale abroad--were 6 percent below the 5-year high of 1965/66. Nigeria, the leading outlet, cut its takings 31 percent, and the Cameroon Republic slashed its takings 46 percent. None was reported shipped to the Netherlands, in contrast with a fairly sizable quantity shipped there (probably for reexport) in 1965/66. On the other hand, there were substantial gains in exports to Ghana, West Africa, and Togo--a relatively new market.

#### Cigar Tobacco, Domestic and Imported

##### Prices and Price Support

Official price data on the 1967 cigar tobacco crops are not yet available. The Government overall price support levels for the 1967 crops of eligible types or groups of types are shown in table 22. Available data indicate that price support levels in 1968 will be at least 3 percent above the 1967 level for the cigar tobaccos under marketing quotas.

##### Supplies

Filler: The 1967/68 supply of Pennsylvania cigar filler is smallest in 9 years--8 percent below 1966/67. Although the 1967 crop is estimated to be up 5 percent from the 12-year low of 1966, carryover dropped 12 percent.

The 1967/68 supply of Ohio filler declined 14 percent to a new low; both the 1967 crop and carryover were down. The 1967/68 supply of Puerto Rican filler is expected to be down to a long-time low, if growers' harvestings are near the quota set by the Puerto Rican Government. The crop is planted late in the calendar year and harvested in the first months of the following year. The October 1, 1967, carryover dropped 22 percent from a year earlier and was 18 percent below the 1961-65 average. The 1965 and 1966 crops were sharply below production in preceding years, and the Puerto Rican quota for 1967 again calls for a crop substantially below average-sized crops prior to 1965.

Imported cigar tobacco: The October 1, 1967, stocks of foreign-grown cigar tobacco owned by U.S. manufacturers and dealers, compared with those on the corresponding date in each of the preceding 3 years, were as follows:

Country of origin	October 1 stocks--farm-sales weight			
	1964	1965	1966	1967
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.
Philippines	18.3	42.7	42.5	30.1
Colombia	17.9	17.1	12.2	11.0
Brazil	11.8	16.3	13.2	10.6
Dominican Republic	17.0	18.2	11.6	10.2
Indonesia	5.7	7.7	5.6	5.0
Cuba	15.7	10.5	6.0	3.6
Paraguay	3.2	4.1	3.3	2.3
Other	6.9	11.2	12.1	12.1
Total	96.5	127.8	106.5	84.9

The reductions in October 1, 1967, stocks from the generally high levels of 2 years earlier can be seen from the foregoing data.

During January-October 1967, general imports (total arrivals) from the Philippine Republic were about  $13\frac{1}{4}$  million pounds (farm-sales weight equivalent). This was sharply less than a year earlier and equal to only about a third of the unusually large quantity that arrived in January-October 1965, when stocks were being built up. Arrivals from the Dominican Republic, at nearly 7 million pounds and from Indonesia, at about  $1\frac{3}{4}$  million, were substantially above the small total for each a year earlier. Arrivals from Colombia and Brazil, at 5.4 million and 2.9 million pounds, were up 9 and 16 percent, respectively. Over 2 million pounds arrived from Paraguay, nearly twice the year-earlier quantity, and 1.4 million from Honduras, also considerably more than a year earlier. On the other hand, the arrivals from Mexico, a little under 3 million pounds, were down nearly a third.

Binder: The 1967/68 supply of Connecticut Valley Broadleaf dropped about a sixth to a new low; the crop fell 22 percent below 1966, and carryover declined 15 percent from a year earlier. The supply of Connecticut Valley Havana Seed is also at a new low--18 percent below 1965/66. The 1967 crop--smallest on record--was over a fourth less than in 1966, and carryover was down 17 percent from a year earlier.

The 1967/68 supply of Southern Wisconsin tobacco declined 6 percent from 1966/67 and is a long-time low. Although the size of the 1967 crop was near that of 1966, carryover fell 8 percent. The 1967/68 supply of Northern Wisconsin tobacco is about the same as in 1966/67 (supplies of this type have fluctuated fairly narrowly since 1959). A rise of 4 percent in carryover to a 10-year high about offset a reduction in the 1967 crop.

#### 1968 Marketing Quotas and Acreage Allotments

By February 1, 1968, the 1968 marketing quotas will be announced for (1) the Connecticut Valley binder types 51-52, and (2) Ohio filler types 42-44 and binder types 53-55 (principally Wisconsin). These tobaccos have been under marketing quotas continuously since 1952. The last referendums were held in February 1966, when growers approved quotas for their 1966, 1967, and 1968 crops.

A quota has never been in effect on Pennsylvania filler type 41; growers have disapproved marketing quotas in all past referendums. In accordance with existing legislation, a referendum will be held in early 1968, in which growers of this type will vote on whether they favor or oppose marketing quotas on their 1968, 1969, and 1970 crops.

The cigar wrapper types 61-62 are not covered by marketing quota legislation.

Wrapper: The 1967/68 supply of Connecticut Valley shade-grown wrapper is about 11 percent below a year earlier and about 4 percent below the 1961-65 average. Carryover stocks were down only a little from the 5-year high of a year earlier. However, the crop is estimated to be the smallest in 6 years, mainly due to sharp drop in average yield per acre because of damage from excess moisture during the growing season. The 1967/68 supply of Georgia-Florida wrapper rose about 7 percent from 1966/67 to the largest in 5 years. Both the 1967 crop and carryover increased over 1966.

Table 22.--Cigar tobacco types: Government price support levels  
1964-67 and season average prices, 1964-66

Types	1964		1965		1966		1967
	Price support level <sup>1/</sup>	Season average price	Price support level <sup>1/</sup>	Season average price	Price support level <sup>1/</sup>	Season average price	Price support level <sup>1/</sup>
	Ct. per lb.	Ct. per lb.	Ct. per lb.	Ct. per lb.	Ct. per lb.	Ct. per lb.	Ct. per lb.
Puerto Rican filler, type 46	30.6	37.2	30.9	2/32.1	31.5	2/30.9	32.1
Conn. Valley Broadleaf, type 51	(40.8)	50.0	(41.2)	46.5	(42.0)	52.0	(42.8)
Conn. Valley Havana Seed, type 52	( )	43.8	( )	44.5	( )	49.5	( )
Ohio filler, types 42-44	( )	26.7	( )	26.2	( )	28.0	( )
So. Wis., type 54	(29.5)	32.2	(29.7)	29.7	(30.3)	34.3	(30.9)
No. Wis., type 55	( )	35.8	( )	28.9	( )	32.4	( )

<sup>1/</sup> Support levels are adjusted to reflect the relative change between the 1959 parity index and the average of the parity index for the 3 most recent calendar years. <sup>2/</sup> Excludes 6 cents per pound payment by Puerto Rican Government.

Table 23.--Cigar tobacco price support operations, quantities placed under loan, 1955-66, and remaining under loan November 30, 1967

Crop	Quantities placed under loan						
	Puerto Rican, type 46	Ohio, types 42-44	Connecticut Valley, type 51	Connecticut Valley, type 52	Southern Wisconsin, type 54	Northern Wisconsin, type 55	Total
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.
1955	2.8	0.8	7.8	5.2	0.4	3.1	20.1
1956	1.5	.4	1.7	1.6	.1	.9	6.2
1957	2.0	.1	2.5	.4	0	.3	5.3
1958	2.0	0	.3	.1	0	.1	2.5
1959	1.8	0	1.5	.2	.9	<u>1/</u>	4.4
1960	.9	0	1.6	2.6	3.2	3.2	11.5
1961	.4	0	.8	1.9	1.5	4.5	9.1
1962	.7	.1	.2	1.4	.3	4.4	<u>2/</u> 7.1
1963	.6	.6	.2	1.3	1.0	3.1	6.8
1964	0	.1	.1	1.0	<u>1/</u>	.8	2.0
1965	1.8	.2	.9	.5	.6	3.2	7.2
1966	6.1	.2	.6	.3	.1	3.3	10.6
<b>Total</b>	<b>20.6</b>	<b>2.5</b>	<b>18.2</b>	<b>16.5</b>	<b>8.1</b>	<b>26.9</b>	<b>2/92.8</b>
Remaining under loan as of November 30, 1967							
1960	0	0	0	0	0	0	0
1961	0	0	0	.6	0	0	.6
1962	0	0	0	.2	0	0	.2
1963	0	0	.1	.2	0	0	.3
1964	0	0	.1	.3	0	0	.4
1965	1.7	0	.4	.3	.6	2.6	5.6
1966	0	.1	.3	.2	.1	3.3	4.0
<b>Total</b>	<b>1.7</b>	<b>.1</b>	<b>.9</b>	<b>1.8</b>	<b>.7</b>	<b>5.9</b>	<b>11.1</b>

<sup>1/</sup> Negligible. <sup>2/</sup> Includes negligible amount from the 1962 crop of New York and Pennsylvania Havana Seed (type 53).

Table 24.--Cigar filler tobacco, types 41-46: Domestic supplies, disappearance, and season average prices, for specified periods

Year	(Farm-sales weight)						
	Production	Stocks, October 1	Supply	Disappearance <sup>1/</sup>			Average price per pound
				Total	Domestic	Exports	
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Ct.
<b>Pennsylvania Seedleaf (type 41)</b>							
1957	41.2	105.3	146.5	42.8	42.7	0.1	20.5
1958	51.0	103.7	154.7	50.4	50.1	.3	28.0
1959	53.5	104.3	157.8	48.1	48.0	.1	31.5
1960	52.7	109.7	162.4	47.5	47.4	.1	28.0
1961	53.5	114.9	168.4	45.5	45.4	.1	27.0
1962	60.0	122.9	182.9	<sup>2/</sup> 52.0	<sup>2/</sup> 51.7	.3	23.5
1963	51.8	128.0	179.8	<sup>2/</sup> 44.7	44.2	.5	21.0
1964	45.9	138.1	184.0	54.6	54.1	.5	27.0
1965	51.3	129.4	180.7	53.0	51.2	1.8	24.0
1966	40.2	127.7	167.9	55.6	54.1	1.5	25.0
1967 <sup>3/</sup>	42.4	112.3	154.7				
<b>Ohio, Miami Valley (types 42-44)</b>							
1957	4.6	23.1	27.7	7.2	7.2		22.8
1958	2.5	20.5	23.0	5.9	5.9		24.2
1959	6.9	17.1	24.0	6.5	6.5		27.3
1960	6.6	17.5	24.1	6.5	6.5		28.1
1961	7.7	17.6	25.3	5.1	5.1		28.3
1962	7.5	20.2	27.7	6.6	6.6		28.2
1963	6.8	21.1	27.9	8.7	8.7		27.1
1964	5.8	19.2	25.0	8.0	8.0		26.7
1965	5.4	17.0	22.4	6.2	6.2		26.2
1966	6.0	16.2	22.2	6.7	6.7		28.0
1967 <sup>3/</sup>	3.6	15.5	19.1				
<b>Puerto Rico (type 46) <sup>4/</sup></b>							
1957	26.7	50.3	77.0	27.4	27.3	.1	27.5
1958	25.6	49.6	75.2	32.8	31.6	1.2	30.0
1959	28.1	42.4	70.5	26.7	26.2	.5	31.6
1960	27.5	43.8	71.3	28.0	27.9	.1	33.7
1961	30.7	43.3	74.0	32.4	32.3	.1	36.8
1962	35.6	41.6	77.2	28.0	28.0	---	38.0
1963	32.0	49.2	81.2	29.8	29.6	.2	40.8
1964	37.9	51.4	89.3	26.7	26.7	---	37.2
1965	16.2	62.6	78.8	27.0	27.0	---	<sup>5/</sup> 32.1
1966	12.2	51.8	64.0	23.5	23.5	---	<sup>5/</sup> 30.9
1967 <sup>3/</sup>	*17.0	40.5	57.5				

<sup>1/</sup> Year beginning October 1. <sup>2/</sup> Adjusted to take into account 1962 tobacco still held at the farm level at end of 1962-63 marketing year. <sup>3/</sup> Subject to revision. <sup>4/</sup> Puerto Rican planting occurs late in calendar year. <sup>5/</sup> Excludes 6 cents per pound payment by Puerto Rican Government.  
\* Quota set by Commonwealth Government of Puerto Rico.



Table 25.--Cigar binder tobacco, types 51-52: Domestic supplies, disappearance and season average prices, for specified periods

(Farm-sales weight)							
Year	Production	Stocks, October 1	Supply	Disappearance <sup>1/</sup>			Average price per pound
				Total	Domestic	Exports	
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Ct.
<b>Connecticut Valley Broadleaf (type 51)</b>							
1957	5.1	25.5	30.6	8.4	7.7	0.7	50.0
1958	3.6	22.2	25.8	5.8	5.6	.2	54.0
1959	4.5	20.0	24.5	4.1	3.9	.2	45.0
1960	3.6	20.4	24.0	4.6	4.3	.3	44.0
1961	3.1	19.4	22.5	3.7	3.6	.1	43.3
1962	2.9	18.8	21.7	6.2	6.0	.2	53.5
1963	3.7	15.5	19.2	4.6	4.3	.3	51.0
1964	3.8	14.6	18.4	3.7	<u>2/</u>	<u>2/</u>	50.0
1965	3.5	14.7	18.2	4.3	<u>2/</u>	<u>2/</u>	46.5
1966	2.7	13.9	16.6	4.8	<u>2/</u>	<u>2/</u>	52.0
1967 <sup>3/</sup>	2.1	11.8	13.9				
<b>Connecticut Valley Havana Seed (type 52)</b>							
1957	3.2	20.2	23.4	7.5	6.3	1.2	44.9
1958	1.8	15.9	17.7	3.2	2.6	.6	49.4
1959	3.2	14.5	17.7	4.9	4.2	.7	41.2
1960	3.2	12.8	16.0	4.2	2.4	1.8	42.5
1961	2.4	11.8	14.2	3.2	2.1	1.1	40.6
1962	2.4	11.0	13.4	3.3	2.6	.7	42.5
1963	2.3	10.1	12.4	4.1	2.8	1.3	41.6
1964	1.9	8.3	10.2	3.6	<u>2/</u>	<u>2/</u>	43.8
1965	1.5	6.6	8.1	2.7	<u>2/</u>	<u>2/</u>	44.5
1966	1.1	5.4	6.5	2.0	<u>2/</u>	<u>2/</u>	49.5
1967 <sup>3/</sup>	.8	4.5	5.3				
<b>Total Connecticut Valley (types 51-52)</b>							
1957	8.3	45.7	54.0	15.9	14.0	1.9	48.2
1958	5.4	38.1	43.5	9.0	8.2	.8	52.4
1959	7.7	34.5	42.2	9.0	8.1	.9	42.6
1960	6.8	33.2	40.0	8.8	6.5	2.3	43.3
1961	5.5	31.2	36.7	6.9	5.7	1.2	42.1
1962	5.3	29.8	35.1	9.5	8.6	.9	48.5
1963	6.0	25.6	31.6	8.7	7.1	1.6	47.5
1964	5.7	22.9	28.6	7.3	5.2	2.1	47.9
1965	5.0	21.3	26.3	7.0	4.9	2.1	45.9
1966	3.8	19.3	23.1	6.8	5.2	1.6	51.2
1967 <sup>3/</sup>	2.9	16.3	19.2				

<sup>1/</sup> Year beginning October 1.

<sup>2/</sup> Breakdown between domestic use and exports not available for individual types of Connecticut Valley binder tobacco.

<sup>3/</sup> Subject to revision.

Table 26.--Cigar binder tobacco, types 54-55: Domestic supplies, disappearance, and season average prices, for specified periods

Year	(Farm-sales weight)						
	Production	Stocks, October 1	Supply	Disappearance <sup>1/</sup>			Average price per pound
				Total	Domestic	Exports	
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Ct.
<b>Southern Wisconsin (type 54)</b>							
1957	7.6	21.0	28.6	8.6	8.2	0.4	31.1
1958	8.8	20.0	28.8	8.0	7.6	.4	34.6
1959	9.2	20.9	30.1	8.0	7.7	.3	29.3
1960	8.6	22.2	30.8	7.5	7.3	.2	28.0
1961	9.0	23.3	32.3	9.0	8.9	.1	28.7
1962	8.7	23.3	32.0	7.7	7.6	.1	29.3
1963	8.3	24.3	32.6	9.7	9.7	<u>2/</u>	30.0
1964	8.7	22.9	31.6	8.9	<u>3/</u>	<u>3/</u>	32.2
1965	8.5	22.7	31.2	8.8	<u>3/</u>	<u>3/</u>	29.7
1966	7.4	22.4	29.8	9.1	<u>3/</u>	<u>3/</u>	34.3
1967 <sup>4/</sup>	7.2	20.7	27.9				
<b>Northern Wisconsin (type 55)</b>							
1957	12.2	31.6	43.8	17.2	15.1	2.1	33.5
1958	13.0	26.6	39.6	14.4	12.1	2.3	35.2
1959	11.6	25.3	36.9	12.4	11.5	.9	37.1
1960	12.3	24.4	36.7	11.3	10.9	.4	30.6
1961	13.4	25.4	38.8	11.0	10.6	.4	29.6
1962	10.9	27.8	38.7	11.1	10.9	.2	29.1
1963	9.7	27.6	37.3	12.5	12.5	<u>2/</u>	31.6
1964	11.2	24.8	36.0	9.2	<u>3/</u>	<u>3/</u>	35.8
1965	10.8	26.8	37.6	9.4	<u>3/</u>	<u>3/</u>	28.9
1966	8.8	28.2	37.0	7.7	<u>3/</u>	<u>3/</u>	32.4
1967 <sup>4/</sup>	7.8	29.3	37.1				
<b>Total Wisconsin (types 54-55)</b>							
1957	19.8	52.6	72.4	25.8	23.3	2.5	32.6
1958	21.8	46.6	68.4	22.4	19.7	2.7	35.0
1959	20.8	46.2	67.0	20.4	19.2	1.2	33.7
1960	20.9	46.6	67.5	18.8	18.2	.6	29.5
1961	22.4	48.7	71.1	20.0	19.5	.5	29.2
1962	19.6	51.1	70.7	18.9	18.6	.3	29.2
1963	18.0	51.9	69.9	22.2	22.2	<u>2/</u>	30.9
1964	19.9	47.7	67.6	18.1	17.5	.6	34.2
1965	19.3	49.5	68.8	18.2	17.9	.3	29.3
1966	16.2	50.6	66.8	16.8	16.5	.3	33.3
1967 <sup>4/</sup>	15.0	50.0	65.0				

<sup>1/</sup> Year beginning October 1.<sup>2/</sup> Negligible.<sup>3/</sup> Breakdown between domestic use and exports not available for individual types of Wisconsin tobacco.<sup>4/</sup> Subject to revision.

Table 27.--Cigar wrapper tobacco, types 61-62: Domestic supplies, disappearance, and season average prices, for specified periods

(Farm-sales weight)

Year	Production	Stocks, July 1	Supply	Disappearance <sup>1/</sup>			Average price per pound
				Total	Domestic	Exports	
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Ct.
<b>Connecticut Valley Shade-grown (type 61)</b>							
1957	11.8	11.4	23.2	10.1			205.0
1958	10.2	13.1	23.3	10.3	6.9	3.4	235.0
1959	10.7	13.0	23.7	8.6	6.1	2.5	210.0
1960	12.0	16.2	28.2	11.3	8.8	2.5	190.0
1961	10.3	16.9	27.2	12.0	8.7	3.3	235.0
1962	11.9	15.2	27.1	11.1	8.3	2.8	250.0
1963	12.0	16.0	28.0	14.1	10.0	4.1	260.0
1964	13.5	13.9	27.4	13.1	10.0	3.1	250.0
1965	14.6	14.3	28.9	12.6	9.3	3.3	250.0
1966	13.7	16.3	30.0	14.0	10.5	3.5	295.0
1967 <sup>2/</sup>	10.6	16.0	26.6				
<b>Georgia-Florida Shade-grown (type 62)</b>							
1957	7.1	7.1	14.2	6.7			190.0
1958	6.3	7.5	13.8	6.5	4.6	1.9	185.0
1959	7.8	7.3	15.1	7.5	6.1	1.4	195.0
1960	9.3	7.7	17.0	6.5	5.5	1.0	200.0
1961	8.8	10.5	19.3	9.1	6.5	2.6	190.0
1962	7.4	10.2	17.6	8.5	6.4	2.1	205.0
1963	6.7	9.1	15.8	7.6	5.3	2.3	205.0
1964	7.6	8.2	15.8	8.5	7.3	1.2	235.0
1965	8.3	7.3	15.6	7.4	5.6	1.8	225.0
1966	7.3	8.2	15.5	6.8	6.1	.7	185.0
1967 <sup>2/</sup>	7.9	8.7	16.6				
<b>Total Shade-grown (types 61-62)</b>							
1957	18.9	18.5	37.4	16.8	11.5	5.3	199.0
1958	16.5	20.6	37.1	16.8	11.5	5.3	216.0
1959	18.5	20.3	38.8	16.1	12.2	3.9	204.0
1960	21.3	23.9	45.2	17.8	14.3	3.5	194.0
1961	19.1	27.4	46.5	21.1	15.2	5.9	214.0
1962	19.3	25.4	44.7	19.6	14.7	4.9	233.0
1963	18.7	25.1	43.8	21.7	15.3	6.4	240.0
1964	21.1	22.1	43.2	21.6	17.3	4.3	245.0
1965	22.9	21.6	44.5	20.0	14.9	5.1	241.0
1966	21.0	24.5	45.5	20.8	16.6	4.2	257.0
1967 <sup>2/</sup>	18.5	24.7	43.2				

<sup>1/</sup> Year beginning July 1.<sup>2/</sup> Subject to revision.

Domestic Use and Exports

Filler: The 1966/67 domestic use of Pennsylvania filler, at 54 million pounds, was up about 3 million pounds from the previous year--about equal to use in 1964/65. The 1966/67 domestic use of Ohio filler, at  $6\frac{3}{4}$  million pounds, increased 8 percent from the previous year, but was substantially below use in the 1963 and 1964 marketing years. The 1966/67 domestic use of Puerto Rican filler, at  $23\frac{1}{2}$  million pounds, declined  $3\frac{1}{2}$  million pounds to the smallest in many years.

The major outlet for domestically-produced filler tobacco is in the manufacture of cigars, although a sizable quantity of Pennsylvania tobacco is used in the manufacture of scrap chewing tobacco. Pennsylvania tobacco is also one of the major components of reconstituted sheet tobacco used for cigar binders.

The 1966/67 exports of cigar filler totaled  $1\frac{1}{2}$  million pounds (farm-sales weight)--down about a sixth from the 16-year high of 1965/66, but substantially above other recent years. Exports to South Vietnam--leading outlet--increased 14 percent. Those to Canada were a little smaller, and shipments to France and the United Kingdom dropped sharply.

Use of imported tobacco: During the year ended September 30, 1967, use of Philippine tobacco is estimated to have been about  $27\frac{3}{4}$  million pounds (farm-sales weight equivalent). This would be about a half-million pounds less than in 1965/66, but about 3 million pounds above 1964/65. Dominican tobacco entering consumption channels--at 7.7 million pounds--was up a little from 1965/66. Use of Brazilian tobacco, at 5.9 million pounds, declined 1 percent; use of Colombian tobacco, at 5.7 million, declined 20 percent. The 1966/67 use of Paraguayan tobacco, at 3 million pounds, and of Indonesian tobacco, at 1.9 million, rose 33 and 30 percent, respectively, from 1965/66. On the other hand, use of Mexican tobacco--amounting to 3.3 million pounds--declined 6 percent. Use of Argentine tobacco amounted to about  $1\frac{1}{4}$  million pounds, nearly  $3\frac{1}{2}$  times the preceding year's use. Less Jamaican, but more Honduran, tobacco was used.

The 1966/67 use of Cuban tobacco from the steadily dwindling stocks remaining in the United States amounted to a little under  $2\frac{1}{2}$  million pounds--about 2 million less than in 1965/66. Before the embargo imposed on imports of this tobacco in February 1962, over 40 million pounds of Cuban tobacco (farm-sales weight equivalent) were used annually in the United States.

Binder: The 1966/67 disappearance of Connecticut Valley cigar binder types, at 6.8 million pounds, was a new low--3 percent below 1965/66. Domestic use was up moderately from 1965/66, but exports dropped nearly a fourth below the level 1 and 2 years earlier. Shipments to Spain and West Germany fell 21 and 62 percent, respectively. A sizable quantity went to East Germany, in contrast with none in 1965/66, and increased exports were made to the Canary Islands.

The 1966/67 disappearance of Southern Wisconsin tobacco--at 9.1 million pounds--was a little above 1965/66. Disappearance of Northern Wisconsin tobacco--at 7.7 million--declined 18 percent to a long-time low. Domestic use accounted for nearly all of the 1966/67 disappearance of these types, since exports amounted to less than 300,000 pounds. The Netherlands--leading export outlet--took appreciably more than in 1965/66. More than a year earlier went to Belgium, but less to Canada and West Germany. None was reported shipped to East Germany--second ranking market in 1965/66.

Wrapper: In the marketing year ended June 30, 1967, domestic use of Connecticut Valley shade-grown wrapper, at  $10\frac{1}{2}$  million pounds, was about an eighth larger than a

year earlier; exports, at  $3\frac{1}{2}$  million pounds, increased 6 percent. During July-October 1967 (first third of the current marketing year), exports were 14 percent below a year earlier. The United Kingdom cut its takings nearly a third, while those to Canada fell about a fifth. Exports to the Canary Islands also dropped sharply. Moderately more than a year earlier went to West Germany.

The 1966/67 domestic use of Georgia-Florida shade-grown wrapper, at 6.1 million pounds, was 9 percent above the comparatively low 1965/66 quantity. However, exports were down substantially to the lowest in many years. During July-October 1967, exports were 13 percent above a year earlier. There were increases in shipments to Canary Islands and East Germany, but declines to Canada and West Germany.

Table 28.--Acreage of tobacco in the United States,  
by class and type, 1963-67 with percentages

Class and type	1963	1964	1965	1966	1967	Percent- age change 1966 to 1967
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	
Va. and N.C. Old and Middle Belts, type 11	251.0	227.0	202.8	214.5	213.9	-0.3
Eastern North Carolina, type 12	223.0	202.0	182.0	201.0	197.0	-2.0
N.C. Border and S.C. Belt, type 13	135.5	122.0	111.6	119.5	130.5	9.2
Georgia and Florida, type 14	85.0	76.6	65.9	74.3	85.5	15.1
<b>Total flue-cured, types 11-14</b>	<b>694.5</b>	<b>627.6</b>	<b>562.3</b>	<b>609.3</b>	<b>626.9</b>	<b>2.9</b>
Virginia, type 21	6.6	7.3	7.6	6.0	5.4	-10.0
Kentucky and Tennessee, type 22	19.8	17.8	16.7	15.4	13.8	-10.4
Kentucky and Tennessee, type 23	7.9	7.0	6.6	5.6	4.4	-21.4
<b>Total fire-cured, types 21-23</b>	<b>34.3</b>	<b>32.1</b>	<b>30.8</b>	<b>27.0</b>	<b>23.6</b>	<b>-12.6</b>
Burley, type 31	338.5	306.6	277.1	240.7	238.3	-1.0
Maryland, type 32	34.5	39.0	33.5	35.0	33.0	-5.7
Ky.-Tenn. One Sucker, type 35	9.2	8.1	7.5	7.2	6.9	-4.2
Kentucky Green River, type 36	4.6	4.3	3.8	3.5	3.3	-5.7
Virginia sun-cured, type 37	1.5	1.7	1.8	1.4	1.2	-14.3
<b>Total dark air-cured, types 35-37</b>	<b>15.3</b>	<b>14.1</b>	<b>13.1</b>	<b>12.1</b>	<b>11.4</b>	<b>-5.8</b>
Pennsylvania Seedleaf, type 41	28.0	27.0	27.0	24.0	22.0	-8.3
Ohio Miami Valley, types 42-44	3.9	3.7	3.7	3.2	2.3	-28.1
<b>Total cigar filler, types 41-44</b>	<b>31.9</b>	<b>30.7</b>	<b>30.7</b>	<b>27.2</b>	<b>24.3</b>	<b>-10.7</b>
Connecticut Valley Broadleaf, type 51	1.8	1.9	1.9	1.3	1.1	-15.4
Mass.-Conn. Valley Havana Seed, type 52	1.0	.9	.7	.5	.4	-20.0
Southern Wisconsin, type 54	4.6	4.6	4.7	3.9	3.8	-2.6
Northern Wisconsin, type 55	6.1	6.3	6.2	5.4	4.5	-16.7
<b>Total cigar binder, types 51-55</b>	<b>13.6</b>	<b>13.7</b>	<b>13.5</b>	<b>11.1</b>	<b>9.8</b>	<b>-11.7</b>
Connecticut Valley Shade-grown, type 61	7.8	8.4	9.3	8.8	8.5	-3.4
Georgia and Florida Shade-grown, type 62	5.1	5.4	6.3	5.8	5.1	-12.1
<b>Total cigar wrapper, types 61-62</b>	<b>12.9</b>	<b>13.8</b>	<b>15.6</b>	<b>14.6</b>	<b>13.6</b>	<b>-6.8</b>
Louisiana Perique, type 72	.3	.2	.3	.2	.2	0
<b>Total all types</b>	<b>1,175.7</b>	<b>1,077.8</b>	<b>976.9</b>	<b>977.2</b>	<b>981.1</b>	<b>.4</b>

1/ Subject to revision.

Table 29.--Tobacco: Acreage and yield per acre in the United States, by types, or groups of types, for specified periods

Period	Flue-cured 11-14	Burley 31	Maryland 32	Fire-cured			Dark air- cured 35-36	Va. sun- cured 37	Cigar					Total 1/
				Va. 21	Ky.-Tenn. 22-23	Filler			Binder		Wrapper 61-62			
						41			42-44	46		51-52	54-55	
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres
1950	958.4	408.3	50.0	9.8	43.1	25.5	3.2	37.3	7.8	37.0	18.9	22.1	13.7	1,636.0
1951	1,110.1	456.1	53.0	10.0	39.0	23.0	3.5	34.9	4.9	36.0	15.3	15.8	13.6	1,815.9
1952	1,111.3	463.5	50.0	9.8	37.6	22.9	3.4	23.7	5.7	36.7	15.1	15.1	13.1	1,808.5
1953	1,021.8	419.7	45.0	9.9	38.4	22.3	3.7	25.8	4.7	41.7	14.6	14.3	12.3	1,674.6
1954	1,042.2	420.9	50.0	10.0	42.0	21.8	4.1	29.2	4.6	38.0	14.4	15.0	13.0	1,705.5
1955	990.7	310.6	47.0	9.1	39.1	20.0	4.2	29.5	4.4	36.1	13.4	14.3	12.9	1,531.5
1956	875.3	309.8	43.5	8.5	38.5	19.3	3.1	29.0	3.9	26.3	7.2	11.8	13.3	1,389.8
1957	662.7	306.6	37.0	6.9	29.7	14.5	2.6	29.0	3.6	26.5	4.3	11.6	13.1	1,148.3
1958	639.4	297.1	34.0	6.8	24.3	12.7	1.6	30.0	3.0	24.2	2.9	13.0	12.9	1,102.1
1959	693.4	301.0	40.0	7.6	27.6	13.2	2.1	31.0	3.9	26.3	4.5	14.4	14.0	1,179.1
1960	691.8	295.7	37.5	7.3	25.9	13.0	1.8	31.0	4.3	28.5	3.8	14.6	14.6	1,170.0
1961	698.5	318.9	40.0	7.5	27.9	13.5	2.1	31.0	4.6	27.0	2.9	13.7	13.4	1,201.4
1962	729.8	338.6	41.0	7.6	28.5	13.9	2.2	30.0	4.2	28.5	2.6	12.1	13.2	1,252.6
1963	694.5	338.5	34.5	6.6	27.7	13.8	1.5	28.0	3.9	30.0	2.8	10.7	12.9	1,205.7
1964	627.6	306.6	39.0	7.3	24.8	12.4	1.7	27.0	3.7	30.8	2.8	10.9	13.8	1,108.6
1965	562.3	277.1	33.5	7.6	23.2	11.3	1.8	27.0	3.7	17.0	2.6	10.9	15.6	993.9
1966	609.3	240.7	35.0	6.0	21.0	10.7	1.4	24.0	3.2	9.0	1.8	9.3	14.6	986.2
1967 2/	626.9	238.3	33.0	5.4	18.2	10.2	1.2	22.0	2.3	3/14.4	1.5	8.3	13.6	995.5
	Lb.	Lb.	Lb.	Lb.	Lb.	Lb.	Lb.	Lb.	Lb.	Lb.	Lb.	Lb.	Lb.	Lb.
1950	1,312	1,222	800	1,310	1,054	983	1,120	1,500	1,350	689	1,670	1,446	1,130	1,256
1951	1,309	1,355	785	1,340	1,183	1,204	1,145	1,610	1,480	781	1,676	1,473	1,098	1,299
1952	1,229	1,403	805	1,250	1,223	1,314	1,100	1,600	1,550	935	1,620	1,447	1,124	1,266
1953	1,245	1,345	900	930	1,034	1,060	790	1,480	1,400	818	1,833	1,400	1,203	1,250
1954	1,261	1,586	875	1,060	1,229	1,395	900	1,670	1,750	895	1,754	1,530	1,264	1,336
1955	1,497	1,513	670	1,155	1,399	1,391	775	1,550	1,700	831	1,643	1,469	1,213	1,451
1956	1,625	1,635	840	1,260	1,555	1,592	1,030	1,670	1,625	913	1,849	1,712	1,290	1,583
1957	1,471	1,592	1,040	1,245	1,411	1,367	1,030	1,420	1,270	1,008	1,940	1,709	1,442	1,475
1958	1,691	1,567	915	1,385	1,393	1,269	1,170	1,700	835	1,058	1,867	1,682	1,283	1,599
1959	1,559	1,669	780	1,320	1,560	1,466	1,040	1,725	1,770	1,068	1,712	1,449	1,325	1,547
1960	1,808	1,639	925	1,220	1,411	1,403	995	1,700	1,535	965	1,826	1,431	1,460	1,685
1961	1,801	1,820	970	1,300	1,552	1,525	1,045	1,725	1,665	1,137	1,856	1,640	1,429	1,741
1962	1,930	1,993	990	1,255	1,566	1,619	1,040	2,000	1,775	1,249	2,014	1,621	1,464	1,876
1963	1,975	2,231	1,000	940	1,795	1,751	760	1,850	1,740	1,067	2,093	1,680	1,449	1,970
1964	2,211	2,022	1,085	1,245	1,854	1,828	1,060	1,700	1,555	1,231	2,021	1,821	1,530	2,044
1965	1,883	2,116	1,150	1,260	1,574	1,639	1,105	1,900	1,465	951	1,910	1,765	1,468	1,882
1966	1,819	2,437	1,020	1,255	1,919	1,987	1,065	1,675	1,885	1,354	2,111	1,744	1,440	1,927
1967 2/	2,023	2,345	1,150	1,275	1,837	1,837	1,075	1,905	1,550	n.a.	1,939	1,805	1,363	2,033

1/ Total includes Perique--type 72--and in 1950-53, type 53. 2/ Preliminary. 3/ Approximation based on reduction in quota. n.a.--not available.

Table 30.--Tobacco: Acreage, yield, production, stocks, supply, disappearance, price and crop value, United States and United States including Puerto Rico, for specified years (farm-sales weight)

Crop year	Acreage	Yield	Production	Stocks	Supply	Disappearance <sup>1/</sup>			Average price per pound	Value of crop
						Total	Domestic	Exports		
	: 1,000 acres	: Pounds	: Million pounds	: Million pounds	: Million pounds	: Million pounds	: Million pounds	: Million pounds	: Cents	: Million dollars
Average: 1947-49	1,676	1,208	2,019	2,947	4,965	1,908	1,417	491	45.9	926
1950	1,599	1,269	2,030	3,089	5,119	1,975	1,452	523	51.7	1,049
1951	1,780	1,310	2,332	3,144	5,476	2,072	1,488	584	51.1	1,191
1952	1,772	1,273	2,256	3,404	5,660	2,055	1,557	498	49.9	1,125
1953	1,633	1,261	2,059	3,605	5,664	1,995	1,480	515	52.3	1,076
1954	1,668	1,346	2,243	3,669	5,912	1,935	1,419	516	51.1	1,147
1955	1,495	1,466	2,193	3,977	6,170	2,058	1,410	648	53.2	1,166
1956	1,364	1,596	2,176	4,112	6,288	1,929	1,373	556	53.7	1,169
1957	1,122	1,486	1,668	4,359	6,027	1,921	1,393	528	56.1	936
1958	1,078	1,611	1,737	4,106	5,843	1,923	1,388	535	59.9	1,040
1959	1,153	1,558	1,796	3,920	5,716	1,927	1,424	503	58.3	1,048
1960	1,142	1,703	1,944	3,789	5,733	2,029	1,462	567	60.9	1,184
1961	1,174	1,755	2,061	3,704	5,765	2,051	1,461	590	63.8	1,315
1962	1,224	1,891	2,315	3,714	6,029	2,004	1,474	530	58.9	1,364
1963	1,176	1,994	2,344	4,025	6,369	2,046	1,437	609	57.7	1,352
1964	1,078	2,067	2,228	4,323	6,551	2,055	1,506	549	59.2	1,319
1965	977	1,898	1,855	4,496	6,351	2,000	1,462	538	65.1	1,207
1966	977	<del>1,933</del>	1,888	4,351	6,239	2,099	1,395	704	66.4	1,254
1967 <sup>2/</sup>	981	2,046	2,007	4,140	6,147					
United States and Puerto Rico										
Average: 1947-49	1,710	1,200	2,045	3,012	5,057	1,942	1,447	495	45.6	932
1950	1,636	1,256	2,055	3,140	5,195	2,003	1,479	524	51.4	1,056
1951	1,816	1,301	2,360	3,192	5,552	2,106	1,522	584	50.8	1,200
1952	1,808	1,266	2,290	3,446	5,736	2,083	1,585	498	49.6	1,136
1953	1,675	1,250	2,093	3,653	5,746	2,028	1,513	515	51.9	1,086
1954	1,706	1,336	2,278	3,718	5,996	1,959	1,443	516	50.8	1,157
1955	1,532	1,451	2,223	4,037	6,260	2,090	1,442	648	52.8	1,174
1956	1,390	1,583	2,200	4,170	6,370	1,960	1,403	557	53.5	1,176
1957	1,148	1,475	1,694	4,410	6,104	1,948	1,420	528	55.6	943
1958	1,102	1,599	1,762	4,156	5,918	1,956	1,420	536	59.5	1,048
1959	1,179	1,547	1,825	3,962	5,787	1,954	1,450	504	57.9	1,057
1960	1,170	1,685	1,972	3,833	5,805	2,058	1,491	567	60.5	1,193
1961	1,201	1,741	2,092	3,747	5,839	2,083	1,493	590	63.4	1,326
1962	1,253	1,876	2,350	3,756	6,106	2,032	1,502	530	58.6	1,378
1963	1,206	1,970	2,376	4,074	6,450	2,076	1,467	609	57.5	1,365
1964	1,109	2,044	2,266	4,374	6,640	2,081	1,532	549	58.8	1,333
1965	994	1,882	1,871	4,559	6,430	2,027	1,489	538	64.8	1,212
1966	986	1,927	1,901	4,403	6,304	2,123	1,419	704	66.1	1,258
1967 <sup>2/</sup>	996	2,033	2,024	4,181	6,205					

<sup>1/</sup> For flue-cured and cigar wrapper, year beginning July 1; for all other types, Oct. 1.

<sup>2/</sup> Preliminary.



Table 31.--Tobacco manufacturing corporations: Net sales, net income, and profit ratios, for specified periods

Period	Net sales	Net income		Profit			
		Before Federal tax	After Federal tax	Per dollar of sales		As percentage of stockholders equity (annual basis)	
				Before Federal tax	After Federal tax	Before Federal tax	After Federal tax
	Million dollars	Million dollars	Million dollars	Cents	Cents	Percent	Percent
Average:							
1947-51	3,058	252	141	8.2	4.6	20.4	11.5
1952-56	3,779	351	159	9.3	4.2	22.6	10.2
1957	4,262	459	220	10.8	5.2	26.0	12.5
1958	4,649	521	249	11.2	5.4	28.2	13.5
1959	4,908	551	265	11.2	5.4	27.8	13.4
1960	5,139	577	281	11.2	5.5	27.5	13.4
1961	5,300	630	303	11.9	5.7	28.3	13.6
1962	5,340	634	306	11.9	5.7	27.1	13.1
1963	5,563	675	327	12.1	5.9	27.6	13.4
1964	5,836	664	345	11.4	5.9	25.8	13.4
1965	6,006	665	354	11.1	5.9	25.4	13.5
1966	6,570	727	389	11.1	5.9	26.3	14.1
Quarterly 1966							
1	1,484	152	80	10.2	5.4	23.0	12.1
2	1,663	188	103	11.3	6.2	27.0	14.8
3	1,721	204	108	11.9	6.3	28.8	15.3
4	1,702	183	98	10.8	5.8	26.2	14.0
1967							
1	1,673	167	86	10.0	5.1	23.5	12.1
2	1,813	199	106	11.0	5.8	27.6	14.7
3	1,803	221	116	12.3	6.4	30.1	15.8

Note: Data include non-tobacco enterprises of tobacco manufacturing corporations. Compiled and adapted from Quarterly Financial Reports for Manufacturing Corporations, Federal Trade Commission--Securities and Exchange Commission.

## STATISTICAL SUMMARY

Item	Unit or base period	1966		1967		Last data as percentage of a year earlier	
		Oct.	Nov.	Sept.	Oct.		Nov.
Average price at auctions							
Flue-cured	Ct. per lb.	65.6	60.0	63.4	62.6	62.6	104
Burley	Ct. per lb.	Closed	68.8	C-1-o-s-e-d		72.1	105
Maryland	Ct. per lb.	C-1-o-s-e-d		C-1-o-s-e-d			---
Virginia fire-cured	Ct. per lb.	C-1-o-s-e-d		C-1-o-s-e-d			---
Ky.-Tenn. fire-cured	Ct. per lb.	C-1-o-s-e-d		C-1-o-s-e-d			---
Ky.-Tenn. dark air-cured	Ct. per lb.	C-1-o-s-e-d		C-1-o-s-e-d			---
Virginia sun-cured	Ct. per lb.	C-1-o-s-e-d		C-1-o-s-e-d			---
Support price 1/							
Flue-cured	Ct. per lb.		58.8		59.9		102
Burley	Ct. per lb.		60.6		61.8		102
Maryland	Ct. per lb.		No support		No support		---
Virginia fire-cured	Ct. per lb.		41.1		41.9		102
Ky.-Tenn. fire-cured	Ct. per lb.		41.1		41.9		102
Ky.-Tenn. dark air-cured	Ct. per lb.		36.6		37.3		102
Virginia sun-cured	Ct. per lb.		36.6		37.3		102
Connecticut Valley cigar binder	Ct. per lb.		42.0		42.8		102
Wis. binder and Ohio filler	Ct. per lb.		30.3		30.9		102
Puerto Rican filler	Ct. per lb.		31.5		32.1		102
Parity index 2/	:1910-14=100	337	337	344	345	344	102
Industrial production index 3/	:1957-59=100	159	159	157	156	159	100
Employment	Mil.	73.7	73.6	74.6	75.2	75.2	102
Personal income 4/	Bil. dol.	598	602	634	636	642	107
Taxable removals							
Cigarettes	Bil.	46.4	43.5	51.7	43.8	46.7	107
Cigars and cigarillos	Mil.	752.2	736.3	737.9	714.0	812.0	110
Accumulated from Jan. 1							
Cigarettes	Bil.	397.7	441.2	358.2	402.0	448.7	102
Cigars and cigarillos	Mil.	6,172.9	6,909.2	5,184.9	5,899.0	6,711.1	97
Invoiced to domestic customers			Jan.-Sept.		Jan.-Sept.		
Smoking tobacco	Mil. lb.		49.2		46.1		94
Chewing tobacco	Mil. lb.		48.9		48.8		100
Snuff	Mil. lb.		22.8		22.1		97
Tax-exempt removals							
Cigarettes	Bil.	3.5	3.8	3.5	3.9	3.9	103
Exports	Bil.	1.9	2.0	1.9	1.8	1.7	85
Cigars and cigarillos	Mil.	13.7	13.1	22.6	19.9	16.4	125
Accumulated from Jan. 1							
Cigarettes	Bil.	34.9	38.7	33.2	37.1	41.0	106
Exports	Bil.	17.9	19.9	16.3	18.1	19.8	99
Cigars and cigarillos	Mil.	149.4	162.5	135.7	155.6	172.1	106
Invoiced for export			Jan.-Sept.		Jan.-Sept.		
Smoking tobacco	Mil. lb.		1.1		1.5		136
Chewing tobacco	Mil. lb.		.5		.5		100
Wholesale price indexes 5/							
Cigarettes (reg. nonfilter)	:1957-59=100	114.1	114.1	119.9	119.9	n.a.	105
Cigars	:1957-59=100	100.7	100.7	100.7	100.7	n.a.	100
Smoking tobacco	:1957-59=100	128.7	128.7	130.2	130.2	n.a.	101
Plug chewing tobacco	:1957-59=100	133.3	133.3	133.3	133.3	n.a.	100
Snuff	:1957-59=100	127.7	127.7	127.3	127.3	n.a.	100
Consumer price indexes (urban) 6/							
Cigarettes (reg. nonfilter)	:1957-59=100	132.5	---	---	139.6	---	105
Cigarettes (filter tip king)	Mar. 1959=100	126.5	---	---	132.5	---	105
Cigars (domestic reg. size)	:1957-59=100	102.6	---	---	103.6	---	101
Imports of tobacco							
Cigarette leaf	Mil. lb.	12.6	12.6	15.8	12.2	14.6	116
Cigar tobacco 7/	Mil. lb.	5.4	6.0	6.7	7.3	6.9	115
Accumulated from Jan. 1							
Cigarette leaf	Mil. lb.	103.8	116.4	102.1	114.3	128.9	111
Cigar tobacco 7/	Mil. lb.	48.9	54.9	42.9	50.2	57.2	104

See footnotes at end of table.

Continued -

STATISTICAL SUMMARY--CONTINUED

Item	Unit or base period	1966			1967		Last data as percentage of a year earlier
		Sept.	Oct.	Aug.	Sept.	Oct.	
Exports of leaf tobacco (farm-sales weight)							
Flue-cured	Mil. lb.	64.8	69.0	41.2	60.2	50.5	73
Burley	Mil. lb.	5.5	2.1	2.8	3.9	4.0	190
Maryland	Mil. lb.	.2	2.2	1.8	1.4	.8	36
Virginia fire- & sun-cured	Mil. lb.	1.0	1.7	.4	.6	.6	35
Ky.-Tenn. fire-cured	Mil. lb.	1.7	1.2	1.3	1.9	2.7	225
Ky.-Tenn. dark air-cured	Mil. lb.	*	*	.1	.2	*	---
Black Fat	Mil. lb.	.4	.1	.4	.2	.2	200
Cigar wrapper	Mil. lb.	.5	.5	.2	.5	.4	80
Connecticut binder	Mil. lb.	.2	.1	.1	*	.1	100
Wisconsin binder	Mil. lb.	*	0	*	*	0	---
Accumulated from beginning of marketing year 8/							
Flue-cured	Mil. lb.	160.3	229.3	65.1	125.3	175.8	77
Burley	Mil. lb.	57.1		53.4	57.3		100
Maryland	Mil. lb.	11.0		15.1	16.5		150
Virginia fire- & sun-cured	Mil. lb.	5.6		7.1	7.7		138
Ky.-Tenn. fire-cured	Mil. lb.	25.5		19.9	21.7		85
Ky.-Tenn. dark air-cured	Mil. lb.	1.6		2.3	2.4		150
Black Fat	Mil. lb.	4.1		3.6	3.8		93
Cigar wrapper	Mil. lb.	1.2	1.7	.6	1.1	1.5	88
Connecticut binder	Mil. lb.	2.1		1.6	1.6		76
Wisconsin binder	Mil. lb.	.3		.2	.3		100
Cigar filler	Mil. lb.	1.8		1.4	1.5		83
Exports of manufactured tobacco in bulk	Mil. lb.	1.5	1.1	1.0	1.8	1.0	91
Accumulated from Jan. 1	Mil. lb.	10.1	11.2	10.7	12.5	13.6	121
Quarterly data							
		1966		1967			
		July-Sept.	Oct.-Dec.	July-Sept.	Oct.-Dec.		
Tobacco stocks--1st of quarter 9/							
Domestic types (farm-sales weight)							
Flue-cured	Mil. lb.	2,439	2,736	2,273	2,621		96
Burley	Mil. lb.	1,563	1,395	1,525	1,382		99
Maryland	Mil. lb.	108	100	104	96		96
Fire-cured	Mil. lb.	125	113	118	106		94
Dark air- and sun-cured	Mil. lb.	71	65	69	65		100
Cigar filler	Mil. lb.	214	196	192	168		86
Cigar binder	Mil. lb.	75	70	72	66		94
Cigar wrapper	Mil. lb.	24	31	25	30		97
Under Government loan 10/	Mil. lb.	1,189	1,127	1,059	**1,091		97
Tobacco sheet 11/							
Cigarette types	Mil. lb.	12.2	12.6	18.8	19.2		152
Cigar types	Mil. lb.	2.9	2.4	2.4	2.1		88
Foreign types (unst. equiv.)							
Cigarette and smoking	Mil. lb.	365	325	405	372		114
Cigar	Mil. lb.	114	107	92	85		79
Tobacco outlets 12/							
Seasonally adjusted data, annual rates, for charts, p.2:							
Cigarettes							
Production	Bil.	560	577	571	573		99
Tax-paid removals	Bil.	522	518	530	530		102
Cigar production	Bil.	8.24	8.00	7.90	8.09		101
Smoking production	Mil. lb.	63.1	67.5	63.3	65.6		97
Chewing production							
Scrap	Mil. lb.	35.5	33.8	34.0	34.4		102
Plug and other	Mil. lb.	31.0	30.4	29.8	30.0		99
Snuff production	Mil. lb.	29.0	29.6	29.1	28.7		97
Exports of leaf							
Total	Mil. lb.	730	705	552	633		90
Flue-cured	Mil. lb.	604	559	444	524		94

1/ 1966 and 1967 crops respectively. 2/ Prices paid by farmers including interest, taxes and wage rates. 3/ Seasonally adjusted. 4/ Seasonally adjusted, annual rate. 5/ Excise tax excluded. 6/ Federal and applicable state and local taxes included. 7/ Farm-sales wgt. equiv. 8/ July 1 for flue-cured and cigar wrapper and October 1 for others. 9/ Holdings of manufacturers and dealers including grower cooperatives. 10/ Reported by grower cooperatives. 11/ Weight of tobacco leaf not including stems added. 12/ Data for most recent quarter are preliminary estimates.

\* Less than 50,000 pounds. \*\* Of this quantity, approximately 130 million pounds had been sold.

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