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WORLD COFFEE CROP ESTIMATE FOR 1978/79
UP 6 MILLION BAGS C1205

SUMMARY

The first USDA estimate of the 1978/79 world coffee crop is for total production of 74.6 million bags (60 kilograms each). This is an increase of 6 million bags, or 9 percent from the 1977/78 outturn, and is 14 million bags above the low 1976/77 crop. Based on past performance, the chances are about two out of three that the first estimate of total production will not vary more than 3.3 percent from the final outturn for the year.

Exportable production, which represents total harvested production less domestic consumption in producing countries, is estimated at 56.3 million bags for 1978/79, and compares with 51 million bags for 1977/78.

About 40 percent of the total increase in 1978/79 is accounted for by Brazil, where production is estimated at 20 million bags. This is less than earlier expectations, as extended drought during the growing season has reduced bean size in some areas.

Output in most of Central America and Mexico is expected to improve over relatively poor harvests in 1977/78. Colombia's production is forecast to exceed 10 million bags for the first time, while in the Ivory Coast, the major producer in Africa, yields should largely recover from the drought that sharply reduced the 1977/78 crop.

PRODUCTION

North America

Preliminary estimates for 1978/79 place the North American coffee harvest at 15 million bags, which would be 7 percent larger than 1977/78 outturn.

Exportable production for the area is estimated at 11.3 million bags as compared with 10.3 million for the current year. Substantially larger crops forecast for El Salvador, Guatemala, and Mexico are the main reason for the higher 1978/79 estimates, as generally adverse weather conditions lowered 1977/78 crops below normally expected levels.

Barring adverse weather and disease problems, Costa Rica's coffee crop in 1978/79 could reach 1.6 million bags. Although no local official estimate had been made as of early May, the general outlook was that the crop could exceed the 1977/78 record outturn. Rains began early this year in the important central valley area and coffee trees in this zone were already flowering.

The 1977/78 crop estimate has been revised upward to 1.55 million bags based on registrations reported by the National Coffee Office. This is considerably higher than initial estimates of the crop as all major production factors were highly favorable during the year.

Export contracts registered during October 1, 1977-April 30, 1978 are reported at 901,000 bags, valued at \$202.7 million. This is up 10 percent in volume but down 6 percent in value from shipments during the same period a year earlier. Through April 1978, green coffee prices averaged \$3.75 per kilogram for export sales and \$0.88 for the domestic market.

The Coffee Office requires that 18 percent of the 1977/78 coffee crop be retained for the domestic market—14 percent for consumption and 4 percent for contingencies. Effective May 29, Costa Rica rescinded the April 24 export regulations that limited export sales to no more than 15 percent of the total 1977/78 crop.

The Seventh National Coffee Congress met in San Jose on February 12 to discuss and analyze the coffee

situation and outlook. Major topics included: The necessity for countries producing "other milds" to coordinate export strategy in order to stabilize prices; illegal movement of Costa Rican coffee through Panama and how to control it; suggestion to lower interest rates to small producers from the current 14 percent; measures to control coffee rust should it appear in the country; contamination caused to the environment by the release of "untreated" coffee wash water into the rivers; and the possibility of increasing the domestic coffee price to the level of international prices.

El Salvador's 1978/79 crop is forecast at 2.7 million bags, up sharply from the 1977/78 level but about the same as in 1975/76, based on preliminary indications. There have been some adverse weather conditions, particularly in March, with widespread hard winds that partially defoliated coffee plants in some areas. Overall, however, the prospects for good yields were favorable as of mid-April.

Based on a more current assessment of the 1977/78 crop, production is now placed at 2 million bags, up 200,000 bags from the preceding estimate. According to the Salvadoran Coffee Company, El Salvador exported a total of 2.88 million bags of coffee in 1976/77. This included the green bean equivalent of some 26,779 bags of soluble coffee. Major destinations of green coffee in 1976/77 were: United States (1,219,443 bags); West Germany (762,080); Netherlands (436,013); and Yugoslavia (174,751 bags).

In Guatemala, the 1978/79 crop is expected to be around 2.5 million bags, 11 percent greater than the low 1977/78 outturn, now estimated at 2.25 million. Growing conditions have been generally favorable and with continued good weather the crop should return to more normal levels. April 1978 exports reached 244,774 bags, bringing October 1977-April 1978 exports to 1.53 million. The trade indicates that there should be another 400,000 to 500,000 bags available for export through September, and still leave a healthy carryover as of October 1.

The 1978/79 Honduran production is forecast at 1 million bags, or 12 percent below that of the current season. The drop reflects the less intensive flowering observed for this crop, although weather and general crop conditions through August will be a major factor in the actual outturn.

The 1977/78 crop remains estimated at 1.13 million bags, close to half again as large as the poor 1976/77 production. Yields in 1976/77 were disappointingly low, in part because of adverse weather conditions. Lack of rain resulted in poor flowering and heavy rains caused extensive berry drop. In contrast, weather conditions were very good for the 1977/78 crop and improved crop management practices helped to increase yields substantially.

Coffee smuggling into Nicaragua continues to be extensive with reports that the quantity is likely to exceed 100,000 bags in 1977/78. The Honduran Government is investing in roads and transportation facilities to the eastern coffee areas to provide a better flow of this coffee to Honduran markets and to reduce the illegal traffic.

Green coffee exports for October 1977-March 1978 totaled 482,002 bags, 27 percent higher than during the first 6 months of 1976/77. This does not include any allowance for contraband movement to Nicaragua. The average f.o.b. price for coffee exports through March 31 was \$242 per 60-kilogram bag, slightly above the average price received for the same 6-month period a year earlier. The value of coffee exports during October-March 1977/78 was \$116.7 million, about one-fourth more than corresponding receipts in 1976/77.

Mexico's 1978/79 coffee production is forecast at 4 million bags, which is 7 percent larger than the revised estimate for 1977/78. Prospects for an improvement over the 1977/78 outturn are good, but much will depend on adequate and timely rainfall during the growing season.

Subsequent to issuance of FAS circular FCOF 2-78 (April 1978), evidence has mounted that dry weather in the States of Veracruz and Oaxaca has reduced the 1977/78 crop to around 3.75 million bags. This is down 9 percent from the previous estimate for this year's outturn. The crop could have been lower, but indications are that output in the States of Chiapas, the largest producer, and in Guerrero were up from the 1976/77 harvests.

Reportedly, the Mexican Coffee Institute ended its suspension of coffee exports early in May but was limiting shipments over the initial 30 days to 150,000 bags. The minimum registration price against these deliveries was said to be \$1.72 per pound, or \$3.79 per kilogram.

In Nicaragua, production in 1978/79 is forecast to reach around 975,000 bags, of which 892,000 bags should be available for export. As of mid-April, flowering and rains throughout the coffee areas had been sporadic and it was too early to determine accurately what the crop set would be. General conditions of the coffee farms are good, however, and Nicaragua could easily have a record year.

The 1977/78 estimate of production is 925,000 bags from a total area of approximately 84,000 hectares. Approximately 560 hectares have been destroyed in the campaign against coffee leaf rust (roya), but this loss has been offset by new plantings.

The Government's program to control roya, which was first detected in November 1976, continued to be very successful as of mid-April. No outbreaks have been reported outside the original quarantined area. With the exception of a 3-week period earlier in the

year, the campaign against the disease has been uninterrupted. In spite of the high cost of running the program, the Government is expected to continue its irradiation efforts.

Coffee production in **Trinidad and Tobago** in 1978/79 should be up somewhat from the 53,000 bags produced in 1977/78. In 1976/77, increased prices and favorable weather resulted in a substantially larger crop than the preceding year's. Rainfall for the current crop has been below average and output is expected to be slightly lower than in 1976/77. Rather surprisingly, disappearance of coffee in the domestic market increased significantly in 1976/77 according to reports, despite sharply higher prices in the world market. Reportedly, a further increase in domestic use is expected in 1977/78. Apparently, the Government has agreed to offer a farm subsidy to coffee growers equivalent to US\$103 per hectare during the present crop year.

South America

Coffee production in South America in 1978/79 is estimated at 33.8 million bags, with an exportable production of 23.1 million. This is 2.8 million bags larger than the total crop estimate for 1977/78. Brazil's crop is estimated up 2.5 million bags alone, although this is particularly tentative as the full extent to which dry weather during the growing season affected bean size in some areas will not be known until the harvest is completed. Colombian and Ecuadoran crops also are estimated up significantly, while Venezuelan output is estimated down almost 200,000 bags.

Brazil's 1978/79 coffee production (1978 crop) is presently estimated at 20 million bags, with exportable output at 12 million. The latter is based on an estimated domestic consumption of around 8 million bags.

The 1978/79 estimate is 2.5 million bags larger than the 1977/78 crop and represents a low point in the range (19.5-21.5 million bags) of expected output. The size of the 1978 crop is particularly difficult to evaluate this early in the season because of the long and extensive drought during the growing season and its effect on normal maturation of the coffee beans. Based largely on field observations of yields and tree conditions during April 10-20, the breakdown of the 1978/79 crop estimate, by principal producing States, is as follows:

<u>State</u>	<u>Million bags</u>
Parana	4.5 to 5.0
Sao Paulo	6.5 to 7.0
Minas Gerais	6.0 to 6.5
Other States	2.5 to 3.0
Total	19.5 to 21.5

Late June, July, and August (winter, Southern Hemisphere) will again be critical in the continued recovery of Brazil's coffee production. Frost warnings have come earlier than usual this year, with prices reacting accordingly. If a damaging frost should occur, the 1979 coffee production potential of some 25 million bags should not be affected as much as in 1975. Much of the former frost-prone coffee areas are now planted to other crops, and more coffee is now being grown in the warmer, northern states.

Although the State of Parana's agriculture was seriously affected by the dry spell this year, coffee trees, except for seedlings in some areas, sustained relatively light damage. The major reason is that Parana's coffee trees were nearly all deeply pruned or stumped to ground level after the 1975 frost. These trees are showing continuous vegetative recovery and growth and are now back to more than half their normal size. The original extensive and deep adult root system of the trees has accelerated the recovery and also enabled the trees to pull through the drought period in good shape.

The effect of the lack of rains was reduced growth of the coffee cherries, abnormal early ripening, and, in degrees depending on area of production, smaller than normal beans. However, coffee trees in Parana are showing considerable damage to their leaves from the larva of the insect *Perilencoptera coffeella*, or "Bicho Minerio." This leaf loss also has contributed to the reduced development of coffee beans this year.

In western Sao Paulo, where the soil is sandy loam, the effect of the drought is more evident than in the central and northeastern parts of the State where the soil is clay loam. Thus, trees in western Sao Paulo are bearing smaller-than-normal beans while trees in central and northeastern Sao Paulo are yielding beans of normal size.

Coffee trees in Minas Gerais, the third major coffee state in Brazil, have been least affected by the drought and by "Bicho Minerio." Output in other producing States, according to comments from producers, exporters, and Brazilian Coffee Institute (IBC) officers, is increasing. These States include Espirito Santo, Bahia, Mato Grosso, Clara, and Goias, where coffee trees planted in previous years are beginning to mature.

During Brazil's coffee year—July 1, 1977-June 30, 1978—exports are not likely to have exceeded 7.5 million bags, as shipments through April were only about 4.5 million. This compares with 17.4 million bags exported during July-June 1976/77. Exports were minimal during most of July-December 1977 as the IBC held to a minimum export price of US\$3.20 per pound (\$7.05 per kilogram) during the decline in world prices. Subsequently, IBC began lowering its minimum export price at various intervals to again become competitive.

IBC Resolutions of May 8 and May 31 set the minimum registration price for green, ground/roasted, or decaffeinated coffee for export at US\$1.60 per pound (\$3.53 per kilogram) for shipments made during the months of July and August. For the same months, the contribution quota, or export tax, was fixed at US\$83 per bag. As of May 8, sales declarations for soluble coffee exports were accepted for shipment during July at the following minimum prices: Spray dried - US\$3.60 per pound; and freeze dried - US\$4.40. The contribution quota on soluble coffee was fixed at 60 U.S. cents per pound. IBC Resolution 29/78 opened registrations for soluble exports at the same prices, effective June 1, for shipment in August.

Because of the stagnant export situation during past months, growers began demanding an increase in the domestic support price for coffee. Finally, under an IBC resolution effective April 3, 1978, at the option of the seller, IBC increased the buying price for 1977/78 crop coffee to CR\$2,500 per bag (about \$2.40 per kilogram), all taxes paid, from CR\$1,500 per bag.

Coffee prices for domestic consumption are still set by the IBC. From January 1, 1978 through May, the Brazilian consumer has been paying CR\$64.80 per kilogram of ground roasted coffee (about US\$3.78 per kilogram or \$1.71 per pound).

The outlook in Colombia for 1978/79 coffee production is 10.1 million bags, a relatively modest, though significant, increase over the 1977/78 outturn, which is estimated at 9.8 million bags. The Coffee Growers Federation (CGF) still maintains a conservative position towards expanding coffee production, believing supply should not outstrip world demand. However, some new areas planted earlier to high yielding varieties are coming into production.

Rainfall as of mid-May was considered normal. For 1977/78, the main harvest was already completed in some regions, with results higher than expected. In the main producing regions of Caldas, Quindio, Risaralda, Valle, and Antioquia, the main harvest occurs from October through December.

During October 1977-March 1978, Colombia exported 3 million bags, of which 908,710 bags went to the United States and 2.05 million went to Europe. This is a decrease of about 5 percent from exports during the first 6 months of the preceding marketing year, when exports to the United States were 1.2 million bags and to Europe 1.7 million.

More recently, private exporters have been said to be reluctant to participate in the market. They blame the repatriation requirement, the exchange certificates, and the retention tax as principal deterrents. While the Government reduced the repatriation requirement on April 7 from US\$313.75 to US\$290 per bag of 70 kilograms exported, exporters still

consider it high compared with world prices. With total 1977/78 exports (October-September) estimated at about 8 million bags, and domestic consumption at 1.5 million, ending stocks on September 30, 1978, would be around 6.9 million bags, which would probably be close to record holdings.

Coffee production in Ecuador in 1978/79 is estimated at 1.6 million bags, or about 8 percent larger than the 1977/78 outturn. This increase reflects, in part, additional harvestings from new plantings of some 16,000 hectares made in 1976. Output probably will increase somewhat more than normal during the next few years as yields from the new trees increase. However, some older plantings are being taken out of production as the new trees mature and future production increases will be limited by this factor. Presently, no further significant increase in area planted to coffee is contemplated.

Domestic prices continue to be based on world price levels. While the Government publishes prices each week as a reference point, they do not necessarily reflect prices received by farmers. Export taxes are determined by a fixed percentage of export prices received. According to exporters, reference prices are presently set too high relative to world levels. They indicate that the result will be either a reduction in the export volume or sharply lower prices paid to producers.

Early indications are that Venezuela's 1978/79 coffee crop will be approximately 200,000 bags less than the 1977/78 outturn of 1.06 million. This is based largely on the cyclical crop pattern for Arabica coffee in which the forthcoming crop would be a down year.

The 1976/77 crop has been revised downward to 602,000 bags, the lowest outturn in many years. There were excessive rains in the principal growing areas of the country, especially in the States of Tachira, Merida, and Trujillo, where over half of the coffee is grown.

Consumption of coffee during 1976/77 was the lowest in recent years. A strong export market and the poor crop combined to cause a severe scarcity in the national market. It was not until early 1978 that the domestic supply appeared to be normal.

To compensate coffee growers from the Andean states for losses in 1976/77 caused by adverse weather, the Government, through the National Coffee Fund, is making subsidy payments to growers equivalent to \$42 million.

Africa

African coffee production for 1978/79 is estimated at 19.4 million bags, with exportable production at 17.8 million. This is well above corresponding

1977/78 estimates of 17.1 million bags total output and 15.6 million exportable. Sharply larger crops in the Ivory Coast and Kenya caused the bulk of the increase for 1978/79. Reasonably favorable weather conditions should result in more normal yields for these two important producers than in 1977/78.

Cameroon coffee production for 1978/79 is forecast at 1.67 million bags, or 5 percent higher than in the current year. This is based on the assumption that weather conditions remain favorable. The 1977/78 crop is expected to be considerably better than in 1976/77, when the crop was only 1.36 million bags. Of this latter total, approximately three-fourths was of the Robusta variety. Again excellent weather conditions, conducive to good coffee yields, and reduced incidence of insect and disease damage, were major factors along with increased availability of fertilizers and other production inputs.

Ethiopia's coffee production in 1978/79 is forecast at 1.9 million bags, the same as for 1977/78. Unfortunately, very little information is available on current crop levels. The problem is made even more difficult by civil disturbances within the country and disruptions in the internal movement of coffee to collection centers and through export facilities. Also, a substantial portion of the large coffee forests existing in many regions of Ethiopia is still only partially exploited. Throughout much of Kaffa and Illubador Provinces, for example, the Arabica tree spreads spontaneously, and readily naturalizes into forest areas located from 3,000 to 6,000 feet in altitude.

Export data are regularly reported to the International Coffee Organization (ICO) and in the past stock levels were verified by ICO representatives as of September 30 (stock verifications did not take place in 1976 and 1977 because of the political situation). Reliable statistics on domestic consumption levels do not exist. Because of difficulties in moving coffee out of internal areas and into export, some Government officials say domestic consumption is increasing as stocks accumulate in-country. The decline in exports in October-September 1976/77 to 716,000 bags from 1.16 million bags in 1975/76 was undoubtedly partly the result of some of these conditions. The cessation of rail service to the port of Djibouti, because of fighting in the Ogoden area, is an example of this problem. Also, the Government's policy of revising the export surtax upward as world prices rose probably caused some disincentive to producers and exporters alike.

A March 1978 report of the Coffee Research Center in Ethiopia indicated the successful development of a variety of coffee resistant to coffee berry disease, a serious problem in many producing countries. This breakthrough could, in time, significantly reduce the incidence of the disease, especially in new

plantings, with a favorable impact on coffee production in future years.

The 1978/79 coffee crop in the Ivory Coast appears off to a good start and is forecast at 5 million bags. Rains came early and were beneficial during the critical February-March flowering period. If weather conditions remain generally favorable until harvest time, the crop could exceed the record 1975/76 outturn.

The 1977/78 crop remains estimated at 3.3 million bags, a very disappointing harvest because of unusual dryness before and throughout most of the growing season.

Green coffee exports during 1977/78 are estimated at 3.7 million bags, well below the 4.6 million bags shipped in 1976/77. Thirty-four private firms have been assigned export quotas for 1977/78, a larger number than ever. Apparently, the \$10,000 fine on those caught smuggling coffee to Liberia (imposed by the Liberian Government) plus the increased border patrol activity by the Ivory Coast has reduced this traffic to a minimum.

Kenya's 1978/79 coffee crop is forecast at 1.6 million bags, about a fourth larger than the poor crop now expected for 1977/78. The forecast is based on the abundant rainfall through early May, but also assumes that the rains in succeeding months will not be excessive as was the case during critical growing periods for 1977/78. Also, new trees planted in 1976 will start bearing, with early crop picking in June-July 1979.

Heavy and prolonged rainfall during the 1977/78 growing season caused poor flowering and a high incidence of coffee berry disease. Therefore, the crop estimate has been revised downward to 1.3 million bags, some 160,000 bags less than the preceding estimate for 1977/78. Kenya's 1976/77 crop estimate also has been adjusted downward, excluding as output the approximate quantity of contraband coffee (mainly from Uganda) that entered the country.

During October 1977-April 1978, some 624,000 bags of coffee were sold through auctions, compared to 671,000 bags in the same period for 1976/77. Of total 1976/77 exports of 1.43 million bags, only 121,886 bags went to the United States, with most of the balance going to Europe. West Germany and the Netherlands were by far the principal buyers. With world prices down, and the outlook for reduced exports in 1977/78, Kenya's foreign exchange earnings from coffee are expected to be well below the \$400-million level of 1976/77.

Coffee production in **Tanzania** in 1978/79 should be larger than in 1977/78, mainly because it is the up year in the production cycle. The incidence of coffee berry disease also will be a factor in the ultimate outturn. In addition, the Government has devised a two-pronged program to increase production. The

Coffee Improvement Program (CIP) is designed to increase yields on existing coffee trees through a larger extension network and by providing inputs and credit facilities. The second part of the program is to open new areas for coffee cultivation in the lesser developed regions.

Coffee is now Tanzania's major foreign exchange earner. In 1976, coffee earnings totaled \$155 million, more than double those of 1975. Some 250,000 households, or about 10 percent of the population, are engaged in coffee production and processing. Further, there are over 200 estates producing coffee that employ additional workers. Smallholdings average about one-half hectare, with yields averaging about 300 kilograms per hectare. Yields are as much as 500 kilograms per hectare on smallholder farms located in the Kiliminjaro area. Yields on estates are higher and average between 600 and 800 kilograms per hectare.

The first estimate of Zaire's 1978/79 coffee crop is around 1.3 million bags, the same as in 1977/78. However, political disturbances make any forecast very tentative.

Reports from Haut-Zaire, the region that accounts for about half of total production, indicate that production in 1977/78 will be down as much as 20 percent from that of 1976/77. Since climatic conditions were favorable, the decline in production in this area results from aging plantations and a dropoff in management and harvest efforts because of the fall in world prices.

Overall, the 1977/78 crop has been revised downward to 1.33 million bags, which compares with 1.43 million bags in 1976/77. It is difficult to predict whether the civil disturbances will have a significant adverse affect on the movement of coffee to markets.

Reports of large-scale smuggling to neighboring countries continue. A large part of this year's Robusta crop allegedly has been sold to smugglers, since partly because of high export taxes, exports through official channels cannot compete with prices offered producers by smugglers. Thus, much more coffee may be leaving the country than is accounted for in official export statistics.

In response to criticism from exporters, the Bank of Zaire began establishing the floor price for coffee exports on a weekly rather than a biweekly basis late in March 1978. The airlift of coffee stored in the east (near Kivu) to Mombasa, Kenya, continued as of April 7, with Air Zaire making 2 flights daily, moving a total volume of 72 tons each day.

The National Coffee Office has obtained approval from the ICO to open 6 more coffee exit points at Aba, Ara, Kalundu, Mahagi, Bukavu, and Goma. These, along with Matadi, Boma, Ishasha, and Kasindi, make a total of 10 exit points. Of the new ones, only Goma was operational as of early April. The new points will permit official exportations

through Sudan, Rwanda, Burundi, and Tanzania. Previously, coffee from eastern Zaire could only cross the border at Ishasha and Kasindi for shipment through Uganda and Kenya.

Asia and Oceania

Production of coffee in Asia and Oceania in 1978/79 is estimated at 6.5 million bags, of which 4.2 million bags would be exportable. These figures are approximately the same as corresponding estimates for 1977/78. India and Indonesia are the major producers of exportable supplies in Asia while Papua New Guinea is the sole significant producer in Oceania.

Preliminary indications are that India's 1978/79 coffee crop will approximate 2.1 million bags, slightly larger than the revised 1977/78 outturn. Weather conditions have been about average for next year's production, with moderate-to-heavy showers during most of last fall and generally erratic rainfall during January-April. Blossoming in India occurs mainly from the end of May until early June.

The revision in the 1977/78 crop to 2 million bags is based mainly on late May estimates of the Coffee Board. The crop includes a larger proportion of Robusta coffee than in previous years.

Substantial profits secured by growers during the past 2 years of high prices have helped to implement various development programs in the industry, paving the way for a steady growth in production in coming years. According to the Coffee Board, 70 percent of the coffee area has not achieved a high level of cultivation and production, and a vast potential still exists for increasing productivity.

As of March 16, 1978, India's export duty on coffee was reduced from 700 rupees per quintal to 500 rupees (from 82 to 59 U.S. cents per kilogram).

In 1978/79, Indonesia's coffee production is estimated at 2.9 million bags, about the same as the 1977/78 output. Increased yields in 1977/78 (1977 crop) are believed to have more than offset declining coffee area and production is now expected to be slightly higher than previously reported. This is based mainly on a particularly strong showing in the estate sector during the fourth quarter of 1977.

Indonesian coffee exports in 1977 totaled 2.67 million bags, of which all but 134,519 bags were Robusta. The United States accounted for about one-third of the total export volume. In 1977, coffee replaced rubber as the leading agricultural export earner with revenues of \$599 million, compared with only \$237 million in 1976.

OTHER DEVELOPMENTS

Green coffee imports into the United States during October-April 1977/78 totaled 9.5 million bags,

one-fifth less than during the first 7 months of the 1976/77 coffee year. Import values for these 7 months of fiscal 1978 and the comparable months of fiscal 1977 were \$2.2 billion and \$2.6 billion, respectively. According to the Department of Commerce, U.S. roastings of green coffee during the first quarter of 1978 were 4.416 million bags, down 8 percent from January-March 1977. March 31, 1978 inventories held by roasters, dealers, and importers were 2.247 million bags, up 563,000 bags from holdings on December 31, 1977. Based partially on the above data, apparent U.S. per capita disappearance of coffee in the first quarter of 1978 was down somewhat from year-ago levels.

Green coffee prices, basis ICO composite (1968 ICA), averaged \$3.48 per kilogram (\$1.58 per pound) in May, compared with \$3.68 per kilogram in April, and were down 47 percent from year-earlier levels. Partially because of the normal lag of 2-4 months between reductions in green prices and changes at the wholesale and retail levels, prices to the consumer remained relatively high. Based on Bureau of Labor Statistics data, the wholesale price of a 1-pound can of roasted coffee in the United States averaged \$2.96 per pound in May 1978, down 24 percent from year-earlier levels, while retail prices for April 1978 (latest available figure as of writing) averaged \$3.28, down only 3 percent from that of April 1977.

World coffee exports by producing countries dropped sharply in 1977 to 47.3 million bags, 20 percent below exports of 59.3 million bags in 1976, and well below average exports of 54.5 million bags during 1968-1972.

Although Brazil continued as the dominant single trader, accounting for over one-fifth of total exports in 1977, its share of the world market has been declining. During 1968-1972, Brazil's share averaged 32 percent.

Africa's share of the total market has held fairly steady during the past 10 years, with 31 percent in 1977, the same level as in 1968-1972. North American exports (mainly Central America and Mexico) increased their world market share from an average 15 percent during 1968-1972 to 22 percent in 1977. Exports by Asia and Oceania (mainly India, Indonesia, and Papua New Guinea) accounted for 10 percent of the total market in 1977, up from 6 percent during 1968-1972.

The next meeting of the ICO Council is scheduled for September 25-29, 1978, in London. It will be preceded by meetings of the Executive Board and special working groups, including a group to review the price levels for triggering export quotas.

Information in this circular was prepared by William C. Bowser, Sugar and Tropical Products Division, FCA/FAS. (202) 447-2252.

COFFEE, GREEN: TOTAL 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.....	1,381	1,390	1,305	1,311	1,555	1,600
CUBA.....	482	450	415	450	425	450
DOMINICAN REPUBLIC.....	730	880	1,040	717	1,000	850
EL SALVADOR.....	2,350	3,300	2,328	2,700	2,000	2,700
GUATEMALA.....	2,028	2,540	2,149	2,534	2,250	2,500
HAITI.....	533	520	650	538	550	530
HONDURAS.....	689	815	843	767	1,134	1,000
JAMAICA.....	23	21	31	19	23	20
MEXICO.....	3,335	3,900	4,200	3,650	3,750	4,000
NICARAGUA.....	619	700	813	926	925	975
PANAMA.....	80	75	75	78	82	80
TRINIDAD-TOBAGO.....	48	65	42	54	53	55
US-HAWAII.....	24	12	11	13	13	13
US-PUERTO RICO.....	196	200	150	145	197	200
TOTAL.....	12,518	14,868	14,052	13,902	13,957	14,973
SOUTH AMERICA:						
BOLIVIA.....	103	90	100	105	110	105
BRASIL.....	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/}	1,006	1,270	1,191	1,389	1,474	1,600
GUYANA.....	12	15	15	17	17	17
PARAGUAY.....	48	42	40	20	25	30
PERU.....	998	900	1,000	1,000	1,050	1,100
VENEZUELA.....	962	765	1,077	602	1,058	867
TOTAL.....	29,309	39,582	34,923	21,733	31,034	33,819
AFRICA:						
ANGOLA.....	3,340	3,000	1,200	1,200	1,400	1,500
BENIN.....	15	14	14	14	15	15
BURUNDI.....	339	450	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	1,283	1,617
LIBERIA.....	76	68	67	83	83	70
MADAGASCAR.....	1,019	1,300	1,200	1,300	1,200	1,200
NIGERIA.....	64	40	65	53	72	65
RWANDA.....	221	256	300	300	350	350
SIERRA LEONE.....	102	125	83	167	117	140
TANZANIA.....	815	865	850	880	850	900
TOGO.....	200	200	155	190	200	200
UGANDA.....	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	18,788	17,099	19,362
ASIA:						
INDONESIA.....	1,473	1,630	1,478	1,791	2,008	2,092
INDONESIA.....	2,450	2,675	2,865	2,820	2,953	2,900
MALAYSIA.....	64	70	100	100	100	100
PHILIPPINES.....	513	467	483	583	602	600
PORTUGUESE TIMOR.....	58	75	75	65	75	4/
VIETNAM.....	52	60	60	60	65	70
YEMEN.....	45	35	35	35	40	40
TOTAL.....	4,655	5,012	5,096	5,454	5,843	5,802
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	60,602	68,575	74,614

^{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.

Foreign Agricultural Service. 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.

Foreign Commodity Analysis, FAS, USDA

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	1,337	1,376
CUBA.....	43	---	---	---	---	---
DOMINICAN REPUBLIC.....	507	600	755	470	730	570
EL SALVADOR.....	2,189	3,130	2,158	2,525	1,820	2,515
GUATEMALA.....	1,772	2,255	1,859	2,236	1,950	2,200
HAITI.....	329	305	425	296	317	290
HONOURAS.....	567	705	739	663	1,027	890
JAMAICA.....	8	4	12	2	5	3
MEXICO.....	1,776	2,156	2,660	2,400	2,250	2,500
NICARAGUA.....	531	608	737	848	845	892
PANAMA.....	14	---	25	13	15	12
TRINIDAD-TOBAGO.....	33	55	29	39	34	35
US-HAWAII.....	3	---	---	---	---	---
US-PUERTO RICO.....	---	---	---	---	---	---
TOTAL.....	8,990	11,055	10,551	10,619	10,330	11,283
SOUTH AMERICA:						
BOLIVIA.....	65	68	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	840
VENEZUELA.....	307	95	377	135	358	150
TOTAL.....	18,119	28,835	24,250	12,387	20,852	23,059
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	1,766	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	4,917
KENYA.....	1,031	1,082	1,213	1,440	1,255	1,585
LIBERIA.....	71	63	62	78	78	65
MADAGASCAR.....	890	1,160	1,060	1,160	1,060	1,060
NIGERIA.....	39	12	10	---	10	---
RWANDA.....	216	250	295	295	345	345
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	2,776	2,678	2,578	2,578
ZAIRE (CONGO,K).....	1,165	1,017	1,266	1,262	1,158	1,141
TOTAL.....	18,496	19,037	17,109	17,362	15,622	17,843
ASIA:						
INDIA.....	709	970	729	941	1,141	1,209
INDONESIA.....	1,543	1,700	1,965	1,920	2,053	2,000
MALAYSIA.....	---	---	---	---	---	---
PHILIPPINES.....	8	84	142	275	277	270
PORTUGUESE TIMOR.....	51	64	64	55	65	^{4/}
VIETNAM.....	---	---	---	---	---	---
YEMEN.....	36	30	30	30	35	35
TOTAL.....	2,347	2,848	2,930	3,221	3,571	3,514
OCEANIA:						
NEW CALEDONIA.....	14	14	14	14	14	14
PAPUA NEW GUINEA.....	494	628	645	694	611	627
TOTAL.....	509	642	659	708	625	641
WORLD TOTAL.....	48,461	62,417	55,499	44,297	51,000	56,340

^{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.

Foreign Agricultural Service. 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: EXPORTS BY CONTINENTS AS PERCENTAGE OF TOTAL WORLD
EXPORTS, AVERAGE 1968-72, ANNUAL 1973-77
(In percent)

Continent	Average: 1968-72	1973	1974	1975	1976	1977
North America	14.7	15.5	16.9	18.2	18.8	22.4
South America	47.8	47.1	40.4	42.8	41.5	36.9
Africa	31.1	31.6	35.9	31.9	32.5	31.0
Asia and Oceania	6.4	5.8	6.8	7.1	7.2	9.7
Total	100.0	100.0	100.0	100.0	100.0	100.0

COFFEE: EXPORTS BY 12 PRINCIPAL PRODUCING COUNTRIES AS PERCENTAGE
OF WORLD EXPORTS
(In percent)

Continent	Average: 1968-72	1973	1974	1975	1976	1977
Angola	5.6	5.9	6.2	4.7	2.4	2.2
Brazil	32.2	32.0	24.4	25.1	26.3	21.5
Colombia	11.9	10.9	12.7	14.0	10.6	11.2
Costa Rica	2.2	2.0	2.8	2.2	1.8	2.5
El Salvador	3.3	3.3	3.3	4.1	4.5	6.4
Ethiopia	2.5	2.0	1.7	1.7	1.9	1.8
Guatemala	3.0	3.1	3.7	3.9	3.3	4.5
Indonesia	3.0	2.7	3.4	3.7	3.8	5.6
Ivory Coast	5.8	5.4	8.1	7.3	9.1	8.4
Mexico	2.8	3.5	3.6	4.1	4.6	3.7
Uganda	5.6	6.0	6.2	5.5	4.6	4.6
Zaire	1.7	1.7	2.0	1.7	3.0	2.3
Total (12 countries)	79.6	78.5	78.1	78.0	75.9	74.7

Source: Compiled by the Foreign Agricultural
Service from official trade statistics
of specified countries.

Foreign Commodity Analysis, FAS, USDA

June 1978

COFFEE: EXPORTS BY COUNTRY OF ORIGIN, AVERAGE 1968-72, ANNUAL 1973-77
(In thousands of 60 kilogram bags) 1/

Country of origin	Average 1968-72	1973	1974	1975 <u>2/</u>	1976 <u>2/</u>	1977 <u>3/</u>
North America:						
Costa Rica	1,183	1,215	1,502	1,283	1,071	1,182
Dominican Republic	428	589	509	417	610	693
El Salvador	1,812	2,028	1,771	2,372	2,667	3,051
Guatemala	1,644	1,913	2,018	2,262	1,985	2,149
Haiti	310	318	306	326	421	289
Honduras	445	627	511	810	730	595
Mexico	1,512	2,148	1,932	2,378	2,735	1,774
Nicaragua	501	621	539	674	876	809
Trinidad and Tobago	49	35	13	52	30	32
Other <u>4/</u>	124	85	78	47	39	38
Total North America	8,008	9,579	9,179	10,621	11,164	10,612
South America:						
Brazil <u>5/</u>	17,586	19,818	13,252	14,604	15,560	10,162
Colombia	6,493	6,751	6,861	8,138	6,290	5,323
Ecuador	824	1,257	993	1,072	1,494	899
Peru	788	1,013	450	703	785	741
Venezuela	276	243	276	226	298	183
Other <u>4/</u>	100	95	60	180	152	164
Total South America	26,067	29,177	21,892	24,923	24,579	17,472
Africa:						
Angola	3,033	3,644	3,380	2,762	1,395	1,039
Burundi	323	361	362	421	366	282
Cameroon	1,107	1,367	1,679	1,561	1,642	1,159
Central African Republic	158	161	144	233	240	134
Ethiopia	1,343	1,265	929	963	1,133	833
Guinea	153	124	17	56	18	33
Ivory Coast	3,186	3,328	4,392	4,234	5,380	3,978
Kenya	873	1,255	1,195	1,128	1,292	1,533
Malagasy Republic	878	1,090	1,090	1,124	1,211	845
Rwanda	125	340	419	477	607	269
Tanzania	775	1,004	684	906	964	744
Togo	193	181	178	132	179	100
Uganda	3,042	3,731	3,358	3,217	2,724	2,192
Zaire (Congo, K)	949	1,081	1,101	982	1,784	1,069
Other <u>4/</u>	859	590	540	338	319	455
Total Africa	16,997	19,522	19,468	18,534	19,254	14,665
Asia and Oceania:						
India	560	971	773	1,026	831	909
Indonesia	1,610	1,653	1,862	2,139	2,268	2,673
Papua New Guinea <u>6/</u>	394	460	544	613	799	626
Other <u>4/ 7/</u>	913	525	490	358	360	400
Total Asia and Oceania	3,477	3,609	3,669	4,136	4,258	4,608
Total	54,549	61,887	54,208	58,214	59,255	47,357

1/ 132.276 pounds each. 2/ Revised. 3/ Preliminary. 4/ Includes minor exporting countries for which data are partially estimated. 5/ Includes soluble coffee in green bean equivalent. 6/ Ending June 30 of year shown. 7/ The major portion of this total is from Singapore and represents reexports not otherwise shown.

Source: Mainly official trade statistics of specified countries.

Foreign Commodity Analysis, FAS, USDA

GREEN COFFEE: N.Y. WHOLESALE PRICES, COLOMBIAN MANIZALES
(IN CENTS PER POUND)

Year	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average
1963	40.3	39.8	39.8	40.0	39.8	39.0	39.8	39.8	39.8	40.3	41.0	39.8	39.9
1964	48.0	44.8	50.5	49.0	49.8	49.3	49.5	51.5	50.3	51.0	50.3	50.5	49.5
1965	48.3	49.8	48.0	48.0	47.8	48.0	47.8	48.5	49.8	49.5	49.8	50.8	48.8
1966	49.8	50.3	49.8	49.8	49.0	48.5	48.5	48.0	46.5	45.5	46.0	44.8	48.0
1967	44.5	43.5	42.0	42.5	42.8	42.8	42.5	40.5	41.0	41.0	44.0	43.0	42.5
1968	43.3	41.3	43.3	43.5	43.0	43.0	43.8	43.5	43.0	43.8	43.8	43.0	43.2
1969	43.0	43.0	42.0	41.0	40.5	41.3	40.5	41.8	43.3	51.5	57.0	55.0	45.0
1970	60.5	58.5	57.0	58.0	58.3	58.0	57.0	57.0	56.5	57.0	54.5	53.5	57.2
1971	53.5	52.5	51.5	50.0	49.5	49.0	48.3	48.8	48.8	48.8	49.0	53.0	50.2
1972	<u>1</u> /	50.8	52.3	52.0	53.3	53.8	59.0	65.5	62.0	60.5	62.0	62.8	57.6
1973	66.0	74.0	75.0	68.3	74.0	76.0	76.8	74.5	74.5	73.5	73.5	72.5	73.2
1974	72.5	80.0	79.5	82.5	82.5	83.5	82.5	70.0	75.0	73.0	74.5	80.0	77.9
1975	81.0	81.5	72.3	69.8	68.3	65.8	72.0	102.0	99.0	97.0	88.5	90.0	82.3
1976	97.5	104.0	101.0	127.0	139.0	176.0	<u>1</u> /	<u>1</u> /	<u>1</u> /	187.0	184.0	205.0	146.7
1977	211.5	231.0	303.0	326.0	295.0	275.0	275.0	191.5	209.0	185.0	211.0	211.0	243.6
1978	200.5	195.5	186.5	180.0	--	--	--	--	--	--	--	--	--

1/ Not available.

Source: U.S. Department of Labor

Foreign Commodity Analysis, FAS, USDA

June 1978

GREEN COFFEE: N.Y. WHOLESALE PRICES, MEXICAN PRIME WASHED
(IN CENTS PER POUND)

Year	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average
1967	1/	39.0	37.8	38.3	40.8	41.5	41.5	40.3	39.8	39.5	40.5	40.3	39.9
1968	40.3	40.3	40.0	40.3	40.5	40.3	40.3	40.3	39.5	39.5	39.5	39.0	40.0
1969	39.0	39.0	38.5	37.5	37.0	37.3	36.5	37.0	40.0	47.0	48.5	46.3	40.3
1970	52.5	51.3	51.8	45.8	55.5	55.0	55.5	55.0	54.0	53.0	49.0	44.5	51.9
1971	46.0	45.5	47.0	45.3	46.8	46.8	46.5	46.0	45.8	45.8	45.8	1/	46.1
1972	47.0	46.3	46.3	46.3	47.3	48.7	54.3	56.5	54.8	53.0	53.0	54.0	50.6
1973	58.0	64.0	68.0	53.5	64.0	65.0	65.5	61.0	59.8	64.3	63.4	64.1	62.5
1974	66.5	76.5	71.0	72.5	72.0	73.5	71.0	62.8	59.0	60.3	60.5	64.0	67.4
1975	58.3	58.8	50.5	48.3	47.3	54.5	52.6	86.0	79.0	80.0	77.5	80.5	64.4
1976	91.8	99.5	95.5	118.5	125.0	151.0	131.0	149.0	167.0	170.5	178.0	204.0	140.0
1977	210.0	235.0	303.0	323.0	275.0	260.0	260.0	200.0	200.0	1/	1/	1/	251.7
1978	202.5	200.0	185.0	177.5	--	--	--	--	--	--	--	--	--

1/ Not available.

Source: U.S. Department of Labor.

Foreign Commodity Analysis, FAS, USDA

June 1978

GREEN COFFEE: ICO COMPOSITE PRICE $\frac{1}{2}$, MONTHLY AND ANNUAL AVERAGES,
1965-1978

(IN CENTS PER POUND)

Year	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average
1965	2/ 3/	3/	38.20	38.41	37.05	39.27	40.67	42.20	41.65	42.15	41.73	42.32	40.37
1966	2/ 42.15	40.91	40.14	40.30	40.46	39.83	39.49	39.14	38.31	38.45	38.24	37.91	39.61
1967	2/ 37.22	37.13	36.68	37.43	38.30	38.57	37.58	36.69	36.53	36.43	37.20	36.82	37.22
1968	2/ 37.26	37.36	37.68	37.81	37.61	37.70	37.56	37.38	37.30	37.38	36.93	36.37	37.36
1969	36.33	36.54	36.05	35.17	34.96	35.35	35.42	37.01	40.28	45.33	45.83	46.22	38.71
1970	49.15	48.73	49.27	50.40	51.14	50.89	51.70	51.99	52.03	51.87	50.23	48.88	50.52
1971	49.02	46.96	45.08	44.28	44.31	43.76	43.50	43.67	43.31	43.13	43.68	45.23	44.66
1972	44.80	44.92	46.01	46.42	47.33	47.76	54.11	55.83	53.99	53.95	54.55	55.17	50.40
1973	57.04	60.75	61.77	59.78	61.63	62.78	62.85	62.33	64.05	64.05	64.82	65.09	62.16
1974	66.22	70.78	72.04	72.89	73.74	71.49	68.45	64.55	63.04	63.04	64.57	65.63	67.95
1975	64.96	63.80	60.71	59.53	60.29	63.00	60.43 $\frac{4}{4}$	88.49	84.59	84.59	82.73	86.84	71.76
1976	94.97	101.94	100.50	123.15	138.93	149.24	142.34	150.87	164.53	164.53	181.28	207.85	142.48
1977	227.89	251.20	324.59	333.49	295.95	269.81	246.15	240.17	236.02	221.70	228.51	201.15	256.38
1978	200.11	191.31	167.67	166.78	158.40	--	--	--	--	--	--	--	--

1/ International Coffee Organization (ICO) composite price, basis 1968 Agreement, of 4 major coffee growths, i.e., Colombian Mild Arabica, Other Mild Arabica, Unwashed Arabica (Brazilian), and Robusta.

2/ Unofficial.

3/ Series began March 22, 1965.

4/ Average through July 1-18 only.

Source: International Coffee Organization; "Complete

Cover Coverage," George Gordon Paton & Co., Inc.

Foreign Commodity Analysis, FAS, USDA

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