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coffee

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SECOND ESTIMATE OF 1978/79 WORLD COFFEE CROP DOWN SLIGHTLY

tion was lowered. Consequently, exportable production estimates for that country have been increased significantly.

Summary

The second USDA estimate of the 1978/79 world coffee crop is for total production of 74.5 million bags (60 kilograms each). This is slightly less than the first estimate, but remains 9 percent larger than the 1977/78 crop of 68.5 million bags. Based on past performance, the chances are two out of three that the second estimate of total production will not vary more than 2.9 percent from the final outturn for the year.

Exportable production, which represents total harvested production less domestic consumption in producing countries, is estimated at 56.5 million bags for 1978/79 and compares with 51.4 million bags for 1977/78.

For 1978/79, total output in North America is virtually unchanged from the first estimate with gains in El Salvador and Guatemala offset by decreases in Mexico and the Dominican Republic. Estimates for the two largest producers—Brazil and Colombia—are unchanged. The cold front that moved through the States of Parana and Sao Paulo on August 13-15 did not affect Brazil's 1978 crop (1978/79 year), which was already largely harvested. While it is too early to make more than preliminary assessments on the effect of the freeze on Brazil's 1979 crop, damage to coffee trees was relatively minor compared with the July 1975 frost.

In Africa, the major change was in Kenya where the first estimate has been reduced by some 360,000 bags because of the adverse effects of heavy and prolonged rainfall on flowering. Production estimates for recent crop years in Indonesia generally were revised upward, while apparent domestic consump-

Production

NORTH AMERICA

Total North American coffee production in 1978/79 is estimated at 15 million bags, with exportable production of 11.2 million. These estimates differ little in total from comparable data for the first estimate of the crop, since increases in some countries offset estimates of smaller outturns in others. The total output for 1978/79, however, is 1 million bags larger than in 1977/78, mainly because of substantially larger crops expected for El Salvador and Guatemala.

COSTA RICA

The estimated 1978/79 coffee crop remains at 1.6 million bags, slightly above the 1977/78 estimate of 1.55 million. Export contracts for the 1977/78 crop through July 15 are reported by the Coffee Office at 1.12 million bags, with an average value of \$3.67 per kilogram. As of the same time a year earlier, approximately 911,000 bags of the 1976/77 crop had been contracted for export at an average price of \$4.49 per kilogram. Reportedly, 14 percent of the 1977/78 crop will be retained for domestic consumption. The auction price for green coffee for the domestic market during October 1, 1977-July 15, 1978 averaged 85 cents per kilogram.

DOMINICAN REPUBLIC

Production of coffee in 1978/79 has been revised downward to 750,000 bags, or 25 percent below the 1977/78 crop of slightly over 1 million bags. Largely

responsible for the expected lower outturn are heavy rains during the flowering period, the good-year/bad-year cycle, and reduced use of fertilizer.

Because of the bigger harvest exports of coffee during 1977/78 are likely to reach 740,000 bags, or more than 50 percent higher than in 1976/77. For the same reason, exports in 1978/79 are likely to be well below those of the 1977/78 marketing year. Foreign exchange earnings in 1977/78 from coffee could reach \$160 million compared with \$130 million the previous year.

Local retail prices follow international price trends. The price for a 1-pound bag of roasted ground coffee peaked at \$4.81 per kilogram in 1977, and was \$3.79 as of mid-August 1978. The prices paid local coffee producers also are directly related to world prices for green coffee. As of mid-August of this year, farmers were getting \$100 per 60 kilogram bag. In 1977/78, revenues from the export tax on coffee amounted to an estimated \$35 million.

EL SALVADOR

Current indications are that the 1978/79 crop will approximate 2.9 million bags, or 200,000 bags above the previous estimate. In general, El Salvador has experienced very good, steady rainfall throughout the country. There were some high winds during March-April, but it appears that the crop set was nearly normal in most areas. Because of earlier than normal rains this year, especially in the low regions, some unseasonably early coffee may be picked beginning in late September or early October.

In part because El Salvador was out of the market for several months exports in 1977/78 may be around 1.5 million bags. This is lower than previously projected and sharply below 1976/77 shipments of 2.88 million bags.

GUATEMALA

The 1978/79 crop is estimated at 2.6 million bags, slightly above the first estimate, and 16 percent larger than the 1977/78 outturn. Weather for the 1978/79 crop through July was very good with abundant rainfall. Based on exports of 1.95 million bags through the third week of July, the National Coffee Growers Association (ANACAFE) expects total 1977/78 shipments to reach at least 2 million bags.

MEXICO

The estimate for Mexico's 1978/79 crop has been lowered to 3.8 million bags, down 200,000 bags from the first estimate and only slightly higher than the 1977/78 crop. The critical period was September when the crop was maturing. Trees flowered well in

Tapachula, Villa Juarez, and Coatepec, but less well in Jalapa.

Exports for 1977/78, as of early August, were forecast at 1.6 million bags. This is lower than previous expectations because of the low level of shipments during July and during the preceding 3 months. During January-May 1978 exports were approximately 40 percent less than in the same period of 1977. Mexico suspended coffee export registrations as of July 24, but reopened registrations on August 8 at a minimum registration price of \$1.30 per pound. The minimum export price was raised several times during the week following the Brazilian frost reports. On August 28, the Mexican Coffee Institute (INMECAFE) again raised the price to \$1.61 per pound, f.o.b., Laredo, from the previous minimum of \$1.55 on August 25.

The Confederation of Mexican Coffee Producers has urged that the "Domestic Coffee Reserve Plan" be discontinued, on the grounds that it is an unnecessary tax on free commerce. The plan was put into effect during April 1977 to ensure supplies for the domestic market in a period when international prices tended to discourage sales to local roasters.

SOUTH AMERICA

Coffee production in South America remains estimated at 33.8 million bags in 1978/79 with exportable production at 23 million bags. This compares with total and exportable productions for 1977/78 of 31 million and 20.9 million bags, respectively. Brazil's crop is estimated at 20 million bags, unchanged from the first estimate although the production range by states has narrowed somewhat. Colombia's crop continues to be estimated at 10.1 million bags, a record high. Of the other South American countries, only Peru's estimate is revised, being lowered by 50,000 bags.

BRAZIL

The cold front that moved through portions of Brazil's coffee areas during August 13-15, 1978, caused some frost damage to trees. The 1978 crop, which was largely harvested at the time, was not materially affected and remains estimated at 20 million bags. Based on a special survey of the frost-affected areas by personnel of the Office of the U.S. Agricultural Attaché in Brazil, a preliminary assessment of the frost is that the potential yield in 1979 of some 24-26 million bags may have been reduced by 5-6 million bags. An important observation is that nearly all coffee trees affected by this year's freeze will very likely recover to full production capacity after the 1979 harvest.

Unlike the 1975 frost that affected all coffee trees in northern Parana and western Sao Paulo, the recent freeze left a very unusual mosaic pattern of damage to coffee trees regardless of age or location. In Parana, over 50 percent of the coffee trees were affected to various degrees, with the heaviest damage occurring northwest, west, and southwest of Maringa. During a field trip completed just prior to the freeze, the production potential for Parana's 1979 coffee harvest was estimated by the Attache's Office at 6-7 million bags. This estimate is now reduced to a range of 3.5-4.5 million bags.

In Sao Paulo, the area most seriously affected by the freeze is located in a strip 60 kilometers wide, running east to west between the towns of Bauru and Dracena. The pre-frost estimate of Sao Paulo's 1979 crop potential of 8-8.5 million bags is now reduced to 5.5-6 million bags.

Less than 5 percent of the trees in southwest Minas Gerais were affected by the freeze. Therefore, potential 1979 crop for the State of 7-7.5 million bags is not likely to be reduced significantly.

Because some coffee trees in the State of Mato Grosso are reported to have been damaged by the frost, the production potential for 1979 for this and all other coffee producing states is revised from 3 million bags to a range of 2.5-3 million.

Prior to the August frost, practically all of the coffee trees in the major growing areas in Parana, Sao Paulo, and Minas Gerais showed excellent vegetative growth and continued recovery from the ravages of the far more damaging frost of July 17-18, 1975.

Also, the early 1978 drought in Parana did not affect coffee trees nearly as much as other crops, such as soybeans. This is because most of the coffee trees that were not killed outright by the 1975 frost were stumped close to the ground or heavily cutback. Because the deep and extensive root systems of the trees remained intact, they came through the dry season in relatively good condition. The result of the drought in the areas affected was mainly an acceleration in the ripening process of the cherries and some reduction in the size of the coffee beans of the 1978 crop.

Under normal growing, harvesting, and drying conditions, the dehusking yield range is from 20 to 21 kilograms of clean coffee beans from 40 kilograms of dried coffee cherries. As a result of the January-March drought, however, average dehusking yields based on field observations during August 3-14 are estimated at 16 to 17 kilograms for Parana and 19 to 20 kilograms for Sao Paulo. In Minas Gerais, however, where there was no significant drought, dehusking yields are estimated at 21 to 22 kilograms per 40 kilograms of dried cherries, or somewhat above average.

For these reasons, and because crops in Parana and Sao Paulo were almost completely harvested by

mid-August after the early ripening of the crop, the present estimate, by states, of Brazil's 1978 crop (1978/79 crop year) is revised slightly from the first estimate, as follows: Parana—4 million bags; Sao Paulo—6.5-7 million; Minas Gerais—6.5-7 million; and other states—3 million bags.

Preliminary trade data indicate that total coffee exports, green and soluble, during January-July were about 6.1 million bags, earning a total of US\$1.2 billion. This compares with exports during the first 7 months of 1977 of 8.7 million bags valued at \$2.2 billion.

IBC resolutions 35/78 and 36/78, effective July 31, 1978, maintained (1) the minimum export registration price for green coffee at \$1.50 per pound (\$3.31/kg) and the respective contribution quota, or export tax, at \$70 per 60 kilogram bag; and (2) the minimum registration prices of \$3.60 and \$4.40 per pound (\$7.94 and \$9.70/kg), respectively, for spray-dried and freeze-dried soluble coffee exported, and their contribution quota at 60 cents per pound (\$1.32/kg).

These prices have been in force since July 1, 1978, for July-September shipment and were to continue in force for August-October shipments unless changed by subsequent IBC resolutions. On August 26, the IBC raised the minimum registration price for green coffee exports to \$1.60 per pound (\$3.53/kg), effective August 28 for shipments through November, while the export tax was increased to \$72 per bag.

As a result of the August 13-15 frost, the IBC issued resolutions 37/78 and 38/78 closing "Sales Declarations" for export of green, roasted, and soluble coffees, effective August 15 until further notice. Subsequently, resolution 40/78 was issued, reopening registrations for coffee exports as of August 21, but maintaining in force all instructions relative to such exports as previously issued. Reportedly, the decision to suspend exports was initially taken so the IBC could examine the effects of the frost and to assess the damage to future crops. Since this evaluation would take considerable time, the IBC presumably decided not to await the assessment before reopening exports.

COLOMBIA

No significant developments on Colombian production since mid-May have modified crop estimates previously reported. The 1978/79 crop is estimated at 10.1 million bags, compared with 9.8 million in 1977/78. Weather conditions have been relatively normal, with rains prevailing during May and June, but tapering off around the end of June. Rainfall during this period favors blossoming of coffee trees and subsequent fruit formation for the fall harvest.

Colombia's exports of coffee for the 9 months ending June 30, 1978, were 4.9 million bags and are

expected to be around 6 million bags for the full marketing year. Exports to the United States through June were 1.4 million bags, or 29 percent of the total. Exchange earnings during October-June 1977/78 are estimated at \$1.24 billion, slightly more than during the same 9 months in 1976/77. Contraband exports are estimated at about 500,000 bags for 1977/78. These shipments would be in addition to the amount exported officially.

Colombia's repatriation requirement for coffee exports was reduced on July 11 from \$275 to \$259 per bag of 70 kilograms. This is the minimum amount of U.S. dollars that coffee exporters must deposit at the Banco de la Republica for each bag exported. The domestic support price for coffee remains at 7,300 pesos per 125 kilograms (about \$1.50 per kilogram). This support price is paid by the Coffee Growers Federation to growers; 6,800 pesos are in cash and 500 pesos go into a Coffee Savings Fund.

PERU

The 1978/79 crop is estimated at the 1977/78 level of 1.05 million bags. There are no changes foreseen in short-term production policies or practices. Although some improvement is being made in the coffee industry, the Ministry of Agriculture feels that if other production programs, such as the planting of new trees, do not get underway soon, output may drop over the next 5 years.

At the same time, lower prices and increasing world supplies may be disincentives to producers and adversely affect Peruvian exports, creating domestic supply problems possibly as early as next year. Interest rates on Agrarian Bank loans were increased from 16 to 27.5 percent, making production and capital investments more costly. The creation of the National Federation of Coffee Cooperatives in April of this year and improvements in transportation facilities for moving coffee from the Departments of San Martin and Cuzco to the coast are more positive factors favoring domestic output.

Exports in 1977/78 have been estimated at 770,000 bags, down from earlier expectations, because of declines in sales during the July-August period.

AFRICA

The rather sharp reduction in Kenya's output estimate to 1.25 million bags—bringing total African production for 1978/79 to 19 million bags—is the only significant change for the crop year. Total production, however, is more than 2 million bags larger than the 1977/78 output, with the expected return of the Ivory Coast crop to more normal levels after sharply lower yields last year. Exportable

production in Africa in 1978/79 is estimated at 17.5 million bags, and for 1977/78 at 15.4 million.

IVORY COAST

Prospects for the 1978/79 coffee crop continue to be excellent, with production estimated at 5 million bags. This would be half again as large as the low 1977/78 output, which suffered from drought. The coming crop got off to a good start with beneficial rains during the critical flowering period in February-March. Although May-June was drier than usual, rains during July were adequate.

The area planted to coffee trees in the Ivory Coast has not increased significantly during the past few years, partly because of the premium of 60,000 CFA (\$267) per hectare that the Government has been paying cocoa producers since 1975 for expanding acreage. Since no premium is paid for coffee plantings, the cocoa expansion program has been undertaken at the expense of coffee. Also, coffee demands more labor input than cocoa. The support price for both crops as of July remained at 250 CFA (\$1.11) per kilogram, a rate set in October 1977. An increase of around 10 percent is expected for the 1978/79 crops.

The proportion of Ivorian coffee exports going to the European Community continued to gain in 1977, with the Common Market taking 60 percent of total exports of approximately 4 million bags; about 15 percent went to the United States.

Exports of soluble coffee will rise with the enlargement of the local factory's processing capacity to 13,000 tons, green bean equivalent, from the previous 4,000-5,000 tons. Most of the increase in soluble output will go to neighboring West African countries.

KENYA

The 1978/79 crop estimate for Kenya is revised downward to 1.25 million bags, nearly one-fourth lower than the initial estimate, because of the adverse effect on flower setting of very heavy and prolonged rainfall. The severe rainfall not only damaged major roads, but thousands of dirt feeder roads were washed away. Consequently, in many cases farmers have been unable to deliver their products to market.

The Coffee Board of Kenya also has lowered its estimate for the 1977/78 crop to 1.1 million bags, or 28 percent below the 1976/77 output. Total coffee classified by the Board from October 1, 1977 through July 18, 1978 was 1.02 million bags, down 17 percent from the quantity classified during the same period in 1976/77. Total exports for 1977/78 are estimated at 1.17 million bags, which would be 18

percent less than exports in 1976/77. As of July 25, 981,403 bags of coffee had been sold for delivery.

ASIA AND OCEANIA

Production of coffee in Asia and Oceania in 1978/79 is estimated at 6.7 million bags, 127,000 bags larger than in 1977/78. Exportable production for both years is 4.8 million bags. The major change in the production figures results from higher estimates for Indonesia's output coupled with lower estimates for consumption in recent years.

INDONESIA

The 1978/79 coffee crop is now estimated at 3.2 million bags, about 300,000 higher than earlier forecasts. Estate production is expected to stabilize at around 285,000 bags and smallholder production is estimated to reach 2.9 million bags, as previously planted areas mature and yields per tree increase.

Output in 1977/78 is revised upward to 3.1 million bags from the previous estimate of 2.95 million, as estate production rose substantially above 1976/77 levels. Output in the more important smallholder sector appears to be at about the previous year's level.

Estate production is located in East Java and to a lesser extent in Central Java, while smallholder plantings (which account for about 90 percent of total annual output) are heaviest in Sumatra. The crop is harvested once a year, between May and December, with most of the harvest completed by the end of September. No quality price differentials exist and the coffee berries are sold to middlemen. Reportedly, the farmer receives less than 50 percent of the c&f New York prices.

Government officials recognize that efforts need to be made to improve the quality of Indonesia's coffee. Early this year, the Department of Trade and Cooperatives, and the Association of Coffee Producers jointly issued new quality requirements for coffee for export to minimize quality rejections by foreign importers. However, it will be some time before major improvements occur because of present methods of picking, processing, and storage.

In January 1978, the Department of Trade issued a decree requiring the licensing of all coffee exporters, the allocation of export quotas on a quarterly basis, and the certification of origin for each shipment.

PHILIPPINES

The crop for 1978/79 continues to be estimated at 600,000 bags, about 5 percent larger than in

1977/78. Weather conditions as of late August were favorable for the coming year, particularly for the major crop in Mindanao, which at that time was ready to be harvested. According to the Coffee Growers Marketing Association (CGMAP), the crop in Southern Luzon was affected by drought at the early stage of flowering, but recovered and should exceed last year's outturn. The medium-term outlook is for production to increase, as high prices in 1976 and 1977 brought about better management practices. Also, trees planted during the 1975-77 period should be producing in the next few years.

The CGMAP, however, is said to be somewhat pessimistic about the long-term outlook of the coffee industry, partly because they feel that if export quotas are implemented under the International Coffee Agreement—of which the Philippines is not a member—this could adversely affect some important foreign markets for Philippine coffee. Further, the drop-off in world prices for green coffee since mid-1977 could discourage farmer initiative and reduce yields. Unofficial estimates place the total area harvested in 1977/78 at 87,650 hectares, and the total number trees at 80.2 million, of which 71.9 million were bearing fruit.

Based on exports during October 1977-April 1978 of 157,986 bags, exports of green coffee for the full marketing year are expected to reach a record high. Exports in 1976/77 and 1975/76 totaled 194,071 and 198,487 bags, respectively. Exports to the United States during the first 7 months of 1977/78 totaled 46,501 bags; France and Singapore were also important destinations.

Other Developments

INTERNATIONAL COFFEE ORGANIZATION

The freezing temperatures that hit parts of Brazil's coffee areas in mid-August brought the 16-month slide in green coffee prices to an abrupt halt, and at least temporarily, evoked a significant increase in both spot and future prices. This was a particularly important development, since the frost, and the subsequent uncertainty as to the extent of the damage, came barely a month before the scheduled meetings of the Council of the International Coffee Organization (ICO) during the last week in September.

Preliminary estimates of the outlook for the 1979 Brazilian crop differ considerably. An early assessment by the USDA of the August 1978 frost was that its effect on Brazil's potential crop of 24-26 million

bags in 1979 would be relatively small compared with the severe damage done Brazil's 1976 crop by the July 1975 frost.

Subsequently, a special survey made by the Office of the U.S. Agricultural Attache in Brazil indicated a crop outturn ranging between 18 million and 21 million bags, assuming weather and growing conditions remain favorable until the crop begins to be harvested in April 1979.

Statements by IBC officials prior to the September ICO meetings were that the 1979 crop would be around 16 million bags. On the other hand, the IBC also said its first official estimate of the 1979 crop would not be made until November. In any case, green coffee prices are likely to remain relatively firm until the outcome of the ICO Council meetings become known. One of the highlights of these meetings undoubtedly will be a review of the trigger price levels at which export quotas would be implemented under the International Coffee Agreement (ICA).

Invited by the Governments of Brazil and Colombia, representatives of Brazil, Colombia, Costa Rica, El Salvador, Guatemala, Honduras, Mexico, and Venezuela—and the Ivory Coast, as an observer—convened in Bogota August 22 and 23. Their purpose was to exchange viewpoints on the world market situation for coffee and to unify criteria for enforcement of the economic clauses of the International Coffee Agreement of 1976.

The delegates analyzed the market statistical situation in light of information provided by the Chairman of the Brazilian delegation on the effects of the most recent frost in the main producing areas of that country. Since the ICO would hold a meeting in London in September, the delegates recommended to other coffee producers that they establish: a) a unified position for negotiations with consumer-members; and b) a mechanism to stabilize prices that would guarantee remunerative prices to producers and contribute to the development of their economies, and adequate supplies to consumers.

The delegates also agreed to intensify their efforts in the ICO's Promotion Committee to begin advertising campaigns that would maintain and increase coffee consumption and its quality.

The ICO composite price (1976 ICA) for green coffee of \$2.73 per kilogram (\$1.24 a pound) on Friday, August 11, jumped to \$2.98, (\$1.35) on Monday, the 14th. As of the end of the month, the ICO price was around \$3.24 (\$1.47), and averaged \$2.93 (\$1.33) for August, up slightly from the July level; this compared with \$4.43 per kilogram (\$2.01 per pound) in August 1977.

U.S. IMPORTS

U.S. imports of green coffee in July totaled 1.32 million bags valued at \$260 million, bringing imports for January-July to 10.4 million bags valued at \$2.33 billion. This is about the same volume that was imported in the first 7 months of 1977, although the total value is down 16 percent from a year earlier. The unit import value for July was \$3.23 per kilogram (\$1.49 per pound), compared with \$5.36 per kilogram (\$2.43 per pound) for July 1977.

Based on January-June 1978 data only, U.S. imports of green coffee from Brazil were down sharply from year-earlier levels while imports from Africa and Asia were substantially higher. Imports from Colombia during the two periods were about the same, while quantities coming from Mexico and Central America were nearly 500,000 bags lower in 1978.

According to Bureau of Census data, total roastings of green coffee for January-June 1978 were 8,017,000 bags compared with 7,991,000 bags in the first half of 1977. Calendar 1977 roastings of 14,233,000 bags were 25 percent less than total roastings in 1976. U.S. inventories of green coffee held by roasters, importers, and dealers on June 30, 1978, were 2,202,000 bags, slightly above end-of-March levels of 2,161,000 bags, but sharply below inventories of 3,115,000 bags held on June 30, 1977.

Based on Bureau of Labor Statistics, the wholesale price of a one-pound can of roasted coffee during August averaged \$2.64, down from \$3.74 in August 1977. In June (the latest month available), the retail price of a one-pound can of roasted coffee was \$3.14, down from \$3.23 in May and well below the average price of \$3.94 a pound in June 1977.

COFFEE LEAF RUST

While not of immediate concern to world coffee supplies, it has been reported that coffee leaf rust (roya) in Nicaragua has begun to spread somewhat beyond its original area of confinement. Reportedly, the rust is headed northward towards the more important coffee-growing areas of the Managua Sierra. Specific information on this development is presently lacking, but the longer term consequences could be serious if the rust is not properly controlled.

All neighboring producing countries in Central America, as well as other Latin American countries, have developed major control and treatment programs for coffee rust should the disease spread beyond the Nicaraguan borders. In Brazil, coffee rust is widely prevalent but is effectively controlled

through regular use of chemical sprays on the coffee trees.

According to reports from Bolivia, Government authorities there have declared a quarantine in the northeastern coffee-growing area of Riberalta, where coffee rust was discovered in August of this year. The movement of any agricultural product or seed near the Brazilian border, reportedly has been indefinitely prohibited. The action was taken, it was said, on the recommendation of a team of experts from the Andean Coffee Rust Control Committee in Bogota.

ETHIOPIAN PROMOTION

It is reported that Ethiopia planned to open trade offices in New York and Hamburg in September 1978 to promote the sale of its coffee, which is that country's No. 1 earner of foreign exchange.

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COFFEE, GREEN: TOTAL PRODUCTION IN SPECIFIED COUNTRIES - AVERAGE 1969/70-1973/74, ANNUAL 1974/75-1978/79
(IN THOUSANDS OF 60 KILOGRAM BAGS) ^{2/}

REGION AND COUNTRY	AVERAGE 1969/70-1973/74	1974/75	1975/76	1976/77	1977/78	1978/79
NORTH AMERICA:						
COSTA RICA	1,381	1,390	1,305	1,311	1,550	1,600
CUBA	482	45	415	450	425	450
DOMINICAN REPUBLIC	730	890	1,040	717	1,010	750
EL SALVADOR	2,350	3,300	2,328	2,525	2,000	2,900
GUATEMALA	2,028	2,540	2,149	2,534	2,250	2,600
HAITI	533	52	650	538	550	530
HONOURAS	689	815	843	767	1,134	1,000
JAMAICA	23	21	31	19	23	20
MEXICO	3,335	3,900	4,200	3,750	3,750	3,800
NICARAGUA	619	700	813	926	925	975
PANAMA	80	75	75	78	96	92
TRINIDAD-TOBAGO	48	65	42	54	53	55
US-HAWAII	24	12	11	13	14	13
US-PUERTO RICO	196	200	150	145	197	200
TOTAL	12,518	14,868	14,052	13,827	13,977	14,985
SOUTH AMERICA:						
BOLIVIA	103	90	100	105	110	105
BRAZIL	18,170	27,500	23,000	9,300	17,500	20,000
COLOMBIA	8,010	9,000	8,500	9,300	9,800	10,100
ECUADOR ^{3/}	1,096	1,270	1,191	1,349	1,474	1,600
GUYANA	12	15	15	17	17	17
PARAGUAY	48	42	40	20	25	30
PERU	994	900	1,000	1,000	1,050	1,050
VENEZUELA	960	765	1,077	602	1,058	867
TOTAL	29,309	39,582	34,923	21,733	31,034	33,769
AFRICA:						
ANGOLA	3,340	3,000	1,200	1,200	1,400	1,500
BENIN	15	14	14	14	15	15
BURUNDI	339	457	295	390	300	360
CAMEROON	1,288	1,816	1,332	1,360	1,583	1,667
CENT AFRICAN EMPIRE	181	175	165	165	200	175
CONGO, BRAZZAVILLE	14	15	20	20	20	20
EQUATORIAL GUINEA	115	110	90	90	80	80
ETHIOPIA	2,010	2,050	1,900	2,000	1,900	1,900
GABON	14	10	10	10	10	10
GHANA	75	50	65	64	70	70
GUINEA	136	100	90	90	100	90
IVORY COAST	4,282	4,500	5,133	4,800	3,333	5,000
KENYA	1,053	1,100	1,230	1,483	1,097	1,250
LIBERIA	78	68	67	83	83	70
MADAGASCAR	1,019	1,300	1,200	1,300	1,200	1,200
NIGERIA	64	4	65	53	72	65
SIERRA LEONE	221	256	300	339	308	358
TANZANIA	102	125	83	167	117	140
TOGO	815	865	850	880	850	900
UGANDA	290	200	155	190	200	200
ZAMBIA	3,120	3,000	2,800	2,700	2,600	2,600
ZAIRE (CONGO-K)	1,289	1,150	1,383	1,429	1,333	1,333
TOTAL	19,767	20,394	18,447	19,827	16,871	19,003
ASIA:						
INDIA	1,473	1,630	1,478	1,791	2,008	2,092
INDONESIA	2,450	2,675	2,965	3,089	3,117	3,185
MALAYSIA	64	70	100	100	100	100
PHILIPPINES	513	467	483	550	571	600
PORTUGUESE TIMOR	58	75	75	65	75	40
VIETNAM	52	60	60	60	65	70
YEMEN, ARAB REP.	45	35	35	35	40	40
TOTAL	4,655	5,012	5,096	5,690	5,976	6,087
OCEANIA:						
NEW CALEDONIA	25	25	25	25	25	25
PAPUA NEW GUINEA	499	633	650	700	617	633
TOTAL	525	658	675	725	642	658
WORLD TOTAL	66,774	80,514	73,193	60,802	68,500	74,502

1/ Coffee marketing year begins about July in some countries and in others about October. 2/ 132,276 pounds. 3/ As indicated in footnote 1, the coffee marketing year begins in some countries as early as July. Ecuador is one of these countries. Hence, the crop harvested principally during June-October 1978 in that country is shown as production for the 1978/79 marketing year. In Ecuador, however, this is referred to as the 1977/78 crop. 4/ Beginning 1978/79 included in Indonesia.

NOTE: Production estimates for some countries include cross-border movements.

Source: Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attaches and Foreign Service Officers, results of office research, and related information.

COFFEE, GREEN: EXPORTABLE PRODUCTION IN SPECIFIED COUNTRIES - AVERAGE 1969/70-1973/74, ANNUAL 1974/75 1978/79 ^{1/}
(IN THOUSANDS OF 60 KILOGRAM BAGS) ^{2/}

REGION AND COUNTRY	AVERAGE 1969/70-1973/74	1974/75	1975/76	1976/77	1977/78	1978/79
NORTH AMERICA:						
COSTA RICA.....	1,219	1,237	1,152	1,127	1,333	1,376
CUBA.....	43	--	--	--	--	--
DOMINICAN REPUBLIC.....	507	600	755	470	740	470
EL SALVADOR.....	2,189	3,130	2,158	2,340	1,810	2,705
GUATEMALA.....	1,772	2,255	1,859	2,236	1,942	2,280
HAITI.....	329	305	425	296	317	290
HONOLULU.....	567	705	739	663	1,027	890
JAMAICA.....	3	4	12	2	5	3
MEXICO.....	1,776	2,156	2,660	2,500	2,250	2,200
NICARAGUA.....	531	608	737	848	845	892
PANAMA.....	14	--	25	13	29	24
TRINIDAD-TOBAGO.....	33	55	29	39	34	35
US-HAWAII.....	3	--	--	--	--	--
US-PUERTO RICO.....	--	--	--	--	--	--
TOTAL.....	8,990	11,055	10,551	10,534	10,332	11,165
SOUTH AMERICA:						
BOLIVIA.....	65	48	78	83	88	83
BRAZIL.....	9,594	19,500	15,000	2,300	10,000	12,000
COLOMBIA.....	6,580	7,400	7,100	7,900	8,300	8,550
ECUADOR ^{3/}	778	1,113	1,026	1,219	1,303	1,428
GUYANA.....	--	--	--	--	--	--
PARAGUAY.....	29	19	19	--	3	8
PERU.....	766	640	650	750	800	800
VENEZUELA.....	307	95	377	135	358	150
TOTAL.....	18,119	28,835	24,250	12,387	20,852	23,019
AFRICA:						
ANGOLA.....	3,239	2,895	1,140	1,140	1,340	1,440
BENIN.....	13	13	13	13	14	14
BURUNDI.....	334	445	290	385	295	355
CAMEROON.....	1,245	1,764	1,279	1,293	1,508	1,584
CENT AFRICAN EMPIRE.....	172	164	155	155	190	165
CONGO-BRAZZAVILLE.....	13	14	19	19	19	19
EQUATORIAL GUINEA.....	109	105	85	85	75	75
ETHIOPIA.....	1,346	1,340	1,175	1,275	1,150	1,140
GABON.....	13	9	9	9	9	9
GHANA.....	62	36	50	49	55	55
GUINEA.....	130	94	84	84	94	84
IVORY COAST.....	4,218	4,432	5,066	4,733	3,250	4,900
KENYA.....	1,031	1,082	1,213	1,440	1,069	1,218
LIBERIA.....	71	63	67	78	78	65
MADAGASCAR.....	890	1,160	1,060	1,160	1,060	1,060
NIGERIA.....	39	12	10	--	10	--
RWANDA.....	216	250	295	334	303	353
SIERRA LEONE.....	97	120	78	162	112	135
TANZANIA.....	796	845	830	860	830	880
TOGO.....	197	197	152	187	197	197
UGANDA.....	3,102	2,978	2,778	2,678	2,578	2,578
ZAIRE (CONGO,K).....	1,165	1,017	1,266	1,262	1,158	1,141
TOTAL.....	18,496	14,037	17,100	17,401	15,394	17,467
ASIA:						
INDIA.....	709	97	729	941	1,141	1,209
INDONESIA.....	1,543	1,700	1,965	2,275	2,699	2,675
MALAYSIA.....	--	--	--	--	--	--
PHILIPPINES.....	4	84	142	242	250	242
PORTUGUESE TIMOR.....	51	64	64	55	65	4/
VIETNAM.....	--	--	--	--	--	--
YEMEN, ARAB REP.....	36	3	3	30	35	35
TOTAL.....	2,347	2,448	2,930	3,543	4,190	4,161
OCEANIA:						
NEW CALEDONIA.....	14	14	14	14	14	14
PAPUA NEW GUINEA.....	494	624	645	694	611	627
TOTAL.....	508	642	659	708	625	641
WORLD TOTAL.....	48,461	62,817	55,499	44,573	51,393	56,453

-- Denotes negligible.

^{1/} Coffee marketing year begins about July in some countries and in others about October. Exportable production represents total harvested production minus estimated domestic consumption. ^{2/} 132,276 pounds. ^{3/} As indicated in footnote 1, the coffee marketing year begins in some countries as early as July. Ecuador is one of these countries. Hence, the crop harvested principally during June-October 1978 in that country is shown as production for the 1978/79 marketing year. In Ecuador, however, this is referred to as the 1977/78 crop. ^{4/} Beginning 1978/79 included in Indonesia.

NOTE: Production estimates for some countries include cross-border movements.

Source: Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attaches and Foreign Service Officers, results of office research, and related information.

October 1978

Foreign Commodity Analysis, FAS, USDA

GREEN COFFEE: U.S. GROSS IMPORTS FOR CONSUMPTION BY MONTHS, 1974-78
(In bags 1/)

Month/year	1974	1975	1976	1977	1978 <u>2/</u>
January	2,182,348	1,851,613	1,664,327	1,994,147	1,682,045
February	2,021,633	1,656,028	1,743,777	1,706,674	1,574,583
March	2,457,448	1,534,871	2,311,082	1,839,178	1,707,452
April	2,264,222	1,448,487	1,636,324	1,824,133	1,556,739
May	1,870,680	1,365,017	1,546,394	1,223,533	1,345,237
June	1,528,705	1,735,631	1,863,977	1,136,816	1,249,290
January-June ..	12,325,036	9,591,647	10,765,881	9,724,481	9,115,346
July	1,499,043	1,625,743	1,909,138	755,821	1,315,844
August	1,152,052	1,867,525	1,636,634	695,029	<u>3/</u>
September	820,716	2,533,330	956,398	678,095	<u>3/</u>
October	739,702	1,783,726	1,012,923	635,077	<u>3/</u>
November	1,159,285	1,587,478	1,648,566	971,964	<u>3/</u>
December	1,549,655	1,299,058	1,858,301	1,347,223	<u>3/</u>
July-December ..	6,920,453	10,696,860	9,021,960	5,083,209	<u>3/</u>
Calendar year total	19,245,489	20,288,507	19,787,841	14,807,690	<u>3/</u>
July-June year total	21,978,889	16,512,100	21,462,741	18,746,441	14,198,555
ICO year total <u>4/</u>	20,743,270	19,066,887	19,938,313	16,373,216	<u>3/</u>

1/ 132.276 lbs. or 60 kilograms.

2/ Preliminary.

3/ Not available.

4/ Year ending September 30 of year shown. ICO is International Coffee Organization.

Compiled from U.S. Bureau of Census data.

October 1978

Foreign Commodity Analysis, FAS, USDA

GREEN COFFEE: U.S. GROSS IMPORTS BY COUNTRY OR AREA OF ORIGIN

Area of origin	Average		1976		1977		January-June			
	Mil. bags 2/	Per-cent	Mil. bags 2/	Per-cent	Mil. bags 2/	Per-cent	Mil. bags 2/	Per-cent		
Brazil	6.17	28	3.09	16	2.45	17	2.17	22	1.31	14
Africa and Asia	7.84	36	7.29	37	4.60	31	2.82	29	3.28	36
Europe	3/	--	.03	--	.02	--	.01	--	3/	--
Mild coffees:										
Colombia	2.75	13	2.69	13	1.95	13	1.18	12	1.12	12
Other South America	1.22	6	1.53	8	1.15	8	.59	6	.86	10
Mexico and Central America...	3.23	15	4.40	22	3.96	27	2.61	27	2.13	23
Caribbean44	2	.76	4	.68	4	.34	4	.42	5
Total Milds ..	7.64	36	9.38	47	7.74	52	4.72	49	4.53	50
Total World ...	21.65	100	19.79	100	14.81	100	9.72	100	9.12	100

-- Denotes not applicable.

1/ Preliminary. 2/ 132.276 lbs. or 60 kilograms. 3/ Less than 10,000 bags.

Compiled from U.S. Bureau of Census data.

October 1978

Foreign Commodity Analysis, FAS, USDA

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