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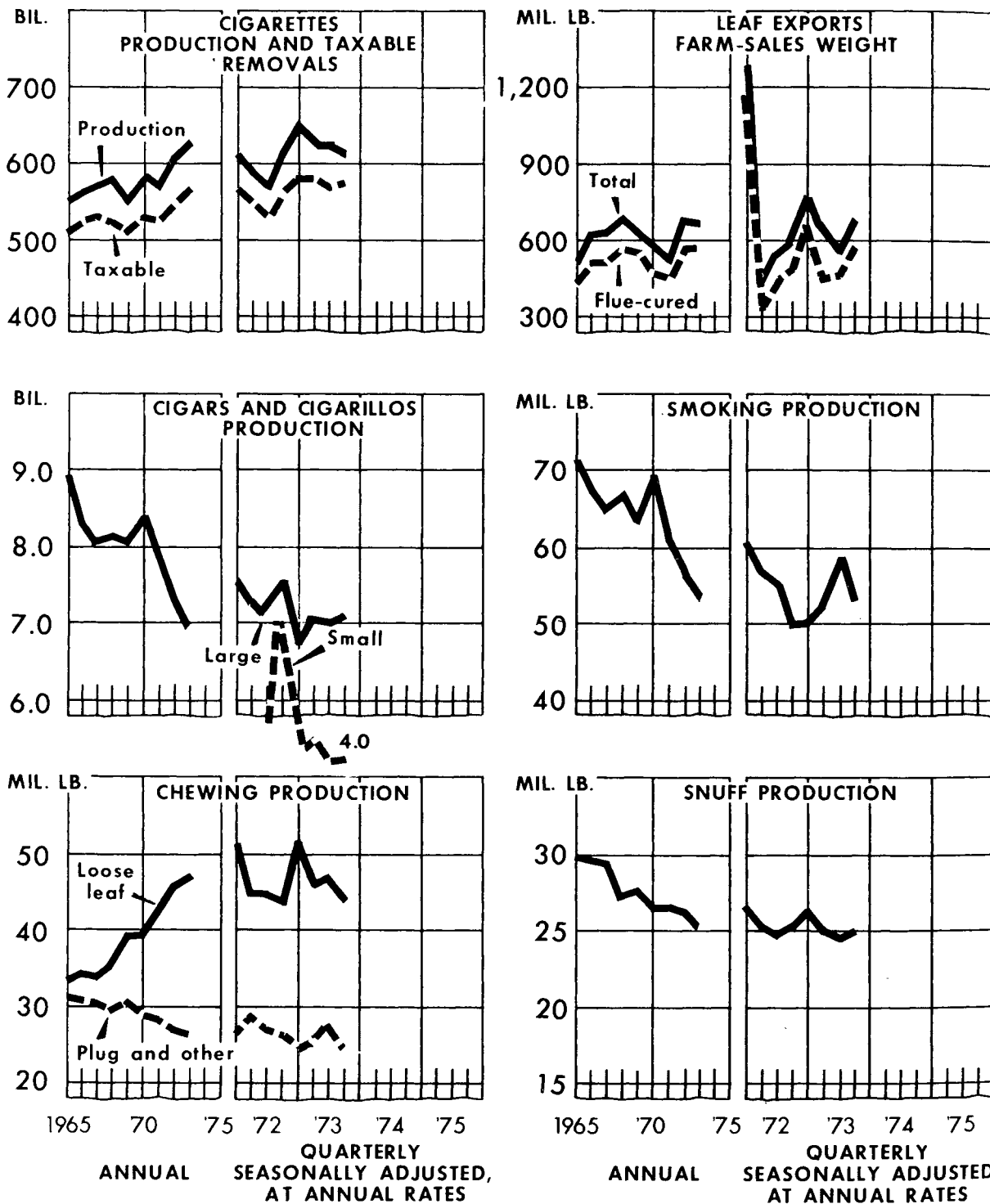
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TOBACCO Situation



TOBACCO OUTLETS

Trends in Manufactured Products and Exports



THE TOBACCO SITUATION

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SUMMARY

Tobacco use in the current marketing year may about match the 2 billion pounds of last season, exceeding the 1973 crop of 1.8 billion. This means a further reduction in carryover from the 3.3 billion pounds at the start of the 1973/74 marketing year.

Domestic tobacco supplies for 1973/74 are down 3 percent from last season because of reduced beginning stocks. The crop is turning out 2 percent above last year. While the flue-cured crop gained, unfavorable weather in the burley area lowered yields from last year's bumper crop. Flue-cured prices edged downward after September, but averaged record high for the season. Burley auction markets opened in late November and leaf prices rose to record levels. With the short crop, burley prices should hold firm throughout the season.

Domestic tobacco use in 1973/74 likely will total a little above last marketing year's level. Some decline in leaf tobacco use per cigarette may be more than offset by the continuing gain in cigarette output. Despite higher U.S. tobacco prices and smaller supplies, U.S. tobacco exports are expected to remain near last season's total.

U.S. cigarette manufacturers have made sizable unit sales gains again in 1973, both here and overseas, and their output has risen about 5 percent above 1972. Continued population gains and a further recovery in per capita use should push cigarette output in 1974 to another record. Cigar volume in 1973 trails the previous year and the downtrend may continue in 1974.

Exports of U.S. unmanufactured tobacco were sizable throughout 1973 and the year's total may approach 1972's 605 million pounds (682 million pounds, farm-sales weight). The 1972 total included some strike-delayed exports from the previous year but the 1973 shipments have benefited from currency realignments and shortfalls in foreign production.

Total exports for the 1974 calendar year may ease off but should exceed the 538 million-pound average for 1963-72. Export payments and other government assistance programs were terminated effective with the 1973 crop. Continuing U.N. sanctions on Rhodesian trade are helping U.S. exports. Japan's purchases of U.S. leaf picked up again this year. And

U.K. cigarette manufacturers have maintained their purchases of U.S. leaf. Despite rising excise taxes, U.S. leaf use in West Germany is steady.

The flue-cured tobacco supply at 2.9 billion pounds for the 1973/74 marketing year (July-June) is 1 percent below last year. Growers sold 13 percent more. But a smaller carryover and strong buyer demand boosted grower price averages to a record of 88.1 cents per pound. With use exceeding marketings, carryover in mid-1974 is expected to decline from the 1-1/4 billion pounds of a year earlier.

With the 1974 national flue-cured marketing quota unchanged from 1973, the effective quota (reflecting adjustments for last season's marketings above and below quota) is about 1.2 billion pounds, 2 percent higher. But flue-cured production could be reduced if fuel and fertilizer are in short supply. Production costs will rise, but the effect of the energy crisis on fuel and fertilizer supplies for the 1974 crop will be more apparent in the months ahead.

A sharp price rise on burley tobacco auctions brought sales through December 11 to a record average of 93 cents per pound, 14 cents above last year. About 85 percent of the crop will be sold in the pre-Christmas sales period.

Burley supply for 1973/74 is 1.73 billion pounds, about 5 percent below last season. The October 1, 1973, carryover declined and with poor growing conditions in midseason, the 1973 burley crop is an estimated 495 million pounds, one-sixth below 1972's outturn.

Current supplies of Maryland and cigar binder types are larger than last season, while supplies of fire-cured, dark air-cured, and cigar filler and wrapper types are lower. Marketing quotas and acreage allotments for several kinds of tobacco will be announced by February 1. Afterwards, growers of burley, Virginia sun-cured, Maryland, and Pennsylvania filler types will vote in referendums concerning quotas on their next 3 crops.

TOBACCO PRODUCTS

More Cigarettes Smoked

Gains in population and in use per person are lifting domestic cigarette consumption 4 percent above the 1972 level. Consumption totaled about 447 billion cigarettes during January-September 1973, 4 percent above a year earlier. Consumption gains continued in the third quarter and seasonal sales patterns suggest that increases continued in the fourth quarter. Domestic consumption (taxable removals) takes about 91 percent of cigarette output. The broadcast advertising ban continues without any noticeable dampening of total sales. Exports jumped, lifting the tax exempt category to a record high level (table 1).

Prospects are for less rapid economic growth next year. But with above-average population gains for the 25-to-44 age group, and a low level of anti-cigarette announcements, look for domestic consumption to rise further.

Due to higher wholesale prices and margin gains between wholesale and retail prices, cigarette prices have been averaging 3 percent above a year ago. The consumer price index for all items is up 6 percent. Only 2 States have increased cigarette tax rates in 1973. This compares with gains for 6 States in 1972 and 15 States in 1971. By October, the weighted average State cigarette tax was 12.0 cents per pack, about the same as a year earlier.

U.S. cigarette exports to leading destinations, 1972-73

Country	1972	January-October	
		1972	1973 ¹
	Mil.	Mil.	Mil.
Hong Kong	4,320	3,556	4,039
Belgium-Luxembourg ...	2,984	2,352	3,167
Spain	2,776	2,285	2,562
Netherlands-Antilles ...	1,924	1,616	1,705
Lebanon	1,901	1,618	1,848
Saudi Arabia	1,744	1,275	1,574
Panama	1,637	1,487	1,435
Ecuador	1,406	1,212	1,364
Kuwait	1,397	1,108	1,562
Switzerland	1,118	858	617
Japan	1,051	729	1,536
Other countries	12,344	9,942	12,981
Total	34,602	28,038	34,390

¹ Subject to revision.

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

Large-Cigar Volume Declines

Large cigar consumption (including cigarillos) in the third quarter slipped 8 percent below a year earlier, after running 4 percent below in the first and

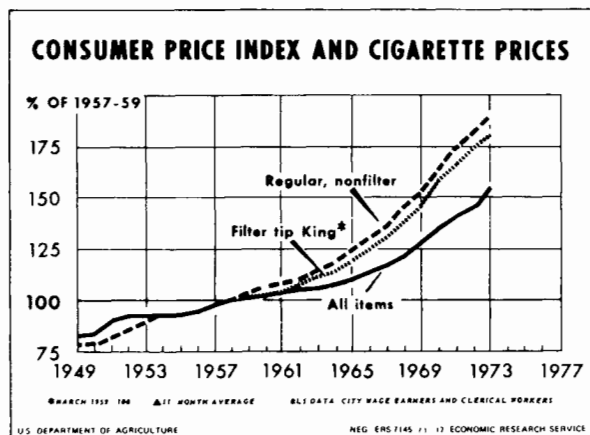


Table 1.--Cigarettes: Output, removals, and consumption, 1962-73

Year	Output	Removals					Total U.S. consumption
		Taxable	Tax-exempt				
			Total	Exports	Puerto Rico and U.S. possessions	Overseas forces	
<u>Billions</u>							
1962	535.5	494.5	41.1	24.1	3.1	13.9	508.4
1963	550.6	509.6	41.1	23.6	3.2	14.3	523.9
1964	539.9	497.4	42.6	25.1	3.7	13.8	511.2
1965	556.8	511.5	44.2	23.1	3.9	17.2	528.7
1966	567.3	522.5	46.1	23.5	3.9	18.7	541.2
1967	576.2	527.8	49.0	23.7	3.9	21.4	549.2
1968	579.5	523.0	53.8	26.5	4.7	22.7	545.7
1969	557.6	510.5	47.1	25.0	3.7	18.4	528.9
1970	583.2	532.8	51.2	29.2	3.7	18.4	3/536.4
1971	576.4	528.9	49.2	31.8	2.7	14.7	3/550.0
1972	599.1	551.0	47.2	34.6	2.1	10.5	3/565.0
1973 ^{4/}	630.0	575.0	55.0	41.0	2.0	12.0	587.0

^{1/} Also includes ship stores and small tax-exempt categories. ^{2/} Taxable removals plus overseas forces. ^{3/} Includes estimated inventory changes. ^{4/} Estimated.

Compiled from reports of Internal Revenue Service and the Bureau of the Census.

Table 2.--Cigars and smoking tobacco: Output, removals, and consumption, 1964-73

Year and item	United States factories			From Puerto Rico	Imports	Exports	Total U.S. consumption
	Output	Removals					
		Taxable	Tax-exempt				
<u>Millions</u>							
<u>Large cigars</u> ^{2/}							
1964	8,736	8,122	193	809	28	44	9,108
1965	7,899	7,578	180	913	25	55	8,641
1966	7,165	7,076	193	1,075	25	73	8,296
1967	6,858	6,846	197	1,099	30	76	8,096
1968	7,184	6,759	169	1,036	48	66	7,946
1969	6,931	6,739	169	1,080	45	65	7,968
1970	7,094	6,706	152	1,259	46	54	8,108
1971	6,707	6,480	131	1,222	48	46	7,835
1972 ^{3/}	6,025	5,896	136	1,272	62	76	7,290
1973 ^{4/}	5,650	5,500	140	1,300	70	80	6,930
<u>Million pounds</u>							
<u>Smoking tobacco</u>							
1964	82.4	79.0	3.4	---	2.7	1.4	83.7
1965	71.8	67.3	3.0	---	2.1	1.0	71.4
1966	67.3	65.3	1.5	---	3.3	.9	69.2
1967	64.8	62.7	2.0	---	3.7	1.3	67.1
1968	66.3	64.1	1.9	---	5.5	1.8	69.7
1969	63.9	62.6	1.6	---	5.7	1.1	68.8
1970	69.4	65.6	1.5	---	8.4	.9	74.6
1971	60.5	61.3	1.4	---	8.4	1.2	69.9
1972	55.9	55.1	1.3	---	11.9	1.4	66.9
1973 ^{4/}	53.5	51.5	1.5	---	9.0	1.3	60.7

^{1/} Total removals (or sales) from U.S. factories plus those from Puerto Rico, and imports, minus exports.

^{2/} Includes cigarillos. ^{3/} Subject to revision. ^{4/} Estimated.

Compiled from reports of the Internal Revenue Service, Bureau of the Census, and Agricultural Marketing Services, USDA.

second quarters. Thus, the 1973 total will be considerably below a year earlier (table 2). Apparently the surge in small cigars and gain in cigarette sales hurt large cigar sales. U.S. smokers (including those overseas) smoked 5.2 billion cigars and cigarillos in January-September, 5 percent fewer than a year earlier. U.S. output was down 6 percent. Cigar shipments from Puerto Rico remained the same. This year's smaller sales are mostly in the lower price categories (cigars retailing for 8 cents each or less). Since 1964, the overall consumption trend has been downward; this pattern may continue in 1974.

Cigars: Taxable removals by revenue class, January-September 1973

Revenue class and retail price	Change from 1972	
	Number	Percent
	<i>Billion</i>	<i>Percent</i>
A-D (up to 8 cents)	3.07	-11.3
E (over 8 to 15 cents) . . .	1.59	-.1
F-G (over 15 cents)44	12.0
Total removals	5.10	-5.7

For *small cigars* (cigarette-size, not over 3 pounds per 1,000) the 1973 taxable removals should reach another record high, about one-fifth above the 4

billion cigars in 1972. Small cigars sell for less than cigarettes and large cigars. Manufacturers withdrew most radio and TV advertising early in 1973. The Little Cigar Act of 1973 became law on September 21 and the radio and TV advertising ban became effective 30 days later.

Sales Decline for Smoking Tobacco

Domestic use of smoking tobacco—including imports—totaled 44.8 million pounds, through September, 11 percent below a year earlier. Domestic pipe and roll-your-own categories were down as well as imports. Smoking tobacco use is reduced by the continued consumer shift to factory-made cigarettes.

Declines in domestic sales are dropping 1973 smoking tobacco disappearance 9 percent below 1972. Following 1973's decline, output will do well in 1974 to hold its own.

Chewing tobacco output and sales recorded a sizable gain in the third quarter, with plug tobacco output ahead of the year-earlier quarter for the first time in 2 years. Chewing tobacco production for 1973 may top last year's figure by 1 percent. The gain for loose leaf chewing tobacco is 3 percent; plug tobacco is down 8 percent. *Snuff* sales steadied in the third quarter but production for all 1973 is estimated slightly below 1972.

Tobacco products: Output 1971-73

Item	1971	1972 ¹	1973 ²
	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
Chewing tobacco			
Plug	20.6	19.6	18.0
Twist	2.4	2.2	2.2
Fine cut	5.1	5.2	5.8
Loose leaf	43.3	45.6	47.0
Total	71.4	72.6	73.0
Snuff	26.4	25.5	25.2
Smoking tobacco in bulk (exports) . . .	30.7	29.1	25.0
	<i>Millions</i>	<i>Millions</i>	<i>Millions</i>
Small cigars	1,135	4,022	4,800

¹ Subject to revision. ² Estimated.

Basic data compiled from reports of Bureau of Alcohol, Tobacco and Firearms, and Agricultural Marketing Service, USDA.

U.S. Bulk smoking tobacco exports to leading destinations, 1972-73

Country	Calendar year 1972	January-October	
		1972	1973 ¹
	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
Italy	0.8	0.8	1.0
Dominican Republic	2.4	1.5	1.2
Switzerland	5.9	4.7	2.0
Netherlands	8.7	8.1	8.0
Spain	1.9	2.2	1.1
Peru7	.7	.5
Ecuador	1.1	.7	.6
Finland	1.4	1.2	1.0
Australia	1.1	1.1	.9
Other countries	5.1	3.8	4.2
Total	29.1	24.8	20.5

¹ Subject to revision.

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

U.S. EXPORTS AND IMPORTS

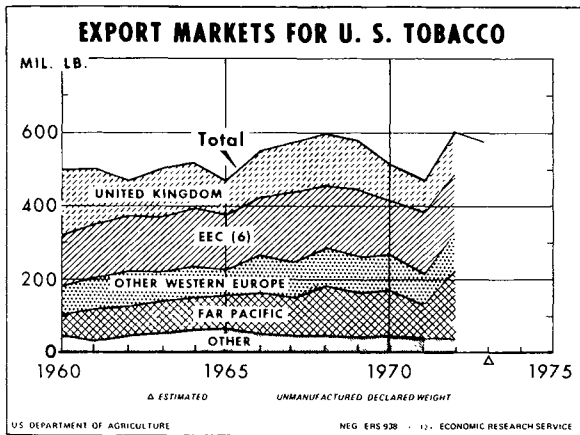
Calendar Year Leaf Exports May Steady

Exports of unmanufactured tobacco this year through October ran slightly below a year earlier (3 percent by weight, but up 2 percent by value). Delayed

shipments from 1971's dock strike boosted shipments in first half 1972. This year's exports are following more normal seasonal patterns. So the 1973 total is expected to remain in line with last year's 605 million pounds (682 million pounds, farm-sales weight).

Exports in calendar year 1974 may drop some but should exceed the 538 million pound average for 1963-72. Fuel shortages may result in some temporary shipping disruptions, but are not expected to affect the overall total for tobacco exports. Effective with the 1973 crop the export payment program was terminated. Barter and CCC export credit also remain suspended. U.N. sanctions on Rhodesian trade continue, and some output declines by competing foreign producers occurred in 1973.

For January-October 1973 a decrease in exports of flue-cured—the principal export class—accounted for most of this year's decline. Shipments of fire-cured, Maryland, dark air-cured, and cigar leaf tobacco also declined, but burley gained (tables 3 and 4). Among major markets, Belgium, Netherlands, Denmark, and Switzerland took more. In total, the 9-member



European Community took slightly more U.S. tobacco. Due to rising cigarette sales, EC manufacturers are maintaining U.S. leaf inventories. U.S. exports to other major destinations are down from a comparable period last year, due to bunched shipments in early 1972. However, Japan's purchases at U.S. auctions rose this past season. Japanese cigarettes containing high proportions of U.S. leaf have continued to sell well.

Import Pattern Mixed

Through October this year, U.S. tobacco imports for consumption (duty paid imports) rose 8 percent above a year earlier. Cigarette leaf tobacco imports, the major class for consumption, are up reflecting a working off of stocks. Lower-value scrap tobacco and stems are rising sharply. Use of imports in 1974 may increase further as cigarette output rises. Despite lower cigar output, the gain in imported cigar tobacco reflects shortages of U.S. leaf (table 5).

January-October 1973 general imports of tobacco (arrivals, i.e., direct entries plus that placed in bonded warehouses for later factory use) were also above the year-earlier level. For cigarette leaf, flue-cured and burley registered a sizable gain, while oriental leaf declined. Total cigar tobacco arrivals increased as stocks of U.S. tobacco declined further.

With rising imports and relatively stable utilization, U.S. stocks of foreign-grown cigarette and smoking tobacco on October 1, 1973, totaled 434 million pounds (farm-sales weight). This was 11 percent above a year earlier, and a record high for that date.

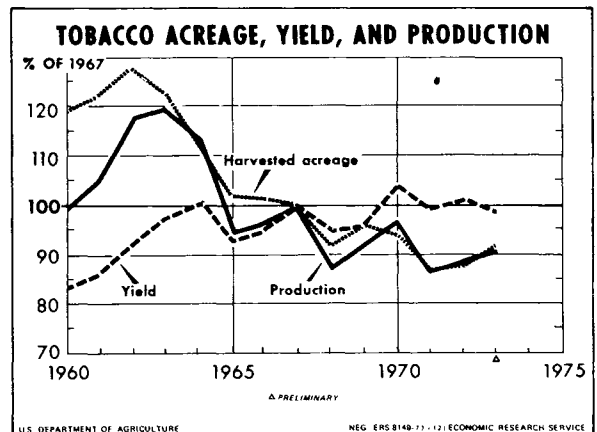
TOBACCO LEAF SITUATION AND OUTLOOK¹

1973 Crop Highlights

The U.S. tobacco crop now being sold is about 2 percent larger than last year. Flue-cured output was up with the larger quota, and yield prospects improved as the season progressed. Burley prospects declined as the crop suffered from heavy spring rains and a midsummer dry spell. The all-tobacco yield averaged 2,011 pounds per acre this season, compared with 2,076 pounds last season and the 1967-71 average of 2,023 pounds. Acres harvested totaled 886,340 or 5 percent above last year.

Increased crop size is offset by smaller carryover of most tobacco types. So reduced supplies are available for the 1973/74 marketing year. Prices for the season will likely average 7 percent above 1972/73 and record high. With the strong demand, volume of tobacco placed under loan this season is falling short of 1972's low level, and may total the least since World War II.

¹All quantities in this section are stated in farm-sales weight equivalent unless otherwise noted.



Farmers' cash receipts from tobacco in calendar 1973 are setting a record, 10 percent above the \$1.44 billion in 1972. Volume is up, and flue-cured and burley tobaccos have made price gains. Larger sales volume is expected in 1974, and support levels will rise, as required by law.

Table 3.--United States exports of unmanufactured tobacco by types and to principal importing countries for specified periods

Country and type	(Declared weight)						
	Average	1970	1971	1972	January-October		1973 as a percentage of 1972
	1965-69			1/	1972 1/	1973 1/	
				Million pounds		Percent	
Flue-cured	414.9	368.2	341.8	425.3	341.9	321.1	94
Burley	46.2	41.4	36.5	53.7	46.1	50.2	109
Maryland	12.0	11.8	9.0	11.0	9.2	8.7	95
Fire- and sun-cured	25.7	24.2	22.5	25.6	19.5	16.0	82
Green River	.6	.3	.4	.3	.2	.1	50
One Sucker	.8	.5	.6	.3	.2	.3	150
Black Fat, etc.	3.0	2.7	2.5	3.3	2.7	2.3	85
Cigar wrapper	3.8	1.6	2.5	3.0	2.6	1.9	73
Cigar binder	1.8	.3	.1	.1	.1	.1	100
Cigar filler	.9	.4	.3	.3	.3	.3	100
Perique	.3	.2	.1	.3	.2	.2	100
Stems, trimmings, and scrap	43.4	58.8	57.0	82.9	63.7	73.2	115
Total	553.4	510.4	473.3	606.1	486.9	474.5	97
Country of destination							
United Kingdom	128.2	95.5	89.8	115.1	85.2	83.5	98
France	7.2	9.0	10.1	7.7	6.7	5.1	76
Belgium	18.3	12.4	15.6	12.9	9.8	15.0	153
Netherlands	36.8	26.6	28.1	22.4	17.6	25.2	143
West Germany	96.9	92.6	100.0	99.2	90.1	86.7	96
Portugal	4.8	4.9	2.7	2.4	1.8	2.5	139
Denmark	17.5	18.1	16.7	20.8	18.4	31.3	170
Ireland	12.8	10.2	9.0	14.3	11.8	5.9	50
Switzerland	20.4	24.7	18.2	23.5	19.9	25.8	130
Finland	5.6	5.0	4.8	5.3	4.9	5.3	108
Norway	8.1	8.1	4.3	7.0	5.4	3.8	70
Sweden	15.8	19.5	14.7	20.5	17.6	13.7	78
Italy	8.7	3.1	16.4	23.1	23.1	21.8	94
Spain	4.4	3.0	5.2	4.6	4.6	4.3	93
Thailand	21.2	20.1	18.9	30.5	23.8	8.6	36
S. Vietnam	10.8	10.8	17.2	18.9	14.3	12.7	89
Malaysia	9.1	11.8	11.0	8.4	6.8	9.6	141
Hong Kong	5.6	4.3	2.7	3.5	3.0	2.3	77
Japan	39.1	58.6	18.6	2/87.3	54.5	39.2	72
Australia	17.9	10.2	10.9	14.8	9.7	8.7	90
New Zealand	4.1	5.0	3.8	4.4	3.6	4.5	125
Egypt	7.0	.6	1.2	.9	.9	2.4	267
Other countries	53.0	56.3	53.5	58.6	53.4	56.6	106
Total	553.4	510.4	473.3	606.1	486.9	474.5	97

1/ Preliminary.

2/ 1972 exports were large due to the 1971 dock strike.
Detail may not add to total due to rounding.

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

Table 4.--United States exports of unmanufactured tobacco by types, to principal importing countries, crop years, 1970/71-1972/73 1/

(Declared weight)

Importing countries	1970-	1971-	1972-	Importing countries	1970-	1971-	1972-
	1971	1972	1973		1971	1972	1973
			2/				2/
	Million pounds				Thousand pounds		
	Flue-cured, types 11-14				Va. fire and sun-cured, types 21, 37		
United Kingdom	95.1	67.9	84.8	Sweden	626	449	307
West Germany	89.0	73.2	69.9	Norway	2,105	1,683	1,693
Japan	41.2	45.0	52.4	Other countries	1,235	864	1,280
Netherlands	15.6	12.8	11.8				
Thailand	21.4	19.8	18.7	Total	3,966	2,996	3,480
Australia	10.4	9.8	10.0				
Italy	9.8	13.8	8.3				
Sweden	9.8	8.0	6.7				
Norway	2.9	3.0	3.2				
Finland	3.8	3.2	3.4				
Denmark	11.2	13.4	13.9	Bahamas	0	77	54
Ireland	9.3	7.7	7.7	Zaire (Congo, Kinshasa)	150	120	134
Belgium	11.0	7.9	13.5	Other countries	3/492	20	194
Switzerland	9.0	6.0	10.1	Total	642	217	382
S. Vietnam	11.9	13.8	14.5				
Philippine Republic	2.0	4.2	3.9				
Spain	5.1	4.2	3.6				
Malaysia	8.7	7.8	7.0				
Taiwan	9.5	13.3	13.9	United Kingdom	108	80	117
New Zealand	3.7	2.8	3.8	Belgium	21	69	46
Other countries	34.1	29.1	31.1	Zaire (Congo, Kinshasa)	73	40	44
Total	414.5	366.7	392.2	Other countries	221	39	4
				Total	423	228	211
	Burley, type 31				Cigar Filler, types 41-44		
Italy	5.4	9.2	8.8	France	90	280	233
Sweden	4.9	2.0	2.6	New Zealand	86	55	30
Denmark	2.4	2.2	3.8	Other countries	24	1	16
Netherlands	1.4	.6	2.6	Total	200	336	279
Japan	1.3	3.3	4.2				
West Germany	12.7	10.1	17.5				
Switzerland	2.8	1.9	4.6				
Finland	1.2	1.0	1.2				
Thailand	1.8	3.8	1.6	West Germany	88	27	21
Philippine Republic	1.9	3.6	2.6	Canada	32	29	21
Other countries	8.3	5.6	8.6	Canary Islands	22	0	28
Total	44.1	43.3	58.2	Other countries	102	29	22
				Total	244	85	92
	Maryland, type 32				Wis. Binder, types 54-55		
Belgium	1.5	1.0	1.7	Netherlands	56	0	0
West Germany	1.7	1.8	2.3	Other countries	6	1	5
Switzerland	6.9	4.2	6.3	Total	62	1	5
Other countries	1.3	.7	1.3				
Total	11.4	7.7	11.6				
	Ky.-Tenn. fire-cured, 22-23				Cigar Wrapper, types 61-62		
Sweden	.2	.6	.5	Canada	441	323	272
Netherlands	12.5	6.0	10.8	United Kingdom	248	1,195	1,155
Belgium	1.5	.4	.8	West Germany	374	648	598
France	2.8	3.5	2.1	Australia	68	47	10
Switzerland	.9	.9	.7	Canary Islands	80	115	183
Other countries	6.7	4.2	4.1	Other countries	461	738	676
Total	24.6	15.8	18.9	Total	1,672	3,066	2,894
	Stems, Trimmings, and Scrap				Black Fat		
Sweden	5.2	6.5	5.0	Cameroon	510	550	390
Denmark	3.3	3.4	7.1	Bahamas	47	40	46
United Kingdom	14.8	17.9	23.2	Togo	457	499	405
West Germany	6.8	6.4	4.8	Nigeria	575	253	211
Japan	12.6	13.8	15.4	West Africa, n.e.c.	914	1,437	2,005
Other countries	26.7	20.3	30.7	Other countries	137	76	85
Total	69.4	68.3	87.2	Total	2,640	2,855	3,142

1/ July-June crop year for flue-cured and cigar wrapper; October-September for all other types.

2/ Subject to revision. 3/ Includes Belgium, 216,000 pounds. Detail may not add to total due to rounding.

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

Table 5.--U.S. imports of unmanufactured tobacco for consumption and general, principal categories, and countries of origin, 1972 and January-October 1972-73 ^{1/}

Classification and country of origin	(Declared weight)							
	Imports for consumption				General imports (arrivals)			
	Total 1972	January-October			Total 1972	January-October		
		1972	1973	1973 as a percentage of 1972		1972	1973	1973 as a percentage of 1972
	- Million pounds -		Percent	- Million pounds -		Percent		
Cigarette tobacco:								
Leaf, unstemmed								
Oriental								
Turkey	95.7	82.0	93.6	114	135.1	116.0	100.5	87
Greece	29.4	25.9	21.0	81	28.9	21.9	12.1	55
Yugoslavia	15.1	12.9	13.0	101	9.3	8.8	13.4	152
Lebanon	10.2	9.1	7.5	82	8.7	7.6	11.7	154
Other countries	5.9	6.1	3.2	52	13.5	12.2	15.9	130
Flue-cured and burley	6.7	5.8	4.3	74	32.4	23.3	33.2	142
Subtotal	164.0	141.7	142.6	101	227.9	189.8	186.8	98
Scrap								
Turkey	10.6	8.8	6.1	69	10.9	10.7	6.1	57
Other countries ^{2/}	2.3	2.1	4.6	219	6.3	5.9	6.3	107
Total	176.9	152.6	153.3	100	245.1	206.4	199.1	96
Cigar tobacco:								
Wrapper	1.0	.8	1.0	125	1.6	1.4	1.4	100
Filler-stemmed and unstemmed								
Dominican Republic	2.0	1.6	1.9	119	15.1	8.2	7.7	94
Other countries	8.8	7.6	7.2	95	34.3	29.2	35.5	122
Subtotal	10.8	9.2	9.1	99	49.5	37.4	43.2	116
Scrap								
Philippine Republic	18.3	15.7	11.9	76	14.2	12.9	11.3	88
Colombia	5.8	4.8	5.9	123	2.4	2.4	3.4	142
Dominican Republic	6.1	4.9	6.6	135	1.9	1.3	2.3	177
Brazil	6.0	3.7	9.4	254	1.5	1.2	4.8	400
Other countries	11.9	9.4	15.4	164	14.2	10.3	18.2	177
Subtotal	43.1	38.5	49.2	128	34.2	28.1	40.0	142
Total	59.8	48.5	59.3	122	85.2	66.9	84.7	127
Stems	3.7	2.7	7.4	274	2.0	1.5	5.0	333
Grand total	240.5	203.8	219.9	108	332.2	274.8	288.8	105

^{1/} Preliminary.

^{2/} Canada, Greece, Cyprus, Lebanon, India, Korea.

Detail may not add to total due to rounding.

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

U.S. tobacco: Acreage and yield, 1971-73

Type	Acreage				Yield per acre			
	1971	1972	1973 ¹	Change from 1972	1971	1972	1973 ¹	Change from 1972
	1,000	1,000	1,000	Percent	Pounds	Pounds	Pounds	Percent
Flue-cured								
11—Old and Middle Belt, VA.—N.C.	189.4	186.0	204.0	9.7	1,876	1,749	1,964	12.3
12—Eastern N.C.	159.0	157.0	176.0	12.1	2,230	2,120	2,225	5.0
13—S.C.—Border N.C. . .	107.0	103.0	111.0	7.8	2,158	2,129	2,099	-1.4
14—Georgia—Florida . .	70.4	67.6	72.0	6.5	1,947	1,997	1,674	-16.2
Total, types 11-14 . . .	525.8	513.6	563.0	9.6	2,050	1,971	2,035	3.2
Burley, type 31	213.5	235.8	230.7	-2.2	2,213	2,549	2,146	-15.8
Total, all types 11-72 . .	837.6	842.6	886.3	5.2	2,035	2,076	2,011	-3.1

¹ November 1 indications; burley is December 1.

QUOTAS, ALLOTMENTS, AND PRICE SUPPORT

1974 Marketing Quotas and Allotments

USDA is considering whether the flue-cured quota should be increased to meet additional export demand. Flue-cured growers approved acreage-poundage quotas for 1974-76 crops in a July 1973 referendum. At that time the 1974 national quota for flue-cured was set the same as the past season.

By February 1, USDA will announce the 1974 marketing quotas and acreage allotments for burley and several other kinds of tobacco. Shortly after the announcement, growers of burley, Virginia sun-cured, Maryland, and Pennsylvania filler will vote in referendums for or against marketing quotas on their next 3 crops. If at least two-thirds of the voters approve, marketing quotas will be in effect. In previous referendums of fire-cured, dark air-cured, cigar binder, and Ohio filler types, farmers approved marketing quotas applicable to the 1974 crop.

1974 Price Support Levels

Price supports for eligible 1974 tobacco crops are expected to rise 8 or 9 percent above the 1973 price support level—nearly 50 percent above the 1959 base. As required by law, the 1974 price support adjustment will be based on the average of the parity index in 1971, 1972, and 1973 compared with 1959. In past years, USDA announced average support levels by tobacco types in the spring and individual grade loan rates later.

Regulations Proposed for Carryover Tobacco

USDA has proposed to extend the price support

program for flue-cured and burley tobacco that is commingled, packed and carried over from one marketing year to another. Present price support and loan regulations are based on farm marketings at auctions or other receiving points. After the 1972 season growers carried over an estimated 6.7 million pounds of flue-cured and 13.1 million pounds of burley for sale during the 1973 season. This tobacco was carried over on farms and maintaining quality was difficult without redrying and packing.

FLUE-CURED

With lower carryover more than offsetting a larger crop, the flue-cured supply for 1973/74 is 1 percent below last season. Utilization this marketing year probably will stabilize, but total disappearance is expected to exceed the 1973 crop. This means the carryover by next July would decline further. For next season's crop, the national poundage quota remains unchanged. With this past season's undermarketings exceeding overmarketings, next season's effective quota will go up about 2 percent. This crop size, added to carryover, would provide a supply next season about the same as 1973/74 (table 6).

1973 Auction Prices Record High

Prices for the 1973 flue-cured crop broke 1972's record. Sales volume was up, and crop value also set a record. Industry takings from both the crop and loan holdings were heavy. Government loan placements totaled a little larger than last year's record low.

The 1973 flue-cured auction season ended December 5. About nine-tenths of the crop had been sold by November 1. Prices peaked at the end of September and then edged downward the remainder of the season. But no sharp breaks occurred as in

Table 6.—Flue-cured and burley tobacco: Marketing quota and marketings, 1965-74

Year	Quota		Marketings				Net carryover ²
	Basic	Effective	Actual	Over-quota	Under-quota	Effective under quota ¹	
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Flue-cured, types 11-14							
1965	1,126.0	1,124.4	1,055.5	27.1	96.0	96.0	68.8
1966	1,126.0	1,199.0	1,107.9	35.0	126.1	126.1	91.1
1967	1,126.0	1,202.4	1,247.5	77.9	32.8	30.8	-47.1
1968	1,126.5	1,067.9	996.3	26.5	98.1	96.6	70.0
1969	1,127.1	1,187.0	1,052.1	26.6	161.5	157.9	131.3
1970	1,071.0	1,190.8	1,178.2	65.1	77.6	71.2	6.1
1971	1,071.4	1,069.9	1,076.3	60.4	53.9	49.9	-10.5
1972	1,071.2	1,056.7	1,022.1	41.2	75.8	72.9	31.7
1973	1,178.4	³ 1,206.0	⁴ 1,155.2		⁴ 50.8		⁴ 48.6
1974	1,178.4	⁴ 1,227.0					
Burley, type 31							
1971	555.1	552.9	471.5	9.7	91.2	91.1	81.4
1972	531.5	612.9	588.6	30.7	53.7	45.7	15.0
1973	559.7	⁴ 574.0					

¹ Under quota marketing less ineligible carryover. ² Effective under quota marketings less over quota marketings. ³ Subject to revision. ⁴ Preliminary.

1972. Price increases over last season were greatest for heavier bodied leaf and smoking tobacco. Nondescript on the thin side declined. The season average price for gross sales (including resales) was 88.1 cents per pound—up 2.8 cents from last year's average. The average price gained in all belts, ranging from 1.5 cents in type 13 to 6.0 cents in type 11a (table 7).

Producer marketings were above the average of the previous 8 years under the acreage-poundage program. Sales totaled 1,155 million pounds—about 133 million more than in 1972. Quality was the best in several years in the Middle and Old Belts but not as good as last year in other belts. The crop consisted of a smaller proportion of fair and good grades than in 1972. Color was lighter. Resales were the smallest share on record, averaging 2.2 percent of gross sales. Growers sold 9 percent of the crop outside the State where produced.

Growers placed 2½ percent of sales under loan this season, mostly in the last 6 weeks of auctions. Except for 1972's record low, loan volume was the lowest since World War II. The Flue-cured Stabilization Cooperative, the association handling tobacco under loan, sold 65 million pounds during July-November, only one-third the record level for that period last year. Most Stabilization sales are for later delivery and may move into trade channels by mid-1974. Thus loan stocks at the beginning of 1974/75 may drop about one-third below the 402 million pounds held last July 1.

Marketing Conditions Less Favorable

With the larger crop and slower selling pace this season, many growers experienced delays in getting tobacco onto auction floors. The Flue-cured Tobacco Marketing Committee again recommended opening dates and set selling times. Four weeks of partial openings prevailed in type 12 and openings were delayed in type 11. Weekly marketing volume was held below last season but congestion on market floors still necessitated cancelling most sales during the first week of September.

To provide a market for type 13 tobacco that was unsold after the originally allotted sales time had expired, the industrywide committee agreed to maintain a set of buyers for an additional period in October. Also, the Stabilization Cooperative set up a separate pool for direct deliveries and received 0.5 million pounds under this arrangement. The Tobacco Subcommittee, U.S. House of Representatives, held hearings in the type 13 area on November 19-20. Growers and warehouse officials described recent marketing conditions. Many growers favored the USDA Study Committee recommendation that each grower have the opportunity to designate the market or warehouse in his belt in which he would like to sell his tobacco.

Export Pace Advances

Flue-cured exports for July-October 1973 were one-tenth above a year earlier, but remained slightly

Table 7.--Flue-cured tobacco: Gross sales (including resales) average price and loan receipts by Belt, 1967-73

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	All Belts
<u>Million pounds</u>						
1967	260	152	359	322	224	1,317
1968	202	110	295	268	164	1,039
1969	235	116	321	266	157	1,096
1970	230	130	367	295	201	1,224
1971	217	117	323	268	182	1,107
1972	201	109	323	249	166	1,048
1973 <u>1/</u>	249	124	385	270	153	1,181
<u>Average price per pound</u>						
<u>Cents</u>						
1967	61.9	62.7	64.7	65.0	65.6	64.1
1968	64.8	64.0	67.5	66.8	68.3	66.5
1969	71.3	71.4	72.3	72.6	73.3	72.2
1970	70.1	70.0	72.7	71.7	74.3	71.9
1971	77.4	77.2	78.4	75.7	76.8	77.2
1972	82.3	84.8	87.2	85.3	85.4	85.3
1973 <u>1/</u>	88.3	88.1	88.9	86.8	87.7	88.1
<u>Receipts under Government loan</u>						
<u>Million pounds</u>						
1967	84.5	49.7	79.8	57.2	11.0	282.1
1968	36.0	26.9	24.3	29.5	12.0	128.8
1969	24.2	14.9	37.3	13.3	8.0	97.6
1970	29.7	19.8	43.3	28.8	22.7	144.2
1971	9.1	5.4	19.2	15.5	6.4	55.7
1972	11.4	3.1	8.2	1.1	.4	24.3
1973 <u>1/</u>	7.4	4.3	17.0	2.4	.2	31.2
<u>Percentage of net sales under Government loan</u>						
<u>Percent</u>						
1967	34.1	34.2	23.0	19.0	5.3	22.6
1968	18.8	25.3	8.5	11.5	7.8	12.9
1969	10.8	13.4	11.9	5.2	5.4	9.3
1970	13.4	15.8	12.1	10.2	11.9	12.2
1971	4.3	4.8	6.1	6.0	3.7	5.2
1972	6.0	3.0	2.6	.5	.3	2.4
1973 <u>1/</u>	3.0	3.5	4.5	.9	.1	2.7

1/ Preliminary.

below the comparable period in 1966-69. In those years Rhodesia's eclipse from world marketings boosted U.S. exports. Leading destinations, including the United Kingdom, West Germany, and Denmark, have sizable increases this year. In the U.K. market, lower cost supplies from Canada and other Commonwealth sources are in short supply until new crops are shipped and they still require blending with more favorable U.S. leaf. West Germany's imports have picked up after cigarette sales recovered from a stiff tax hike late last year. Shipments to Japan usually go in midseason, and purchases may have risen 15 percent.² Except for more favorable prospects in these areas, reduced supplies are expected to limit exports to some destinations. By June total exports may run close to last season's 519 million pounds.

U.S. flue-cured to principal countries, 1971-73

(export weight)

Country	July-October		
	1971	1972	1973
	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
United Kingdom . . .	12	35	40
West Germany	29	27	26
Japan	5	6	5
Netherlands	6	4	6
Ireland	1	3	1
Thailand	11	11	6
Australia	3	3	3
Belgium	4	4	4
Denmark	3	4	10
Switzerland	2	3	5
Sweden	5	5	6
South Vietnam	5	2	1
Others	21	21	28
Total*	107	128	141

*Based on unrounded data.

Supplies Declining Again in 1973/74

With lower carryover offsetting the larger current crop, the season's flue-cured supply of 2.9 billion pounds is about 1 percent below last year and 23 percent below the 1964/65 record (table 8). The 1973 crop was about one-seventh above 1972's outturn. Harvested acreage in 1973 increased 10 percent and the average yield per acre increased 3 percent.

The gain in U.S. cigarette output and the steady level of exports in prospects for this marketing year mean total disappearance may gain a little from last year's level. So, despite the larger crop, next July's carryover is expected to be below a year earlier.

²B.G. Andrews, "Climate Bright for U.S. Exports to Japanese Tobacco Market," *Foreign Agriculture*, Nov. 26, 1973, pp. 2-4.

USDA to Reconsider 1974 Quota

USDA is considering views and recommendations on whether the 1974 flue-cured marketing quota should be increased to meet expected higher export demand. Last July, the quota was set the same as 1973—1,179 million pounds. Since midyear exports have been greater than originally projected and available overseas supplies have fallen below last year.

Acreage allotments and poundage quotas for individual farms will reflect 1973 undermarketings, overmarketings, and other required adjustments. Aggregate marketings this past season were 4 percent below the effective quota. This difference represents about the average shortfall since the acreage-poundage program began in 1965. As originally set, the base quota plus net undermarketings gives an effective 1974 quota of about 1,228 million pounds, about 2 percent above 1973. A crop close to the quota when added to prospective carryover would provide a 1974/75 supply about the same as this year's level.

Tobacco loan stocks, 1971-73

(Farm-sales weight)

Type	End of November		
	1971	1972	1973
	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
Flue-cured, 11-14	799.4	531.0	351.2
Uncommitted	603.1	372.7	283.1
Burley, 31	466.9	316.6	281.7
Uncommitted	426.7	259.9	140.6
Virginia, 219	(¹)	(²)
Kentucky-Tennessee, 22-23 . .	5.1	.8	3.2
Kentucky-Tennessee, 35-36 . .	14.7	13.1	13.1
Ohio, 42-44	0	0	0
Puerto Rican, 46	2.5	0	0
Connecticut Valley, 51-52 . . .	1.9	2.0	2.2
Total	1,291.4	863.5	651.4

¹ October 31. ² Negligible.

Compiled from records of Tobacco Division, ASCS.

BURLEY

Auction Prices Record High

Auction sales of the 1973 burley crop began November 26 and will close December 20 for the Christmas holidays. Sales resume on January 7. Gross sales totaled 351 million pounds and averaged a record high 93 cents per pound during the first 3 weeks of sales. Opening sales were heavy in volume although dry weather slowed stripping and handling. Quality of the crop is high but weight is generally light. Growers will sell about 85 percent of

Table 8.—Flue cured tobacco, types 11-14, and burley tobacco, type 31: Acreage, yield, production, carryover, supply, disappearance, season average price, and price support operations, 1963-74

(Farm-sales weight)

Marketing year	Acreage harvested	Yield per acre	Production	Beginning stocks ¹			Total supply	
				Manufactures and other	Under loan	Total		
	<i>Thousand acres</i>	<i>Pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	
Flue-cured, types 11-14								
1963	694.5	1,975	1,371.5	1,785.3	496.3	2,281.6	3,653.1	
1964	627.6	2,211	1,387.8	1,689.5	696.9	2,386.4	3,774.2	
1965	562.3	1,883	1,059.0	1,636.9	918.5	2,555.4	3,614.4	
1966	607.0	1,825	1,107.9	1,602.5	836.4	2,438.9	3,546.8	
1967	610.3	2,070	² 1,250.0	1,587.1	685.4	2,272.5	3,522.5	
1968	533.0	1,841	² 995.6	1,528.1	773.4	2,301.5	3,297.1	
1969	576.8	1,825	1,052.8	1,299.6	800.5	2,100.1	3,152.9	
1970	584.1	2,042	² 1,178.1	1,227.5	744.9	1,972.4	3,150.5	
1971	525.8	2,050	² 1,076.3	1,214.5	761.9	1,976.4	3,052.7	
1972	513.6	1,971	² 1,022.1	1,292.4	617.8	1,910.2	2,932.3	
1973 ³	563.0	2,035	² 1,155.2	1,347.0	402.0	1,749.3	2,904.5	
1974 ⁴				1,414.5	300.0	1,714.5		
Burley, type 31								
1963	338.5	2,231	755.1	1,133.5	94.4	1,227.9	1,983.0	
1964	306.6	2,022	619.8	1,146.8	265.4	1,412.2	2,032.0	
1965	277.1	2,116	586.3	1,099.3	316.4	1,415.7	2,002.0	
1966	240.7	2,437	586.7	1,133.4	261.9	1,395.3	1,982.0	
1967	237.7	2,274	540.6	1,104.8	276.7	1,381.5	1,922.1	
1968	237.6	2,372	563.4	1,002.4	321.7	1,324.1	1,887.5	
1969	237.7	2,488	591.4	975.7	340.8	1,316.5	1,907.9	
1970	216.4	2,590	560.5	887.9	454.8	1,342.7	1,903.2	
1971	213.5	2,213	472.6	882.4	463.4	1,345.8	1,818.4	
1972	235.8	2,549	² 590.3	920.9	327.6	1,248.5	1,838.8	
1973 ³	230.7	2,146	495.2	952.5	276.7	1,229.2	1,724.4	
1974 ⁴				959.4	150.0	1,109.4		
		Disappearance		Average price per pound	Price support level	Placed under Government loan		
		Total	Domestic			Exports	Quantity	Percentage of crop
		<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Cents</i>	<i>Cents</i>	<i>Million pounds</i>	<i>Percent</i>
Flue-cured, types 11-14								
1963	1,266.7	768.3	498.4	58.0	56.6	277.2	20.2	
1964	1,218.8	774.7	444.1	58.5	57.2	285.6	20.7	
1965	1,175.5	752.4	423.1	64.6	57.7	71.5	6.8	
1966	1,274.3	687.2	587.1	66.9	58.8	74.6	6.8	
1967	1,221.0	687.7	533.3	64.2	59.9	282.1	22.6	
1968	1,197.0	671.7	525.3	66.6	61.6	128.8	12.9	
1969	1,180.5	645.9	534.6	72.4	63.8	97.6	9.3	
1970	1,174.1	640.1	534.0	72.0	66.6	144.2	12.2	
1971	1,142.5	662.5	480.0	77.2	69.4	55.7	5.2	
1972	1,183.0	664.2	518.8	85.3	72.7	24.3	2.4	
1973	⁴ 1,190.0	⁴ 680.0	⁴ 510.0	³ 88.1	76.6	³ 31.3	2.7	
Burley, type 31								
1963	570.8	513.4	57.4	59.2	58.3	202.3	26.8	
1964	616.3	560.6	55.7	60.3	58.9	110.4	17.8	
1965	606.7	549.6	57.1	67.0	59.5	42.2	7.2	
1966	600.5	544.1	56.4	66.9	60.6	62.5	10.6	
1967	598.0	544.6	53.4	71.8	61.8	64.2	11.9	
1968	571.0	516.1	54.9	73.7	63.5	56.2	10.0	
1969	565.2	507.1	58.1	69.6	65.8	158.2	26.8	
1970	557.4	503.0	54.4	72.2	68.6	47.7	8.5	
1971	569.9	515.2	54.7	80.9	71.5	.2	(⁵)	
1972	609.6	534.0	75.6	79.2	74.9	22.9	3.9	
1973	⁴ 615.0	⁴ 545.0	70.0	⁶ 93.2	78.9	⁶ .2	.1	

¹ July for flue-cured; October 1, for burley. ² Sales. ³ Subject to revision. ⁴ Estimated. ⁵ Less than .05 percent. ⁶ Through December 17.

the crop in the pre-Christmas sales, compared with 79 percent last season.

Prices opened 7 cents above last year's opening and increased further in succeeding sales. Quality is off slightly from last year but is still high. Sales contain larger percentages of lower grades and tips. Better grades have been selling 16 cents per pound above support levels and about 12 cents above last year. Some leaf and tip grades are 20 cents higher than last year. Prices peaked during the second week of sales and have since edged downward.

Grade loan rates range from 55 to 85 cents a pound, with an average support level of 78.9 cents. USDA increased grade prices from 3 to 6 cents per pound over 1972 levels. Through December 12, the two burley cooperatives took negligible amounts under government loan. In the comparable period last season, about 5 percent of sales went under loan.

1972/73 Disappearance Higher

During the year ended September 30, 1973, burley disappearance totaled 610 million pounds, 7 percent above the previous year. Both domestic use and exports increased. Domestic burley use increased 3½ percent compared with a 6½ percent gain for cigarette manufacture, the principal outlet for burley. During the same period, packaged smoking tobacco output fell 5 million pounds and bulk smoking tobacco exports declined again for the second straight year. Despite a downtrend in burley tobacco use per cigarette, increased cigarette production in 1973/74 would point to another gain in domestic burley disappearance.

Burley exports for the crop year ended September 30, 1973, were substantially above last year, with volume totaling 76 million pounds. Most destinations took more. Switzerland and the Netherlands recorded sizable gains. West Germany, our leading foreign burley market, increased takings by 7.5 million pounds. Part of the increase was due to West Germany's reduced takings and lower stocks last year. At the end of 1972, West Germany's stocks were off about 6 percent. Imports were down, due partially to changing parities of currency and uncertainties about cigarette sales after a large tax and retail price hike. But American burley tobacco held its own, accounting for about 32 percent of West Germany's burley imports in 1973. Sales of American brand cigarettes to West Germany increased also.

Supplies Lower

This season's burley supply of 1,724 million pounds is about 6 percent below last season and 15 percent below the 1964/65 peak (table 8). The 1973 crop, estimated December 1 at 495 million pounds, was 18 percent below last year's crop. This reflects declines in both acreage and yields due to unfavorable weather conditions during the planting and growing

season. Effective farm poundage quotas totaled 574 million pounds—39 million below last year's quota. Harvested acreage declined 1 percent from last year and estimated yield fell 16 percent.

Burley carryover on October 1 was down 2 percent from a year earlier. Carryover under government loan was down 16 percent, to 277 million pounds. From October 1 through December 7, the loan cooperatives sold 70 million pounds. With large sales and negligible loan take this season, next year's loan carryover will drop substantially.

Supply for 1973/74 is equal to 2.8 times probable disappearance, about the same as last season. Based on the legislative formula, the desirable ratio is about 2%. Carryover next October 1 is expected to decline.

Outlook for burley in 1974 hinges partially on the allotment decisions USDA will make by February 1. Burley poundage legislation requires that the national quota for any year not be less than 95 percent of estimated marketing year disappearance. For 1973/74 the basic allotment of 560 million pounds was set at the minimum 95 percent of estimated disappearance of 590 million pounds. By contrast, disappearance in 1972/73 totaled 610 million pounds, 7 percent above the previous year. A gain is indicated for 1973/74. If this pattern continues, USDA will probably raise the burley quota for the 1974 crop. As in the past, individual farm quotas are adjusted for the previous year's overmarketings and undermarketings.

MARYLAND

1972/73 Disappearance Unchanged

During the year ended September 30, 1973, disappearance of Maryland tobacco was 25½ million pounds. This was the same as in the previous year, and the lowest since the early 1930's (table 9). The 1973 crop output increased about 2½ million pounds from 1972. Indications are that crop quality will be high.

Domestic use of Maryland tobacco at 13½ million pounds was 4 million below last year and 25 million below 1968's level. Supplies have declined, so manufacturers have reduced the amount of Maryland tobacco in cigarette blends. Domestic use in the current marketing year may be near that in the past year.

Last season's exports totaled 12 million pounds—up about 4 million from the previous year. Switzerland's takings were up 2 million pounds after last season's decline. Switzerland accounted for about one-half of exports.

Supplies up Slightly

Carryover on January 1, 1974, is estimated to be slightly below the 46½ million pounds of a year

Table 9.—Maryland tobacco, type 32: Acreage, yield, production, carryover, supply, disappearance, and season average prices

(Farm sales weight)

Marketing year	Acreage harvested	Yield per acre	Supply			Disappearance ¹			Average price per pound to growers
			Production	Stocks, Jan. 1	Total	Total	Domestic	Exports	
	Thousand acres	Pounds	Pounds	Pounds	Pounds	Million pounds	Million pounds	Million pounds	Cents
1968	30.0	1,065	32.0	81.5	113.5	48.7	38.3	10.4	69.8
1969	28.0	1,000	28.0	66.7	94.7	41.3	29.1	12.2	75.1
1970	27.0	1,090	29.4	50.1	79.5	39.5	27.6	11.9	78.6
1971	27.0	1,040	28.1	46.0	74.1	25.5	17.5	8.0	81.9
1972	24.0	990	23.8	46.6	70.4	25.5	13.4	12.1	⁴ 84.4
1973 ²	24.0	1,100	26.4	³ 45.0	71.4				

¹ Year beginning October 1. ² Subject to revision. ³ Estimated. ⁴ Auction market average.

earlier. Estimated at 26.4 million pounds, the 1973 Maryland crop is about 11 percent above the previous season. Acreage allotments were not in effect, since growers disapproved a marketing quota for the 1973 crop. The current crop was produced on the same acreage as in 1973 but yields recovered from that year's hurricane-reduced level.

Estimated supply (current crop plus estimated carryover) for 1973/74 is about 1 percent above a year earlier. Auction sales of the 1973 Maryland tobacco crop will begin April 16 and end June 14.

Beginning with the 1973 crop, USDA issued regulations to identify and certify nonquota Maryland tobacco (type 32) grown and marketed in a quota area. Last season about a million pounds of type 32 were produced in the burley area.

FIRE-CURED

Auction Prices Jump

Auction markets for Virginia fire-cured tobacco (type 21) opened December 4. For sales through December 13 prices averaged a record high 75 cents a pound, 12 cents above last year's level. Quality improved from last year's crop. Markets closed for the holidays on December 20 and reopen January 7. Auctions for Kentucky-Tennessee fire-cured (types 22 and 23) are expected to open around the middle of January. At an estimated 40 million pounds, the 1973 fire-cured crop is 5 percent below 1972. The drop in production is the result of an acreage decline in Kentucky-Tennessee types. About 5 percent less Virginia fire-cured tobacco was used than in the last marketing year. The overall support level for the 1973 crop is 53.5 cents a pound. In the Virginia fire-cured markets before Christmas, government loan placements were negligible.

Supplies Stabilizing

With a smaller crop and about the same carryover, the 1973/74 supply of fire-cured types totals 106 million pounds—almost unchanged from a year

earlier. Based on prospective use, this supply would last 2½ years. On October 1, the beginning of the marketing year, government loan stocks were 1.5 million pounds above a year earlier. Total carryover next October will probably decrease slightly. Supply is 6 percent above last year's level for Virginia fire-cured but is down 2½ percent for the Kentucky-Tennessee types (table 10).

Disappearance Steadies

Disappearance of fire-cured types in 1972/73 was 42 million pounds—about ½ million pounds more than in the previous season. Domestic use declined but was offset by the increase in exports. Snuff output steadied some but plug and twist chewing tobacco dropped 5 percent. Domestic use of Kentucky-Tennessee types declined about 1.8 million pounds after the previous season's recovery. Last season's prices for types 22 and 23 were slightly below the previous season's record high. Domestic use of Virginia fire-cured decreased sharply after two years of increase.

Exports of fire-cured tobacco, including an allowance for Black Fat, increased 4.2 million pounds last season. For Black Fat, a semiprocessed product, exports increased about a quarter of a million pounds. Exports of Kentucky-Tennessee types to the Netherlands increased sharply following the previous season's decline. In that country, our major fire-cured destination, cigar and smoking tobacco consumption almost equals cigarette use. Among other leading outlets, Belgium took a little more than last season but France, Sweden, and Switzerland took less.

Exports of Virginia fire-cured for 1972/73 increased ½ million pounds. More than half the total went to Norway for roll-your-own cigarettes and smoking tobacco.

DARK AIR-CURED

Auction Prices

Auction markets for Green River and One Sucker

Table 10.--Fire-cured tobacco, Kentucky-Tennessee types 22-23, and Virginia fire-cured type 21: Acreage, yield, production, carryover, supply, disappearance, season average price, and price support operations, 1967-73

(Farm-sales weight)							
Marketing year beginning October 1	Acreage harvested	Yield per acre	Production	Beginning stocks, October 1 --			Total supply
				Manufacturers and other	Under loan	Total	
	Thousand acres	Pounds	Million pounds				
Kentucky-Tennessee fire-cured, types 22-23							
1967	17.3	1,702	29.5	64.0	27.3	91.3	120.8
1968	17.9	1,822	32.6	57.3	21.5	78.8	111.4
1969	19.0	1,797	34.1	61.1	11.6	72.7	106.8
1970	17.7	1,749	30.9	54.1	9.7	63.8	94.7
1971	19.5	1,928	37.6	48.6	4.7	53.3	90.9
1972	20.4	1,844	37.6	55.0	1.2	56.2	93.8
1973 ^{1/}	19.4	1,764	34.2	54.2	3.1	57.3	91.5
Virginia fire-cured, type 21							
1967	5.4	1,290	7.0	12.1	2.7	14.8	21.8
1968	4.9	1,205	5.9	8.9	2.8	11.7	17.6
1969	5.0	1,340	6.7	8.0	1.9	9.9	16.6
1970	5.0	1,230	6.2	8.4	1.4	9.8	16.0
1971	5.0	1,180	5.9	8.0	1.0	9.0	14.9
1972	^{4/} 4.3	970	4.7	7.9	.4	8.3	13.0
1973 ^{1/}	4.9	1,250	6.1	7.6	^{3/}	7.6	13.7
Disappearance				Average price	Price support level	Placed under Government loan	
Total	Domestic	Exports	per pound	per pound	per pound	Quantity	Percentage of crop
Million pounds				Cents		Million pounds	Percent
Kentucky-Tennessee fire-cured, types 22-23							
1967	42.0	14.9	27.1	46.2	41.9	.8	2.7
1968	38.7	^{2/} 19.1	19.6	51.1	43.1	.4	1.2
1969	43.0	18.5	24.5	48.1	44.6	1.9	5.6
1970	41.4	13.1	28.3	54.4	56.6	^{3/}	.1
1971	34.7	16.0	18.7	60.8	48.5	^{3/}	.1
1972	36.5	14.2	22.3	57.3	50.8	2.8	7.4
1973					53.5		
Virginia fire-cured, type 21							
1967	10.1	3.4	6.7	40.9	41.9	.7	10.1
1968	7.7	3.0	4.7	46.9	43.1	.2	3.4
1969	6.8	1.7	5.1	53.1	44.6	.1	1.5
1970	7.0	2.4	4.6	52.0	46.6	.1	2.0
1971	6.6	3.1	3.5	54.8	48.5	.1	1.0
1972	5.4	1.3	4.1	64.2	50.8	^{3/}	.1
1973				^{4/} 74.8	53.5		^{4/} 0.3

^{1/} Subject to revision. ^{2/} Includes 4.7 million pounds fire loss, April 1969. ^{3/} Less than 50,000 pounds. ^{4/} Through December 17.

opened December 3 and December 7 respectively (Kentucky-Tennessee dark air-cured, types 35-36). Auctions for Virginia sun-cured (type 37) opened December 11. The overall price support level for the 1973 crop is 47.6 cents a pound. (Farmers averaged 12 cents per pound more for types 35-37 this year through December 14 than last season. The quality of offerings was up.

An estimated 14½ million pounds dark air-cured crop is 10 percent below 1972's level and 3 million below last season's disappearance. Acreage was unchanged for Green River but down from One Sucker and Virginia type 37.

Supplies Below Year Ago

The supply of dark air-cured and sun-cured tobacco for 1973/74, about 63 million pounds, is 5 percent below last season. Supply is lower for One Sucker and Green River but higher for Virginia sun-cured (table 11). New crop and carryover levels are both below last year.

Total supplies of dark air-cured tobacco represent about 3.5 years' use, based on projected disappearance. Government loan stocks on October 1 (the outset of the current marketing year) were about the same as year-earlier holdings. Carryover will decline if disappearance remains about unchanged, as expected.

Disappearance Declines

Disappearance of dark air-cured tobacco last season was almost 18 million pounds, about 3 million less than in the previous season. Output of plug, twist, and fine-cut chewing tobacco combined fell 4½ percent. Domestic use declined but exports gained. Exports of the dark types last season (including Black Fat) increased sharply due to an increase in Green River and One Sucker leaf.

CIGAR TOBACCO

U.S. and Puerto Rican Supplier Lower

Supplies of U.S. and Puerto Rican cigar tobacco are about 6 percent lower than in 1972, continuing the postwar trend (table 12). Carryover is down 14 percent but 1973/74 production is up. Most of the decline in supply is occurring in cigar filler types, but wrapper supplies are down some. Last season, disappearance of filler and binder was lower than in 1971/72. Wrapper disappearance dropped 19 percent from the previous season's low level. On November 30, government loan stocks of cigar tobacco were about the same as 1972's total.

Production of U.S. cigar types was estimated at about 13 percent above 1972. Both acreage and yields increased. U.S. cigar leaf tobacco is sold either directly on the farms or through cooperatives.

Therefore, price data are less detailed than for types sold at auctions. Buyers paid more per pound for Connecticut binder crops than last season but purchasing has not begun for other types. Season average prices will be published in the May 1974 issue of USDA's crop report.

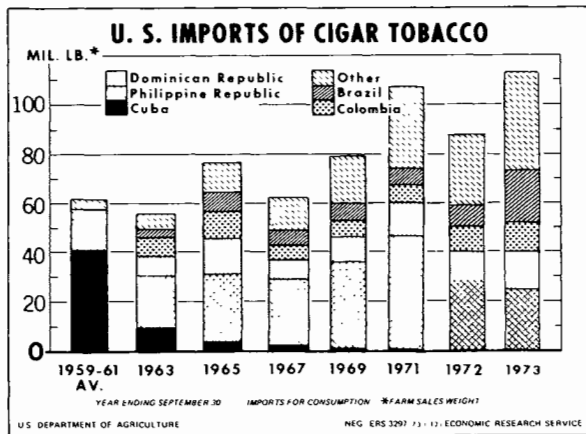
Filler Supplies Falling

Supplies of continental cigar filler (U.S. and Puerto Rican) are 10 percent below 1972's record low level. Production was up 4 percent but carryover was down sharply. These supplies would last about 2.2 years, based on 1972/73 disappearance. Disappearance in the 1973/74 marketing year is expected to continue down but probably will again exceed production. Last season the Pennsylvania filler crop suffered severe flood damage. So both harvested acreage and yield for the 1973 crop are up.

Declining cigar filler output is likely to persist as long as price is low relative to costs. Much cigar filler tobacco is grown near urbanized areas and many growers have turned to alternative farm enterprises or nonfarm employment.

Imports Supplementing Lower U.S. Supplies

Again last season, cigar tobacco imports substantially exceeded use from domestic filler supplies. Imports accounted for about six-tenths of U.S. cigar tobacco requirements. With domestic supplies declining further in 1973/74, manufacturers will again draw heavily on foreign leaf.



Despite reduced production of cigars, manufacturers increased imports in 1972/73 (October-September). Last season 113 million pounds of cigar tobacco were imported for consumption, 21 million pounds more than in the previous season. Imports from the Philippines decreased slightly but imports from Brazil were up substantially. Imports from several other suppliers increased.

Foreign-grown cigar leaf stocks in the United States on October 1 were 115 million pounds—about 10 million above a year earlier.

Table 11.--Dark air-cured tobacco, types 35-36, and Sun-cured tobacco type 37: Acreage, yield, production, carryover, supply, disappearance, season average price, and price support operations, 1967-73

(Farm-sales weight)							
Marketing year beginning October 1	Acreage harvested	Yield per acre	Production	Beginning stocks			Total supply
				Manufacturers and other	Under loan	Total	
	Thousand acres	Pounds		Million pounds			
Dark air-cured, types 35-36							
1967	9.5	1,629	15.5	39.2	21.3	60.5	76.0
1968	9.8	1,831	18.0	41.1	17.1	58.2	76.2
1969	10.1	1,793	18.1	44.1	15.0	59.1	77.2
1970	8.2	1,863	15.4	35.5	18.2	53.7	69.1
1971	8.6	1,834	15.7	35.5	14.3	49.8	65.5
1972	8.2	1,875	15.5	33.5	12.7	46.2	61.7
1973 ^{1/}	7.9	1,741	13.8	31.9	12.8	44.7	58.5
Sun-cured, type 37							
1967	1.2	1,090	1.3	4.2	0	4.2	5.5
1968	1.1	1,095	1.2	3.9	0	3.9	5.1
1969	1.1	1,225	1.3	3.8	0	3.8	5.1
1970	1.0	1,100	1.1	3.3	0	3.3	4.4
1971	.9	1,200	1.1	3.1	0	3.1	4.2
1972	.8	1,010	.8	3.0	0	3.0	3.8
1973 ^{1/}	.7	1,200	.8	3.2	0	3.2	4.0
Disappearance		Average price		Price support	Placed under Government loan		
Total	Domestic	Exports	per pound	level	Quantity	Percentage of crop	
---- Million pounds ----		Cents			Million pounds	Percent	
Dark air-cured, types 35-36							
1967	17.8	14.8	3.0	40.8	37.3	1.4	9.0
1968	17.1	15.0	2.1	47.4	38.3	.7	3.9
1969	23.5	21.2	2.3	40.3	39.7	4.8	26.5
1970	19.3	16.7	2.6	46.0	41.4	1.0	6.8
1971	19.3	17.4	1.9	47.1	43.1	1.7	10.7
1972	17.0	14.0	2.3	50.3	45.2	1.2	.8
1973				^{2/} 62.0	47.6		^{2/} .1
Sun-cured, type 37							
1967	1.6	1.2	.4	45.2	37.3	^{3/} 25	1.9
1968	1.3	1.1	.2	53.2	38.3	^{3/} 1	.1
1969	1.8	1.5	.3	52.8	39.7	^{3/} 1	.1
1970	1.3	1.1	.2	53.8	41.4	^{3/} 3	.3
1971	1.2	1.0	.2	54.1	43.1	0	---
1972	.6	.4	.2	57.9	45.2	0	---
1973				^{2/} 68.3	47.6		^{2/} 0

^{1/} Subject to revision. ^{2/} Through December 17. ^{3/} Quantity placed under loan reported in thousand pounds.

Table 12--Cigar tobacco, types 41-62: Domestic supplies, disappearance, and season average prices, for 1967-73

Crop year	Acreage harvested	Yield per acre	Supply			Disappearance			Average price per pound to growers
			Production	Beginning stocks 1/	Total supply	Total	Domestic	Exports	
Thous. acres	Pounds	Million pounds						Cents	
Pennsylvania Seedleaf Filler (type 41)									
1967	21.0	1,825	38.3	112.3	150.6	41.9	41.3	0.6	28.0
1968	21.0	1,775	37.3	108.7	146.0	40.9	40.0	.9	30.0
1969	20.0	1,825	36.5	105.1	127.9	44.3	43.7	.6	30.0
1970	17.0	1,800	30.6	97.3	129.3	40.9	40.7	.2	31.0
1971	15.2	1,610	24.5	87.0	111.5	41.3	40.6	.4	36.0
1972	13.0	1,400	18.2	70.2	88.4	34.7	34.4	.3	46.0
1973 2/	14.0	1,700	23.8	53.7	77.5				
Ohio, Miami Valley Filler (type 41-44)									
1967	2.3	1,580	3.6	15.5	19.1	6.2	6.2	---	29.0
1968	2.0	1,670	3.4	12.9	16.3	5.4	5.4	---	31.0
1969	1.7	1,650	2.8	10.9	13.7	4.7	4.7	---	32.5
1970	1.6	1,750	2.9	9.0	11.9	4.1	4.1	---	38.0
1971	2.0	1,850	3.8	7.8	11.6	4.6	4.6	---	41.0
1972	2.3	1,750	4.0	7.0	11.0	4.2	4.2	---	44.0
1973 2/	2.2	1,500	3.3	6.8	10.1				
Puerto Rico Filler (type 46) 3/									
1967	7.6	1,419	10.8	40.5	51.3	16.9	16.9	---	4/33.1
1968	6.0	1,282	7.6	34.4	42.0	16.2	16.2	---	4/33.3
1969	4.7	1,303	6.1	25.8	31.9	12.6	12.6	---	4/33.6
1970	3.2	1,397	4.5	19.3	23.8	8.8	8.8	---	4/36.1
1971	4.8	1,418	6.7	15.0	21.7	9.0	9.0	---	4/39.8
1972	6.0	783	4.7	12.7	17.4	8.2	8.2	---	4/43.2
1973 2/	6.0	1,333	8.0	9.2	17.2				
Total Cigar Filler (types 41-46)									
1967	30.9	1,707	52.7	168.3	221.0	65.0	64.4	.6	29.1
1968	29.0	1,666	48.3	156.0	204.3	62.5	61.6	.9	30.5
1969	26.4	1,721	45.4	141.8	187.2	61.6	61.0	.6	30.6
1970	21.8	1,737	38.0	125.6	163.6	53.8	53.6	.2	32.1
1971	22.0	1,587	35.0	109.8	144.8	54.9	54.5	.4	37.3
1972	21.3	1,264	26.9	89.9	116.8	47.1	46.8	.3	45.2
1973 2/	22.2	1,581	35.1	69.7	104.8				
Connecticut Valley Binder (types 51-53)									
1967	1.5	1,819	2.7	16.4	19.1	7.9	5.7	2.2	54.5
1968	1.6	1,808	2.8	11.2	14.0	5.1	4.7	.4	59.5
1969	1.6	1,434	2.3	8.9	11.2	4.2	3.9	.3	58.2
1970	1.7	1,756	2.9	7.0	9.9	2.7	2.4	.3	65.5
1971	1.6	1,743	2.8	7.2	10.0	2.6	2.5	.1	65.7
1972	1.6	1,725	2.7	7.4	10.1	2.6	2.5	.1	70.2
1973 2/	1.5	1,728	2.6	7.5	10.1				
Southern Wisconsin Binder (type 54)									
1967	3.8	1,905	7.2	20.7	27.9	8.0	8.0	---	34.4
1968	3.7	1,990	7.4	19.9	27.3	7.7	7.7	---	36.8
1969	3.7	1,740	6.4	19.6	26.0	9.3	9.3	---	40.2
1970	4.4	2,135	9.4	16.7	26.1	7.3	7.3	---	50.3
1971	5.3	2,270	12.0	18.8	30.8	10.5	10.5	---	55.6
1972	5.0	1,700	8.5	20.3	28.8	9.4	9.4	---	48.0
1973 2/	4.9	1,950	9.6	19.4	29.0				
Northern Wisconsin Binder (type 55)									
1967	4.5	1,975	8.9	29.3	38.2	9.3	8.9	.4	34.1
1968	4.0	1,670	6.7	28.9	35.6	14.9	14.5	.4	37.9
1969	3.7	1,815	6.7	20.7	27.4	8.8	8.5	.3	43.4
1970	4.4	2,055	9.0	18.6	27.6	9.2	9.1	.1	52.0
1971	5.3	1,980	10.5	18.4	28.9	9.9	9.9	#	54.0
1972	5.8	1,750	10.2	19.0	29.2	9.7	9.7	#	49.0
1973 2/	5.3	1,950	10.3	19.5	29.8				

See footnotes at end of table.

Continued --

Table 12.--Cigar tobacco, types 41-62: Domestic supplies, disappearance, and season average prices, for 1967-73--Cont.

Crop year	Acreage harvested	Yield per acre	Supply			Disappearance			Average price per pound to growers
			Production	Beginning stocks ^{1/}	Total supply	Total	Domestic	Exports	
Total Wisconsin Binder (types 54-55)									
1967	8.3	1,943	16.1	50.0	66.1	17.3	16.9	0.4	34.2
1968	7.7	1,824	14.1	48.8	62.9	22.6	22.2	.4	37.3
1969	7.4	1,778	13.1	40.3	53.4	18.1	17.8	.3	41.8
1970	8.8	2,095	18.4	35.3	53.7	16.5	16.4	.1	51.1
1971	10.6	2,125	22.5	37.2	59.7	20.4	20.4	#	54.9
1972	10.8	1,727	18.7	39.3	58.0	19.1	19.1	#	48.5
1973 ^{2/}	10.2	1,250	19.9	38.9	58.8				
Total Cigar Binder (types 51-55)									
1967	9.8	1,924	18.8	66.4	85.2	25.2	22.6	2.6	37.1
1968	9.2	1,821	16.9	60.0	76.9	27.7	26.9	.8	41.0
1969	9.0	1,710	15.4	49.2	64.6	22.3	21.7	.6	44.3
1970	10.5	2,041	21.3	42.3	63.6	19.2	18.8	.4	53.1
1971	12.2	2,075	25.3	44.4	69.7	23.0	22.9	.1	56.1
1972	12.1	1,727	21.4	46.7	68.1	21.7	21.6	.1	51.3
1973 ^{2/}	11.7	1,921	22.5	46.4	68.9				
Connecticut Valley Shade-grown (type 61)									
1967	8.5	1,124	9.6	15.0	25.6	12.9	9.6	3.3	360.0
1968	8.4	1,215	10.2	12.7	22.9	10.8	9.1	1.7	280.0
1969	7.3	1,288	8.1	12.1	20.2	8.0	7.0	1.0	400.0
1970	6.0	1,535	9.3	12.2	21.5	7.5	6.6	1.0	400.0
1971	4.7	1,535	7.7	13.9	21.6	8.4	5.8	2.6	400.0
1972	4.0	1,250	5.1	13.2	18.5	7.5	4.8	2.8	480.0
1973 ^{2/}	5.0	1,344	6.7	10.7	17.4				
Georgia-Florida Shade-grown (type 62)									
1967	5.1	1,572	8.0	8.7	16.7	7.9	6.3	1.6	245.0
1968	5.0	1,556	7.9	8.8	16.7	9.2	7.1	2.1	270.0
1969	5.0	1,569	7.8	7.5	15.3	6.1	5.2	.9	280.0
1970	3.6	1,590	5.6	9.2	14.8	6.7	5.8	.9	270.0
1971	3.0	1,582	4.7	8.1	12.8	6.2	5.4	.8	262.0
1972	3.0	1,517	4.6	6.6	11.2	4.2	3.8	.4	280.0
1973 ^{2/}	2.6	1,408	3.7	7.0	10.7				
Total Shade-grown (types 61-62)									
1967	13.6	1,292	17.6	24.7	42.3	20.8	15.9	4.9	308.0
1968	13.4	1,343	18.1	21.5	39.6	20.0	16.2	3.8	276.0
1969	11.3	1,411	15.9	19.6	35.5	14.1	12.2	1.9	341.3
1970	9.6	1,555	14.9	21.4	36.3	14.3	12.4	1.9	351.0
1971	7.7	1,614	12.4	22.0	34.4	14.6	11.2	3.4	347.5
1972	7.0	1,365	9.7	19.8	29.5	11.8	8.6	3.2	384.5
1973 ^{2/}	7.6	1,366	10.4	17.7	28.1				
Grand Total Cigar Tobacco (types 41-62)									
1967	54.3	1,642	89.1	259.4	348.5	111.0	102.9	8.1	85.7
1968	51.7	1,610	83.3	237.5	320.8	110.2	104.7	5.5	85.9
1969	46.7	1,545	76.7	210.6	287.3	98.0	94.9	3.1	97.7
1970	41.9	1,771	74.2	189.3	263.4	87.3	84.8	2.5	102.3
1971	41.9	1,734	72.7	176.2	248.9	92.5	88.6	3.9	96.7
1972	40.7	1,422	58.0	156.4	214.4	80.6	77.0	3.6	104.2
1973 ^{2/}	41.5	1,638	68.0	133.8	201.8				

^{1/} October 1 for types 41-55; July 1 for types 61-62.

^{2/} Subject to revision.

^{3/} Puerto Rican planting occurs late in calendar year; projected for 1973.

^{4/} Excludes payment by Puerto Rican Government; 17 cents per pound in 1972.

^{5/} Less than 50,000 pounds.

Foreign-grown cigar leaf tobacco: U.S. imports and stocks, 1970-73

Country of origin	Imports for consumption				Dealers and manufacturers stocks			
	Year ending September 30—				October 1—			
	1970	1971	1972	1973	1970	1971	1972	1973
	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
Philippines	36.6	46.7	29.1	25.1	38.9	39.9	37.7	33.2
Dominican Republic	12.5	13.3	11.4	15.3	9.5	10.8	10.4	16.6
Brazil	7.6	6.5	3.2	21.0	9.2	9.5	7.2	8.8
Colombia	8.1	7.4	10.0	11.7	10.1	8.2	10.6	13.4
Paraguay	5.6	2.8	4.5	8.0	8.9	6.7	4.3	7.3
Mexico	3.4	5.0	6.7	6.5	5.9	6.3	6.7	6.4
Indonesia	2.6	4.2	2.5	6.4	3.4	4.2	4.6	10.2
All others	14.2	21.7	19.1	19.0	13.2	12.7	13.6	19.5
Total	90.6	107.6	86.5	113.0	99.1	98.3	95.2	115.3

Binder Supplies Up Slightly

Binder tobacco supplies for the season are 1 percent above 1972/73 due to a slightly larger crop. Yields are up but acreage is down. At the end of this season about the same carryover is likely. Sunshine, winds, and low humidity benefited tobacco hanging in curing sheds. Also, there was little hail or wind damage through the harvest season. Quality should be very good if the tobacco cures out well. Late plantings and dry weather during the summer affected the crop but August and September rains resulted in better growth for the late tobacco.

Cigar binder disappearance last season was almost 22 million pounds, about 1½ million below a year earlier. Disappearance decreased for Wisconsin types but was about the same for Connecticut Valley binder.

Loose leaf chewing tobacco output, the principal outlet for Wisconsin binder, gained almost 1½ million pounds. Loose leaf manufacturers continue to use other kinds of leaf to supplement Wisconsin leaf. At

current levels of use, Connecticut tobacco is used primarily for natural binder in higher-priced cigars.

Wrapper Supplies Decline

Cigar wrapped tobacco supplies for 1973/74 are about 5 percent below last year. An increase in Connecticut Valley wrapper supplies brought the total crop up 7 percent after 4 straight years of decline. Total carryover was down about 11 percent from last year. If disappearance steadies, carryover next July 1 will drop 8 percent below last July's 18 million pounds.

By shifting to homogenized wrapper, manufacturers utilize the entire leaf and thus reduce their overall wrapper leaf requirements. During July-October 1973, exports for cigar wrapper was below the level of a year earlier. Exports were up for Georgia-Florida but down for Connecticut Valley wrapper. United Kingdom manufacturers again took a sizable quantity of Connecticut Valley wrapper this season to supply their expanding cigar market.

INTERNATIONAL DEVELOPMENTS

World Tobacco Harvest Up Slightly¹

World tobacco production in 1973 of about 10½ billion pounds is up 3 percent from 1972. Production increased in North America, Europe, Asia, and Oceania, but declined in Africa and South America.

Flue-cured production was 6 percent above last year. This estimate includes recent indications for Peoples Republic of China (PRC), the largest producing country, where a substantial increase occurred. Output also gained in the United States and Canada. Brazil, India, and Rhodesia registered

declines. In most other areas, production held about the same as the year before, but remains substantially above the 1965-69 average. World demand for cigarette type tobacco has increased and Rhodesia's trade is held down by U.N. sanctions (table 14).

In Rhodesia, drought conditions held the 1973 flue-cured harvest below the production goal of 132 million pounds. With the stockpile of old crops apparently sold, the quota for 1974 has been raised 40 percent to 200 million pounds. While sanctions on Rhodesian trade continue, the country has shifted its agriculture away from tobacco.

Production in Canada gained about one-half this season as growers made up the previous season's shortfall. In Ontario, the major production area,

¹Data summarized from "World Production Tobacco," Foreign Agriculture Circular FT 6-73, December 1973, available from Foreign Agricultural Service, Room 5918, USDA, Washington, D.C. 20250.

Table 13.--Tobacco: Acreage, yield, production, stocks, supply, disappearance, price and crop value, United States and Puerto Rico, 1947-73

Crop year	(Farm-sales weight)									
	Acreage	Yield per acre	Production	Stocks <u>1/</u>	Supply	Disappearance <u>1/</u>			Average price per pound to growers	Crop value
						Total	Domestic	Exports		
	1,000 acres	Pounds	----- Million pounds -----						Cents	Million dollars
United States										
Average:										
1947-49	1,676	1,208	2,019	2,947	4,965	1,908	1,417	491	45.9	926
1950-54	1,690	1,292	2,184	3,382	5,566	2,006	1,479	527	51.2	1,118
1955-59	1,242	1,541	1,914	4,095	6,009	1,951	1,397	554	56.0	1,072
1960-64	1,159	1,879	2,178	3,911	6,089	2,037	1,468	569	60.0	1,307
1965	977	1,898	1,855	4,496	6,351	2,000	1,452	538	65.1	1,207
1966	972	1,939	1,885	4,351	6,236	2,098	1,392	704	66.5	1,252
1967	960	2,050	1,968	4,140	6,108	2,020	1,372	648	66.8	1,316
1968	879	1,945	1,710	<u>2/</u> 4,088	5,798	1,975	1,352	623	69.5	1,189
1969	918	1,964	1,803	3,823	5,626	1,949	1,308	640	71.8	1,296
1970	898	2,122	1,906	3,678	5,584	1,919	1,278	639	72.9	1,389
1971	839	2,034	1,705	<u>2/</u> 3,667	5,372	1,886	1,313	571	78.6	1,340
1972	843	2,074	1,749	<u>2/</u> 3,488	5,237	1,948	1,309	639	83.0	1,453
1973 <u>3/</u>	886	2,011	1,783	<u>2/</u> 3,289	5,072				*89.7	*1,539
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
1950-54	1,728	1,282	2,215	3,430	5,645	2,036	1,508	527	50.9	1,127
1955-59	1,270	1,528	1,941	4,147	6,088	1,981	1,426	555	55.6	1,080
1960-64	1,188	1,861	2,211	3,957	6,168	2,006	1,497	569	59.7	1,319
1965	994	1,882	1,871	4,559	6,430	2,027	1,489	538	64.8	1,212
1966	981	1,934	1,899	4,403	6,300	2,121	1,415	704	66.2	1,256
1967	967	2,045	1,979	4,181	6,160	2,037	1,390	648	66.7	1,319
1968	885	1,941	1,718	<u>2/</u> 4,122	5,840	1,992	1,368	623	69.3	1,191
1969	923	1,960	1,810	3,849	5,658	1,961	1,320	640	71.7	1,298
1970	902	2,120	1,912	3,698	5,609	1,926	1,288	639	72.9	1,391
1971	844	2,031	1,714	<u>2/</u> 3,682	5,394	1,895	1,322	571	78.4	1,342
1972	849	2,067	1,754	<u>2/</u> 3,501	5,255	1,957	1,318	639	83.0	1,455
1973 <u>3/</u>	892	2,007	1,736	<u>2/</u> 3,298	5,094				*89.5	*1,563

1/ For flue-cured and cigar wrapper, year beginning July 1; for all other types, October 1. 2/ Includes flue-cured carried over on farms; 1968, 13 million pounds; 1971, 16 million pounds; 1972, 17 million pounds; 1973, 7 million pounds for flue-cured and 13 million pounds for burley. 3/ Preliminary. * Estimated.

Table 14.—Flue-cured and Oriental tobacco production in specified countries, average 1965-69, 1972-73

Country	Average 1965-69	1972 ¹	1973 ²	Country	Average 1965-69	1972 ¹	1973 ²
	Million pounds	Million pounds	Million pounds		Million pounds	Million pounds	Million pounds
Flue-cured:				Flue-cured—			
Canada	208	181	267	continued:			
Mexico	12	15	14	Cambodia	10	5	4
Brazil	144	171	149	South Korea	106	178	170
Angola	9	8	8	Pakistan	60	24	20
Mozambique	5	6	8	Philippines	76	56	43
Zambia	13	12	15	Thailand	37	52	46
Malawi	4	19	22	South Vietnam	5	6	6
Rhodesia	187	146	110	Total	1,500	1,523	1,478
Tanzania	11	21	22	Oriental:			
Uganda	4	6	6	Greece	204	161	173
South Africa	34	41	38	Bulgaria	242	265	270
Iran	10	11	9	Yugoslavia	94	106	116
Taiwan	39	36	35	Turkey	345	399	348
Ceylon	7	11	11	Total	885	931	907
India	212	307	245				
Indonesia	35	29	29				
Japan	272	182	201				

¹ Subject to revision. ² Preliminary. ³ West Pakistan only. ⁴ Estimated.

Compiled from reports of Foreign Agricultural Service.

auctions began October 25, about 2 weeks earlier than usual. Prices for the first 6 weeks' sales averaged 75 U.S. cents per pound compared with 77 cents a year earlier. For the entire crop, buyers have assured growers an average of 72.5 cents per pound.

Barley production in 1973 was down 10 percent from 1972 but remained 19 percent above the 1965-69 average. The short U.S. crop represented most of the world drop. Increased foreign production partly offset reduced U.S. production. Although output was lower in Italy and South Korea, foreign production gains were recorded for 1973 in Mexico, Greece, Argentina, Japan, and Malawi. Those countries have been increasing acreage and offering sizable portions of their crop for export.

Oriental leaf production was virtually unchanged in 1973, but remains 5 percent above the 1965-69 average. Russia's output increased. In Greece and Turkey, old crop stocks have been reduced and 1972 prices surged. With output down this year in Turkey, growers are anticipating a strong market for their crops. U.S. firms have recently purchased substantial amounts of oriental leaf in Italy where the buyers' premium makes the price attractive.

U.S. Trade Legislation

On December 11, the House of Representatives approved the Trade Reform Act of 1973. The bill contains the basic authority required for U.S. participation in GATT trade negotiations next year. Following House passage, the legislation goes to the Senate.

EC Enlargement Negotiations Continue

Since March, the United States has been

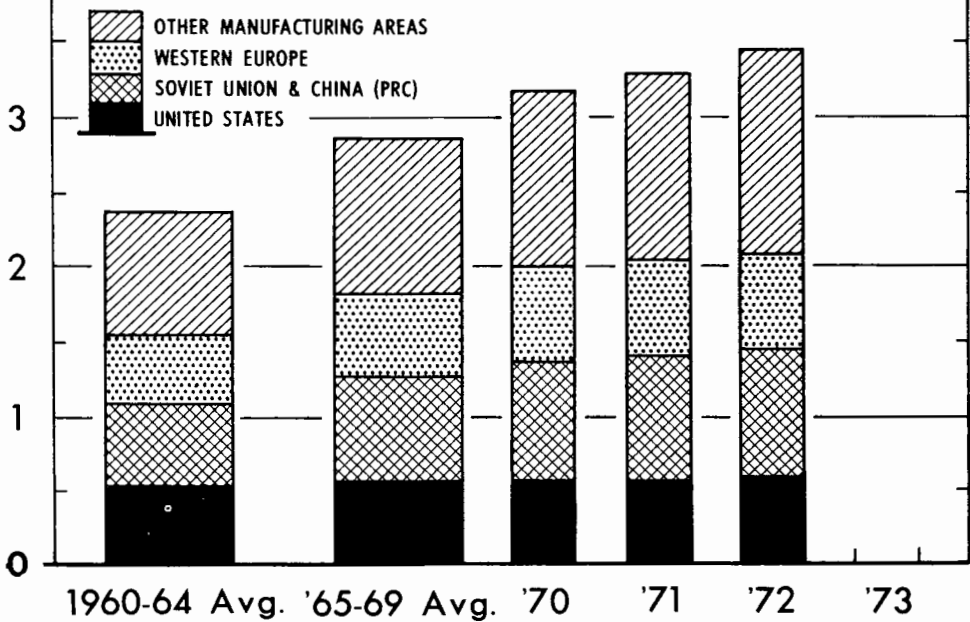
negotiating under Article 24:6 of the GATT to protect the trading rights of U.S. farmers, including tobacco growers, from the adverse effects of EC enlargement. Tariffs of the United Kingdom, Denmark, and Ireland will increase as a result of these countries joining the EC and U.S. tobacco would be subject to substantial higher duties in these countries. In the tobacco area, U.S. objections have highlighted the EC tariff category 2401(A), the so-called cigar wrapper tariff. Although specifically designed to protect Italian cigar wrapper production, the duty is applied to cigarette leaf. As U.S. stemmed leaf rises in price, it becomes subject to this higher-rate tariff category.

As the largest tobacco market by far of the 3 countries that joined the EC this year, the United Kingdom's membership may affect UK's position as the leading U.S. export market for unmanufactured tobacco. By the end of the transition period in 1978, EC tobacco policies—primarily the common external tariff (CXT) on tobacco and an ad valorem tax—will have raised the cost of U.S. tobacco to British cigarette manufacturers. Also, an extension of duty-free preference to competing tobacco producers, and the CAP price support and buyers' premiums for tobacco may widen the already appreciable price gap between U.S. and competing tobaccos, and bring about imports of types and qualities of tobaccos not previously used in British cigarettes.¹

¹Kenneth E. Howland, "U.S. Tobacco Faces Altered Position in the U.K. Market", *Foreign Agriculture*, Dec. 10, 1973, pp. 10-12.

WORLD CIGARETTE OUTPUT

TRIL. PIECES

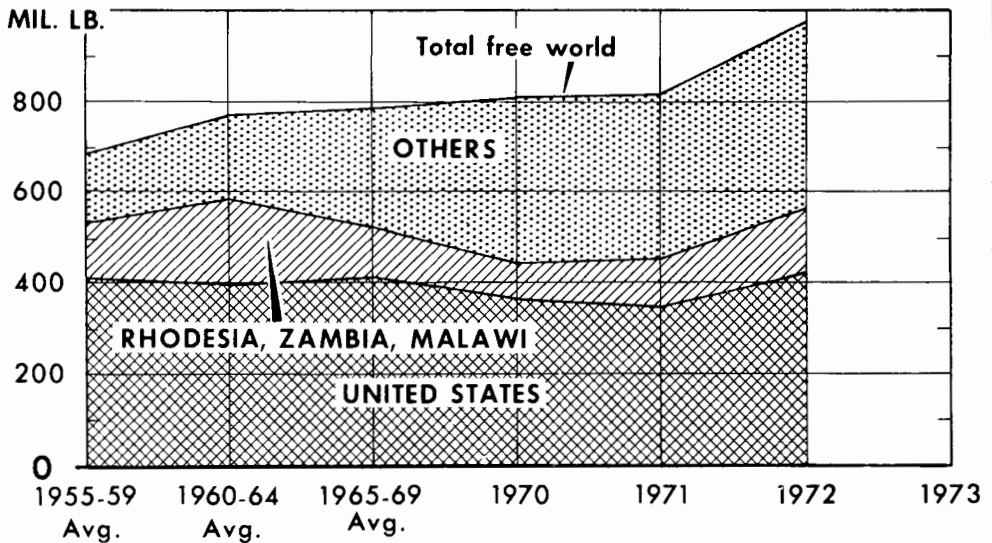


U.S. DEPARTMENT OF AGRICULTURE

NEG. FAS 2324-73 (10)

FOREIGN AGRICULTURAL SERVICE

FREE WORLD EXPORTS OF FLUE-CURED TOBACCO



U.S. DEPARTMENT OF AGRICULTURE

NEG. FAS 2400-73 (7)

FOREIGN AGRICULTURAL SERVICE

Table 15.—Kingdom tobacco: Imports, stocks, clearances, and exports, 1971-73

Item	January-September			Item	January-September		
	1971	1972	1973 [≠]		1971	1972	1973 [≠]
	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>		<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
Imports, by source:				Gross clearances:			
United States	61	61	66	Full duty rate ¹	112	108	115
Commonwealth	101	105	110	Commonwealth rate ²	103	118	125
Other	37	34	33	Total	215	225	240
Total	199	200	209	Flue-cured:			
Exports:				United States	89	83	87
Manufactured products	39	43	43	Canada	37	48	43
Unmanufactured	6	6	6	India	31	32	34
Stocks, Sept. 30:				Zambia and Malawi	9	11	15
Flue-cured	345	317	296	Rhodesia	(¹)	(¹)	(¹)
Other	56	57	23	Other	21	26	49
Total	401	374	319	Total	188	200	228
				Net clearances:	163	172	187

¹ Equivalent to \$12.10 per pound. ² Equivalent to \$11.92 per pound. ³ Negligible. [≠] Estimated.

Compiled from Official United Kingdom sources.

RECENT PUBLICATIONS

Recent Department publications pertaining to tobacco and tobacco products that may be obtained by writing to Economic Research Service Publications, Room 0054, USDA, Washington, D.C. 20250.

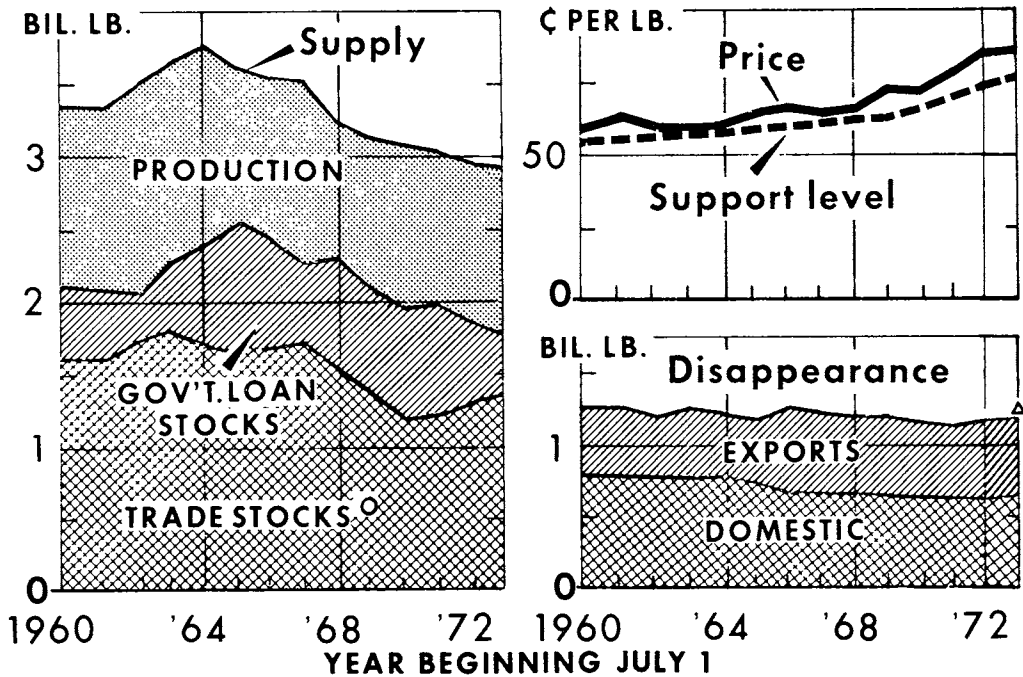
"Outlook for Tobacco," by Robert H. Miller, talk presented at the National Agricultural Outlook Conference, USDA, Washington, D.C., December 19. The conference was held about 2 months earlier than usual to give farmers and farm suppliers more time to plan for 1974 production.

"Tobacco and Tobacco Products Consumption for 1985," by Robert H. Miller, talk presented at the 25th National Tobacco Workers Conference, Hamilton, Ont., Aug. 9, 1973. The talk summarizes recent

statistical analyses in this general field and projects U.S. consumption of tobacco and tobacco products into the future. Population increases are certain to drive up the number of cigarettes smoked in 1985, according to the paper, but total tobacco use could fall with less tobacco per cigarette.

"A Dynamic Model of the U.S. Tobacco Economy," by Jitendar S. Mann, reprinted from *Agricultural Economics Research*, Vol. 25, No. 3, July 1973. This article develops a 14-equation model for (1) flue-cured acreage, (2) burley acreage, (3) flue-cured price, (4) burley price, and (5) consumer demand for cigarettes. Coefficients are estimated using 1954-70 data. Reduced form and impact multipliers are derived.

FLUE-CURED TOBACCO: SUPPLY, PRICE, AND USE

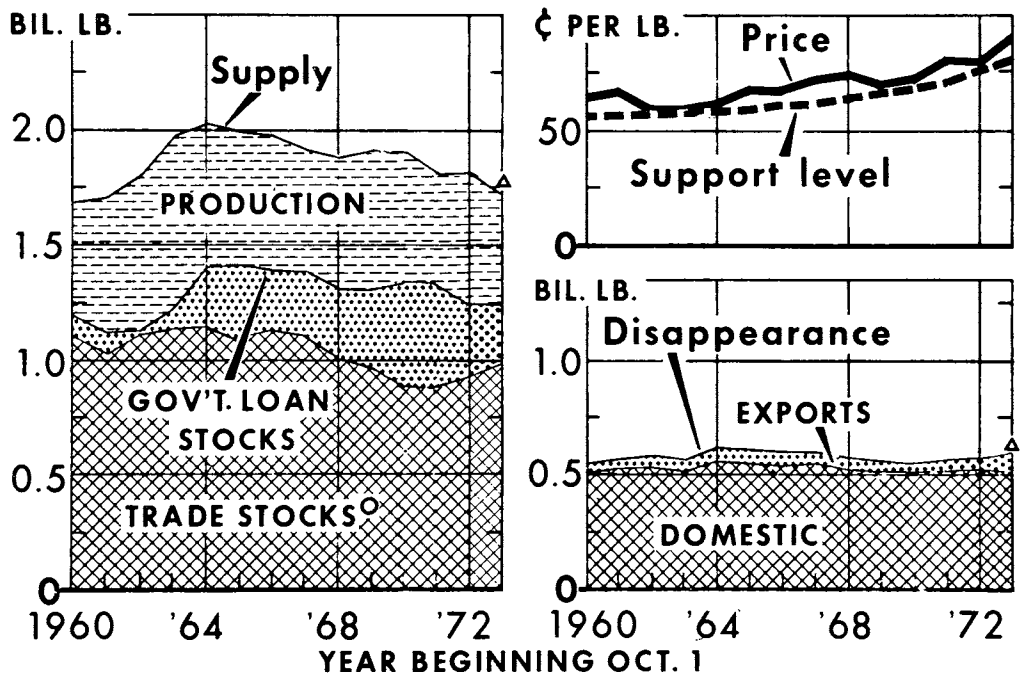


○ MANUFACTURERS' AND DEALERS' △ PRELIMINARY INDICATION.

U.S. DEPARTMENT OF AGRICULTURE

NEG. ERS 223 - 73 (12) ECONOMIC RESEARCH SERVICE

BURLEY TOBACCO: SUPPLY, PRICE, AND USE



○ MANUFACTURERS' AND DEALERS' △ PRELIMINARY INDICATION.

U.S. DEPARTMENT OF AGRICULTURE

NEG. ERS 381 - 73 (12) ECONOMIC RESEARCH SERVICE

STATISTICAL SUMMARY

Item	Unit or base period	1972		1973			Last data as percentage of year earlier
		Oct.	Nov.	Sept.	Oct.	Nov.	
Average price at auctions							
Flue-cured	Ct. per lb.	82.8	73.1	89.6	89.3	86.1	118
Burley	Ct. per lb.	Closed	73.5	Closed		87.9	111
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.	72.7			76.6		105
Burley	Ct. per lb.	74.9			78.9		105
Maryland	Ct. per lb.	No support			No support		---
Virginia fire-cured	Ct. per lb.	50.8			53.5		105
Ky.-Tenn. fire-cured	Ct. per lb.	50.8			53.5		105
Ky.-Tenn. dark air-cured	Ct. per lb.	45.2			47.6		105
Virginia sun-cured	Ct. per lb.	45.2			47.6		105
Connecticut Valley cigar binder	Ct. per lb.	51.9			54.6		105
Wis. binder and Ohio filler	Ct. per lb.	37.5			39.5		105
Puerto Rican filler	Ct. per lb.	38.9			41.0		105
Parity index 2/	1967=100	129	130	150	150	151	116
Industrial production index 3/	1967=100	119.2	120.2	126.8	127.0	127.2	106
Employment	Mil.	82.7	82.7	84.8	85.0	85.8	104
Personal income 4/	Bil. dol.	967.0	977.5	1,058.5	1,067.5	1,076.2	110
Taxable removals							
Cigarettes	Bil.	45.0	51.3	56.8	46.1		102
Cigars and cigarillos	Mil.	594.8	693.2	619.6	556.1		94
Accumulated from Jan. 1							
Cigarettes	Bil.	416.0	467.3	391.0	437.1		105
Cigars and cigarillos	Mil.	5,402.1	6,095.2	4,545.8	5,101.9		94
Invoiced to domestic customers			Jan.-Sept.		Jan.-Sept.		
Accumulated from Jan. 1							
Smoking tobacco	Mil. lb.	40.8			38.4		94
Chewing tobacco	Mil. lb.	55.0			56.3		102
Snuff	Mil. lb.	19.4			19.2		99
Tax-exempt removals							
Cigarettes	Bil.	4.2	2.9	4.9	4.9		114
Exports	Bil.	2.9	3.5	4.4	3.5	3.8	109
Cigars and cigarillos	Mil.	12.4	10.6	12.8	12.6		102
Accumulated from Jan. 1							
Cigarettes	Bil.	36.1	39.0	36.6	41.5		115
Exports	Bil.	24.5	28.0	27.0	30.6	34.4	123
Cigars and cigarillos	Mil.	111.5	118.6	97.7	110.2		99
Invoiced for export							
Accumulated from Jan. 1							
Smoking tobacco	Mil. lb.	1.0			1.2		120
Chewing tobacco	Mil. lb.	.1			.1		100
Wholesale price indexes 5/							
Cigarettes (reg. nonfilter)	1967=100	121.7	121.7	126.3	126.3	126.3	104
Cigars	1967=100	109.0	109.0	111.2	112.2	112.8	103
Smoking tobacco	1967=100	119.9	119.9	124.0	124.0	124.0	103
Plug chewing tobacco	1967=100	126.4	126.4	128.8	128.8	128.8	102
Snuff	1967=100	138.6	138.6	149.6	149.6	157.9	114
Consumer price indexes (urban) 6/							
Cigarettes (reg. nonfilter)	1967=100	135.9	136.0	139.5	139.7	139.9	103
Cigarettes (filter tip king)	1967=100	136.2	136.2	140.1	140.2	140.4	103
Cigars (domestic reg. size)	1967=100	111.3	111.2	113.2	113.2	113.6	102
Imports of tobacco							
Cigarette leaf	Mil. lb.	14.2	14.9	15.0	13.8	17.3	116
Cigar tobacco 7/	Mil. lb.	8.8	8.3	9.7	11.9	12.2	147
Accumulated from Jan. 1							
Cigarette leaf	Mil. lb.	126.8	141.7	111.5	125.3	142.6	101
Cigar tobacco 7/	Mil. lb.	74.3	82.6	86.0	97.9	110.1	133

See footnotes at end of table.

Continued -

STATISTICAL SUMMARY—CONTINUED

Item	Unit or base period	1972		1973		Last data as percentage of a year earlier	
		Sept.	Oct.	Aug.	Sept.		Oct.
Exports of leaf tobacco							
(farm-sales weight)							
Flue-cured	Mil. lb.	45.4	49.8	32.9	51.3	68.3	137
Burley	Mil. lb.	5.4	5.7	8.0	6.7	5.3	93
Maryland	Mil. lb.	1.4	2.3	.9	2.1	1.1	48
Virginia fire- & sun-cured	Mil. lb.	.3	.3	.3	.3	.4	133
Ky.-Tenn. fire-cured	Mil. lb.	1.1	1.8	1.6	2.2	1.5	83
Ky.-Tenn. dark air-cured	Mil. lb.	.1	.1	.1	0	0	---
Black Fat	Mil. lb.	.2	.3	.2	.3	*	---
Cigar wrapper	Mil. lb.	.5	.3	.2	.1	.2	67
Connecticut binder	Mil. lb.	*	*	*	*	*	---
Wisconsin binder	Mil. lb.	0	0	0	0	0	---
Accumulated from beginning of marketing year <u>8</u> /							
Flue-cured	Mil. lb.	121.1	170.9	68.7	120.0	188.3	110
Burley	Mil. lb.	54.7		68.9	75.6		138
Maryland	Mil. lb.	8.0		10.0	12.1		151
Virginia fire- & sun-cured	Mil. lb.	3.7		4.0	4.3		116
Ky.-Tenn. fire-cured	Mil. lb.	17.3		18.5	20.7		120
Ky.-Tenn. dark air-cured	Mil. lb.	.5		.7	.7		140
Black Fat	Mil. lb.	2.9		2.8	3.1		107
Cigar wrapper	Mil. lb.	.8	1.1	.3	.4	.6	55
Connecticut binder	Mil. lb.	.1		.1	.1		100
Wisconsin binder	Mil. lb.	*		*	*		---
Cigar filler	Mil. lb.	.4		.3	.3		75
Exports of manufactured tobacco							
in bulk	Mil. lb.	1.2	1.5	2.9	2.3	2.4	160
Accumulated from Jan. 1	Mil. lb.	23.3	24.8	15.8	18.1	20.5	83
		Quarterly data					
		1972		1973			
		July-Sept.	Oct.-Dec.	July-Sept.	Oct.-Dec.		
Stocks of tobacco—1st of quarter <u>9</u> /							
Domestic types							
(farm-sales weight)							
Flue-cured	Mil. lb.	1,910	2,340	1,749	2,112		90
Burley	Mil. lb.	1,390	1,248	1,384	1,229		98
Maryland	Mil. lb.	61	54	60	53		98
Fire-cured	Mil. lb.	73	64	74	65		102
Dark air- and sun-cured	Mil. lb.	54	49	52	48		98
Cigar filler	Mil. lb.	102	90	76	70		78
Cigar binder	Mil. lb.	52	47	52	46		98
Cigar wrapper	Mil. lb.	20	20	18	18		90
Under Government loan <u>10</u> /	Mil. lb.	972	875	708	643		73
Tobacco sheet <u>11</u> /							
Cigarette types	Mil. lb.	27.6	24.4	23.5	23.5		96
Cigar types	Mil. lb.	2.3	1.7	1.9	1.5		88
Foreign types (farm-sales weight)							
Cigarette and smoking	Mil. lb.	423	390	454	434		111
Cigar	Mil. lb.	94	95	114	115		121
Tobacco outlets <u>12</u> /							
Seasonally adjusted data, annual rates, for charts, p.2							
Cigarettes							
Production	Bil.	578.0	612.0	622.8	612.0		100
Taxable removals	Bil.	530.8	561.6	567.6	574.0		102
Cigar production	Bil.	7.34	7.53	6.62	7.09		95
Smoking production	Mil. lb.	55.9	50.1	58.4	52.8		105
Chewing production							
Loose leaf	Mil. lb.	44.6	43.9	47.2	44.3		101
Plug and other	Mil. lb.	27.0	26.2	27.8	25.2		96
Snuff production	Mil. lb.	24.8	25.4	24.8	25.0		98
Exports of leaf							
Total	Mil. lb.	548.3	595.7	578.2	679.0		114
Flue-cured	Mil. lb.	465.1	481.4	460.9	564.0		117

1/1972 and 1973 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 weight equivalent. 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. Detail may not add to total due to rounding.

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