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FOREIGN AGRICULTURE CIRCULAR

U.S. DEPARTMENT OF AGRICULTURE
Foreign Agricultural Service Washington D.C.



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CURRENT SERIAL RECORDS

WORLD COFFEE CROP

EXCEEDS REQUIREMENTS

The Foreign Agricultural Service's fourth (March) estimate of the 1961-62 world coffee crop places total production at 73 million bags, compared with a 1960-61 production of 66.2 million. Exportable production is estimated at 59 million, 13 percent above 1960-61. North America and South America show increases this year, while Africa, and Asia and Oceania will have some reduction.

World coffee trade of about 44 million bags in 1961 was 3.7 percent above 1960. European markets accounted for the main increase. U. S. imports in 1961 showed an increase of 1.5 percent over 1960.

Production

North America: North American coffee production for 1961-62 is estimated at 9.95 million bags, with 7.7 million exportable. This compares with a total production of 8.99 million for 1960-61, with an exportable of 6.8 million.

Costa Rica's 1961-62 crop is below the 1960-61 record. Picking was completed in January, and all except about 50,000 bags is expected to be registered.

Production is higher this year in the Dominican Republic and Haiti, due mainly to this being the "on-year" in the 2-year production pattern.

El Salvador has a production rise this year, despite some hail and wind damage. One storm was centered around Atiquizaya and Chalchuapa on August 7, 1961. A second storm during the first half of November affected coffee areas throughout the country. A survey, however showed no significant loss in coffee but an increase in the proportion of low grade coffee.

This circular contains more detailed information than the summary of similar title published in the monthly supplement issue of Foreign Crops and Markets of March 29, 1962.

GREEN COFFEE: World total production for the marketing year 1961-62 with comparisons 1/

Continent and country	Average	1958-59	1959-60	1960-61	4th
	1950/51- 1954/55				estimate
	1,000	1,000	1,000	1,000	1,000
	bags 2/	bags 2/	bags 2/	bags 2/	bags 2/
North America:					
Costa Rica	439	895	905	1,165	1,015
Cuba	542	525	800	700	800
Dominican Republic	455	425	585	500	600
El Salvador	1,216	1,475	1,575	1,450	1,600
Guatemala	1,129	1,400	1,600	1,500	1,625
Haiti	642	450	650	400	650
Honduras	212	330	350	275	300
Mexico	1,373	1,600	2,050	2,100	2,350
Nicaragua	362	360	375	450	440
Panama 3/.....	-	63	70	65	75
Other North America 4/.....	470	300	475	385	495
Total North America	6,840	7,823	9,435	8,990	9,950
South America:					
Brazil	18,964	31,000	44,000	30,000	37,000
Colombia	6,330	7,700	8,000	7,700	7,800
Ecuador	347	450	675	750	800
Peru	146	390	475	525	700
Venezuela	729	1,000	900	825	800
Other South America 5/.....	55	65	70	90	95
Total South America	26,571	40,605	54,120	39,890	47,195
Africa:					
Angola	1,019	1,465	1,800	2,750	2,650
Cameroun 6/.....	182	450	560	675	835
Central African Republic	-	100	105	125	145
Congo, Republic of the 7/.....	613	1,525	1,380	900	750
Ethiopia	613	950	950	950	900
Guinea, Republic of	120	190	195	235	235
Ivory Coast	1,210	2,478	2,578	3,300	2,000
Kenya	223	400	410	560	550
Malagasy Republic	634	875	825	900	950
Ruanda-Urundi 7/.....	-	-	600	400	400
Tanganyika	281	390	425	495	425
Togo	56	180	140	150	172
Uganda	754	1,525	1,950	1,900	2,100
Other Africa 8/.....	213	330	393	446	369
Total Africa	5,918	10,858	12,311	13,786	12,481
Asia and Oceania:					
India	387	775	800	1,125	850
Indonesia	985	1,175	1,500	1,525	1,500
Yemen	70	85	90	90	90
Other Asia and Oceania 9/.....	275	344	581	820	895
Total Asia and Oceania	1,717	2,379	2,971	3,560	3,335
Total world production	41,046	61,665	78,837	66,226	72,961

1/ The coffee marketing season begins during the second half of the calendar year, starting in some countries like Brazil as early as July 1 and in other countries about October 1. 2/ 132.276 pounds each. 3/ Prior to 1958-59 included in other North America. 4/ Includes Guadeloupe, Hawaii, Jamaica, Martinique, Puerto Rico and Trinidad & Tobago. 5/ Includes Bolivia, British Guinea, Paraguay and Surinam. 6/ Beginning with 1961-62 includes West Cameroun. Prior to 1961-62 this area was identified as Southern Cameroun and its production was included with Nigeria. 7/ Prior to 1959-60 Ruanda-Urundi shown in Republic of the Congo. 8/ Includes Cape Verde, Comores Islands, Dahomey, Gabon, Ghana, Liberia, Nigeria, Republic of Congo, Sao Tome & Principe, Sierra Leone and Spanish Guinea. 9/ Includes Malaya, New Caledonia, New Hebrides, North Borneo, Papua & New Guinea, Philippines, Portuguese Timor and Vietnam.

GREEN COFFEE: World exportable production for the marketing year 1961-62 with comparisons 1/

Continent and country	Average	1958-59	1959-60	1960-61	4th estimate
	1950/51- 1954/55				1961-62
	1,000 bags 2/	1,000 bags 2/	1,000 bags 2/	1,000 bags 2/	1,000 bags 2/
North America:					
Costa Rica	378	815	800	1,050	900
Cuba	49	60	200	100	200
Dominican Republic	372	300	460	375	475
El Salvador	1,087	1,375	1,475	1,350	1,500
Guatemala	905	1,200	1,400	1,300	1,425
Haiti	443	300	500	250	500
Honduras	167	200	300	225	250
Mexico	1,141	1,200	1,550	1,450	1,650
Nicaragua	313	320	325	400	390
Panama 3/.....	-	23	25	20	30
Other North America 4/.....	72	190	365	287	345
Total North America	4,927	6,063	7,400	6,807	7,665
South America:					
Brazil	14,730	26,000	37,000	22,000	29,000
Colombia	5,632	6,900	7,000	6,700	6,800
Ecuador	308	350	475	550	600
Peru	68	300	375	415	600
Venezuela	488	600	500	450	425
Other South America 5/.....	52	40	44	40	44
Total South America	21,278	34,190	45,394	30,155	37,469
Africa:					
Angola	990	1,440	1,775	2,700	2,600
Cameroun 6/.....	180	440	545	660	820
Central African Republic	-	90	95	120	140
Congo, Republic of the 7/.....	595	1,490	1,365	850	700
Ethiopia	544	850	850	850	600
Guinea, Republic of	110	175	100	225	220
Ivory Coast	1,137	2,430	2,530	3,250	1,950
Kenya	214	380	390	540	525
Malagasy Republic	569	750	750	800	850
Ruanda-Urundi 7/.....	-	-	590	390	390
Tanganyika	274	385	420	435	415
Togo	57	178	138	148	170
Uganda	744	1,500	1,920	1,885	2,085
Other Africa 8/.....	211	296	355	406	337
Total Africa	5,625	10,404	11,903	13,309	12,002
Asia and Oceania:					
India	93	240	275	550	350
Indonesia	504	975	1,300	1,325	1,300
Yemen	60	65	30	80	80
Other Asia and Oceania 9/.....	71	64	66	140	165
Total Asia and Oceania	728	1,344	1,721	2,095	1,895
World exportable production	32,558	52,001	66,418	52,366	59,031

1/ The coffee marketing season begins during the second half of the calendar year, starting in some countries like Brazil as early as July 1 and in other countries about October 1. Exportable production represents total production minus consumption, except for Brazil prior to 1959-60 which was based upon "registrations" of current crop coffee minus port consumption and coast wise shipments. 2/ 132.276 pounds each. 3/ Prior to 1958-59 included in other North America. 4/ Includes Guadeloupe, Hawaii, Jamaica, Puerto Rico and Trinidad & Tobago. 5/ Includes Bolivia, British Guinea, Paraguay and Surinam. 6/ Beginning with 1961-62 includes West Cameroon. Prior to 1961-62 this area was identified as Southern Cameroon and its production was included with Nigeria. 7/ Prior to 1959-60 Ruanda-Urundi shown in Republic of the Congo. 8/ Includes Cape Verde, Comores Islands, Dahomey, Gabon, Ghana, Liberia, Nigeria, Republic of Congo, Sao Tome & Principe, Sierra Leone and Spanish Guinea. 9/ Includes New Caledonia, New Hebrides, North Borneo, Papua & New Guinea, Portuguese Timor and Vietnam.

Guatemala's 1961-62 coffee crop is estimated to be 125,000 bags larger than the 1960-61 crop. It could set a record.

Production in Honduras is increasing, partly by new areas coming into bearing, and partly by improved cultural practices. Coffee is grown on 40,000 farms in many mountainous regions between the elevations of 1,000 to 6,000 feet, with concentrations in the Sula Valley and the Departments of Camayagua and Morazon.

Mexico's 1961-62 crop has been damaged somewhat by unusually low temperatures in northeast Mexico during the middle of January. There also was some damage in the Villa Zaurez district of the state of Puebla and in the Tlapacoyan and Plan de las Hayas districts of northern Veracruz. Some damage to trees, particularly in the Xilitla district, may affect next season's crop.

Nicaragua's crop is late, and is now expected to be smaller than the 1960-61 crop. Weather conditions were favorable in Jamaica, and the 1961-62 crop is about 50 percent higher than in 1960-61.

South America: South America's 1961-62 total crop is now estimated at 46.2 million bags, with an exportable of 36.5 million.

The 1961-62 crop in Brazil is now estimated at 36 million bags total, and 28 million exportable. Almost half of this production will be from the state of Parana. Registrations on December 31, 1961 stood at 24.6 million bags, or probably about 75 percent of the crop.

Colombia's 1961-62 crop may be up slightly from 1960-61. Most of the crop harvested in the latter part of 1961 had moved to market by the middle of February; the crop was heavy, especially in the Department of Antioquia.

The 1961-62 crop in Ecuador is estimated at 800,000 bags, with exportable at 600,000 bags.

New trees coming into bearing in Peru account for a 1961-62 production estimate which is 33 percent higher than for 1960-61. Approximately half of the coffee plantings have yet to come into bearing. This year's crop is a record and the increase is mainly in the Chanchamayo Valley (Department of Junin) and Oriental (Department of San Martin) producing areas.

The 1961-62 Venezuelan crop will probably be slightly below the previous year. Prospects are promising for the coming 1962-63 crop however.

Bolivia's 1961-62 crop is larger than the 1960-61 crop. Over half is in the Department of La Paz, and the remainder in Santa Cruz.

Africa: African coffee production for 1961-62 is estimated at a total of 13.4 million bags, with 13 million exportable. This is a reduction of about 4 percent from 1960-61; internal disturbances and adverse weather in some countries reduced production.

Good weather, and new plantings coming into production in Angola will substantially offset losses due to internal disturbances and are expected to provide another large crop. Many new trees planted in the past few years have yet to bear fruit; currently, however the only new plantings being made are to replace old trees. Volunteer brigades have done much to save the crop that was expected to be destroyed as a result of fighting in the northern areas.

The 1961-62 Cameroon crop is estimated at 835,000 bags, with 820,000 bags exportable. Of this amount, 110,000 bags is estimated as West Cameroon production (prior to 1961-62 included with Nigeria).

Production continues to rise in the Central African Republic, and prospects for future production are good. New plantings are continuing through government services, and increased production and exports may balance imports.

Coffee berry disease may reduce Kenya's 1961-62 crop. The crop has not suffered severely from the phenomenal rains and may yet exceed 1960-61.

Production and quality of coffee in the Republic of the Congo both continue to decline. Many plantations are now out of production, and there is no plan to recover them. Lack of insecticides this year has lowered both production and quality.

Coffee farms have been neglected in Ruanda-Urundi, and a smaller crop is expected. There have been tribal difficulties, making it difficult for technicians to travel and give guidance to the producers.

The 1961-62 Tanganyika crop is smaller than the 1960-61 outturn. The proportion of Arabica as compared to Robusta is expected to rise this year.

Uganda is expected to have an appreciably heavier crop. Heavy rains this season probably have increased it. The government is not now encouraging further planting. The price paid to farmers was increased 20 percent as of January 22, 1962 to help growers who have gone into debt because of low coffee prices.

Estimates of 1961-62 exportable production for some of the smaller producing countries of Africa are as follows in bags of 132.276 pounds each: Cape Verde 2,000; Comores Islands 2,000; Dahomey 40,000; Gabon 19,000; Ghana 38,000; Liberia 16,000; Nigeria 18,000; Republic of Congo 11,000; Sao Tome and Principe 6,000; Sierra Leone 75,000; Spanish Guinea 110,000.

Asia and Oceania: The 1961-62 crop in Asia and Oceania is estimated at a total of 3,380,000 bags, with 1,890,000 bags exportable.

India's 1961-62 crop is estimated at 850,000 bags, with 350,000 exportable. This is substantially below the 1960-61 record. Returns to growers continued to drop.

Indonesian coffee production is expected to be about the same in 1961-62 as in 1960-61. Some of the plantations have not been replanting old acreage, finding it more profitable to plant rubber or tea.

Increases in bearing trees continue to build up coffee production in the Philippines. Acreage harvested for the 1960-61 year was about 100,000 acres, up about 28 percent. Good growing conditions and improved cultural practices are expected to boost this season's crop.

World Trade and Requirements

World trade in coffee during calendar 1961 set a record of about 44 million bags, 3.5 percent over 1960, the previous record. The largest increases were in Western European countries. West Germany surpassed France in 1961 in coffee imports, and became the second largest importer. There were significant increases in imports in Italy, Sweden, the Netherlands, Canada, the United Kingdom, Finland, Switzerland, Argentine Republic, Spain, the Soviet Union, Japan and Portugal.

U. S. 1961 coffee imports amounted to 22.4 million bags, 1.2 percent over 1960, but 3.4 percent below the 1959 record of 23.2 million bags. Imports from Brazil accounted for 38.6 percent of the total, compared with 42 percent in 1960. The United States in 1961 imported a record 4.6 million bags from Africa, 20 percent more than in 1960. Gross imports for the first 6 months of calendar 1961 were 11.25 million bags, and 11.04 million for the last 6 months. The value of green coffee imports for calendar 1961 was \$961,656,000, compared with the 1960 value of \$1,003,386,000. The 1961 value was 4.2 percent below 1960, and 12 percent below 1959.

Green coffee stocks in the United States dropped from 3,204,000 bags at the beginning of 1961 to 2,815,000 bags at the end of the year. Roastings for the year 1961 increased by 1.8 percent over 1960. The green coffee used in manufacturing soluble in 1961 at 4,010,000 bags was the highest ever. The percentage of coffee used in soluble manufacture in 1961 was 18.0, compared with 18.1 in 1960 and 17.3 in 1959.

Spot prices in New York for Santos 4's (Brazils) averaged 36.3 cents per pound in 1961; the 1960 average was 36.9 cents and the 1959 average 37.6 cents. Colombian Manizales prices averaged 43.9 cents in 1961, compared with 45.2 in 1960. Ambriz #2 AA prices dropped more than Brazils or Colombians in 1961 compared with 1960. The 1961 average price for Ambriz was 19.69 cents per pound, compared with 25.27 cents for 1960. There was a sharp drop in Ambriz prices toward the end of 1960.

Brazil's exports during calendar 1961 totaled 16,969,565 bags, up slightly from the 16,819,043 bags in 1960. Exports to new markets (countries not members of the International Coffee Agreement) rose somewhat in 1961. About half of such shipments were to the Soviet Union, During the International Coffee Agreement year, Brazil's total exports were 16,110,594 bags of which 15,449,477 bags went to "traditional markets" and 661,117 bags to "new markets."

Colombia exported 5,662,517 bags of coffee in 1961, compared with 5,953,240 bags in 1960. October-December 1961 exports totaled 1.404 million bags with 1.791 million in the like period of 1960. Most of this drop was in exports to the United States. Exports recently have been particularly large to Spain, Italy, Czechoslovakia, and Japan. Stocks will probably rise considerably during the current marketing year, and this season's carryover stocks may reach 6.5 million bags.

The International Coffee Agreement was extended in September 1961 for the October 1961-September 1962 year. A proposed draft long-term agreement was published in December 1961. Meetings of the Coffee Study Group began in Washington on March 21, 1962 to achieve a substantial measure of agreement on certain fundamental issues. These meetings were to determine whether a basis exists for formal negotiations later in the year for a long-term coffee agreement comprising both importing and exporting countries. The meetings ended on March 28, and there was virtually unanimous agreement of the Group that an international conference should be called to negotiate a comprehensive international coffee agreement. It was therefore decided to request the Secretary General of the United Nations to arrange such a conference.

GREEN COFFEE: U. S. gross import requirements by country of origin
(1 million bags of 132.276 pounds)

Area of origin	Average 1951-55	(Per- cent)	1959	(Per- cent)	1960	(Per- cent)	1962 ^{1/}	(Per- cent)	Est. 1962 Jan.-June	(Per- cent)
Brazil.....	8.82	45	10.56	46	9.26	42	8.63	39	4.67	41
Africa and Asia.....	1.55	8	3.07	13	3.87	18	4.78	21	2.28	20
<u>Mild Coffees:</u>										
Colombia.....	4.83	25	4.90	21	4.26	19	4.08	18	2.17	19
Other South America.....	0.70	3	0.90	4	1.08	5	0.97	4	0.46	4
Mexico and Central America.....	3.29	17	3.31	14	3.16	14	3.58	16	1.59	14
Caribbean.....	0.47	2	0.43	2	0.47	2	0.34	2	0.23	2
<u>Total Milds.....</u>	<u>9.29</u>	<u>47</u>	<u>9.54</u>	<u>41</u>	<u>8.97</u>	<u>40</u>	<u>8.97</u>	<u>40</u>	<u>4.45</u>	<u>39</u>
<u>Total World.....</u>	<u>19.66</u>	<u>100</u>	<u>23.17</u>	<u>100</u>	<u>22.10</u>	<u>100</u>	<u>22.38</u>	<u>100</u>	<u>11.40</u>	<u>100</u>

^{1/} Revised.

GREEN COFFEE: U. S. Gross imports for consumption by months, 1957-1961
(Bags of 132.276 pounds each)

Calendar year	1957	1958	1959	1960	1961 <u>1/</u>
January	2,015,745	1,827,521	1,587,840	1,231,918	1,951,110
February	2,399,730	1,473,665	2,278,610	2,148,092	1,715,463
March	1,828,416	1,470,061	2,252,406	2,021,836	2,234,710
April	1,543,456	1,927,182	1,781,449	1,643,136	1,771,217
May	1,494,024	2,017,091	1,840,258	1,815,797	1,711,767
June	1,192,069	1,307,345	1,505,026	1,899,318	2,048,374
January - June	10,473,440	10,022,865	11,245,589	10,760,097	11,432,641
July	1,575,947	1,445,675	1,255,221	1,625,133	1,632,012
August	1,441,611	1,247,495	2,162,982	2,031,009	1,775,779
September	1,171,908	1,479,026	3,044,343	1,962,691	1,864,301
October	1,668,558	2,052,425	1,472,339	2,066,741	1,934,063
November	2,127,476	1,885,605	1,623,384	1,827,269	1,607,714
December	2,333,283	2,030,033	2,368,647	1,827,996	2,141,378
July - December ...	10,318,783	10,140,259	11,926,916	11,340,839	10,955,247
January - December	20,792,223	20,163,124	23,172,505	22,100,936	22,387,888
Fiscal year	1957-58	1958-59	1959-60	1960-61	1961-62
July - December ...	10,318,783	10,140,259	11,926,916	11,340,839	10,955,247
January - June	10,022,865	11,245,589	10,760,097	11,432,641	(11,400,000)
July - June	20,341,648	21,385,848	22,687,013	22,773,480	22,355,247

1/ Revised.

Source: United States Bureau of Census.

January - June 1962 Foreign Agriculture Service estimate.

GREEN COFFEE: U. S. estimated import requirements, annual 1959-1962
(1 million bags of 132.276 pounds)

Calendar year: Semi-annual	1959	1960	1961	1962
January - June:				
Total consumption	10.8	10.9	11.2	11.3
Net stock change	$\frac{+ 0.2}{11.0}$	$-\frac{0.4}{10.5}$	$-\frac{0.1}{11.1}$	$\frac{+ 0.1}{11.4}$
Net imports				
July - December:				
Total consumption	10.8	11.0	11.1	-
Net stock change	$\frac{+ 0.8}{11.6}$	$\frac{+ 0.3}{11.3}$	$-\frac{0.3}{10.8}$	$-\frac{-}{-}$
Net imports				
Calendar year:				
Total consumption	21.6	21.9	22.3	-
Net stock change	$\frac{+ 1.0}{22.6}$	$-\frac{0.1}{21.8}$	$-\frac{0.4}{21.9}$	$-\frac{-}{-}$
Net imports				

Fiscal year summary	1958-59	1959-60	1960-61	1961-62
Total consumption	21.3	21.7	22.2	22.4
Net stock change	$-\frac{0.4}{20.9}$	$\frac{+ 0.4}{22.1}$	$\frac{+ 0.2}{22.4}$	$-\frac{0.2}{22.2}$
Net imports				

Note: Total consumption: Civilian and military disappearance, plus manufactured coffee for consumption.

Net stock change: All coffees, green or roasted, except imports not yet entered for consumption.

Net imports: Total receipts from territories and imports into continental United States minus exports and re-exports.



GREEN COFFEE: United States imports 1957-1961

Continent and country	1957	1958	1959	1960	1961 ^{1/}
	bags ^{2/}	bags ^{2/}	bags ^{2/}	bags ^{2/}	bags ^{2/}
North America:					
Costa Rica	165,522	302,331	246,696	271,275	369,203
Cuba	124,003	91,224	34,263	227	411
Dominican Republic	296,315	381,164	307,562	403,308	265,971
El Salvador	676,302	723,797	620,651	445,551	582,724
Guatemala	829,780	882,071	988,470	798,092	954,549
Haiti	80,792	210,744	85,067	63,878	75,531
Honduras	118,200	147,846	146,379	332,043	144,399
Mexico	1,240,951	1,201,612	1,085,980	1,097,418	1,253,371
Nicaragua	239,035	247,275	153,917	170,251	224,944
Panama	100	8,183	19,119	15,922	5,942
Other North America	22,546	31,278	42,357	30,332	46,899
Total North America	3,793,546	4,227,525	3,730,461	3,628,297	3,923,944
South America:					
Brazil	8,889,282	7,477,700	10,563,514	9,260,842	8,629,273
Colombia	4,054,040	4,245,530	4,901,789	4,254,415	4,078,422
Ecuador	315,227	361,514	241,803	316,889	202,222
Peru	93,598	244,891	232,474	346,908	382,482
Venezuela	368,617	532,232	401,629	344,642	343,976
Other South America	2,337	21,124	28,187	75,055	43,109
Total South America	13,723,101	12,882,991	16,369,396	14,598,751	13,679,484
Africa:					
Angola	796,739	699,410	741,765	802,329	1,024,401
British East Africa	766,508	760,266	729,799	934,051	1,245,541
Cameroun	2,271	11,199	8,416	35,560	70,994
Ethiopia	466,787	457,912	267,273	581,739	681,522
Ivory Coast	252,942	304,733	337,082	657,207	735,857
Malagasy Republic	255,024	154,456	33,234	83,021	113,957
Republic of the Congo	518,064	512,665	813,326	644,566	592,532
Other Africa	64,563	63,191	99,403	85,925	116,259
Total Africa	3,122,898	2,969,832	3,030,298	3,824,398	4,581,063
Asia & Oceania:					
India	9,786	7,357	6,006	7,861	39,814
Indonesia	89,934	20,531	13,216	19,113	138,002
Other Asia & Oceania	52,958	54,888	23,128	22,516	23,344
Total Asia & Oceania	152,678	82,776	42,350	49,490	201,160
Other Countries	-	-	-	-	2,237
Grand total	20,792,223	20,163,124	23,172,505	22,100,936	22,387,888

^{1/} Preliminary.

^{2/} 132.276 pounds each.

Foreign Agricultural Service. Compiled from official records of the Bureau of the Census.

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