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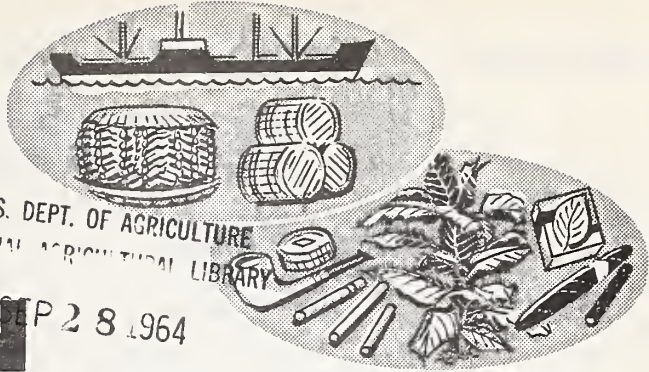
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# TOBACCO SITUATION

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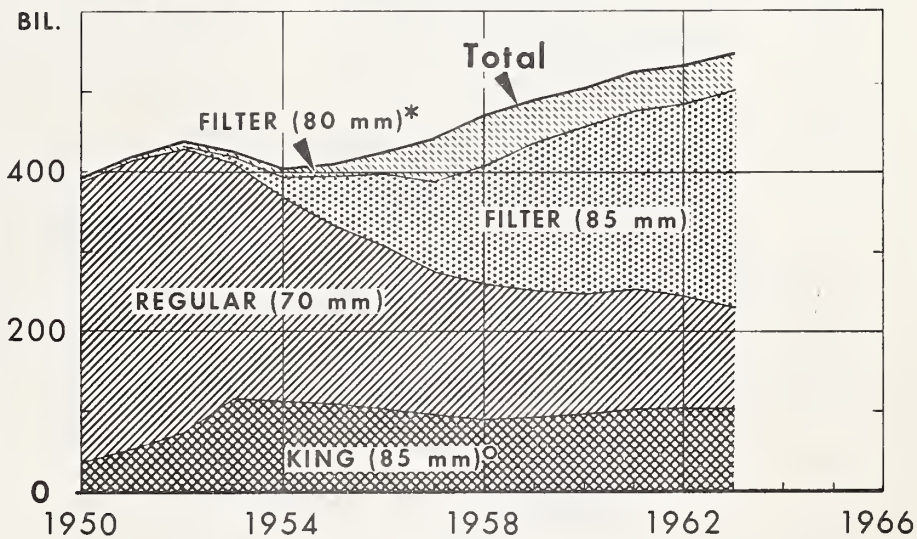
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MARCH 1964

In 1963, U. S. cigarette output, at a record 550 1/2 billion, was 2.8 percent above 1962; this was about twice the unusually small output increase in 1962 over 1961. In 1963, nearly 58 percent of the output consisted of filter tip cigarettes, and about 42 percent, non-filter tips. The year before, the split was about 54 1/2 percent filter tips, and about 45 1/2 percent nonfilter tips. Ten years ago filter tip cigarettes accounted for less than 10 percent of total output.

U. S. smokers (including those overseas) use about 95 percent of the cigarettes produced in the United States; foreign markets and offshore shipments take the other 5 percent.

## CIGARETTE OUTPUT BY KIND AND SIZE



\*INCLUDES 70 MM. FILTER TIPS. ○ INCLUDES 80 MM. NONFILTER TIPS.  
PRIOR TO 1958 BASED ON VARIOUS UNOFFICIAL SOURCES.

U. S. DEPARTMENT OF AGRICULTURE

NEG. ERS 660-64 (3) ECONOMIC RESEARCH SERVICE

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Per Capita Consumption

Exports, Imports, Foreign Production

Leaf Supplies and Use

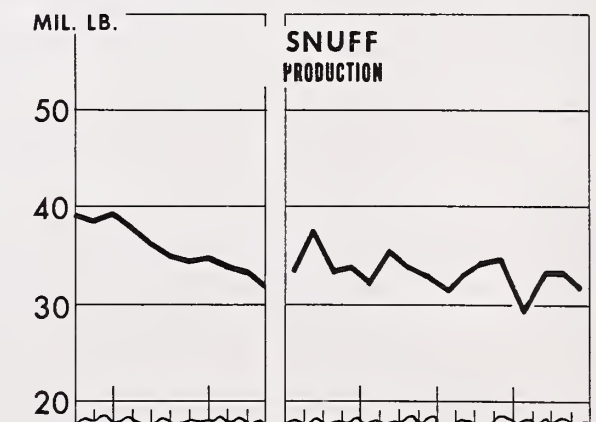
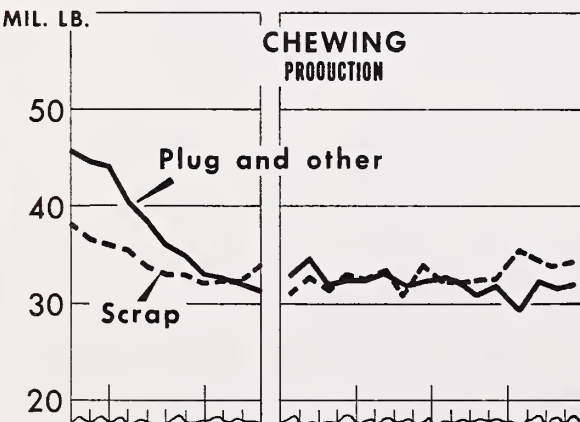
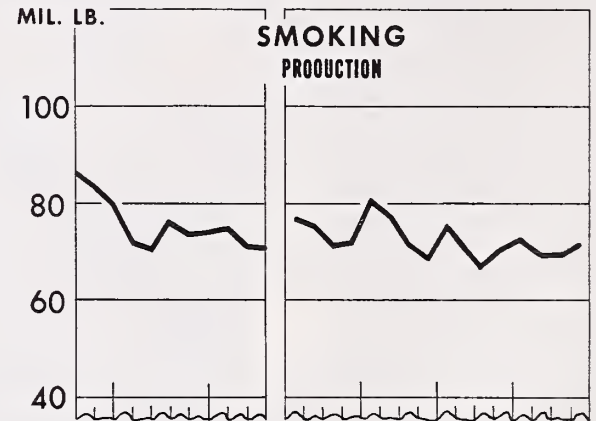
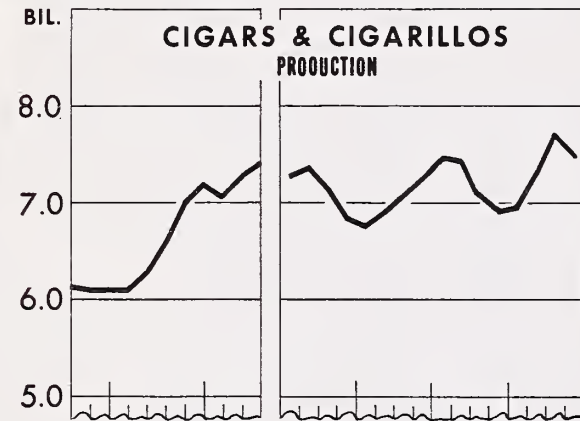
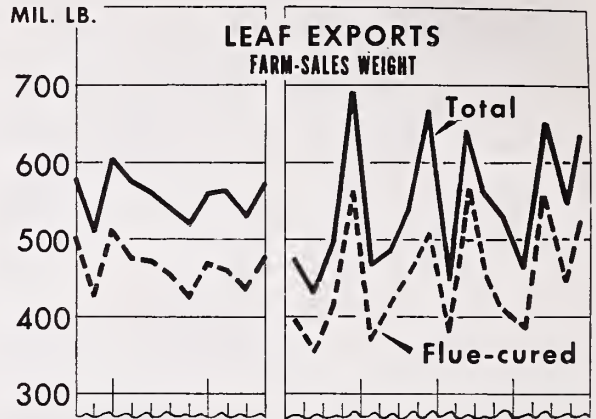
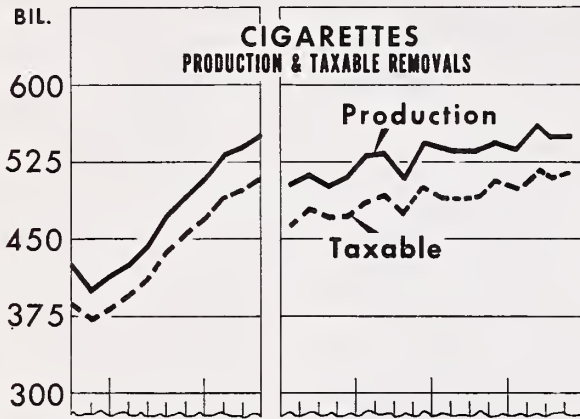
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# TOBACCO OUTLETS

## Recent Trends in Manufactured Products and Exports



1955 '60 1960 '61 '62 '63  
ANNUAL QUARTERLY, SEASONALLY ADJUSTED,  
AT ANNUAL RATES

1955 '60 1960 '61 '62 '63  
ANNUAL QUARTERLY, SEASONALLY ADJUSTED,  
AT ANNUAL RATES

THE TOBACCO SITUATION

Approved by the Outlook and Situation Board, March 24, 1964

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SUMMARY

Growers' intentions as of March 1 indicate this year's tobacco acreage will be 8½ percent below last year and the smallest in many years. The 1964 acreage allotments of flue-cured and burley--the 2 big-volume cigarette tobaccos--have been reduced 10 percent below 1963, primarily because record yields per acre during 1962 and 1963 greatly increased supplies. Acreage allotments of some other kinds also are smaller than a year earlier. The 1964 production of flue-cured, burley, and Kentucky-Tennessee fire-cured and dark air-cured types is expected to be moderately lower than in 1963 and 1962; this year's production of cigar binder, cigar wrapper and Maryland tobacco is expected to exceed last year's but little change is indicated for cigar filler tobacco.

In 1963, U. S. smokers consumed a record 524 billion cigarettes--3 percent more than in 1962. This compares with an increase of only a little more than 1 percent a year earlier. Cigarette consumption per capita (18 years old and over) rose 2 percent above 1962 and 1961--2 years of virtually no change.

Total 1963 output of cigarettes, at 550½ billion, exceeded 1962 by 15 billion for a new record. U. S. smokers consume 95 percent of the output and exports to numerous overseas destinations and shipments to U. S. island possessions account for the other 5 percent. Of total output in 1963, filter tip cigarettes comprised nearly 58 percent and nonfilter tips about 42 percent; in 1962 the split was filter tips, 54½ percent, and nonfilter tips 45½ percent.

On January 11, 1964, Smoking and Health: Report of the Advisory Committee to the Surgeon General of the Public Health Service was released. It will be several months before sufficient data are available for a reliable appraisal of the report's impact on tobacco consumption. In January 1964, taxable removals of cigarettes declined 5<sup>3</sup>/<sub>4</sub> percent from the record for that month a year earlier. Taxable removals of cigars rose a fourth and taxable removals of small cigars (cigarette size) were 3½ times the January 1963 figure. The January 1964 taxable removals of smoking tobacco (for pipes and roll-your-own cigarettes) were about a sixth above a year earlier.

The 1963 consumption of cigars and cigarillos by U. S. smokers totaled nearly 7.3 billion--around 3 percent above the nearly static level of the 3 preceding years and highest since 1923. Cigar and cigarillo consumption trended upward strongly in the last half of 1963; also, there were particularly sharp gains by small cigars (cigarette size) in the final quarter.

The 1963 consumption of smoking tobacco in pipes and roll-your-own cigarettes totaled nearly 71 million pounds--about one-half million pounds lower than in 1962. The decline occurred in roll-your-own cigarettes; tobacco used in pipes likely was near the level of 1962.

The 1963 output of chewing tobacco, at 65.3 million pounds, topped 1962 by about 600,000 pounds. Manufacture of scrap chewing increased to a 7-year high and more than offset the drop in output of plug chewing tobacco. The 1963 output of snuff, at 31.8 million pounds, was down 4 percent from 1962 to a 50-year low.

Exports of unmanufactured tobacco in 1963 totaled about 570 million pounds (farm-sales weight)--8 percent above 1962 and highest since 1956. Exporters placed a total value of \$403 million on 1963 exports of unmanufactured tobacco--up 8 percent from 1962 and above the declared value in any previous year. Four-fifths of the total tobacco exports was flue-cured. The better quality available from the crop produced in 1963 than in 1962 contributed to the increase in exports. For the year ending June 30, 1964, exports of flue-cured tobacco will likely be up about 9 percent from 1962-63 and exports of total unmanufactured tobacco probably will be close to the calendar year 1963 figure.

Government price support levels for 1964 tobaccos eligible for price support are 1 percent higher than for 1963. The increase results from the rise in the parity index--based on the comparison of its average in 1961-63 with 1959. The method of computing price support levels for tobacco is specified by law. The parity index measures the average change over time in the prices of commodities and services commonly bought by farm families.



The 1964 intended acreage would produce a crop of flue-cured tobacco 8 percent smaller than in 1963, based on an average yield per acre with an allowance for trend. A crop of this size, plus the expected carryover of around 5 percent above mid-1963, would provide a total supply for 1964-65 fairly near 1963-64 which was the largest since 1956-57.

Assuming an allowance for trend in average yield per acre, the intended acreage of burley would provide a 1964 production of about 14 percent lower than the past season's marketings. The 1963 average yield of burley was exceptionally high. Carryover of burley, boosted by the record-breaking 1963 crop, may be up about 14 percent from a year earlier. The carryover plus the 1964 crop may provide a total supply for 1964-65 nearly 4 percent above 1963-64 and a record high.

The 1963-64 total supply of Maryland tobacco is about  $3\frac{1}{2}$  percent below 1962-63. The 1963 drought-reduced crop has been estimated to be almost a third below 1962, but the sharp increase in carryover partially offset this. Auctions for 1963-crop Maryland tobacco are scheduled to open April 28 and run until July 10. The intended 1964 acreage for Maryland tobacco is 13 percent larger than the 1963 harvested acreage.

Based on the 1964 prospective acreages and average yields with an allowance for trend, the 1964 production of fire-cured tobacco would be about 4 percent smaller than in 1963; similarly, production of the dark air-cured and sun-cured tobaccos would be 12 percent below 1963-crop marketings. The 1964 acreage allotments for farms growing Kentucky-Tennessee fire-cured and dark air-cured types were cut 10 percent. Most farm acreage allotments for Virginia fire-cured and sun-cured tobaccos were unchanged; the short crops resulting from the drought conditions last year have reduced supplies of these types. The carryovers of Kentucky-Tennessee fire- and dark air-cured tobaccos will be larger than last year.

The 1963-64 total supply of Pennsylvania filler is fairly close to the comparatively high level of 1962-63, but supply of Ohio filler is slightly above a year earlier. The 1964 intended acreage of Pennsylvania filler is 4 percent below last year's harvested acreage and of Ohio filler is 2 percent higher. January 1 stocks of Puerto Rican filler were up about one fifth from a year earlier.

Arrivals of foreign cigar tobaccos (principally for cigar filler) from sources other than Cuba increased during 1963. Main sources included the Philippine Republic, Colombia, Dominican Republic, and Brazil. Stocks of Cuban tobacco in the United States continue to diminish gradually.

The 1963-64 total supply of the Connecticut Valley binder types is at a new low. Based on March 1 intentions, the 1964 acreage of Broadleaf is indicated the same as harvested in 1963 but acreage of Havana Seed may be up 5 percent. Domestic use of Broadleaf in 1962-63 rose significantly above the low 1961-62 level.

The 1963-64 total supply of Northern Wisconsin tobacco is at a longtime low, but the 1963-64 supply of Southern Wisconsin tobacco is slightly above a year earlier. Prospective 1964 acreage of Northern Wisconsin tobacco is about 5 percent above last year's harvested acreage; acreage of Southern Wisconsin tobacco is indicated 4 percent above last year.

The 1963-64 supplies of Connecticut Valley and Georgia-Florida shade-grown wrapper are both the lowest in 4 years--most of the drop from a year earlier was in the Georgia-Florida type. According to March 1 intentions, the 1964 acreage in the Connecticut Valley equals that harvested in 1963, but acreage in Georgia-Florida will be up 4 percent.

#### THE SMOKING AND HEALTH REPORT AND LATER DEVELOPMENTS

On January 11, 1964, Smoking and Health: Report of the Advisory Committee to the Surgeon General of the Public Health Service was published. This "Report"--387 pages--is designated Public Health Service Publication No. 1103 and is for sale by the Superintendent of Documents, U. S. Government Printing Office, Washington, D. C., 20402--Price \$1.25. The Advisory Committee preparing the "Report" was composed of 10 nongovernmental scientists appointed by the Surgeon General. The Committee made a judgment that "cigarette smoking is a health hazard of sufficient importance in the United States to warrant appropriate remedial action."

#### Public Health Service

On January 27, the Public Health Service announced its acceptance of the principal findings and conclusions of the "Report." On January 29, the Surgeon General stated the "main findings and conclusions (of the Report) now constitute general policy of the Public Health Service." The Public Health Service is planning action under two broad phases--research and education.

#### U. S. Department of Agriculture

The Department of Agriculture is concerned with the "Smoking and Health Report" as it relates to agriculture and to the responsibilities of the Department to help provide the public with high quality agricultural products. The Department has extensive research programs to help meet these responsibilities. The Department's tobacco research program is now being reoriented to take account of this "Report". The reoriented tobacco research program involves studies of:

1. The mechanism of smoke formation.
2. The nature of chemical substances formed by burning known constituents of tobacco.
3. The chemical substances in leaf.
4. The variability in germ plasm with respect to components of leaf.
5. The inheritance of genetic factors in the tobacco plant.



6. The breeding, physiological, chemical, biochemical, and physical means of reducing or eliminating harmful agents from tobacco leaf.
7. Other aspects of smoking as warranted.

Department of Agriculture research is being coordinated with the research of the Department of Health, Education, and Welfare in fields of joint interest and responsibility.

### Federal Trade Commission

On January 18, the Federal Trade Commission announced a proceeding to establish trade regulation rules dealing with advertising and labeling of cigarettes. One proposed rule would require placing a cautionary statement on cigarette smoking as a health hazard in every cigarette advertisement and on every container in which cigarettes are sold to the public. Two other proposed rules seek to prevent unsubstantiated claims and unfair or misleading material in cigarette advertising. Public hearings were held on the proposed rules on March 16-18. Much testimony both for and against the proposed rules was submitted to the Commission by various associations, organizations, members of Congress and individuals. Written views concerning the proposed rules and subject matter of the proceeding can be filed through April 15, 1964.

### TOBACCO PRODUCTS

#### Cigarettes

In 1963, U. S. smokers consumed nearly 524 billion cigarettes--3 percent more than in 1962 and more than in any previous year. Cigarette consumption gained steadily for many years except for the moderate dip in 1953 and 1954 when the possible relationship of cigarettes and health began receiving increased attention. Cigarette consumption in 1953 declined 2½ percent from the 1952 peak--from 1950 to 1952 there had been a particularly sharp rise, probably abetted by Korean War tensions. In 1954, cigarette consumption continued downward to 7½ percent below the 1952 high. However, after 1954, the uptrend resumed, with cigarette consumption increasing about 3½ percent annually.

Cigarette consumption per capita (18 years and over) at 4,345 cigarettes (about 217 packs of 20) rose 2 percent in 1963 above the level of 1962 and 1961, when it was virtually unchanged. (See table 3.)

It is impossible at this time to appraise the short-term and long-term impact of the Smoking and Health Report and ensuing developments on cigarette consumption. Official U. S. Internal Revenue Service statistics provide nationwide data essential for analyzing cigarette consumption. As of late March, only January data were available. Data for February and probably 2 or 3 additional months will be necessary before a reliable assessment can be made of the short-term impact of the Report. The longer-term impact depends not only on the wide public attention given to the report but also on developments generated by the report.

Taxable removals of cigarettes in January 1964 were 5¾ percent below a year earlier; the January 1963 removals--a record for that month--were unusually high, nearly 6 percent above January 1962.

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

Period	Shipments to					Exports
	Total output	Domestic consumption	Overseas forces and other <sup>1/</sup>	Puerto Rico and U. S. islands <sup>2/</sup>		
	Billions	Billions	Billions	Billions	Billions	Billions
Average:						
1947-49	380.5	345.2	11.7	1.5	22.5	
1950	392.0	360.2	15.6	1.9	14.3	
1951	418.8	379.7	20.1	2.0	16.8	
1952	435.5	394.1	21.7	1.9	16.4	
1953	423.1	386.8	18.8	2.0	16.2	
1954	401.8	368.7	15.9	1.8	15.4	
1955	412.3	382.1	13.2	2.0	15.1	
1956	424.2	393.2	13.3	2.0	15.7	
1957	442.3	409.4	13.7	2.1	17.0	
1958	470.1	436.4	13.4	2.2	18.1	
1959	489.9	453.7	13.7	2.5	19.6	
1960	506.9	470.1	14.3	2.5	20.2	
1961	528.3	488.1	14.6	2.8	22.2	
1962	535.5	494.5	13.9	3.1	24.1	
1963 <sup>3/</sup>	550.6	509.6	14.2	3.3	23.6	

<sup>1/</sup> Also includes ship stores and small tax-exempt categories. <sup>2/</sup> Includes Virgin Islands, Guam, American Samoa, Wake, and Canton and Enderbury Islands. <sup>3/</sup> Subject to revision.

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

In 1963, U. S. output of cigarettes at over 550 $\frac{1}{2}$  billion set a new high--2.8 percent above 1962. The principal increase was in the king size (85 millimeter) filter tips, which gained 12 percent over the previous year. This more than offset a decline of 8 percent in the regular size (70 millimeter) nonfilter tips. The percentage share of the market held by filter tip cigarettes in 1963 was nearly 58 percent compared with about 51 percent in 1960 and 18 $\frac{3}{4}$  percent in 1955. (See table 2.)

The United States is the leading exporter of cigarettes, with approximately two-thirds going to 15 countries and one-third to about 100 other countries and their dependencies. Cigarette exports in 1963 totaled 23.6 billion, valued at \$105 million. The number exported was 2 percent below 1962 but above every other year since 1948. The principal increase in cigarette exports in 1963 were to Hong Kong, Singapore, Kuwait, Peru, Switzerland, Australia, and Lebanon; there were small to moderate declines in exports to such leading outlets as France, Netherlands Antilles, Belgium, Italy, Sweden, and West Germany; there were sharper drops to Gibraltar, Uruguay, Spain, and Morocco.

Table 2.--Cigarettes: Estimated output of nonfilter tip and filter tip by length, and percentage distribution, 1952-63

Year	Total output	Nonfilter tip				Filter tip			
		Total	Regular 70 mm.	Long 80 mm.	King 85 mm.	Total	Regular 70 mm.	Long 80 mm.	King 85 mm.
	Bil.	Bil.	Bil.	Bil.	Bil.	Bil.	Bil.	Bil.	Bil.
1952	435.5	429.9	353.4		76.5	5.6	5.0		0.6
1953	423.1	410.7	297.0		113.7	12.4	6.0		6.4
1954	401.8	364.9	253.3		111.6	36.9	6.9		30.0
1955	412.3	335.3	224.5		110.8	77.0	9.0	6.5	61.5
1956	424.2	307.3	203.9	2.6	100.8	116.9	7.1	17.9	91.9
1957	442.3	274.0	180.3	5.6	88.1	168.3	8.0	46.1	114.2
1958 <sup>1/</sup>	470.5	257.5	169.0	10.0	78.5	213.0	6.9	54.5	151.6
1959	489.9	251.1	159.0	5.8	86.3	238.8	5.5	48.2	185.1
1960	506.9	248.9	151.9	2.8	94.2	258.0	3.6	46.4	208.0
1961	528.3	251.2	148.5	.5	102.2	277.1	3.1	47.4	226.6
1962	535.5	243.0	139.8	.5	102.7	292.5	2.4	48.1	242.0
1963	550.6	231.5	128.6	.4	102.5	319.1	2.2	45.8	271.1
Percentage distribution									
	Pct.	Pct.	Pct.	Pct.	Pct.	Pct.	Pct.	Pct.	Pct.
1952	100.0	98.7	81.1		17.6	1.3	1.2		0.1
1953	100.0	97.1	70.2		26.9	2.9	1.4		1.5
1954	100.0	90.8	63.0		27.8	9.2	1.7		7.5
1955	100.0	81.3	54.4		26.9	18.7	2.2	1.6	14.9
1956	100.0	72.4	48.1	0.6	23.7	27.6	1.7	4.2	21.7
1957	100.0	62.0	40.8	1.3	19.9	38.0	1.8	10.4	25.8
1958	100.0	54.7	35.9	2.1	16.7	45.3	1.5	11.6	32.2
1959	100.0	51.3	32.5	1.2	17.6	48.7	1.1	9.8	37.8
1960	100.0	49.1	30.0	.5	18.6	50.9	.7	9.2	41.0
1961	100.0	47.5	28.1	.1	19.3	52.5	.6	9.0	42.9
1962	100.0	45.4	26.1	.1	19.2	54.6	.4	9.0	45.2
1963	100.0	42.1	23.4	.1	18.6	57.9	.4	8.3	49.2

<sup>1/</sup> Data shown for 1958 are final figures from the Census of Manufactures; total production indicated by the Census is slightly above the 470.1 billion total reported by the Internal Revenue Service.

General notes: Cigarettes having lengths other than specified in this table were included in the group with which they were most nearly comparable. The distribution of total cigarette output prior to 1958 represents approximate estimates based on unofficial source materials.



Table 3.—Cigarettes and all tobacco products: Consumption per capita, 18 years and over (including overseas forces), and indexes, 1925-63

Year	Cigarettes <sup>1/</sup>		All tobacco:	Cigarettes	All tobacco	
	Number	Pounds	products <sup>1/</sup> :	(number)	products	
			Pounds	----- (Indexes--1957-59=100) -----		
1925	1,085	3.10	9.66	28	33	84
1926	1,191	3.23	9.62	30	34	83
1927	1,279	3.65	9.69	33	39	84
1928	1,366	3.75	9.58	35	40	83
1929	1,504	4.08	9.85	38	44	85
1930	1,485	4.21	9.66	38	45	84
1931	1,399	3.99	9.23	36	43	80
1932	1,245	3.42	9.23	32	37	71
1933	1,334	3.51	8.17	34	37	71
1934	1,483	3.95	8.72	38	42	75
1935	1,564	4.22	8.67	40	45	75
1936	1,754	4.77	9.33	45	51	81
1937	1,847	5.01	9.50	47	53	82
1938	1,830	4.92	9.25	47	53	80
1939	1,900	5.15	9.35	48	55	81
1940	1,976	5.35	9.62	50	57	83
1941	2,236	6.08	10.22	57	65	88
1942	2,585	7.27	11.23	66	78	97
1943	2,956	8.04	11.78	75	86	102
1944	3,039	8.12	11.53	77	87	100
1945	3,449	9.48	13.02	88	101	113
1946	3,446	9.43	12.58	88	101	109
1947	3,416	9.12	12.11	87	97	105
1948	3,505	9.42	12.36	89	101	107
1949	3,480	9.45	12.22	89	101	106
1950	3,522	9.54	12.29	90	102	106
1951	3,743	9.94	12.59	95	106	109
1952	3,884	10.44	13.10	99	111	113
1953	3,702	10.36	12.95	94	111	112
1954	3,544	9.58	12.11	90	102	105
1955	3,595	9.48	11.98	92	102	104
1956	3,647	9.34	11.64	93	100	101
1957	3,751	9.20	11.38	96	98	98
1958	3,949	9.45	11.66	101	101	101
1959	4,071	9.45	11.64	104	101	101
1960	4,172	9.65	11.77	106	103	102
1961	4,266	9.85	11.94	109	105	103
1962	4,265	9.69	11.72	109	104	102
1963 <sup>2/</sup>	4,345	9.76	11.81	111	104	102

<sup>1/</sup> The weight represents the unstemmed processing-weight equivalent of the tobacco. <sup>2/</sup> Preliminary estimate.

Table 4.--Consumption of cigars, smoking tobacco and chewing tobacco per male, and snuff per person, 18 years and over, and indexes for specified periods

Period	Consumption per male 18 years and over				Per person
					18 years and over
	Large cigars and cigarillos <sup>1/</sup>		Smoking tobacco <sup>1/</sup>	Chewing tobacco <sup>1/</sup>	Snuff <sup>1/</sup>
	Number	Pounds	Pounds	Pounds	Pounds
Average					
1925-29	177.4	4.10	4.15	5.03	0.52
1930-34	125.2	2.96	4.40	3.15	.46
1935-39	120.9	2.89	4.39	2.48	.42
1940-44	118.9	2.87	3.67	2.34	.43
1945	112.3	2.71	3.41	2.34	.44
1946	120.4	2.93	2.12	2.21	.40
1947	112.8	2.78	2.06	1.92	.39
1948	113.7	2.80	2.09	1.85	.40
1949	109.3	2.50	2.08	1.71	.40
1950	107.8	2.53	2.03	1.67	.38
1951	110.7	2.56	1.89	1.62	.37
1952	115.0	2.72	1.80	1.58	.36
1953	115.5	2.72	1.62	1.55	.36
1954	112.8	2.64	1.55	1.48	.35
1955	112.8	2.60	1.47	1.44	.35
1956	110.8	2.41	1.30	1.36	.34
1957	112.9	2.28	1.27	1.29	.32
1958	117.3	2.34	1.37	1.23	.31
1959	125.0	2.36	1.31	1.20	.29
1960	124.7	2.28	1.30	1.13	.30
1961	122.9	2.27	1.30	1.13	.29
1962	121.9	2.24	1.24	1.10	.28
1963 <sup>2/</sup>	124.5	2.30	1.22	1.11	.26
			1957-59=100		
Average					
1925-29	150	176	316	406	168
1930-34	106	127	334	254	150
1935-39	102	124	333	200	138
1940-44	100	123	279	189	140
1945	95	116	259	189	144
1946	102	126	161	178	129
1947	95	119	157	155	127
1948	96	120	159	149	130
1949	92	107	158	138	129
1950	91	109	154	134	125
1951	94	110	144	131	121
1952	97	117	137	128	118
1953	98	117	123	125	117
1954	95	113	118	120	115
1955	95	112	112	116	115
1956	94	103	99	110	110
1957	95	98	97	104	105
1958	99	101	104	99	100
1959	106	101	99	97	95
1960	105	98	99	91	97
1961	104	97	99	91	93
1962	103	96	94	89	91
1963 <sup>2/</sup>	105	99	93	90	86

<sup>1/</sup> Unstemmed weight equivalent for cigars and finished-product weight for all others.

<sup>2/</sup> Preliminary estimate.

Cigars, Cigarillos, and Small Cigars

The combined consumption of cigars and cigarillos by U. S. smokers (including overseas forces) in 1963 totaled about 7,280 million, the highest since 1923; consumption of small cigars (cigarette-size) at about 270 million was the highest since 1932, except for the unusual boom in 1959.

Cigar and cigarillo consumption per male 18 years and over in 1963 was  $124\frac{1}{2}$ --up 2 percent from 1962 and, except for 1959 and 1960, the highest in many years. (See table 4.)

Total consumption of cigars and cigarillos gained over 3 percent from 1962 to 1963 after remaining nearly level for 3 years; consumption rose about a fifth in the past decade. Approximately 93 percent of the cigars consumed in 1963 were produced in mainland factories and 7 percent came from Puerto Rican factories; 10 years ago, less than 1 percent came from Puerto Rico. The 1963 increase in cigar consumption occurred mainly in the second half--factory removals in the first half were up about 1 percent, in the third quarter they rose 4 percent, in the final quarter,  $6\frac{1}{2}$  percent.

Cigars and cigarillos retailing for 6 cents or less accounted for most of the gain in 1963 over 1962; in this lower price bracket cigarillos constitute a sizable proportion. For 1963, separate figures on the cigarillo group (which weigh from 3 to 10 pounds per 1,000) are not yet available; in 1962, cigarillo sales, at near 1 billion, comprised about a third of the cigars and cigarillos sold for 6 cents or less. Cigars and cigarillos in the 6 cents or less price bracket made up about  $45\frac{1}{2}$  percent of the overall total, compared with  $43\frac{1}{2}$  percent in 1962. Cigars retailing for over 6 but not over 15 cents apiece dropped from 50 percent of the total in 1962 to about  $48\frac{1}{2}$  percent in 1963; the percentage selling above 15 cents declined from about  $6\frac{1}{2}$  to 6 percent of the total.

Consumption of small cigars (weighing not more than 3 pounds per 1,000) jumped 70 percent from 1962 to 1963. Taxable removals from factories during the first half of 1963 increased a third over the like period of 1962 and, during the second half of 1963, more than doubled those of the comparable 1962 period.

Data for January 1964 show total taxable removals of large cigars and cigarillos were up one-fourth from a year earlier and taxable removals of small cigars were over  $3\frac{1}{2}$  times the January 1963 figure. Cigar consumption was rising prior to the issuance of the Smoking and Health Report and was given additional impetus by references to cigar smoking in the report.

Cigar exports increased sharply in 1963 and at 33 million (valued at \$1,327,000) were record high. The major part of the increase was to France--over 9 million shipped in 1963 contrasted with less than 1 million in 1962. Cigar exports also increased to the United Kingdom, Switzerland, Australia, Gibraltar, Peru, and Republic of South Africa but were lower to Canada, Uruguay, Hong Kong, and Egypt.



Table 5.--Large cigars and cigarillos: Output and consumption for specified periods

Period	Factories in the United States <sup>1/</sup>			From	Imports for consumption	Exports	Total consumption <sup>3/</sup>	
	Total output	Removals	Tax-able	Tax-exempt	Puerto Rico: taxable			Total <sup>2/</sup>
	Mil.	Mil.	Mil.	Mil.	Mil.	Mil.	Mil.	
Average: 1947-49	5,668	5,618	42	5	12	2	12	5,665
1950	5,558	5,525	47	1	12	1	2	5,583
1951	5,774	5,695	85	1	14	1	3	5,792
1952	6,026	5,951	102	2	15	2	3	6,067
1953	6,122	6,025	90	10	17	3	6	6,136
1954	6,029	5,896	89	50	16	4	8	6,043
1955	6,004	5,915	82	84	20	5	6	6,095
1956	5,998	5,863	72	93	23	4	9	6,042
1957	6,145	5,995	79	124	26	5	9	6,215
1958	6,469	6,260	87	137	28	4	9	6,503
1959	6,857	6,717	103	148	31	5	4/10	6,989
1960	6,991	6,728	105	198	32	6	4/11	7,052
1961	6,642	6,558	118	354	24	8	4/16	7,038
1962	6,684	6,442	126	483	23	14	4/19	7,055
1963 <sup>5/</sup>	6,716	6,621	144	526	21	15	33	7,279

<sup>1/</sup> Includes bonded manufacturing warehouses that make cigars from tobacco imported from a single source country. <sup>2/</sup> Prior to the embargo on imports from Cuba (effective February 1962) cigars imported from Cuba accounted for 70 percent or more of total cigar imports except in 1961. <sup>3/</sup> Total removals from U. S. factories including bonded manufacturing warehouses, from Puerto Rico, imports, minus exports. <sup>4/</sup> Estimated--excludes little cigars. <sup>5/</sup> Subject to revision.

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

Table 6.--Small cigars (weighing not more than 3 pounds per thousand and approximately cigarette size): Output and removals for specified periods

Period	Output	Factory removals		
		Total	Taxable	Tax-exempt
	Million	Million	Million	Million
Average: 1947-49	84.1	84.6	84.6	Neg.
1950	68.9	69.2	69.1	.1
1951	69.2	68.6	68.2	.4
1952	67.1	67.4	66.9	.5
1953	58.3	56.9	56.7	.2
1954	61.2	62.9	60.3	2.6
1955	58.7	57.8	57.0	.8
1956	63.6	59.5	58.9	.6
1957	49.0	49.1	48.8	.3
1958	170.0	160.0	159.7	.3
1959	530.1	505.5	481.6	23.9
1960	148.7	158.7	141.9	16.8
1961	158.2	152.9	146.1	6.8
1962	164.0	162.9	155.8	7.1
1963 <sup>1/</sup>	281.4	272.4	264.2	8.2

<sup>1/</sup> Subject to revision.

Compiled from reports of the Internal Revenue Service.

Cigar imports for consumption in 1963 totaled 21 million--moderately below 1962. Cigar imports from the Philippine Republic, accounting for two-thirds of the total, were a little above 1962 and nearly double 1961.

### Smoking Tobacco

The 1963 production of smoking tobacco for pipes and "roll-your-own" cigarettes totaled close to  $70\frac{1}{2}$  million pounds--slightly below 1962 and lowest this century. In 1959-61, annual smoking tobacco output ranged between 73 and about 74 million pounds; but before then, output had trended downward during most of the postwar period. The 1963 production was nearly a fifth less than 10 years ago. Smoking tobacco is a secondary outlet for types of tobacco used in cigarettes, mainly burley.

Most of the smoking tobacco output is consumed domestically. Taxable removals in 1963, at 68 million pounds, were only slightly less than in 1962 but approximately 3 million below the relatively steady level during 1959-61. In all but the third quarter of 1963, taxable removals were below year-earlier levels, but the decline was nearly offset by a substantial gain in July-September compared with the like 1962 period.

An estimate of consumption of smoking tobacco by U. S. smokers (including overseas forces) is derived by adding to total removals from domestic factories the taxable removals of imported smoking tobacco and subtracting exports. For 1963, consumption is estimated at nearly 71 million pounds--about a half-million pounds below 1962 but almost 1 million above the 1957 low. (See table 7.) The dip in 1963 consumption was probably due to less tobacco used for "roll-your-own" cigarettes; use of tobacco for pipe-smoking probably was about the same. The number of "roll-your-own" cigarettes smoked in 1963 is estimated at around  $11\frac{3}{4}$  billion, compared with about 12 billion in 1962.

Consumption of smoking tobacco, per male 18 years and over, was about  $1\frac{1}{5}$  pounds (product weight) in 1963--nearly 2 percent less than in 1962. Ten years ago, per capita consumption was about  $1\frac{3}{5}$  pounds. (See table 4.) In January 1964, taxable removals of smoking tobacco jumped about a sixth over those a year earlier, and were largest for that month since 1953.

According to the Bureau of Labor Statistics wholesale price index, manufacturers' prices of smoking tobacco through January 1964 remained unchanged since March 1963, when they advanced  $1\frac{1}{2}$  percent.

The 1963 imports for consumption of manufactured tobacco (nearly all smoking tobacco) totaled about 1.9 million pounds, valued at \$2.2 million. The quantity increased nearly one-fifth over 1962, with about three-fourths coming from the Netherlands and a tenth from the United Kingdom. The average values of imports in 1963 were as follows (per pound, exclusive of the  $17\frac{1}{2}$ -cent duty): The Netherlands, \$1.04; United Kingdom, \$2.68; all sources, \$1.18.

Table 7.--Smoking tobacco: Output, removals, foreign trade, and consumption, for specified periods

Period	Output	Removals		Imports, taxable <u>1/</u>	Exports, in packages	Total consump- tion <u>2/</u>	Exports, smoking tobacco in bulk <u>3/</u>
		Taxable	Tax- exempt				
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.
Average: 1947-49	106.8	<u>4/</u> 104.6	<u>4/</u> 2.3	.1	1.2	105.8	1.4
1950	107.7	104.3	3.4	.1	.6	107.2	1.4
1951	101.3	97.4	4.0	.1	.7	100.8	1.9
1952	96.8	92.9	3.6	.1	.6	96.0	2.3
1953	86.6	84.2	2.4	.1	.6	86.1	4.7
1954	83.7	81.2	2.5	.1	.6	83.2	4.6
1955	80.0	77.7	2.3	.1	.5	79.6	6.2
1956	71.5	69.9	1.7	.1	.6	71.1	5.7
1957	70.5	68.7	1.7	.2	.6	70.0	4.4
1958	76.0	74.0	2.0	.4	.7	75.7	7.5
1959	73.2	71.2	1.9	.7	.7	73.1	8.5
1960	73.8	71.3	2.3	.9	.9	73.6	7.7
1961	74.2	71.4	2.5	1.3	.8	74.4	9.0
1962	70.9	68.3	2.6	1.4	.9	71.4	8.6
1963 <u>5/</u>	70.4	68.0	2.2	1.6	.9	70.9	9.8

1/ Prior to July 1962, data are from Census import classification "tobacco manufactures, n.e.s."

2/ Total removals plus taxable imports minus exports in packages.

3/ Includes specially-prepared cigarette tobacco, cut or granulated tobacco, partially-processed blended tobacco and shredded tobacco. Virtually all of the smoking tobacco in this export class is not included in Internal Revenue Service output figures for smoking tobacco.

4/ Partly estimated.

5/ Subject to revision.

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



Exports of packaged smoking tobacco totaled about 877,000 pounds, valued at \$1,303,000. The quantity declined slightly from 1962, but the value was up 1 percent. A little more than in 1962 was exported to Canada, the leading outlet, and to Belgium. Shipments to Japan and Hong Kong also increased. However, smaller exports than in 1962 were made to Denmark, Australia, Iceland, West Germany, and Italy.

#### Smoking Tobacco in Bulk for Export

Bureau of Census export statistics report a sizable volume of manufactured tobacco as smoking tobacco in bulk, little of which is covered in Internal Revenue Service output statistics. This export category includes specially prepared cigarette tobacco, cut or granulated tobacco, partially processed blended tobacco, and shredded tobacco. In 1963, exports of smoking tobacco in bulk increased 14 percent to 9.8 million pounds--a record high. The value was \$10 million--a sixth above 1962 and also a record high. Exports to Switzerland, leading outlet, rose 66 percent, and to the Dominican Republic, second ranking market, increased 18 percent. Consignments to Ecuador, the Netherlands, and Italy also gained appreciably, and to Mexico, increased moderately. About a half-million pounds were exported to Spain, in contrast to none the year before. A little less than in 1962 was exported to Haiti, and substantially less to Finland.

#### Chewing Tobacco

The 1963 output of chewing tobacco totaled about 65-1/3 million pounds--nearly 1 percent above 1962. For the past 4 years, output has centered around the 65-million-pound level; but prior to 1960, annual production declines generally were sizable. The 1963 output was more than a fifth below 10 years ago.

Scrap chewing tobacco, which made up 52 percent of all chewing in 1963, rose 1.7 million pounds to the highest in 7 years. But plug chewing, comprising 38 percent of the total, declined more than 1 million pounds to a record low. Scrap chewing utilizes mainly Wisconsin binder tobacco and some Pennsylvania filler, while plug chewing utilizes mainly dark air-cured and burley. Production of twist and fine-cut, which made up the remaining 10 percent of chewing output, was close to 1962 levels.

Taxable removals of scrap chewing--a measure of total domestic consumption--increased 4 percent in 1963 to 34 million pounds, largest since 1956. Taxable removals of plug chewing, at about 24-3/4 million pounds, were about a half-million below 1962. This decline was less than the decrease in production; in 1962, there was an apparent larger-than-usual inventory accumulation by manufacturers. Taxable removals of twist were down somewhat, but fine-cut gained slightly.

Table 8.--Chewing tobacco and snuff: Output by category for specified periods

Period	Chewing tobacco					Total	Snuff
	Plug	Twist	Fine-cut	Scrap			
	Mil. <u>lb.</u>	Mil. <u>lb.</u>	Mil. <u>lb.</u>	Mil. <u>lb.</u>	Mil. <u>lb.</u>	Mil. <u>lb.</u>	Mil. <u>lb.</u>
Average 1947-49	44.9	5.5	3.3	41.3	95.0	40.3	
1950	40.3	5.5	2.7	39.0	87.5	40.0	
1951	39.9	4.6	2.8	39.1	86.4	39.5	
1952	39.1	4.8	2.8	38.2	84.9	38.8	
1953	38.1	4.7	2.9	38.1	83.8	39.1	
1954	36.9	4.9	2.9	36.6	81.3	38.5	
1955	36.5	4.5	3.0	36.0	80.0	39.2	
1956	33.0	4.3	2.9	35.5	75.7	37.7	
1957	31.6	4.0	2.8	34.0	72.4	36.1	
1958	29.6	3.8	2.9	33.0	69.3	34.8	
1959	28.6	3.6	3.0	33.0	68.2	34.3	
1960	26.4	3.4	3.1	32.0	64.9	34.6	
1961	26.0	3.3	3.2	32.7	65.2	33.8	
1962	26.0	2.9	3.3	32.5	64.7	33.2	
1963 <u>1/</u>	24.9	2.9	3.3	34.2	65.3	31.8	

1/ Subject to revision.

Compiled from reports of the Internal Revenue Service.

The 1963 consumption of chewing tobacco per male 18 years and over held even with 1962 but was more than a fourth below 10 years ago. (See table 4.)

According to the Bureau of Labor Statistics wholesale price index, manufacturers' prices for plug chewing increased 6 percent from September to October 1963 and remained unchanged through January 1964.

Exports account for only a small fraction of chewing tobacco output and consist mostly of twist and plug. The 1963 exports totaled about 461,000 pounds--down a fourth from 1962 and lowest on record. Value of these exports, at about \$418,000, was down a fifth from 1962. Australia, accounting for 45 percent of the total quantity, reduced takings slightly, but substantially less was exported to Panama. None went to the Netherlands in contrast with a sizable quantity in 1962, but exports to French Pacific Islands increased moderately.

### Snuff

Snuff production in 1963, at 31.8 million pounds, dropped 4 percent below 1962 to the lowest in 50 years. From 1956 to 1958, production also fell 4 percent a year, but in following years the rate of decline generally had slackened to about  $1\frac{1}{2}$  to 2 percent. Most of the 1963 decline occurred in the first and last quarters.

Snuff is the principal domestic outlet for the fire-cured types. Virtually all U. S. output is consumed in this country. The 1963 per capita consumption by persons 18 years and over was 7 percent below 1962 and 26 percent below 10 years earlier. (See table 4.)

According to the Bureau of Labor Statistics wholesale price index, manufacturers' prices for snuff increased twice in 1963--2 percent in March and another 3 percent in October. The January 1964 index was thus 5 percent above the year-earlier figure.

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

Exports of unmanufactured tobacco in 1963 totaled  $505\frac{1}{2}$  million pounds (equivalent to about 570 million, farm-sales weight)--8 percent above a year earlier and slightly more than 2 years earlier. The declared value, \$403 million, was also up 8 percent from 1962 and was the highest on record. During 1952-61, annual exports averaged 486 million pounds, valued at \$341 million.

Flue-cured comprised 80 percent of total 1963 unmanufactured exports, the same percentage as in each of the 2 preceding years. Burley made up close to 9 percent, compared with about  $8\frac{1}{2}$  percent in the previous year, and exports of fire-cured represented less than 4 percent, compared with approximately 5 percent in most recent years.

The gain in 1963 exports was occasioned mainly by an increase of 7 percent in flue-cured shipments over 1962. Quality of the 1963 flue-cured crop was improved over that of the 1962 crop, which contained a larger-than-normal proportion of low-quality leaf. The United Kingdom boosted 1963 flue-cured takings two-fifths and West Germany, nearly an eighth. Larger flue-cured exports than in 1962 were also made to Japan, the Netherlands, Belgium,

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



Table 9.--United States exports of unmanufactured tobacco by types and to principal importing countries for specified periods

Country and type	(Declared weight)						
	Average 1954-58	1959	1960	1961	1962 1/	1963 1/	1963 as a per- centage of 1962
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Percent
Flue-cured	413.4	373.7	408.7	402.8	375.4	403.5	107
Burley	28.0	31.9	33.6	36.6	40.1	44.5	111
Maryland	11.0	14.4	11.4	11.4	10.9	10.7	98
Va. fire-cured and sun-cured	4.5	4.9	5.1	4.7	4.7	5.3	115
Ky. and Tenn. fire-cured	21.6	17.8	18.8	25.0	17.3	14.2	82
Green River	1.6	.8	.8	.5	.6	.6	100
One Sucker	1.7	2.4	.3	.8	.5	.5	100
Black Fat, etc.	4.8	4.9	4.5	4.3	3.7	4.2	114
Cigar wrapper	3.9	4.0	3.3	4.3	4.8	4.6	96
Cigar binder	2.5	3.2	1.9	3.0	.9	.8	89
Cigar filler	.4	1.0	.5	.2	.1	.4	400
Perique	.1	.1	.1	.1	.2	.2	100
Stems, trimmings, and scrap	3.9	6.5	7.1	7.3	9.3	16.1	164
Total	497.4	465.6	496.1	501.0	468.9	505.5	108
Country of destination							
United Kingdom	163.4	139.7	176.9	152.4	97.0	139.0	143
France	8.5	5.8	5.2	7.2	4.6	5.6	122
Belgium	18.1	20.1	18.6	17.3	17.3	16.3	94
Netherlands	31.3	24.9	40.0	30.0	28.1	29.7	106
West Germany	64.6	62.5	66.8	77.5	80.6	85.3	106
Portugal	7.0	6.4	8.7	6.5	7.0	6.0	79
Denmark	11.9	15.0	12.4	14.1	13.8	13.8	100
Ireland	11.8	10.0	13.2	13.8	21.6	14.5	67
Switzerland	12.2	11.2	11.1	14.2	13.0	11.5	88
Norway	7.8	6.9	8.0	7.3	8.4	7.3	87
Sweden	12.3	10.3	17.4	18.9	15.1	11.0	80
Italy	5.6	10.4	5.4	11.7	18.2	12.0	66
Thailand	9.0	11.8	4.6	13.6	7.7	9.1	118
Australia	29.5	20.4	20.0	11.8	22.0	18.1	82
India	2.3	2.0	.6	2.0	2.4	1.5	62
Pakistan	2.1	.8	1.6	1.9	2.1	2.3	110
New Zealand	6.8	7.3	4.8	6.0	4.7	2.9	62
Philippine Republic	9.7	4.1	1.2	6.9	2/	2/	---
Indonesia	10.2	2.4	.2	3.0	2.7	1.2	44
Egypt	7.5	16.2	12.8	1.6	12.4	15.2	122
Japan	9.0	11.6	18.2	24.5	24.1	28.7	119
Spain	4.1	7.0	2/	3.6	.3	1.2	400
Other countries	52.7	58.8	48.4	55.2	65.3	73.3	112
Total	497.4	465.6	496.1	501.0	468.9	505.5	108

1/ Preliminary.

2/ Less than 50,000 pounds.

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

Egypt, Thailand, Finland, and Hong Kong. But less flue-cured than the year before was exported to Australia, Ireland, Denmark, Norway, Italy (which took only two-fifths as much as the unusually large 1962 total), Portugal, Austria, Malaya, and New Zealand.

Burley exports in 1963 rose 11 percent over 1962 and exceeded any previous year. Countries taking more burley than in 1962 included Italy, Portugal, the Netherlands, Egypt, Mexico, and Hong Kong. Among those reducing their takings were West Germany, Sweden, and Denmark.

Exports of Maryland tobacco were down a little from 1962. Virginia fire-cured exports increased about an eighth, but those of Kentucky-Tennessee fire-cured fell 18 percent to the lowest for any peacetime year on record. Exports of Green River and One Sucker were close to 1962 levels, but those of Black Fat increased 15 percent over the relatively low year-earlier figure. Cigar leaf exports gained a little, due to an increase in cigar filler shipments over the minor quantity shipped in 1962; this gain more than offset a small decline in cigar wrapper exports and a moderate decline in those of cigar binder.

The United Kingdom, leading U. S. foreign market for tobacco leaf, increased takings 43 percent over 1962 and accounted for a fourth of the total. West Germany, second ranking U. S. market, took 6 percent more tobacco (all types combined), and the Netherlands, ranking third, also increased takings 6 percent. Exports to Japan, fourth-ranking market, rose nearly a fifth, but those to Australia, which ranked fifth, dropped 18 percent. Belgium, ranking sixth, reduced takings 6 percent. Among markets taking more U. S. tobacco than in 1962 were Egypt and Thailand, while those taking less included Ireland, Italy, Switzerland, Sweden, Norway, and Portugal; takings by Denmark were even with 1962.

In 1963, exports of tobacco for foreign currencies under Title I, P. L. 480 were about  $35\frac{1}{2}$  million pounds, valued at \$25 million. The quantity was about a fourth greater than in 1962 and largest in 4 years. Egypt accounted for about a third of the 1963 Title I exports and the bulk of the remainder went to South Vietnam, Poland, Congo Republic, Pakistan, and Taiwan. (See table 10.) Under present legislation, the termination date for Title I, P. L. 480 is December 31, 1964; extension of the law is under consideration.

Exports of tobacco in 1963 under Title III, P. L. 480, which authorizes sales of surplus agricultural commodities for strategic and other materials produced abroad, totaled 14 million pounds, valued at \$9 million. Both quantity and value were sharply below levels in the 3 preceding years. (See table 11.) Principal countries receiving barter tobacco in 1963 were United Kingdom, 9.6 million pounds; West Germany, 2.1 million; and Portugal, 1.1 million. Lesser quantities were shipped to Finland, Canada, Japan, Italy, Hong Kong, and the Netherlands.

Table 10.--Tobacco exports under P. L. 480, Title I (foreign currency sales), and totals by countries, calendar years 1959-63

(Export weight)

Country	1959 exports		1960 exports		1961 exports		1962 exports		1963 exports	
	P. L. 480, Title I		P. L. 480, Title I		P. L. 480, Title I		P. L. 480, Title I		P. L. 480, Title I	
	Total	Total	Total	Total	Total	Total	Total	Total	Total	Total
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.
Brazil	0	0	0.1	0.1	0	<u>2</u> / <sub>0</sub>	0	<u>2</u> / <sub>0</sub>	0	<u>2</u> / <sub>0</sub>
Burma	.3	.3	.6	.6	.5	0.5	0	0	0	0
Chile	0	.3	.2	.7	.8	1.1	.3	1.6	0	1.3
Colombia <u>3</u> / <sub>0</sub>	0	.7	.5	.8	.7	.9	.2	.6	0	.5
Congo Republic	0	.8	0	.1	0	.7	1.2	2.5	3.0	3.7
Ecuador <u>3</u> / <sub>0</sub>	0	.3	0	.4	.7	.7	.7	1.5	.1	.6
Egypt	13.3	16.2	10.5	12.8	.7	1.6	9.2	12.5	11.8	15.2
Finland	5.0	7.1	4.3	5.2	0	7.9	.3	8.6	0	9.1
France	3.2	5.8	1.5	5.2	2.6	7.2	1.7	4.6	0	5.6
Iceland <u>3</u> / <sub>.5</sub>	.5	.6	.5	.6	.6	.7	.6	.8	<u>4</u> / <sub>.7</sub>	.6
India	2.0	2.0	.5	.6	2.0	2.0	2.4	2.4	1.4	1.5
Indonesia	.2	2.4	0	.2	<u>4</u> / <sub>3.1</sub>	3.0	2.5	2.7	1.2	1.2
Israel	.3	.3	.3	.5	.1	.3	.3	.5	.3	.5
Italy	7.3	10.4	3.1	5.4	0	11.7	0	18.2	0	12.0
Morocco	0	0	0	.1	0	.6	0	.4	.5	.8
Pakistan	0	.8	1.1	1.6	<u>4</u> / <sub>2.1</sub>	1.9	2.1	2.1	<u>4</u> / <sub>2.6</sub>	2.3
Poland	0	0	1.6	1.6	.3	.3	0	0	<u>4</u> / <sub>3.6</sub>	3.0
Spain <u>3</u> / <sub>11.2</sub>	11.2	11.4	.5	.7	5.5	6.2	0	.3	0	1.7
Syria	0	0	0	<u>2</u> / <sub>0</sub>	0	<u>2</u> / <sub>0</sub>	.2	.2	0	.1
Taiwan	1.2	2.3	1.9	2.2	2.1	2.7	2.0	3.5	2.0	3.3
Uruguay <u>3</u> / <sub>7.0</sub>	7.0	7.3	0	2.4	0	4.1	1.1	5.5	.1	1.8
Viet Nam <u>3</u> / <sub>5.3</sub>	5.3	5.3	<u>4</u> / <sub>4.2</sub>	4.1	<u>4</u> / <sub>4.2</sub>	3.9	3.7	3.7	8.3	8.5
Total above countries <u>5</u> / <sub>56.5</sub>	56.5	74.3	31.2	45.9	26.0	58.0	28.5	72.2	35.6	73.3
Total, all countries <u>6</u> / <sub>465.6</sub>		465.6		496.1		501.0		468.9		505.5

1/ Preliminary; subject to revision.2/ Less than 50,000 pounds.3/ Includes manufactured tobacco.4/ P. L. 480 exports exceed Census-reported total probably because of difference in cut-off date of reporting periods.5/ Based on unrounded data.6/ Unmanufactured tobacco.



Table 11.--Tobacco exports under Government-financed programs, 1955-63

Calendar year	Public Law 480						Total unmanufactured tobacco exports	Exports under Government-financed programs as percentage of total exports
	Title I, foreign currency sales	Title III, barter sales <sup>1/</sup>	Title IV, long-term dollar credit sales	Total	Mutual security programs	Total under Government-financed programs		
1955	43.8	---	---	43.8	2.3	46.1	540.3	8.5
1956	71.2	---	---	71.2	4.3	75.5	510.4	14.8
1957	35.8	---	---	35.8	---	35.8	501.0	7.1
1958	37.9	0.5	---	38.4	2.6	41.0	481.8	8.5
1959	56.5	19.5	---	76.0	5.5	81.5	465.6	17.3
1960	31.2	27.3	---	58.5	22.8	81.3	496.1	16.4
1961	26.0	61.3	---	87.3	20.5	107.8	501.0	21.5
1962	28.5	50.3	0.4	79.2	.4	79.6	468.9	17.0
1963 <sup>2/</sup>	35.6	14.3	3.6	53.5	---	53.5	505.5	10.6

Quantity (export weight)			
Million pounds	Million pounds	Million pounds	Million pounds
43.8	43.8	2.3	46.1
71.2	71.2	4.3	75.5
35.8	35.8	---	35.8
37.9	38.4	2.6	41.0
56.5	76.0	5.5	81.5
31.2	58.5	22.8	81.3
26.0	87.3	20.5	107.8
28.5	79.2	.4	79.6
35.6	53.5	---	53.5

Value			
Million dollars	Million dollars	Million dollars	Million dollars
31.3	31.3	0.6	31.9
48.5	48.5	2.3	50.8
26.6	26.6	---	26.6
28.3	28.7	1.5	30.2
41.6	52.9	3.5	56.4
22.0	43.0	17.8	60.8
20.4	55.6	16.5	72.1
22.2	53.7	.3	54.0
25.1	37.7	---	37.7

<sup>1/</sup> Title III, P. L. 480 broadened the authority of the barter program, which is conducted under several legislative authorizations.

<sup>2/</sup> P. L. 480 exports preliminary; subject to revision.

Title IV, P. L. 480 authorizes sales under long-term dollar credit arrangements. In 1963, Title IV sales of tobacco totaled about  $3\frac{1}{2}$  million pounds, valued at approximately  $\$3\frac{1}{2}$  million. Chief countries taking Title IV tobacco were Iraq, Ecuador, and Chile, with some also shipped to Colombia and Ryukyu Islands.

On a combined basis, exports under P. L. 480 totaled about  $53\frac{1}{2}$  million pounds--about  $10\frac{1}{2}$  percent of all unmanufactured tobacco exports. The quantity and percentage of all exports were the lowest since 1958 (table 11).

Another measure to encourage U. S. tobacco exports is the export payments program under Section 32, P. L. 74-320, enacted in 1935. Payments are made to tobacco exporters from Section 32 funds on export sales (including those under barter arrangements and for foreign currency) of Commodity Credit Corporation loan stocks of leaf tobacco from 1956 and earlier crops. About 31 million pounds of the total  $505\frac{1}{2}$  million exported in 1963 were assisted by export payments in cash totaling \$3.3 million. Some of these assisted exports were made under P. L. 480. As of March 19, 1964, applications under the Section 32 program (announced in February 1962) had been approved for a total of 60.6 million pounds of tobacco, made up of the following: Flue-cured, 52.7 million; fire-cured, 5.1 million; dark air-cured 1.6 million; burley, 0.4 million; and cigar leaf, 0.8 million. Included in the total were 31.6 million pounds of reprinted or special offer tobacco, nine-tenths of which was flue-cured. Termination dates for the Section 32 program are November 30, 1964, for the sales period and March 31, 1965, for the shipment period.

U. S. exports of unmanufactured tobacco in the year ending June 30, 1964, may reach about 510 million pounds, about 8 percent above the  $47\frac{1}{4}$  million shipped in fiscal 1963.

#### Major Foreign Countries Exporting Tobacco

In world markets, U. S. flue-cured tobacco meets competition mainly from that grown in the former Federation of Rhodesia and Nyasaland, Canada, and India. Greece and Turkey are the principal producers and exporters of oriental tobacco, which in free-world commerce ranks second to flue-cured in volume.

The current flue-cured crop in the two Rhodesias and Nyasaland may approach a record 290 million pounds--46 percent larger than harvested in 1963. Acreage and yields were at record levels in Northern and Southern Rhodesia, and it is reported that the crop would have been even larger were it not for an inadequate number of curing barns. Auctions for the Rhodesian crop opened March 10. Prices for the 9.7 million pounds sold during the first 2 weeks of sales averaged the equivalent of 37.2 cents per pound. In the comparable period a year ago, 9.0 million pounds were sold and averaged the equivalent of 42.2 cents per pound.

For the full season last year, Salisbury auction sales of Rhodesian tobacco amounted to 195 million pounds, averaging 48.6 cents a pound, second



highest on record. United Kingdom buyers purchased about 108 million pounds on 1963 auctions, compared with 94 million in 1962. British manufacturers have estimated their requirements of Rhodesian flue-cured at 100-105 million pounds annually in 1964-66.

Exports of tobacco from the Rhodesias-Nyasaland in 1963 totaled 213 million pounds (dry weight)--1 percent below record shipments in the previous year. About 85 percent consisted of flue-cured, 10 percent fire-cured, and the remaining 5 percent other kinds. About half of total flue-cured exports was consigned to the United Kingdom, which increased takings 14 percent. Other Commonwealth areas, principally Hong Kong, Malaysia, and Australia, accounted for an eighth of the total. Among continental European countries taking Rhodesian flue-cured in 1963 were West Germany, 23.1 million pounds; the Netherlands, 9.8 million; Italy, 3.7 million; France, 3.4 million; Belgium, 2.9 million; Denmark, 2.1 million; and Austria, 1.8 million. About 1 million pounds each were shipped to Norway and Sweden, and lesser quantities to Switzerland, Portugal, and Finland. Exports to all these continental European countries were below 1962 levels, except for France, Sweden, and Portugal. Japan took  $5\frac{3}{4}$  million pounds of Rhodesian flue-cured, compared with  $6\frac{1}{2}$  million in 1962.

Canada's 1963 flue-cured crop is estimated at 189 million pounds--slightly more than in 1962. Most of the flue-cured crop is produced in Ontario. Auction sales of Ontario flue-cured, which began mid-November, were suspended February 28 due to grower dissatisfaction because of declining prices. As of February 28, a total of 117 million pounds of 1963-crop flue-cured tobacco had been sold, at an average price of 51.1 Canadian cents per pound. Auctions reopened March 16.

Exports of unmanufactured tobacco from Canada in the first 11 months of 1963 totaled 39 million pounds, of which flue-cured comprised  $35\frac{1}{3}$  million. Compared with 1962, total exports were down 19 percent, and flue-cured 24 percent. About four-fifths of all flue-cured was consigned to the United Kingdom, which cut takings nearly 20 percent. Other Commonwealth areas accounted for about 4 percent of the total. About  $2\frac{1}{2}$  million pounds of flue-cured were exported to West Germany, but this quantity was less than half of the previous year's takings. Other countries taking significant quantities of Canadian flue-cured were Belgium, the Netherlands, Denmark, Sweden, and Norway. All but the Netherlands increased takings over the year before. A substantial quantity of Canadian burley was exported to West Germany, in contrast to a token quantity in 1962.

The 1964 flue-cured crop in India is placed at about 165 million pounds--7 percent less than the record outturn in 1963. Exports of Indian flue-cured in January-November 1963, at 114 million pounds, were slightly under record shipments a year earlier. Takings by the United Kingdom were virtually unchanged and represented nearly a third of the total. Exports to the Soviet Union accounted for another 30 percent and were a little smaller than in 1962. Takings by Yugoslavia jumped 67 percent, but those by Poland and East Germany dropped sharply. Other markets for Indian flue-cured included Japan (which took over 3 million pounds contrasted with a negligible quantity in 1962), Belgium, the Netherlands, France, and Hungary.



Oriental tobacco production in Turkey in 1963 has been estimated at about 276 million pounds--44 percent larger than the below-normal crop of 1962 and third largest on record.

In Greece, oriental tobacco production in 1963 is estimated at 271 million pounds--almost a third above 1962 and largest on record. Exports in 1963 are placed at 134½ million pounds--a third more than in the previous year, when exports dropped to a 10-year low. The United States, leading market, took more than 4 times the relatively-low 1962 quantity, and West Germany, second ranking market, boosted takings nearly 50 percent. More than in 1962 was also exported to Belgium, Japan, Finland, East Germany, Portugal, and Poland, but less was shipped to Soviet Union, Italy, France, the Netherlands, Switzerland, Austria, Sweden, and Egypt. The 1963 burley crop (for export) is estimated at about 3½ million pounds, compared with a little over 1 million in 1962. The 1964 production goal for burley is about 5½ million pounds.

### British Tobacco Situation

Imports of unmanufactured tobacco into the United Kingdom in 1963 totaled 325 million pounds--nearly a sixth more than the relatively low 1962 total. About 145 million pounds of unmanufactured tobacco--45 percent of the total--were received from the United States. This was nearly two-fifths more than in 1962, when 106 million pounds from the United States accounted for about 38 percent of the total. Imports from Rhodesia-Nyasaland increased a tenth, but those from India and Canada declined 1 and 9 percent, respectively. (See table 13.) The 3 Commonwealth areas supplied 53 percent of total imports, compared with about 60 percent in 1962 and 52 percent in 1961.

Over nine-tenths of the 1963 tobacco imports consisted of flue-cured, of which nearly 58 percent entered in stemmed form, the rest unstemmed. The proportion of stemmed flue-cured imports was substantially higher than in 1962. Quantities of imported flue-cured by principal sources were United States, 142 million pounds; Rhodesia-Nyasaland, 92 million; India, 35¾ million; and Canada, 31 million. Almost half of the U.S. flue-cured was stemmed, compared with about a third in 1962, and over half of Canadian flue-cured was stemmed, compared with less than a tenth the previous year. Over three-fifths of Rhodesian flue-cured entered already stemmed, a little higher proportion than the year before, while 1963 imports of Indian flue-cured were virtually all in stemmed form. Average values of flue-cured imports in 1963 were as follows (expressed in U. S. cents per pound):

<u>Country of Origin</u>	<u>Stemmed</u>	<u>Unstemmed</u>
	<u>Ct. per lb.</u>	<u>Ct. per lb.</u>
United States	97.2	88.3
Rhodesia-Nyasaland	84.9	81.0
Canada	79.5	74.1
India	66.4	---

Table 12.—United Kingdom tobacco: Imports, stocks, clearances, and exports for specified periods

Period	Imports <sup>1/</sup>		Stocks *Dec. 31	Gross clearances from bond <sup>3/</sup>		Exports of manu- factured tobacco	Re- exports of unmanu- factured tobacco
	From U. S. <sup>2/</sup>	From Common- wealth coun- tries <sup>2/</sup>		Total	Non- prefer- ential <sup>2/</sup>		
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Average: 1947-49	176	99	431	210	68	278	1
1950	144	146	445	180	91	271	4
1951	212	131	498	183	104	287	7
1952	67	143	430	172	108	280	12
1953	174	127	452	167	116	283	9
1954	160	139	468	168	122	290	4
1955	179	149	507	173	125	298	4
1956	160	146	523	173	127	300	3
1957	168	141	529	169	135	304	3
1958	164	145	529	172	138	310	2
1959	140	157	509	171	144	315	2
1960	178	180	538	166	153	319	5
1961	157	181	563	161	156	317	3
1962	106	168	540	153	155	308	4
1963 <sup>1/</sup>	145	174	536	155	159	314	3

Percentage change

	Percent	Percent	Percent	Percent	Percent	Percent	Percent	
Average: 1957-59 to 1963 1962 to 1963	-7.6 36.8	18.4 3.6	4.2 16.1	1.7 -.7	-9.4 1.3	14.4 2.6	1.3 1.9	50.0 -25.6 -25.0

<sup>1/</sup> Unmanufactured tobacco. <sup>2/</sup> Since 1946 the full duty rate on tobacco from the United States and other nonpreferential areas has been 2.2 to 2.9 percent above the preferential rate on tobacco from Commonwealth areas. <sup>3/</sup> Largely withdrawals for manufactures for home use and export. <sup>4/</sup> Subject to revision. \* Beginning with 1957, stocks not strictly comparable with prior years.  
Compiled from the Annual Statement of Trade and Accounts Relating to Trade and Navigation of the United Kingdom.

Table 13.--Unmanufactured tobacco imports into the United Kingdom from major sources, average 1947-49, annual 1950-63

Period	United States	Rhodesia and Nyasaland	India	Canada	Turkey	Greece	Other	Total
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Average 1947-49	175.9	52.3	28.0	16.0	10.2	5.5	4.6	292.5
1950	143.7	78.5	48.1	15.8	10.8	1.0	7.9	305.8
1951	212.0	66.5	40.1	21.6	3.2	1.3	10.2	354.9
1952	66.8	70.2	38.3	32.7	.6	1.2	13.9	223.7
1953	174.2	68.2	31.4	24.1	2.4	.8	14.7	315.8
1954	159.7	76.8	36.2	24.9	2.8	1.4	10.7	312.5
1955	178.6	72.1	36.4	40.0	3.1	1.5	12.0	343.7
1956	160.3	84.4	40.0	21.7	2.6	1.4	8.0	318.4
1957	168.1	79.9	35.6	25.6	2.5	1.1	5.9	318.9
1958	163.9	74.6	44.7	23.4	1.0	.5	7.9	316.0
1959	140.1	86.8	37.4	29.7	.2	.4	5.7	300.3
1960	178.5	105.5	42.7	30.2	.4	.1	7.2	364.6
1961	157.2	102.0	43.6	34.8	.3	.4	7.1	345.4
1962	105.8	91.9	39.9	35.5	.1	.5	6.7	280.4
1963 <sup>1/</sup>	145.5	101.3	39.5	32.3	.3	.1	6.0	325.0
Percentage change								
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent
Average 1957-59 to 1963	-7.6	26.0	0.8	23.3	-75.0	-85.7	-7.7	4.3
1962 to 1963	37.5	10.2	-1.0	-9.0	200.0	-80.0	-10.4	15.9
Percentage distribution								
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent
Average 1947-49	60.1	17.9	9.5	5.5	3.5	1.9	1.6	100.0
1950	47.0	25.7	15.7	5.2	3.5	.3	2.6	100.0
1951	59.7	18.7	11.3	6.1	.9	.4	2.9	100.0
1952	29.9	31.4	17.1	14.6	.3	.5	6.2	100.0
1953	55.2	21.6	9.9	7.6	.8	.3	4.6	100.0
1954	51.1	24.6	11.6	8.0	.9	.4	3.4	100.0
1955	52.0	21.0	10.6	11.6	.9	.4	3.5	100.0
1956	50.4	26.5	12.6	6.8	.8	.4	2.5	100.0
1957	52.8	25.0	11.2	8.1	.8	.3	1.8	100.0
1958	52.0	23.6	14.1	7.4	.3	.2	2.4	100.0
1959	46.7	28.9	12.4	9.9	.1	.1	1.9	100.0
1960	49.0	28.9	11.7	8.3	.1	---	2.0	100.0
1961	45.5	29.5	12.6	10.1	.1	.1	2.1	100.0
1962	37.7	32.8	14.2	12.7	---	.2	2.4	100.0
1963	44.8	31.2	12.2	9.9	.1	---	1.8	100.0

<sup>1/</sup> Preliminary.Basic data compiled from Accounts Relating to Trade and Navigation of the United Kingdom.



The United Kingdom import duty on unstemmed tobacco from non-Commonwealth sources is \$9.92 a pound and from Commonwealth sources, \$9.70 $\frac{1}{2}$ --allowing a margin of preference for Commonwealth areas equal to 21 $\frac{1}{2}$  cents a pound.

Gross clearances of tobacco from bond in the United Kingdom are an approximate measure of home use and exports combined. After increasing steadily for some years, gross clearances slipped nearly 1 percent in 1961 and declined another 3 percent in 1962, with most of the decline occurring in the months following the March 1962 release of a smoking-health report. In 1963, however, gross clearances increased 2 percent over 1962 but were still a little below 1961. Gross clearances of flue-cured (over nine-tenths of total gross clearances) in 1963 amounted to 293 million pounds, and by source were as follows: United States, about 144 $\frac{1}{2}$  million; Rhodesia-Nyasaland, 81 million; India, 37 $\frac{1}{2}$  million; and Canada, 30 million. Compared with 1962, gross clearances of U. S. flue-cured increased 1.2 percent, Rhodesian 2.9 percent. Indian and Canadian flue-cured each gained approximately 1 $\frac{1}{2}$  percent.

Net clearances of tobacco from bond (the measure of home consumption) in 1963, at 256 million pounds, were 1.8 percent above 1962 but still about 1 percent below 1961. Total sales of cigarettes, which had declined 3 percent in 1962, increased nearly 5 percent in 1963 to the highest on record. Most of the 1962 decline in cigarettes occurred in March-July, following the release of the smoking-health report by the Royal College of Physicians. In terms of product weight rather than number, however, cigarette sales in 1963 were about 3 percent above 1962 and still about 2 percent under 1961. Filter-tip cigarettes continued to gain in 1963, and comprised about 33 percent of total cigarette sales, compared with 26 percent in the previous year. Sales of smoking mixtures for "roll-your-own" cigarettes also were larger in 1963, but sales of pipe tobacco, up moderately in 1962 compared with the year before, declined about 6 percent in 1963. Cigar sales continued to increase, but still made up less than 1 percent of total tobacco consumption.

Exports of manufactured products, which had been trending downward, were a little larger in 1963 than the preceding year. Cigarettes made up about nine-tenths of the total, and increased about 3 percent. Among markets increasing their takings of British cigarettes in 1963 were Aden, Kuwait, Sudan, France, Hong Kong, West Germany, and Persian Gulf States; among those receiving less were Malaya (which slashed takings more than a third), Gibraltar, Jamaica, and Arabian States.

Stocks of unmanufactured tobacco in the United Kingdom on December 31, 1963, at about 536 million pounds, were about 4 million less than a year earlier, and about 27 million below the postwar peak 2 years earlier. The December 31, 1963, holdings represented about 20 $\frac{1}{2}$  months' use (as measured by gross clearances), compared with a ratio of a little over 21 in 1962 and a 1957-61 average of 20.4.

Included in 1963 year-end stocks were 258 million pounds of U. S. flue-cured--4 percent less than a year earlier. Holdings of Rhodesian flue-cured increased 6 percent to 134 million. Stocks of Indian flue-cured, at 61 million

pounds, were somewhat smaller than on December 31, 1962, but those of Canadian flue-cured rose about 4 percent to 43 million. Holdings of dark fire-cured and air- and sun-cured from Nyasaland were a little higher, but air- and sun-cured from India were down moderately.

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

In 1963, U. S. imports of foreign-grown tobacco for consumption totaled nearly 168 million pounds, about 3 percent more than in 1962 and the highest on record. However, the value of 1963 imports, at \$99 million (excluding import duties), declined 2 percent from the previous year. The volume of cigarette leaf continued to increase some, but imports of scrap tobacco (small pieces of leaves) for cigars jumped 25 percent. Imports of cigar filler and wrapper were both down sharply. Cigarette leaf comprised over three-fourths of the total, and cigar tobacco virtually all the rest.

The 1963 imports of cigarette leaf for consumption (direct entries plus withdrawals from bond) increased 1 percent over 1962. This rate of gain was the same as in the previous year but appreciably below other recent years. The 1963 receipts from Turkey rose 3 percent but those from Greece fell a tenth. Leaf imports from Yugoslavia jumped nearly a third, and those from Italy also gained.

General imports (total arrivals) of cigarette tobacco (direct entries plus that placed in bond) totaled 121 million pounds--over a fifth less than the year before. Arrivals from Turkey were down sharply, but those from Greece more than doubled. (See table 15.) On January 1, 1964, stocks of foreign-grown cigarette and smoking tobacco in this country amounted to 256 million pounds, 4 percent less than a year earlier but 5 percent above 2 years earlier.

The 1963 imports for consumption of cigar filler fell 40 percent, mainly due to sharply curtailed withdrawals of Cuban filler from stocks already in the United States. Imports of Cuban scrap from bond dropped nearly a half, but increases occurred in scrap imported from the Philippine Republic, Colombia, Dominican Republic, Brazil, and Indonesia.

Stocks of Cuban tobacco in the United States totaled 17.8 million pounds on January 1, 1964--down 35 percent from a year earlier and less than half as much as the comparatively high level of 2 years earlier. (See table 16.)

Total arrivals of cigar tobacco in 1963 were 4 percent less than in the previous year. (See table 15.) In 1962 about  $6\frac{1}{2}$  million pounds of Cuban tobacco arrived before trade with Cuba was embargoed. Arrivals from the Philippine

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2/ Imports of tobacco are on a declared-weight basis and stocks are on an unstemmed equivalent basis.

Table 14.--United States imports for consumption of unmanufactured tobacco, from principal supplying countries, for specified periods

Classification and country of origin	(Declared weight)						1963 as a percentage of 1962
	Average 1954-58	1959	1960	1961	1962 <sup>1/</sup>	1963 <sup>1/</sup>	
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Percent
<b>Cigarette leaf:</b>							
Unstemmed:							
Turkey	60.1	69.6	74.3	78.7	82.4	84.5	103
Greece	20.8	31.6	32.3	34.4	32.1	28.8	90
Syria	2.0	.9	.7	.9	.6	.3	50
Italy	1.7	1.8	1.9	1.7	1.4	1.7	121
Cyprus	.4	1.0	1.1	.9	.6	.6	100
Yugoslavia	3.3	4.6	5.5	6.4	7.3	9.6	132
Total <sup>2/</sup>	88.6	111.9	118.7	125.7	127.2	129.0	101
<b>Cigar leaf (filler):</b>							
Cuba:							
Stemmed	9.0	9.1	7.0	5.1	2.9	1.0	34
Unstemmed	3.9	3.7	4.0	4.7	3.0	1.4	47
Philippine Republic:							
Stemmed	.1	.2	.5	0	.1	.9	900
Unstemmed	.1	<sup>3/</sup>	.1	.2	.1	<sup>3/</sup>	---
Colombia	0	<sup>3/</sup>	.1	.3	.8	.2	25
Brazil	0	0	<sup>3/</sup>	.3	.5	.6	120
Paraguay	0	0	<sup>3/</sup>	.3	.3	.1	33
Dominican Republic	0	.1	.3	.2	.8	.3	38
Mexico	0	0	0	0	.2	.6	300
Total <sup>2/</sup>	13.4	13.1	12.3	11.3	8.9	5.3	60
<b>Scrap:</b>							
Cuba	11.3	16.1	13.8	12.5	6.4	3.3	52
Philippine Republic	4.3	7.4	9.9	10.4	10.1	12.9	128
Peru	0	.1	1.7	.5	0	.2	---
Colombia	0	0	.2	1.2	3.2	5.3	166
Dominican Republic	0	.1	.3	1.2	3.0	5.2	173
Netherlands	0	.1	<sup>3/</sup>	.3	<sup>3/</sup>	.1	---
Indonesia	0	<sup>3/</sup>	.1	.3	.6	1.0	167
Brazil	<sup>3/</sup>	<sup>3/</sup>	0	.1	.3	1.9	633
Argentina	0	0	<sup>3/</sup>	.1	.3	.4	133
Total <sup>2/</sup>	15.6	24.7	26.9	28.4	26.3	33.0	125
<b>Cigar wrapper (unst.):</b>							
Indonesia	.2	<sup>3/</sup>	<sup>3/</sup>	<sup>3/</sup>	<sup>3/</sup>	<sup>3/</sup>	---
Cuba	.5	.5	.6	.6	.5	.2	40
Total <sup>2/</sup>	.7	.6	.6	.6	.5	.3	60
Total imports <sup>4/</sup>	119.7	151.7	159.1	166.4	163.3	167.8	103

<sup>1/</sup> Preliminary. <sup>2/</sup> Includes relatively small quantities from other countries not separately listed. <sup>3/</sup> Less than 50,000 pounds. <sup>4/</sup> Includes stems not cut, ground, or pulverized.

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



Table 15.--United States general imports of tobacco from principal supplying countries for specified periods

Classification and country	(Declared weight)						1963 as a percentage of 1962
	Average 1957-59	1960	1961	1962	1963		
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Pct.	
<b>Cigarette leaf (unstemmed):</b>							
Turkey	80.6	69.8	111.7	116.8	67.4	58	
Greece	32.9	29.2	46.2	17.0	41.7	245	
Other countries	11.5	13.8	17.0	21.3	11.0	52	
Total 2/	125.0	112.7	175.0	155.1	120.1	77	
<b>Scrap:</b>							
Turkey	.4	1.1	1.9	.7	.7	100	
Greece	1/	.3	.3	0	0	---	
Total 2/ 3/	.4	1.4	2.3	1.3	.7	100	
Total cigarette tobacco 3/	125.4	114.1	177.3	156.4	120.8	77	
<b>Cigar wrapper (unstemmed):</b>							
Cuba	.5	.8	.6	1/	0	---	
Indonesia	.1	1/	1/	1/	1/	---	
Total 3/	.6	.8	.6	.1	.2	200	
<b>Cigar filler (stemmed):</b>							
Cuba	9.3	7.6	5.9	1.3	0	---	
Philippine Republic	.3	.5	0	.1	2.3	---	
Brazil	1/	0	1/	.1	1.9	---	
Total 3/	9.6	8.1	5.9	1.6	5.1	319	
<b>Cigar filler (unstemmed):</b>							
Cuba	18.4	26.1	12.3	3.5	0	---	
Philippine Republic	2.4	.2	.2	.1	.1	100	
Dominican Republic	.2	3.4	5.8	5.4	6.5	120	
Colombia	1/	1.4	5.6	7.8	8.8	113	
Brazil	1/	.2	1.7	1.5	2.3	153	
Paraguay	1/	.4	1.3	1.4	.8	57	
Indonesia	1/	.3	1.3	1.8	1.9	106	
Netherlands	1/	1.3	.1	0	1/	---	
Peru	2.0	0	0	.4	0	---	
Argentina	0	0	1/	.5	1/	---	
Mexico	0	0	1/	.5	.9	180	
Jamaica	0	0	1/	.4	1/	---	
Other countries	1/	1/	.2	0	.4	---	
Total	23.0	33.3	28.5	23.3	21.7	93	
<b>Scrap:</b>							
Cuba	6.7	11.9	4.9	1.6	0	---	
Philippine Republic	6.2	9.7	10.5	11.9	10.2	86	
Dominican Republic	1/	1/	1/	.2	.6	300	
Colombia	0	0	.1	.1	1/	---	
Brazil	0	0	1/	.4	.1	25	
Paraguay	0	1/	.3	.2	.1	50	
Indonesia	1/	1/	.1	0	1/	---	
Netherlands	0	1/	.3	1/	.2	---	
Spain	.4	0	0	0	0	---	
Argentina	0	0	.1	.6	.4	67	
Honduras	0	0	0	.1	1/	---	
Other countries	.1	.2	0	0	.1	---	
Total	13.4	21.8	16.3	15.1	11.7	77	
Total cigar tobacco 3/	46.6	64.0	51.3	40.1	38.7	96	
Grand total 3/	172.0	179.6	230.9	198.1	160.4	81	

1/ Less than 50,000 pounds. 2/ Details may not add to total, due to rounding. 3/ Includes quantities from other countries not separately listed.

Note: General imports include all arrivals in the United States as distinguished from "imports for consumption" which represent merchandise entering into domestic consumption channels.

Table 16.--Stocks of Cuban tobacco in the United States, owned by manufacturers and dealers on specified dates

Year and date	Manufacturers		Dealers		Total unstemmed basis
	Unstemmed	Stemmed	Unstemmed	Stemmed	
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
1956-58 average					
January 1	6.3	7.8	0.2	0.3	16.3
April 1	6.8	7.6	.2	.3	17.8
July 1	7.9	7.2	.2	.3	17.1
October 1	7.7	7.6	.2	.3	17.6
1959					
January 1	9.8	7.8	.9	.5	20.7
July 1	12.6	8.6	1.5	.5	25.1
1960					
January 1	14.2	9.1	.5	.5	26.3
July 1	24.7	11.1	6.0	.4	44.5
1961					
January 1	22.2	10.3	6.7	.8	42.2
July 1	21.7	10.5	4.5	2.0	41.2
1962					
January 1	18.7	11.4	4.3	2.7	39.9
April 1	18.5	10.6	3.9	2.6	38.3
July 1	16.3	9.6	3.0	2.7	34.1
October 1	16.6	8.2	1.1	2.2	30.2
1963					
January 1	13.3	7.2	2.5	2.4	27.3
April 1	11.2	6.3	2.4	2.2	23.9
July 1	9.7	5.1	2.5	2.0	20.8
October 1	8.8	4.6	2.7	1.7	19.2
1964					
January 1	8.5	4.0	2.6	1.6	17.8

Republic increased a little. Stocks of Philippine tobacco on January 1, 1964, at  $12\frac{1}{2}$  million pounds, were about 1 million less than on the same date in each of the 2 preceding years. In 1963, more cigar tobacco than the previous year arrived from Colombia, Dominican Republic, Brazil, Indonesia, and Mexico; countries showing decreases included Paraguay, Argentina, Peru, and Jamaica.

January 1, 1964, stocks of foreign-grown cigar tobacco, other than Cuban and Philippine, totaled about  $28\frac{1}{2}$  million pounds, compared with about  $27\frac{3}{4}$  million a year earlier and about  $17\frac{1}{2}$  million 2 years earlier. Holdings as of January 1, 1964, consisted of the following (unstemmed weight): Dominican Republic, 8.7 million pounds; Colombia, 8.0 million; Brazil, 4.4 million; Indonesia, 2.6 million; Paraguay, 2.2 million; and other, 2.6 million. Compared with January 1, 1963, stocks of Dominican, Paraguayan, and "other" cigar tobacco were down, while stocks of Colombian, Brazilian, and Indonesian were larger.

#### OUTLOOK AND SITUATION FOR TOBACCO LEAF

##### Flue-cured, Types 11-14

##### Prices and Price Supports

The 1963 season average price for flue-cured tobacco was 58.1 cents per pound--2 cents lower than in 1962 and over 6 cents lower than in 1961. A larger proportion of the crop fell into lower grade classifications, but grade for grade, there was an improvement in quality of the 1963 crop over 1962. The Government support price level was 56.6 cents per pound--a half cent above the previous season. About 20 percent of the 1963 crop went under Government loan compared with just under 17 percent in 1962 and 4 to 6 percent in each of the previous 3 seasons.

At the end of February, the quantity of flue-cured under Government loan was 703 million pounds (farm-sales weight). In 1963 and the first 2 months of 1964, about 150 million pounds moved out of Government loan into private trade channels. Over seven-tenths of the stocks under Government loan at the end of February was from the 1963 and 1962 crops and the rest from the preceding 5 crops.

The overall price support level for the 1964 crop is 57.2 cents per pound--six-tenths of a cent higher than for 1963. The increase in the overall support level in 1964 is based on the comparison of the 3-year average of the parity index for 1961, 1962, and 1963 with what it was for the single year 1959. The parity index measures the average change over time in prices of commodities and services commonly bought by farm families. The basis for making year-to-year adjustments in the overall support price levels for eligible kinds of tobacco is specified by law; the average of the parity index of the most recent 3 calendar years is compared with 1959. Comparing the average of 1961-63 (the most recent 3 years) with 1959, the percentage increase is 3 percent; the 1964 price support level for flue-cured, at 57.2 cents per pound, is 3 percent above 1959 and 1 percent above last season's support level of 56.6 cents per pound.



Table 17.--Marketing quota referendums, by kinds of tobacco

Kind	Last referendum				Next referendum		
	Date	Crops to which applicable:	Number voting	Percentage voting in favor of quota <sup>1/</sup>	Probable date <sup>2/</sup>	Crops to which applicable	
Flue-cured (11-14)	Dec. 12, 1961	1962-64	194,121	98.1	About Dec. 1964	1965-67	
Burley (31)	Feb. 20, 1962	1962-64	176,926	99.2	About Feb. 1965	1965-67	
Maryland (32)	Feb. 14, 1963	1963-65	4,441	83.8	About Feb. 1966	1966-68	
Fire-cured (21-23)	Feb. 28, 1964	1964-66	11,978	94.7	About Feb. 1967	1967-69	
Dark air-cured (35-36)	Feb. 28, 1964	1964-66	9,113	97.8	About Feb. 1967	1967-69	
Va. sun-cured (37)	Feb. 20, 1962	1962-64	1,431	98.5	About Feb. 1965	1965-67	
Pa. filler (41)	Feb. 20, 1962	1962-64	4,275	13.8	About Feb. 1965	1965-67	
Cigar binder (51-52)	Feb. 26, 1963	1963-65	349	96.0	About Feb. 1966	1966-68	
Cigar filler and binder (42-44, 53-55)	Feb. 26, 1963	1963-65	3,401	89.6	About Feb. 1966	1966-68	

<sup>1/</sup> At least a two-thirds majority of farmers voting is required to place marketing quotas in effect.

<sup>2/</sup> Unless circumstances necessitate an earlier date.

Table 18.--Flue-cured tobacco, types 11-14: Domestic supplies, disappearance, season average price, and price support operations for specified periods

(Farm-sales weight)						
Year	Production	Stocks, July 1	Supply	Disappearance 1/		
				Total	Domestic	Exports
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.
Average:						
1947-49	1,174	1,458	2,632	1,108	715	393
1950	1,257	1,485	2,742	1,185	757	428
1951	1,453	1,557	3,010	1,279	777	502
1952	1,365	1,731	3,096	1,244	828	416
1953	1,272	1,852	3,124	1,209	778	431
1954	1,314	1,915	3,229	1,173	744	429
1955	1,483	2,056	3,539	1,281	728	553
1956	1,423	2,258	3,681	1,170	705	465
1957	975	2,511	3,486	1,178	737	441
1958	1,081	2,308	3,389	1,179	736	443
1959	1,081	2,210	3,291	1,185	766	419
1960	1,251	2,106	3,357	1,267	792	475
1961	1,258	2,090	3,348	1,267	782	485
1962	1,408	2,081	3,489	1,208	777	431
1963 2/	1,360	2,281	3,641			
	Average price per pound	Price support level 3/	Placed under Government loan Quantity	Percentage of crop	Remaining in Government loan stocks on Feb. 29, 1964 4/	
	Ct.	Ct.	Mil. lb.	Pct.	Mil. lb.	
1950	54.7	45.0	77.6	6.2	0	
1951	52.4	50.7	142.2	9.8	0	
1952	50.3	50.6	5/165.0	12.1	0	
1953	52.8	47.9	151.4	11.9	0	
1954	52.7	47.9	130.2	9.9	0	
1955	52.7	48.3	298.9	20.2	0	
1956	51.5	48.9	319.9	22.5	0	
1957	55.4	50.8	107.8	11.1	28.5	
1958	58.2	54.6	144.8	13.4	65.6	
1959	58.3	55.5	55.3	5.1	18.7	
1960	60.4	55.5	51.8	4.1	31.4	
1961	64.3	55.5	70.5	5.6	55.6	
1962	60.1	56.1	237.2	16.8	228.9	
1963	58.1	56.6	277.2	20.4	274.7	
1964		57.2				
Total	---	---	2,229.8	---	703.4	

1/ Year beginning July 1.

2/ Subject to revision.

3/ Through 1959--90 percent of parity price; 1960 set at 1959 level; from 1961 on, adjusted to reflect relative change between 1959 parity index and average of parity index for 3 most recent calendar years.

4/ As reported by Flue-cured Tobacco Cooperative Stabilization Corporation; actual loan stocks on a packed-weight basis average about 11 percent less than these farm-sales weight figures.

5/ An additional 78.4 million pounds under option to British manufacturers were pledged for CCC loans, but were purchased and shipped by mid-1953.

Supplies

The 1964 acreage allotments for most flue-cured tobacco farms are 10 percent smaller than in 1963. This is the second successive year for a cut in allotments; the 1963 allotments were reduced 5 percent below 1962. According to March 1 intentions, 626,700 acres of flue-cured will be grown in 1964--10 percent less than in 1963. The average yield per acre with an allowance for trend applied to intended acreage would indicate a crop of about 1,253 million pounds, according to the Crop Reporting Board. A crop of this size would be 107 million smaller than in 1963 and 155 million below the comparatively large 1962 crop. The Department continues to emphasize by every means possible the importance of following cultural practices that will enhance the overall quality of tobacco. This is vital to the holding and building of market outlets in the face of increasing competition.

Carryover of flue-cured tobacco in mid-1964 may range between 2,380 and 2,410 million pounds--about 100 to 130 million above a year earlier and above any previous carryover except mid-1958. If the 1964 crop approximates 1,253 million pounds, the total supply for 1964-65 would be within 1 percent of the 1963-64 level of 3,641 million pounds--second highest on record.

Domestic Use and Exports

During the first half (July-December 1963) of the 1963-64 marketing year, domestic use of flue-cured was indicated to be larger than in the like period of 1962-63. Cigarette output in July-December 1963 was about 2½ percent higher than in the comparable period of 1962. During the 1962-63 marketing year, domestic use of flue-cured, at 777 million pounds, fell slightly below a year earlier despite an increase in cigarette output.

Exports of flue-cured tobacco in the year ending June 30, 1964 may approximate 470 million pounds (farm-sales weight)--about 9 percent more than in 1962-63 though about 3 percent below the 7-year high of 1961-62. During July 1963-January 1964 exports of flue-cured to the United Kingdom (leading outlet and accounting for over two-fifths of the total) rose 47 percent above the lower-than-usual quantity of a year earlier. West Germany (second ranking outlet) and Japan (third ranking outlet) took 38 and 16 percent more, respectively, than in the same period a year earlier. Among other countries taking significantly more in July 1963-January 1964 than a year earlier were Netherlands, Belgium, Austria, Finland, Switzerland, Thailand, South Vietnam, and Hong Kong. Takings by Australia, Sweden and Denmark were up moderately but exports to Ireland, Portugal, Norway, Italy, and New Zealand were down sharply. Among other countries taking less were France, India, Mexico, Uruguay and Malaysia.

Burley, Type 31

Prices and Price Supports

Auction prices for the 1963 burley crop averaged about 59.2 cents a pound--1 percent above the average for the 1962 crop but otherwise lowest



Table 19.--Burley tobacco: Price spreads among specified grades, average 1953-55, annual 1956-63

Period	Cents per pound lower than C4F							
	Average price of C4F	X4F	C4R	B4F	B4FR	B4R	T4R	NIG
	Cents per lb.	Cents per lb.	Cents per lb.	Cents per lb.	Cents per lb.	Cents per lb.	Cents per lb.	Cents per lb.
Average 1953-55	64	1	6	8	15	23	28	43
1956	66	1	1	1	1	1	2	14
1957	67	1	3	4	7	10	13	29
1958	70	1	2	2	3	4	7	20
1959	70	1	2	2	7	12	17	32
1960	70	1	2	2	5	9	13	25
1961	71	1	4	3	5	8	10	15
1962	71	1	4	5	10	17	22	37
1963	71	1	6	5	12	20	26	42

since 1955. Markets opened November 26 and the season ended March 5 with a cleanup sale at Lexington. Volume sold jumped 11 percent above 1962 and was the largest on record. The Christmas shutdown came a week earlier than the originally scheduled December 20, because of crowded conditions in plants re-drying tobacco going under Government loan. Approximately 60 percent of total producers' sales was made by December 13, when markets closed for the holidays. In 1962, about 75 percent occurred before a later Christmas shutdown.

Overall quality of the record volume of market deliveries was better than in the 1962 season. In general, prices of thin-bodied grades were unchanged or were up 1 to 2 cents a pound, but prices of medium- and heavy-bodied leaf grades and nondescript and all tip grades declined, mostly 1 to 6 cents a pound. As a result, price spreads between the C4F grade (one of the major cigarette grades) and representative medium- and heavy-bodied grades widened to the most since 1954. (See table 19.)

The Government support level for the 1963 crop was 58.3 cents a pound--1 percent above 1962. Growers placed about 203 million pounds under loan, equal to 27 percent of estimated producers' sales. This is the largest quantity and percentage since 1954. In the 1962 season, about 64 million pounds--9½ percent of the crop--were placed under loan, and in the 6 seasons before that, loan deliveries varied from only 1 to about 3 percent of the respective crop.

Table 20.--Burley tobacco, type 31: Domestic supplies, disappearance, season average price, and price support operations for specified periods

Year	Production	Stocks, Oct. 1	Supply	Disappearance 1/		
				Total	Domestic	Exports
				Mil. lb.	Mil. lb.	Mil. lb.
(Farm-sales weight)						
Average:						
1947-49	550	939	1,489	530	493	37
1950	499	1,000	1,499	518	488	30
1951	618	981	1,599	538	506	32
1952	650	1,061	1,711	548	519	29
1953	564	1,163	1,727	529	494	35
1954	668	1,198	1,866	519	486	33
1955	470	1,347	1,817	518	484	34
1956	506	1,299	1,805	510	482	28
1957	488	1,295	1,783	506	478	28
1958	465	1,277	1,742	518	483	35
1959	502	1,224	1,726	535	499	36
1960	485	1,191	1,676	549	508	41
1961	580	1,127	1,707	570	525	45
1962	675	1,137	1,812	584	531	53
1963 <u>2/</u>	*750	1,228	1,978			
	Average price per pound	Price support level <u>3/</u>	Placed under Government loan Quantity	Percentage of crop	Remaining in Government loan stocks on Feb. 29, 1964 <u>4/</u>	
	Ct.	Ct.	Mil. lb.	Pct.	Mil. lb.	
1950	49.0	45.7	44.2	8.9	0	
1951	51.2	49.8	97.3	15.7	0	
1952	50.3	49.5	103.9	16.0	0	
1953	52.5	46.6	102.1	18.1	0	
1954	49.8	46.4	221.4	33.2	0	
1955	58.6	46.2	73.1	15.6	0	
1956	63.6	48.1	6.0	1.2	0	
1957	60.3	51.7	16.6	3.4	5.9	
1958	66.1	55.4	11.2	2.4	1.2	
1959	60.6	57.2	13.2	2.6	7.2	
1960	64.3	57.2	8.4	1.7	7.4	
1961	66.5	57.2	10.3	1.8	10.0	
1962	58.6	57.8	63.5	9.4	60.7	
1963	*59.2	58.3	202.8	27.0	202.8	
1964		58.9				
Total	---	---	974.0	---	295.2	

1/ Year beginning October 1.

2/ Subject to revision.

3/ Through 1959--90 percent of parity price; 1960 set at 1959 level; from 1961 on, adjusted to reflect relative change between 1959 parity index and average of parity index for 3 most recent calendar years.

4/ Actual loan stocks on a packed-weight basis average about 11 percent less than these farm-sales weight figures.

\* Indicated by sales data.

At the end of February, Government loan stocks of burley amounted to 295 million pounds (farm-sales weight equivalent); a year earlier they were 96 million and 2 years earlier, 35 million.

The 1964 burley crop will be supported at an average level of 58.9 cents a pound--six-tenths of a cent or 1 percent above the overall level in effect for the 1963 crop. Under present law, the 1964 support was determined by adjusting the 1959 support level according to the change between the 1959 parity index and the average of the parity index for 1961, 1962, and 1963. (See page 33 for further details of method used.) The parity index is the index of prices paid by farmers, including interest, taxes, and farm wage rates.

### Supplies

The 1963-64 total supply of burley is estimated at 1,978 million pounds--9 percent above 1962-63 and the largest on record. Carryover increased 8 percent to the most since 1958, and producers' sales rose 11 percent to a new high.

Based on farmers' March 1 intentions, 306,200 acres of burley will be grown in 1964--10 percent less than in 1963. Acreage allotments for most farms were reduced 10 percent.

Based on an average yield per acre with an allowance for trend, the 1964 burley crop would be 643 million pounds--about 14 percent less than producers' marketings of the 1963 crop. The 1963 average yield was an alltime high.

Burley carryover next October 1 may be around 1,405 million pounds--approximately 175 million pounds above October 1, 1963 and largest on record. If the crop should turn out near 643 million pounds, total 1964-65 supplies--production plus the indicated carryover--would be around 2,048 million pounds and would exceed the current season's record high by nearly 4 percent.

### Domestic Use and Exports

Domestic use of burley in 1962-63, at 531 million pounds, was 1 percent above 1961-62 and a new high. Cigarette manufacture, the chief outlet for burley, rose  $2\frac{1}{2}$  percent over the 1961-62 marketing year. A significant volume of burley is also used in smoking tobacco and plug chewing. Output of smoking tobacco was up slightly, but plug chewing declined 4 percent.

Burley exports also were record high in 1962-63, reaching 53 million pounds (farm-sales weight). In the first third of the current marketing year (October 1963-January 1964), burley exports were 5 percent below those a year earlier. The Netherlands increased takings 8 percent, while Denmark took about  $2\frac{1}{2}$  times as much as a year earlier. Exports to Finland, Egypt, and Hong Kong gained sharply, and approximately 1.1 million pounds (farm-sales weight) went to Poland--a new postwar outlet--under a Title I, P. L. 480 authorization. However, these increases were more than offset by steep reductions in exports to West Germany and Sweden, which took 60 percent and 71 percent less, respectively, than a year earlier.



Maryland, Type 32 3/Prices and Price Supports

Auctions for the 1963 Maryland crop are now scheduled to open April 28 and continue through July 10. Sales also will be held at the Baltimore hogshead market, where approximately a sixth of the crop has been sold in the last few years.

The 1963 crop will be supported at an average level of 51.8 cents a pound-- $\frac{1}{2}$  cent or 1 percent more than for the 1962 crop. For the 1964 crop, the overall support level will be 52.3 cents--1 percent above the 1963 crop. The 1964 level of support was determined by adjusting the support level that would have applied to the 1959 Maryland crop--had it been produced under a marketing quota--by the percentage change between (1) the 1959 parity index, and (2) the average of the parity indexes for 1961, 1962, and 1963. (See page 33 for more details.)

The average price for the 1962 crop (marketed mostly in 1963) was 55.4 cents per pound--about a tenth below the previous season's average and lowest in 5 years. Auction sales increased a little and average quality was poorer than in the preceding year. About 15 percent of the crop was placed under Government loan.

Supplies

The 1963 crop of Maryland tobacco, reduced by drought, is estimated at 27.6 million pounds--32 percent less than 1962 and smallest since 1945. Carry-over on January 1, 1964, was  $76\frac{1}{2}$  million pounds--about 9 million more than a year earlier and largest in 8 years. Total 1963-64 supply, at about 104 million pounds, is about  $3\frac{1}{2}$  percent less than in 1962-63 but otherwise largest since 1957-58.

Based on farmers' intentions as of March 1, about 39,000 acres will be grown this year--13 percent above 1963, when acreage was sharply curtailed because of the severe drought. The 1964 allotments for most farms are the same as in 1963. Based on the average yield with an allowance for trend, about 38 million pounds would be produced from the 1964 intended acreage--about  $10\frac{1}{2}$  million above the 1963 estimated outturn. Carryover next January 1 may be around 73 million pounds--about  $3\frac{1}{2}$  million less than last January 1. The 1964-65 total supply--production plus carryover--is thus indicated at 111 million pounds--nearly 7 percent above the previous year and largest since 1954.

Domestic Use and Exports

Domestic use of Maryland tobacco in the 1962-63 marketing year declined more than 1 million pounds below 1961-62 to the lowest in nearly 30 years.

3/ For marketing quota purposes, the carryover and total supply of Maryland tobacco are calculated as of January 1 falling within the marketing year (the 12-month period, October 1 through September 30). Disappearance is calculated on the October-September basis.

Table 21.--Maryland tobacco, type 32: Domestic supplies, disappearance, season average price and price support operations for specified periods

(Farm-sales weight)

Year	Production	Stocks following Jan. 1 <sup>1/</sup>	Supply	Disappearance <sup>2/</sup>		
				Total	Domestic	Exports
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.
Average:						
1947-49	38.0	45.8	83.8	35.6	27.6	8.0
1950	40.0	53.4	93.4	35.5	27.1	8.4
1951	41.6	59.3	100.9	33.3	26.7	6.6
1952	40.2	64.9	105.1	40.3	32.5	7.8
1953	40.5	65.4	105.9	36.4	28.4	8.0
1954	43.8	68.6	112.4	36.1	27.9	8.2
1955	31.5	77.5	109.0	38.6	25.7	12.9
1956	36.5	69.7	106.2	34.9	21.4	13.5
1957	38.5	69.4	107.9	37.0	25.0	12.0
1958	31.1	70.9	102.0	39.4	24.1	15.3
1959	31.2	64.2	95.4	32.3	20.4	11.9
1960	34.7	61.7	96.4	35.6	23.6	12.0
1961	38.8	60.6	99.4	32.6	20.7	11.9
1962	40.5	67.3	107.8	30.6	19.4	11.2
1963 <sup>3/</sup>	27.6	76.5	104.1			
	Average price per pound	Price support level <sup>4/</sup>	Placed under Government loan Quantity	Percentage of crop	Remaining in Government loan stocks on Feb. 29, 1964 <sup>5/</sup>	
	Ct.	Ct.	Mil. lb.	Pct.	Mil. lb.	
1950	48.2	48.6	5.5	13.8	0	
1951	44.8	No price support		<sup>6/</sup>		
1952	48.8	No price support		<sup>6/</sup>		
1953	54.5	50.4	6.7	16.5	0	
1954	40.3	No price support		<sup>6/</sup>		
1955	50.8	No price support		<sup>6/</sup>		
1956	51.7	47.0	3.3	9.0	0	
1957	44.9	48.0	5.9	15.3	1.8	
1958	62.5	50.8	1.1	3.6	.4	
1959	61.6	No price support		<sup>6/</sup>		
1960	63.8	50.8	1.6	4.6	.6	
1961	62.0	50.8	3.7	9.5	2.2	
1962	55.4	51.3	6.0	14.8	4.4	
1963		51.8	Auctions scheduled to start April 23, 1964			
1964		52.3				
Total	---	---	33.8	---	9.4	

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

The major domestic outlet for Maryland tobacco is in the manufacture of cigarettes, but such use has not kept pace with expanded cigarette output. Some Maryland tobacco is also used as filler in some cigars, the quantity varying according to the availability and prices of certain grades.

Exports of Maryland tobacco in the 1962-63 marketing year were moderately below the relatively steady level of the preceding 3 years. In the first third of the current marketing year (October 1963-January 1964), exports of Maryland tobacco were 35 percent above a year earlier. Switzerland, accounting for over half of the total, reduced takings 12 percent. Less than a year earlier also went to the Netherlands. On the other hand, sharply increased shipments were made to West Germany and Belgium, and significant quantities were exported to Spain, France and South Vietnam, all of which took none a year earlier.

#### Fired-Cured, Types 21-23

#### Prices and Price Supports

Auctions for Virginia fire-cured, type 21, began during the first week of December and ended by the first week of February. Sales volume fell about a third to the lowest on record, and average quality was poor due to drought and considerable frostbite. The auction average was 35.3 cents per pound--nearly a tenth less than the previous year and lowest since 1955.

Auction markets for Kentucky-Tennessee fire-cured, types 22 and 23, opened near the end of January, latest on record. Through March 20, gross sales of type 22 amounted to 32.2 million pounds, and averaged 36.1 cents per pound compared with 38.1 cents a year earlier. Sales of type 23 came to an end on March 20. Sales volume was up a tenth, and the price averaged 35.1 cents a pound, 3 percent below the previous year.

The Government support level for the 1963 crop of fire-cured was 39.6 cents a pound--1 percent above the preceding year. During the season just ended, growers of Virginia fire-cured placed about 407,000 pounds--about 6½ percent of marketings--under Government loan. This was the second smallest quantity and proportion of market deliveries on record.

Through March 20, growers of Kentucky-Tennessee fire-cured, type 22, placed about 8.7 million pounds under loan--27 percent of estimated producers' auction sales--nearly twice as much as a year earlier. Season loan deliveries of type 23 totaled about 3.9 million pounds--about 30 percent of estimated producers' sales--and were close to a third above the 1962 season.

In a referendum held February 28, nearly 95 percent of the growers of the three fire-cured types voting approved marketing quotas for the 1964-66 crops. A two-thirds majority was required to continue marketing quotas in effect.



The 1964 crop of fire-cured will receive Government price support at an overall level of 40.0 cents a pound--1 percent above the level in effect for the 1963 crop. (See page 33 for method used for year-to-year adjustments in price support levels.)

### Supplies

The 1963-64 total supply of fire-cured, about 166 million pounds, is about 1 percent above the previous year. The supply of Kentucky-Tennessee types 22-23 is up 4 percent, but the supply of Virginia fire-cured, type 21, is a tenth below 1962-63.

According to farmers' intentions as of March 1, about 25,400 acres of Kentucky-Tennessee fire-cured and 7,300 acres of Virginia fire-cured will be grown in 1964. Intended acreage of Kentucky-Tennessee fire-cured is down 9 percent from 1963, while that of Virginia fire-cured is 9 percent larger. Acreage allotments for most farms growing the Kentucky-Tennessee types were reduced 10 percent below 1963; the 1964 farm acreage allotments for Virginia fire-cured are the same as for 1963 because of relatively lower supplies resulting from last year's drought. If the yield per acre equals the average with an allowance for trend, production of the combined fire-cured types would be about 50.7 million pounds--roughly  $1\frac{1}{2}$  million below 1963.

Carryover of fire-cured next October 1 may be around 114 million pounds--about 1 million higher than last October 1. Stocks at this level plus the indicated crop would provide a total 1964-65 supply of about 164 million pounds--1 percent less than for the current year.

### Domestic Use and Exports

In 1962-63, domestic use of fire-cured, at about  $26\frac{1}{2}$  million pounds, increased 4 percent over the average of the 2 preceding marketing years. Domestic disappearance of types 22-23 rose sharply from the unusually low figure calculated for 1961-62, but that of type 21 declined moderately from the average of the 2 preceding years.

In the first third of the current marketing year (October 1963-January 1964), exports of Kentucky-Tennessee fire-cured were 6 percent above those a year earlier. The Netherlands increased takings 9 percent, but shipments to Switzerland and Belgium fell 31 and 7 percent, respectively. Sweden increased takings nearly a third, and France about two-fifths. More than a year earlier was exported to Denmark and Norway, while South Vietnam and Congo Republic took some Kentucky-Tennessee fire-cured in contrast to none a year earlier.

Exports of Virginia fire-cured in October 1963-January 1964 jumped 46 percent over those a year earlier. Takings by Norway more than quadrupled, and those by Sweden increased 48 percent. West Germany and United Kingdom also stepped up takings appreciably, and some was exported to Switzerland, Congo Republic, and New Guinea.

Table 22.--Fire-cured tobacco, type 21: Domestic supplies, disappearance, season average price, and price support operations for specified periods

(Farm-sales weight)						
Year	Production	Stocks, Oct. 1	Supply	Disappearance <sup>1/</sup>		
				Total	Domestic	Exports
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.
Average: 1947-49	12.9	22.5	35.4	12.8	5.3	7.5
1950	12.8	23.1	35.9	11.3	5.9	5.4
1951	13.4	24.6	38.0	11.0	6.3	4.7
1952	12.2	27.0	39.2	10.5	5.5	5.0
1953	9.2	28.7	37.9	11.7	6.9	4.8
1954	10.6	26.2	36.8	10.2	6.0	4.2
1955	10.5	26.6	37.1	12.7	6.7	6.0
1956	10.7	24.4	35.1	10.3	4.8	5.5
1957	8.6	24.8	33.4	9.6	4.2	5.4
1958	9.4	23.8	33.2	10.7	5.3	5.4
1959	10.0	22.5	32.5	10.3	4.9	5.4
1960	8.9	22.2	31.1	10.2	4.0	6.2
1961	9.8	20.9	30.7	10.8	5.5	5.3
1962	9.5	19.9	29.4	9.2	4.1	5.1
1963 <sup>2/</sup>	*6.3	20.2	26.5			
	Average price per pound	Price support level <sup>3/</sup>	Placed under Government loan: Quantity	Percentage of crop	Remaining in Government loan stocks on Feb. 29, 1964 <sup>4/</sup>	
	Ct.	Ct.	Mil. lb.	Pct.	Mil. lb.	
1950	36.3	34.3	2.4	18.8	0	
1951	39.2	37.4	2.6	19.4	0	
1952	35.5	37.1	2.4	19.7	0	
1953	35.6	35.0	.7	7.6	0	
1954	34.4	34.8	2.1	19.8	0	
1955	31.3	34.6	1.8	17.1	0	
1956	39.5	36.1	1.7	15.9	.5	
1957	38.7	38.8	1.0	11.6	.7	
1958	36.9	38.8	2.2	23.4	1.2	
1959	37.6	38.8	.8	8.1	.4	
1960	39.4	38.8	.3	3.3	.2	
1961	38.8	38.8	.9	9.8	.6	
1962	38.8	39.2	1.2	12.6	.5	
1963	*35.3	39.6	.4	6.5	.5	
1964		40.0				
Total	---	---	20.5	---	4.6	

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

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

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

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

\* Indicated by sales data.

Table 23.--Fire-cured tobacco, types 22-23 <sup>1/</sup>: Domestic supplies, disappearance, season average price, and price support operations for specified periods

(Farm-sales weight)						
Year	Production	Stocks, Oct. 1	Supply	Disappearance <sup>2/</sup>		
				Total	Domestic	Exports
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.
Average: 1947-49	64.4	132.1	196.5	57.3	30.7	26.6
1950	45.4	141.8	187.2	64.6	30.7	33.9
1951	46.1	122.6	168.7	48.8	25.8	23.0
1952	46.0	119.9	165.9	48.3	24.2	24.1
1953	39.7	117.6	157.3	49.5	26.0	23.5
1954	51.6	107.8	159.4	48.9	23.9	25.0
1955	54.7	110.5	165.2	52.0	24.6	27.4
1956	59.9	113.2	173.1	52.3	27.5	24.8
1957	41.9	120.8	162.7	53.3	29.5	23.8
1958	33.9	109.4	143.3	44.1	24.6	19.5
1959	43.1	99.2	142.3	41.1	22.5	18.6
1960	36.5	101.2	137.7	44.9	23.9	21.0
1961	43.3	92.8	136.1	46.7	17.2	29.5
1962	44.6	89.4	134.0	40.8	22.3	18.5
1963 <sup>3/</sup>	46.0	93.2	139.2			
	Average price per pound	Price support level <sup>4/</sup>	Placed under Government loan Quantity	Percentage of crop	Remaining in Government loan stocks Feb. 29, 1964 <sup>5/</sup>	
	Ct.	Ct.	Mil. lb.	Pct.	Mil. lb.	
1950	29.7	34.3	9.8	21.6	0	
1951	40.3	37.4	4.9	10.6	0	
1952	38.1	37.1	8.5	18.4	0	
1953	33.3	35.0	7.5	18.9	0	
1954	38.5	34.8	4.8	9.3	0	
1955	38.4	34.6	7.9	14.4	0	
1956	36.1	36.1	18.6	31.1	4.6	
1957	36.4	38.8	13.9	33.1	3.9	
1958	38.1	38.8	4.4	12.0	2.0	
1959	38.3	38.8	5.3	12.3	3.8	
1960	43.3	38.8	3.2	8.7	2.7	
1961	40.2	38.8	5.1	11.8	4.6	
1962	38.7	39.2	8.6	19.3	8.5	
1963	*35.8	39.6	<sup>6/</sup>	<sup>6/</sup>	<sup>6/</sup>	
1964		40.0				
Total	---	---	102.5	---	30.1	

<sup>1/</sup> Type 24 included until early 1950's when it became practically nonexistent. <sup>2/</sup> Year beginning October 1. <sup>3/</sup> Subject to revision. <sup>4/</sup> Through 1957--75 percent of burley support; 1958-60 legal basis changed; from 1961 on adjusted to reflect relative change between 1959 parity index and average of parity index for 3 most recent years. <sup>5/</sup> Actual loan stocks on a packed-weight basis are somewhat lower than these farm-sales weight figures. <sup>6/</sup> Through March 20, about 8.7 million pounds of type 22 and 3.9 million of type 23 were placed under loan.

\* Auction average through March 20.



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

Prices and Price Supports

Auction markets for One Sucker (type 35), Green River (type 36), and Virginia sun-cured (type 37) opened during the first third of December and ended in the last week of January for type 37 and by the last week in February for types 35 and 36. The price average for type 35 was 33.0 cents a pound--a tenth below the previous year and lowest in 8 years. Sales volume increased 10 percent to the largest since 1956; general quality was considerably below that of the previous season. Auction sales of type 36 averaged 33.9 cents a pound, 1 cent below the previous year. Volume sold increased 3 percent to the largest since 1956, and quality of offerings was not quite as good as in the 1962 season. For all auction sales of Virginia sun-cured, the price average was 31.2 cents a pound--a sixth below the previous year and lowest since 1955. Poundage sold was nearly 50 percent less than in the preceding season and was the smallest on record. Quality of offerings was poorer than in the previous year, because of an extremely dry growing season. About 15 percent of the Virginia sun-cured volume was sold on the fire-cured markets.

The Government support level for the 1963 crop of dark air-cured and sun-cured was 35.2 cents a pound--1 percent more than in 1962. In the season just ended, growers of One Sucker placed about 5.8 million pounds under loan, nearly 36 percent of marketings. This was the largest quantity and percentage in 10 years. Type 36 loan placements were close to 2½ million pounds--about 31 percent of marketings--and were largest, both in poundage and percentage of market deliveries since 1956. Loan placements of Virginia sun-cured rose to about 92,000 pounds and equaled about 8 percent of marketings--a record-high percentage.

About 98 percent of growers of dark air-cured types 35-36, voting in a referendum held February 28, approved marketing quotas on their 1964-66 crops. A two-thirds majority was required to continue quotas in effect. Growers of Virginia sun-cured, type 37, had approved marketing quotas on their 1962-64 crops in a February 1962 referendum.

As marketing quotas continue in effect, Government price support will be available for the 1964 crops of dark air- and sun-cured. The overall support level will be 35.5 cents per pound--nearly 1 percent higher than the support level in effect for the 1963 crop. (See page 33 for the method used for year-to-year adjustments in price support levels.)

Supplies

The 1963-64 combined supply of dark air-cured and sun-cured tobacco, at about 88½ million pounds, is about 4 percent above 1962-63. Both carryover and marketings of types 35-36 increased, more than offsetting the sharp decline in the 1963 crop of Virginia sun-cured. Supplies of types 35-36 are up nearly 6 percent, but the supply of Virginia sun-cured is 15 percent below 1962-63.

Table 24.--Dark air-cured tobacco, types 35-36: Domestic supplies, disappearance, season average price, and price support operations for specified periods

(Farm-sales weight)						
Year	Production	Stocks, Oct. 1	Supply	Disappearance 1/		
				Total	Domestic	Exports
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.
Average:						
1947-49	33.0	71.2	104.2	30.4	21.3	9.1
1950	25.0	76.8	101.8	32.9	22.6	10.3
1951	27.7	68.9	96.6	26.4	18.5	7.9
1952	30.1	70.2	100.3	25.2	19.2	6.0
1953	23.6	75.2	98.8	26.7	20.1	6.6
1954	30.4	72.1	102.5	25.9	16.3	9.6
1955	27.8	76.6	104.4	23.6	18.4	5.2
1956	30.7	80.8	111.5	34.0	23.4	10.6
1957	19.8	77.5	97.3	24.8	18.5	6.3
1958	16.1	72.5	88.6	25.0	17.5	7.5
1959	19.3	63.6	82.9	21.9	16.4	5.5
1960	18.2	61.0	79.2	22.0	17.3	4.7
1961	20.6	57.2	77.8	22.6	17.9	4.7
1962	22.5	55.2	77.7	19.5	15.3	4.2
1963 2/	*24.1	58.2	82.3			
	Average price per pound	Price support level 3/	Quantity	Placed under Government loan	Percentage of crop	Remaining in Government loan stocks on Feb. 29, 1964 4/
	Ct.	Ct.	Mil. lb.		Pct.	Mil. lb.
1950	23.2	30.5	4.1		16.3	0
1951	34.3	33.2	7.3		26.4	0'
1952	31.6	33.0	5/9.9		32.9	0
1953	25.2	31.1	7.5		31.8	0
1954	34.3	30.9	7.2		23.7	0
1955	31.8	30.8	6.3		22.7	0
1956	34.0	32.1	6.6		21.5	3.7
1957	36.1	34.5	3.0		15.2	2.4
1958	38.4	34.5	.5		2.7	.3
1959	34.5	34.5	3.7		19.2	3.6
1960	37.4	34.5	2.2		12.2	2.1
1961	37.8	34.5	1.9		9.2	1.9
1962	36.2	34.8	4.1		18.2	4.1
1963	*33.3	35.2	8.3		34.4	8.3
1964		35.5				
Total	---	---	72.6		---	26.4

1/ Year beginning October 1.

2/ Subject to revision.

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

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

5/ An additional 200,000 pounds under option to British manufacturers were pledged for CCC loans but purchased and shipped by mid-1953.

\* Indicated by sales data.

Table 25.--Sun-cured tobacco, type 37: Domestic supplies, disappearance, season average price, and price support operations for specified periods

(Farm-sales weight)						
Year	Production	Stocks, Oct. 1	Supply	Disappearance 1/		
				Total	Domestic	Exports
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.
Average: 1947-49	3.0	3.6	6.6	3.0		
1950	3.6	4.0	7.6	3.5	3.0	0.5
1951	4.0	4.1	8.1	3.8	3.1	.7
1952	3.7	4.3	8.0	4.0	3.4	.6
1953	2.9	4.0	6.9	3.2	2.7	.5
1954	3.7	3.7	7.4	3.2	2.7	.5
1955	3.3	4.2	7.5	2.9	2.1	.8
1956	3.2	4.6	7.8	2.5	1.9	.6
1957	2.7	5.3	8.0	2.5	1.9	.6
1958	1.9	5.5	7.4	2.5	2.2	.3
1959	2.2	4.9	7.1	1.9	1.6	.3
1960	1.8	5.2	7.0	2.0	1.7	.3
1961	2.2	5.0	7.2	2.1	1.8	.3
1962	2.3	5.1	7.4	2.3	2.0	.3
1963 <sup>2/</sup>	1.2	5.1	6.3			
	Average	Price	Placed under Government loan		Remaining in	
	price	support	Quantity	Percentage	Government loan	
	per pound	level <sup>3/</sup>		of crop	stocks on	
					Feb. 29, 1964	
	Ct.	Ct.	1,000 lb.	Pct.	1,000 lb.	
1950	33.9	30.5	34	0.9	0	
1951	34.6	33.2	59	1.5	0	
1952	31.6	33.0	84	2.3	0	
1953	31.8	31.1	24	.8	0	
1954	32.2	30.9	123	3.3	0	
1955	25.3	30.8	72	2.2	0	
1956	35.7	32.1	103	3.2	0	
1957	34.0	34.5	11	.4	0	
1958	36.8	34.5	29	1.5	0	
1959	34.4	34.5	24	1.1	0	
1960	37.9	34.5	4	.2	0	
1961	39.8	34.5	7	.3	0	
1962	37.4	34.8	59	2.6	0	
1963	*31.2	35.2	92	7.7	0	
1964		35.5				
Total	---	---	725	---	0	

1/ Year beginning October 1.

2/ Subject to revision.

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

\*Indicated by sales data.



According to farmers' intentions on March 1, about 12,500 acres of dark air-cured and 1,400 acres of sun-cured will be grown in 1964. Prospective acreages are 9 percent and 7 percent, respectively, below 1963. The 1964 acreage allotments for most farms growing types 35-36 were reduced 10 percent from 1963. Due to relatively lower supplies resulting from the 1963 drought, 1964 farm acreage allotments for Virginia sun-cured tobacco are the same as for 1963. Based on an average yield per acre with an allowance for trend, 1964 production of dark air-cured and sun-cured would be about 22.2 million pounds, 12 percent less than marketings from the 1963 crop.

Carryover of the combined dark air- and sun-cured types next October 1 may be near 66 million pounds--approximately 3 million more than last October 1. Such carryover plus this year's crop may result in total 1964-65 supplies of around 88 million pounds--practically the same as for the current marketing year.

### Domestic Use and Exports

Domestic use of dark air- and sun-cured in 1962-63 declined more than 2 million pounds to about 17½ million--smallest on record. Chief use for dark air-cured tobacco in this country is in the manufacture of plug, twist, and fine-cut chewing tobaccos. In 1962-63, combined output of these products was 3 percent below 1961-62, and in the first third of the current marketing year (October 1963-January 1964) it was slightly below a year earlier. Use in products other than chewing tobacco will also influence domestic disappearance of types 35-37. Such use apparently varies considerably from year to year.

During the first third of the current marketing year (October 1963-January 1964), exports of One Sucker leaf at 382,000 pounds (farm-sales weight) were about a fifth above a year earlier. Belgium accounted for about 80 percent of the total, and the rest was consigned to Congo Republic, Hong Kong, and Trinidad. Exports of Green River leaf during October 1963-January 1964 amounted to 211,000 pounds (farm-sales weight), compared with only 12,000 pounds a year earlier. Virtually all of the recent period's exports were to United Kingdom, Belgium, Australia, and Congo Republic.

A large portion of U. S. exports of dark air-cured tobacco is made in the form of Black Fat--a semiprocessed product. In October 1963-January 1964, exports of Black Fat were 74 percent above a year earlier. Half went to Nigeria, which about doubled takings. Exports to Ghana rose 40 percent, and to Western Africa 84 percent. More than a year earlier also went to Cameroun, but less to Bahamas and Spanish Africa.

### Cigar Types, 41-62

### Prices and Price Supports

Official season average prices for the 1963 crops of the cigar types are not yet available. Prices for the Pennsylvania filler crop may average a little lower than last season due to the adverse effects of weather on quality. A substantial part of the 1963 crop of Connecticut Valley Broadleaf

Table 26.--Cigar tobacco price support operations, quantities placed under loan, 1950-63, and remaining under loan Feb. 29, 1964

Crop year	Quantities placed under loan						Total
	Puerto Rican type 46	Ohio types 42-44	Conn. Valley, type 51	Conn. Valley, type 52	So. Wis. type 54	No. Wis. type 55	
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
1950	0.3	2.6	0.1	3.7	1.4	0.6	<u>1/</u> 11.5
1951	1.1	.6	1.7	2.7	4.8	.1	<u>1/</u> 11.0
1952	1.4	No Price Supports <u>2/</u>					1.4
1953	1.4	2.7	<u>3/</u>	1.8	2.4	1.9	<u>1/</u> 10.3
1954	5.1	1.2	.8	3.4	1.3	.9	12.7
1955	2.8	.8	7.8	5.2	.4	3.1	20.1
1956	1.5	.4	1.7	1.6	.1	.9	6.2
1957	2.0	.1	2.5	.4	0	.3	5.3
1958	2.0	0	.3	.1	0	.1	2.5
1959	1.8	0	1.5	.2	.9	<u>3/</u>	4.4
1960	.9	0	1.6	2.6	3.2	3.2	11.5
1961	.4	0	.8	1.9	1.5	4.5	9.1
1962	.7	.1	.2	1.4	.3	4.4	<u>1/</u> 7.1
1963	<u>4/</u>	.6	.2	1.3	1.0	2.7	5.8
Total	21.4	9.1	19.2	26.3	17.3	22.7	<u>1/</u> 118.9
Remaining under loan as of Feb. 29, 1964							
1955	0	0	} .7 .2 .2 .1 0	0	0	.3	1.0
1956	0	0		0	0	<u>3/</u>	.2
1957	0	0		.1	0	0	.3
1958	0	0		<u>3/</u>	0	0	.1
1959	0	0		.1	0	0	.1
1960	0	0	.5	2.3	1.9	1.6	6.3
1961	0	0	.8	1.3	.6	1.4	4.1
1962	0	<u>6/</u>	.2	1.2	.2	3.8	5.4
1963	<u>4/</u>	.6	.2	1.3	1.0	2.7	5.8
Total	0	.6	2.9	6.3	3.7	9.8	23.3

1/ Includes 2.8 million pounds of 1950 crop Pennsylvania Seedleaf (type 41) and negligible amounts from the 1950, 1951, 1953, and 1962 crops of New York and Pennsylvania Havana Seed (type 53). 2/ Price support not in effect because marketing quotas were disapproved by growers. 3/ Less than 50,000 pounds.

4/ Not yet marketed. 5/ Substantially all of these stocks have been sold under deferred contracts. 6/ About 0.1 million pounds which recently sold.

(type 51) crop was marketed at prices averaging fairly close to those of the 1962 season. About two-thirds of the Connecticut Valley Havana Seed (type 52) crop went under Government loan.

The 1963 Wisconsin crops began selling in late December--ahead of usual since marketings generally begin in January. Prices of Southern Wisconsin tobacco (type 54) averaged about 30 cents per pound--about  $\frac{3}{4}$  of a cent above last season. Prices of Northern Wisconsin tobacco (type 55) averaged about 31 cents--nearly 1 cent higher than for the 1962 crop.

The Government overall price support for Connecticut Valley binder (types 51-52) will be 40.8 cents per pound for 1964 crops compared with 40.4 cents in 1963. The 1963 loan level for type 51 was 41.0 cents per pound, and for type 52 was 39.6 cents. The overall price support for the cigar filler and binder types 42-44 and 53-55 (practically all grown in Wisconsin and Ohio) for 1964 will be 29.5 cents per pound compared with 29.2 cents in 1963. The 1963 loan levels were: 23.9 cents for types 42-44, 27.0 cents for types 53 and 54, and 32.6 cents for type 55.

The overall support level for Puerto Rican cigar filler type 46 for 1964 is 30.6 cents per pound compared with 30.3 cents in 1963. (See page 33 for the way overall price supports are adjusted from year to year.)

Growers of Pennsylvania filler type 41 will not receive price support on the 1964 crop since marketing quotas were disapproved when growers last voted in February 1962. Pennsylvania growers will vote in another referendum before the 1965 crop on whether or not they favor marketing quotas for their next 3 crops.

#### 1964 Cigar Filler and Binder Allotments

On January 29, the 1964 acreage allotments for Connecticut Valley types 51-52 and Ohio filler-Wisconsin binder types 42-44 and 54-55 were announced. Acreage allotments for most farms will be about the same as for 1963, but for farms for which tobacco acreage in recent years was below 75 percent of the allotment, the 1964 allotment will be below 1963. In 1963, about 35 percent of the allotted acreage of Connecticut Valley binder types was grown and roughly two-thirds of allotted acreage of the Wisconsin types. Approximately 85 percent of the Ohio filler allotted acreage was grown in 1963.

#### Supplies

Filler: The 1963-64 supply of Pennsylvania cigar filler is fairly close to the long-time high of 183 million pounds for 1962-63. The October 1, 1963 commercial stocks were up from a year earlier but the 1963 crop was down sharply to the smallest in 6 years. According to March 1 intentions of growers, the 1964 acreage will be 4 percent smaller than that harvested in 1963. Based on an average yield with an adjustment for trend, 1964 production could approximate 50 million pounds, about the same as in 1963.



Table 27.--Cigar filler tobacco, types 41-46: Domestic supplies, disappearance, and season average prices, for specified periods

(Farm-sales weight)							
Year	Production	Stocks October 1	Supply	Disappearance <sup>1/</sup>			Average price per pound
				Total	Domestic	Exports	
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Cents
Pennsylvania Seedleaf (type 41)							
Average:							
1947-49	54.6	101.4	156.0	48.8	47.8	1.0	27.7
1950	56.0	115.8	171.8	45.6	45.0	.6	26.4
1951	56.2	126.2	182.4	50.0	49.3	.7	19.0
1952	37.9	132.4	170.3	51.2	50.8	.4	25.2
1953	38.2	119.1	157.3	51.6	51.4	.2	27.5
1954	48.8	105.7	154.5	41.5	41.4	.1	27.4
1955	45.7	113.0	158.7	55.0	54.6	.4	24.5
1956	48.4	103.7	152.1	46.8	46.6	.2	24.0
1957	41.2	105.3	146.5	42.8	42.7	.1	20.5
1958	51.0	103.7	154.7	50.4	50.1	.3	28.0
1959	53.5	104.3	157.8	48.1	48.0	.1	31.5
1960	52.7	109.7	162.4	47.5	47.4	.1	28.0
1961	53.5	114.9	168.4	45.5	45.4	.1	27.0
1962	60.0	122.9	182.9	<sup>2/</sup> 51.3	51.0	.3	23.5
1963 <sup>3/</sup>	50.0	128.0	178.0				
Ohio, Miami Valley (types 42-44)							
Average:							
1947-49	10.2	24.5	34.7	8.7	8.7		26.3
1950	10.5	28.0	38.5	7.3	7.3		18.6
1951	7.3	31.2	38.5	10.0	10.0		24.4
1952	8.8	28.5	37.3	10.0	10.0		25.0
1953	6.6	27.3	33.9	9.8	9.8		18.5
1954	8.0	24.1	32.1	9.2	9.2		22.5
1955	7.5	22.9	30.4	7.2	7.2		21.8
1956	6.3	23.2	29.5	6.4	6.4		22.0
1957	4.6	23.1	27.7	7.2	7.2		22.8
1958	2.5	20.5	23.0	5.9	5.9		24.2
1959	6.9	17.1	24.0	6.5	6.5		27.3
1960	6.6	17.5	24.1	6.5	6.5		28.1
1961	7.7	17.6	25.3	5.1	5.1		28.3
1962	7.4	20.2	27.6	6.5			28.4
1963 <sup>3/</sup>	6.8	21.1	27.9				
Puerto Rico (type 46)							
Average:							
1947-49	26.4	65.0	91.4	34.0	29.8	4.2	24.8
1950	25.5	51.1	76.6	28.8	28.5	.3	28.0
1951	28.1	47.8	75.9	34.1	33.8	.3	30.0
1952	34.3	41.8	76.1	28.9	28.6	.3	32.0
1953	34.1	47.2	81.3	32.1	32.0	.1	30.0
1954	34.0	49.2	83.2	23.9	23.8	.1	30.5
1955	30.0	59.3	89.3	31.7	31.6	.1	25.2
1956	24.0	57.6	81.6	31.3	30.9	.4	30.8
1957	26.7	50.3	77.0	27.4	27.3	.1	27.5
1958	25.6	49.6	75.2	32.8	31.6	1.2	30.0
1959	27.6	42.4	70.0	26.2	25.8	.4	32.2
1960	27.1	43.8	70.9	27.6	27.5	.1	34.2
1961	30.4	43.3	73.7	32.1	32.1	neg.	37.2
1962	35.6	41.6	77.2	28.0	28.0	---	38.0
1963 <sup>3/</sup>	34.0	49.2	83.2				

<sup>1/</sup> Year beginning October 1. <sup>2/</sup> Disappearance adjusted to take into account some 1962 tobacco still held at the farm level at end of marketing year. <sup>3/</sup> Subject to revision.

The 1963-64 total supply of Ohio cigar filler, at nearly 28 million pounds, is slightly above 1962-63. The 1964 prospective acreage is 2 percent above that harvested in 1963. Based on an average yield with an adjustment for trend, this year's production could total about 7.2 million pounds--roughly 400,000 pounds above last year's harvestings.

The January 1, 1964, stocks of Puerto Rican tobacco totaled nearly 44 million pounds--about a fifth above a year earlier. The crop planted in late 1963 for harvest in the early months of 1964 is estimated to be down some from the previous season, the largest in many years.

Imported Cigar Tobacco: In 1963 about  $38\frac{1}{2}$  million pounds (declared weight) of foreign cigar tobacco arrived in the United States, compared with 40 million in 1962. In 1962 about  $6\frac{1}{2}$  million pounds of Cuban tobacco arrived before trade with Cuba was embargoed. Non-Cuban sources accounted for all the 1963 cigar tobacco arriving here and supplied 5 million pounds more than in 1962. (See table 15 for details.) The 1963 total arrivals of scrap tobacco from the Philippine Republic (leading supplier) were below 1962 but there was a sharp jump in stemmed filler from that source. Arrivals of unstemmed cigar filler from Colombia (second ranking source in 1963) were up 13 percent and from Dominican Republic (third ranking source) were up 20 percent from a year earlier. The 1963 arrivals of both stemmed and unstemmed filler from Brazil (fourth ranking source) were up sharply from 1962. Also, arrivals from Indonesia were up a little and those from Mexico increased significantly, but less came from Paraguay and Argentina than in 1962.

Stocks of Cuban tobacco in the United States on January 1, 1964, at 17.8 million pounds (unstemmed weight), were  $9\frac{1}{2}$  million pounds lower than a year earlier and over 22 million below the comparatively high level of 2 years earlier. At the rate of usings during 1963, stocks of Cuban tobacco would be exhausted in the latter part of 1965. January 1 stocks of Philippine tobacco totaled  $12\frac{1}{2}$  million pounds (unstemmed weight)--approximately 1 million pound lower than a year and also 2 years earlier. Stocks of foreign cigar tobaccos other than Cuban and Philippine, at over  $28\frac{1}{2}$  million pounds (unstemmed weight), were 3 percent above a year earlier and 62 percent higher than 2 years earlier; Dominican, Colombian, and Brazilian tobaccos accounted for 31, 28, and 15 percent respectively of the  $28\frac{1}{2}$  million pounds. Stocks of Colombian and Brazilian tobacco were above a year earlier, but stocks of Dominican tobacco were lower. Stocks of Indonesian tobacco were appreciably above a year earlier, but stocks of Paraguayan and other miscellaneous foreign-grown cigar tobaccos were down.

Binder: The 1963-64 supply of Connecticut Valley binder types, at about 31 million pounds, dropped 4 million below 1962-63 to a new low. Based on farmers' intentions as of March 1, the 1964 prospective acreage of Broadleaf equals that harvested last year but acreage of Havana Seed may be up a little. Allowing for trend in average yields per acre, the production of Connecticut Valley binder types may total about  $5\frac{1}{2}$  million pounds--practically the same as last year.

Table 28.--Cigar binder tobacco types 51-52: Domestic supplies, disappearance, and season average prices, for specified periods

(Farm-sales weight)							
Year	Production	Stocks October 1	Supply	Disappearance <sup>1/</sup>			Average price per pound
				Total	Domestic	Exports	
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Cents
<b>Connecticut Valley Broadleaf (type 51)</b>							
Average:							
1947-49	14.4	28.5	42.9	14.7	12.4	2.3	54.7
1950	16.4	27.7	44.1	14.3	13.3	1.0	52.0
1951	14.5	29.8	44.3	14.1	13.2	.9	51.0
1952	14.8	30.2	45.0	14.5	13.8	.7	50.0
1953	14.7	30.5	45.2	13.4	12.7	.7	58.4
1954	13.3	31.8	45.1	11.7	11.5	.2	56.5
1955	12.1	33.4	45.5	14.7	14.3	.4	44.9
1956	7.5	30.8	38.3	12.8	11.3	1.5	59.0
1957	5.1	25.5	30.6	8.4	7.7	.7	50.0
1958	3.6	22.2	25.8	5.8	5.6	.2	54.0
1959	4.5	20.0	24.5	4.1	3.9	.2	45.0
1960	3.6	20.4	24.0	4.6	4.3	.3	44.0
1961	3.1	19.4	22.5	3.7	3.6	.1	43.3
1962	2.9	18.8	21.7	6.2	6.0	.2	53.5
1963 <sup>2/</sup>	3.5	15.5	19.0				
<b>Connecticut Valley Havana Seed (type 52)</b>							
Average:							
1947-49	14.8	18.5	33.3	11.9	9.1	2.8	59.2
1950	15.2	25.0	40.2	12.9	11.2	1.7	39.8
1951	11.2	27.3	38.5	11.0	9.1	1.9	42.6
1952	9.6	27.5	37.1	12.9	11.5	1.4	48.9
1953	12.0	24.2	36.2	11.9	10.8	1.1	54.9
1954	11.9	24.3	36.2	12.9	12.2	.7	44.0
1955	9.9	23.3	33.2	11.6	10.1	1.5	35.0
1956	5.8	21.6	27.4	7.2	5.7	1.5	42.3
1957	3.2	20.2	23.4	7.5	6.3	1.2	44.9
1958	1.8	15.9	17.7	3.2	2.6	.6	49.4
1959	3.2	14.5	17.7	4.9	4.2	.7	41.2
1960	3.2	12.8	16.0	4.2	2.4	1.8	42.5
1961	2.4	11.8	14.2	3.2	2.1	1.1	40.6
1962	2.4	11.0	13.4	3.3	2.6	.7	42.5
1963 <sup>2/</sup>	2.0	10.1	12.1				
<b>Total Connecticut Valley (types 51-52)</b>							
Average:							
1947-49	29.2	47.0	76.2	26.6	21.5	5.1	56.9
1950	31.6	52.7	84.3	27.2	24.5	2.7	46.1
1951	25.7	57.1	82.8	25.1	22.3	2.8	47.3
1952	24.4	57.7	82.1	27.4	25.3	2.1	49.6
1953	26.7	54.7	81.4	25.3	23.5	1.8	56.8
1954	25.2	56.1	81.3	24.6	23.7	.9	50.6
1955	22.0	56.7	78.7	26.3	24.4	1.9	40.4
1956	13.3	52.4	65.7	20.0	17.0	3.0	51.7
1957	8.3	45.7	54.0	15.9	14.0	1.9	48.2
1958	5.4	38.1	43.5	9.0	8.2	.8	52.4
1959	7.7	34.5	42.2	9.0	8.1	.9	42.6
1960	6.8	33.2	40.0	8.8	6.5	2.3	43.3
1961	5.5	31.2	36.7	6.9	5.7	1.2	42.1
1962	5.3	29.8	35.1	9.5	8.6	.9	48.5
1963 <sup>2/</sup>	5.5	25.6	31.1				

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



Table 29.--Cigar binder tobacco, types 54-55: Domestic supplies, disappearance, and season average prices, for specified periods

(Farm-sales weight)							
Year	Production	Stocks October 1	Supply	Disappearance <sup>1/</sup>			Average price per pound
				Total	Domestic	Exports	
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Cents
Southern Wisconsin (type 54)							
Average:							
1947-49	13.4	38.3	51.7	12.7	12.5	0.2	22.5
1950	13.2	40.1	53.3	13.0	13.0		23.5
1951	10.4	40.3	50.7	16.0	16.0		25.3
1952	8.3	34.7	43.0	9.7	8.1	1.6	19.5
1953	7.2	33.3	40.5	10.0	10.0		24.3
1954	7.5	30.5	38.0	9.0	8.5	.5	24.3
1955	6.7	29.0	35.7	10.3	9.9	.4	22.9
1956	6.8	25.4	32.2	11.2	11.0	.2	26.1
1957	7.6	21.0	28.6	8.6	8.2	.4	31.1
1958	8.8	20.0	28.8	8.0	7.6	.4	34.6
1959	9.2	20.9	30.1	8.0	7.7	.3	29.3
1960	8.6	22.2	30.8	7.5	7.3	.2	28.0
1961	9.0	23.3	32.3	9.0	8.9	.1	28.7
1962	8.7	23.3	32.0	7.7	7.6	.1	29.3
1963 <sup>2/</sup>	8.1	24.3	32.4				
Northern Wisconsin (type 55)							
Average:							
1947-49	19.6	36.3	55.9	18.5	17.5	1.0	28.8
1950	18.7	40.8	59.5	16.4	16.3	.1	28.1
1951	12.9	43.1	56.0	15.6	15.5	.1	31.3
1952	13.6	40.4	54.0	18.6	18.4	.2	31.4
1953	12.8	35.4	48.2	16.4	16.1	.3	31.9
1954	15.4	31.8	47.2	16.3	16.1	.2	32.7
1955	14.3	30.9	45.2	13.4	13.1	.3	24.6
1956	13.4	31.8	45.2	13.6	13.4	.2	30.9
1957	12.2	31.6	43.8	17.2	15.1	2.1	33.5
1958	13.0	26.6	39.6	14.4	12.1	2.3	35.2
1959	11.6	25.3	36.9	12.4	11.5	.9	37.1
1960	12.3	24.4	36.7	11.3	10.9	.4	30.6
1961	13.4	25.4	38.8	11.0	10.6	.4	29.6
1962	10.9	27.8	38.7	11.1	10.9	.2	29.1
1963 <sup>2/</sup>	8.8	27.6	36.4				
Total Wisconsin types (54-55)							
Average							
1947-49	33.0	74.6	107.6	31.2	30.0	1.2	26.2
1950	31.9	80.9	112.8	29.4	29.3	.1	26.2
1951	23.3	93.4	106.7	31.6	31.5	.1	28.6
1952	21.9	75.1	97.0	28.3	26.5	1.8	26.9
1953	20.0	68.7	88.7	26.4	26.1	.3	25.8
1954	22.9	62.3	85.2	25.3	24.6	.7	30.0
1955	21.0	59.9	80.9	23.7	23.0	.7	24.1
1956	20.2	57.2	77.4	24.8	24.4	.4	29.3
1957	19.8	52.6	72.4	25.8	23.3	2.5	32.6
1958	21.8	46.6	68.4	22.4	19.7	2.7	35.0
1959	20.8	46.2	67.0	20.4	19.2	1.2	33.7
1960	20.9	46.6	67.5	18.8	18.2	.6	29.5
1961	22.4	48.7	71.1	20.0	19.5	.5	29.2
1962	19.6	51.1	70.7	18.9	18.6	.3	29.2
1963 <sup>2/</sup>	16.9	51.9	68.8				

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

Table 30.--Cigar wrapper tobacco, types 61-62: Domestic supplies, disappearance, and season average prices, for specified periods

(Farm-sales weight)							
Year	Production	Stocks July 1	Supply	Disappearance 1/			Average price per pound
				Total	Domestic	Exports	
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Cents
Connecticut Valley Shade-grown (type 61)							
Average:							
1947-49	10.2	11.0	21.0	8.9			268.3
1950	9.1	13.6	22.7	9.7			205.0
1951	8.2	13.0	21.2	8.3			205.0
1952	8.9	12.9	21.8	10.8			210.0
1953	10.3	11.0	21.3	9.9			205.0
1954	9.9	11.4	21.3	10.2			215.0
1955	8.8	11.1	19.9	9.3			215.0
1956	10.3	10.6	20.9	9.5			190.0
1957	11.8	11.4	23.2	10.1			205.0
1958	10.2	13.1	23.3	10.3	6.9	3.4	235.0
1959	10.7	13.0	23.7	8.6	6.1	2.5	210.0
1960	12.0	15.1	27.1	11.4	8.9	2.5	190.0
1961	10.3	15.7	26.0	12.2	8.9	3.3	235.0
1962	11.9	13.8	25.7	12.0	9.2	2.8	250.0
1963 2/	11.6	13.7	25.3				
Georgia-Florida Shade-grown (type 62)							
Average:							
1947-49	5.2	3.8	9.1	4.3			235.0
1950	6.4	5.9	12.3	5.4			200.0
1951	6.8	6.9	13.7	5.4			180.0
1952	5.8	8.3	14.1	5.8			180.0
1953	4.5	8.3	12.8	6.0			195.0
1954	6.6	6.8	13.4	6.5			195.0
1955	6.8	6.9	13.7	7.3			185.0
1956	6.8	6.4	13.2	6.1			180.0
1957	7.1	7.1	14.2	6.7			190.0
1958	6.3	7.5	13.8	6.5	4.6	1.9	185.0
1959	7.8	7.3	15.1	7.5	6.1	1.4	195.0
1960	9.3	7.6	16.9	6.5	5.5	1.0	200.0
1961	8.8	10.4	19.2	9.2	6.6	2.6	190.0
1962	7.4	10.0	17.4	8.5	6.4	2.1	200.0
1963 2/	6.7	8.9	15.6				
Total Shade-grown (types 61-62)							
Average:							
1947-49	15.3	14.8	30.1	13.3	11.2	2.1	257.0
1950	15.5	19.4	34.9	14.9	11.3	3.6	203.0
1951	14.9	20.0	34.9	13.7	10.1	3.6	194.0
1952	14.7	21.2	35.9	16.6	12.2	4.4	198.0
1953	14.8	19.3	34.1	15.9	12.2	3.7	202.0
1954	16.4	18.2	34.6	16.6	12.4	4.2	207.0
1955	15.6	18.0	33.6	16.6	11.5	5.1	202.0
1956	17.2	17.0	34.2	15.7	11.2	4.5	186.0
1957	18.9	18.5	37.4	16.8	11.5	5.3	199.0
1958	16.5	20.6	37.1	16.8	11.5	5.3	216.0
1959	18.5	20.3	38.8	16.1	12.2	3.9	204.0
1960	21.3	22.7	44.0	17.9	14.4	3.5	194.0
1961	19.1	26.1	45.2	21.4	15.5	5.9	214.0
1962	19.3	23.8	43.1	20.5	15.6	4.9	231.0
1963 2/	18.3	22.6	40.9				

1/ Year beginning July 1.

2/ Subject to revision.

The 1963-64 total supply of Wisconsin binder types, at under 69 million pounds, is almost 2 million below 1962-63; the decline in Northern Wisconsin tobacco supply to a long-time low more than offsets the small increase in the Southern Wisconsin type. According to farmers' intentions, the 1964 acreages of Northern Wisconsin and Southern Wisconsin may be up 5 and 4 percent respectively from last year's harvested acreages. Based on average yields adjusted for trend, the 1964 production of the Wisconsin tobacco types may total almost 18 million pounds--roughly 1 million above 1963.

Wrapper: The 1963-64 total supply of the shade-grown wrapper types is near 41 million pounds--down more than 2 million from 1962-63 and lowest in 4 years. Prospective acreage of wrapper in the Connecticut Valley is the same as last year's harvested acreage, but cigar wrapper (including fire-cured wrapper) acreage in Georgia-Florida may be 4 percent above last year's. Based on average yields adjusted for trend, the 1964 crops in the Connecticut Valley and Georgia-Florida would total about 19.2 million pounds--5 percent above 1963 and nearly the same as in 1962 and 1961.

#### Domestic Use and Exports

Filler: Domestic use of Pennsylvania filler during the 1962-63 marketing year increased substantially to probably around 51 million pounds--the most in 7 years. Use of Ohio filler at  $6\frac{1}{2}$  million pounds was up from the unusual low of 1962-63 to what it was in each of the previous 2 years. Domestic use of Puerto Rican filler in 1962-63, at 28 million pounds, was sharply below the 10-year high of 1961-62 but above each of the preceding 2 years. Exports of filler during October 1963-January 1964 totaled about  $\frac{1}{4}$  million pounds; it went mostly to South Vietnam, France and Canada.

Foreign Cigar Tobacco: Use of foreign cigar tobacco in October 1962-September 1963 (the period corresponding with the marketing year for U. S. filler types) totaled about  $45\frac{1}{2}$  million pounds (unstemmed weight)--roughly 1 million above a year earlier. Use of Cuban tobacco, at about 11 million pounds, was down about 44 percent from 1961-62. Use of Philippine, Dominican, Colombian, Brazilian, Indonesian, Mexican, Argentine, and Paraguayan tobaccos all increased from 1961-62 to 1962-63.

During October 1963-January 1964, the greatly reduced rate continued in use of Cuban tobacco from stocks. The imports for consumption of Philippine tobacco (unstemmed equivalent) increased about 5 percent. The quantities of Colombian and Dominican tobaccos entering consumption channels during October 1963-January 1964 were 58 and 55 percent larger than in the comparable period of 1962-63; use of Brazilian tobacco was more than  $2\frac{1}{2}$  times that of the year-earlier period. Comparing the same 2 periods, there was a relatively sharp increase in use of Indonesian tobacco, but a drop in use of Paraguayan tobacco. Use of Mexican tobacco about equalled that of a year ago.

Binder: The 1962-63 domestic use of Connecticut Valley Broadleaf (type 51), at 6 million pounds, rose well above the 1961-62 record low and was largest since 1957-58. Use of Broadleaf was cut sharply after 1956-57





Table 31.--Acreage of tobacco in the United States, by class and type, average 1952-56 and 1957-61, annual 1962-64 and percentages

Class and type	Average:	Average:	1962	1963	1964	Percent- age change 1963 to 1964
	1952-56:	1957-61:		<u>1/</u>	<u>2/</u>	
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	Percent
Old and Middle Belt, type 11	358.8	243.4	264.5	251.5	227.0	- 9.7
Eastern North Carolina, type 12	324.0	220.4	234.0	223.0	201.0	- 8.9
South Carolina, type 13	202.4	134.0	142.0	135.5	122.0	-10.0
Georgia and Florida type 14	123.1	79.3	89.3	85.0	76.7	- 9.8
<b>Total flue-cured, types 11-14</b>	<b>1,008.3</b>	<b>677.1</b>	<b>729.8</b>	<b>695.0</b>	<b>626.7</b>	<b>- 9.8</b>
Virginia, type 21	9.5	7.2	7.6	6.7	7.3	9.0
Kentucky and Tennessee, type 22	28.2	20.0	20.5	19.9	18.2	- 8.5
Kentucky and Tennessee, type 23	10.9	7.1	8.0	7.9	7.2	- 8.9
<b>Total fire-cured, types 21-23</b>	<b>48.6</b>	<b>34.3</b>	<b>36.1</b>	<b>34.5</b>	<b>32.7</b>	<b>- 5.2</b>
Burley, type 31	384.9	303.9	338.6	338.5	306.2	- 9.5
Maryland, type 32	47.1	37.7	41.5	34.5	39.0	13.0
One Sucker, type 35	13.8	9.0	9.2	9.2	8.4	- 8.7
Green River, type 36	7.4	4.4	4.7	4.5	4.1	- 8.9
Virginia sun-cured, type 37	3.7	2.0	2.2	1.5	1.4	- 6.7
<b>Total dark air-cured, types 35-37</b>	<b>24.9</b>	<b>15.4</b>	<b>16.1</b>	<b>15.2</b>	<b>13.9</b>	<b>- 8.6</b>
Pennsylvania, Seedleaf, type 41	27.4	30.4	30.0	27.0	26.0	- 3.7
Miami Valley, types 42-44	4.7	3.9	4.2	4.0	4.1	2.5
<b>Total cigar filler, types 41-44</b>	<b>32.1</b>	<b>34.3</b>	<b>34.2</b>	<b>31.0</b>	<b>30.1</b>	<b>- 2.9</b>
Connecticut Valley Broadleaf, type 51	7.5	2.3	1.5	1.8	1.8	0
Connecticut Valley Havana Seed, type 52	5.4	1.4	1.1	1.0	1.0	0
Southern Wisconsin, type 54	4.8	5.3	4.9	4.6	4.8	4.3
Northern Wisconsin, type 55	9.4	8.1	7.2	6.1	6.4	4.9
<b>Total cigar binder, types 51-55</b>	<b>27.1</b>	<b>17.1</b>	<b>14.7</b>	<b>13.5</b>	<b>14.0</b>	<b>3.7</b>
Connecticut Valley Shade-grown, type 61	8.0	8.0	7.9	7.8	7.8	0
Georgia and Florida Shade-grown, type 62	4.9	5.6	5.3	5.1	5.3	3.9
<b>Total cigar wrapper, types 61-62</b>	<b>12.9</b>	<b>13.6</b>	<b>13.2</b>	<b>12.9</b>	<b>13.1</b>	<b>1.6</b>
Louisiana Perique, type 72	.3	.3	.4	.2	.2	0
<b>Total all types</b>	<b>1,586.2</b>	<b>1,133.7</b>	<b>1,224.6</b>	<b>1,175.3</b>	<b>1,075.9</b>	<b>- 8.5</b>

1/ Subject to revision.

2/ Farmers' intentions as of March 1.

Table 32.--Cash receipts from farm marketings, averages 1947-49, annual 1950-62, with percentages

Period	Cash receipts				Tobacco as a percentage of	
	Livestock and products	All crops	Total farm	Tobacco	All crops	Total cash receipts
	Mil. dol.	Mil. dol.	Mil. dol.	Mil. dol.	Pct.	Pct.
Average: 1947-49	16,302	12,984	29,286	960	7.4	3.3
1950	15,976	12,352	28,328	1,061	8.6	3.7
1951	19,612	13,187	32,799	1,190	9.0	3.6
1952	18,445	14,248	32,693	1,091	7.7	3.3
1953	17,209	14,035	31,244	1,094	7.8	3.5
1954	16,688	13,515	30,203	1,161	8.6	3.8
1955	15,837	13,427	29,264	1,225	9.1	4.2
1956	16,250	14,122	30,372	1,162	8.2	3.8
1957	17,363	12,461	29,824	971	7.8	3.3
1958	19,301	14,259	33,560	1,020	7.2	3.0
1959	18,855	14,291	33,146	1,060	7.4	3.2
1960	18,937	15,076	34,013	1,154	7.7	3.4
1961	19,415	15,828	35,243	1,325	8.4	3.8
1962	19,987	15,935	35,922	1,316	8.3	3.7
1963 <sup>1/</sup>	19,542	16,706	36,248	1,252	7.5	3.5

<sup>1/</sup> Preliminary.

Table 33.--Federal and State tax revenues from tobacco products for specified periods

Period	Federal				States <sup>2/</sup>	Total
	Cigarettes	Cigars	Chewing, smoking, and snuff	Total <sup>1/</sup>	All tobacco products <sup>3/</sup>	Federal and State
	Mil. dol.	Mil. dol.	Mil. dol.	Mil. dol.	Mil. dol.	Mil. dol.
Average: 1947-49	1,210	46	43	1,300	357	1,657
1950	1,263	43	41	1,348	445	1,793
1951	1,360	44	37	1,446	461	1,907
1952	1,580	46	22	1,662	485	2,147
1953	1,546	46	21	1,614	486	2,100
1954	1,477	45	20	1,543	476	2,019
1955	1,530	46	20	1,596	500	2,096
1956	1,576	45	18	1,639	573	2,212
1957	1,639	46	18	1,704	614	2,318
1958	1,750	49	18	1,817	673	2,490
1959	1,792	51	17	1,860	841	2,701
1960	1,887	50	17	1,955	998	2,953
1961	1,950	50	17	2,019	1,070	3,094
1962	1,961	50	16	2,030	1,130	3,160
1963 <sup>4/</sup>	2,047	51	17	2,116	<sup>5/</sup> 1,230	3,346

<sup>1/</sup> Includes leaf dealer penalties, floor taxes, cigarette papers and tubes, etc. <sup>2/</sup> Includes District of Columbia. <sup>3/</sup> In postwar years cigarette taxes have accounted for about 98 percent of State tobacco tax revenues. <sup>4/</sup> Preliminary. <sup>5/</sup> Estimated. General note: Local government taxes from tobacco products in a recent year totaled about \$63 million.

Compiled from reports of the Internal Revenue Service, The National Tobacco Tax Association, and other sources.



## STATISTICAL SUMMARY

Item	Unit or base period	1963		1964		Last data as percentage of a year earlier
		Jan.	Feb.	Jan.	Feb.	
Average price at auctions						
Flue-cured	:Ct. per lb. :	C - 1 - o - s - e - d		C - 1 - o - s - e - d		---
Burley	:Ct. per lb. :	53.1	49.5	58.0	56.1	113
Maryland	:Ct. per lb. :	C - 1 - o - s - e - d		C - 1 - o - s - e - d		---
Virginia fire-cured	:Ct. per lb. :	37.8	34.2	35.6	33.7	99
Ky.-Tenn. fire-cured	:Ct. per lb. :	37.9	38.8	36.4	36.5	94
Ky.-Tenn. dark air-cured	:Ct. per lb. :	35.7	35.5	33.0	31.2	88
Virginia sun-cured	:Ct. per lb. :	37.2	36.6	31.0	20.8	57
Support price levels <sup>1/</sup>			<sup>1/</sup>		<sup>1/</sup>	
Flue-cured	:Ct. per lb. :	56.1		56.6		101
Burley	:Ct. per lb. :	57.8		58.3		101
Maryland	:Ct. per lb. :	51.3		51.8		101
Virginia fire-cured	:Ct. per lb. :	39.2		39.6		101
Ky.-Tenn. fire-cured	:Ct. per lb. :	39.2		39.6		101
Ky.-Tenn. dark air-cured	:Ct. per lb. :	34.8		35.2		101
Virginia sun-cured	:Ct. per lb. :	34.8		35.2		101
Connecticut Valley		40.0		40.4		101
cigar binder	:Ct. per lb. :					
Wis. binder and Ohio filler	:Ct. per lb. :	28.9		29.2		101
Puerto Rican filler	:Ct. per lb. :	30.0		30.3		101
Parity index <sup>2/</sup>	:1910-14=100 :	312	312	313	313	100
Industrial production index <sup>3/</sup>	: 1957= 100 :					
Employment	: Mil. :	65.9	66.4	67.2	68.0	102
Personal income <sup>4/</sup>	: Bil. dol. :	452.4	450.8	478.1	478.3	106
		1962-63		1963-64		
		Dec.	Jan.	Nov.	Dec.	Jan.
Taxable removals						
Cigarettes	: Bil. :	34.7	43.5	41.3	36.7	41.0
Cigars and cigarillos	: Mil. :	336.0	493.7	647.9	407.3	594.1
Smoking tobacco	: Mil. lb. :	4.7	5.6	5.3	5.1	6.5
Chewing tobacco	: Mil. lb. :	4.6	5.5	5.4	4.8	5.6
Snuff	: Mil. lb. :	2.7	2.8	2.4	2.5	2.8
Accumulated from Jan. 1						
Cigarettes	: Bil. :	494.5		472.9	509.6	
Cigars and cigarillos	: Mil. :	6,355		6,156	6,563	
Smoking tobacco	: Mil. lb. :	68.3		62.9	68.0	
Chewing tobacco	: Mil. lb. :	63.8		60.1	65.0	
Snuff	: Mil. lb. :	33.1		29.4	31.9	
Tax-exempt removals						
Cigarettes	: Bil. :	3.5	2.4	3.6	3.4	3.3
Exports	: Bil. :	2.5	.6	2.0	2.0	1.8
Cigars and cigarillos	: Mil. :	10.1	11.4	13.6	12.0	9.9
Smoking tobacco	: Mil. lb. :	.2	.1	.2	.2	.3
Chewing tobacco	: Mil. lb. :	.1	*	*	.1	*
Accumulated from Jan. 1						
Cigarettes	: Bil. :	41.1		37.7	41.1	
Exports	: Bil. :	24.1		21.6	23.6	
Cigars and cigarillos	: Mil. :	125.7		129.9	141.9	
Smoking tobacco	: Mil. lb. :	2.6		2.0	2.2	
Chewing tobacco	: Mil. lb. :	.7		.5	.6	
Wholesale price indexes <sup>5/</sup>						
Cigarettes, reg. nonfilter	: 1957-59=100 :	101.4			109.5	
Cigarettes, filter tip	: Jan. 1959=100 :	100.0			100.0	
Cigars	: 1957-59=100 :	100.4			100.3	
Smoking tobacco	: 1957-59=100 :	115.4			117.1	
Plug Chewing tobacco	: 1957-59=100 :	116.6			123.9	
Snuff	: 1957-59=100 :	107.4			113.0	
Consumer prices indexes (urban) <sup>6/</sup>						
Cigarettes, reg. nonfilter	: 1957-59=100 :	110.1			117.2	
Cigarettes, filter tip	: Mar. 1959=100 :	109.3			112.6	
Cigars	: 1957-59=100 :	99.9			100.2	
Imports of tobacco						
Cigarette leaf	: Mil. lb. :	8.5	11.8	11.4	9.3	6.2
Cigar tobacco <sup>7/</sup>	: Mil. lb. :	2.2	4.0	4.0	3.9	3.2
Accumulated from Jan. 1						
Cigarette leaf	: Mil. lb. :	127.2		119.7	129.0	
Cigar tobacco <sup>7/</sup>	: Mil. lb. :	41.7		42.0	45.9	

See footnotes at end of Statistical Summary.

Continued -

STATISTICAL SUMMARY--CONTINUED

Item	Unit or base period	1962-63		1963-64		Last data as percentage of a year earlier	
		Dec.	Jan.#	Nov.	Dec.		Jan.
Exports of leaf tobacco							
(farm-sales weight)							
Flue-cured	Mil. lb.	47.3	6.6	58.4	55.0	32.9	#
Burley	Mil. lb.	4.4	.4	4.7	4.7	1.9	#
Maryland	Mil. lb.	1.0	o	.6	1.5	1.2	#
Virginia fire- & sun-cured	Mil. lb.	.4	.1	1.1	.2	.8	#
Ky.-Tenn. fire-cured	Mil. lb.	4.4	*	2.1	1.0	2.6	#
Ky.-Tenn. dark air-cured	Mil. lb.	.3	*	*	*	*	#
Black Fat	Mil. lb.	.2	*	.3	.6	.2	#
Cigar wrapper	Mil. lb.	.4	*	.2	.1	.3	#
Connecticut binder	Mil. lb.	.1	*	*	*	.8	#
Wisconsin binder	Mil. lb.	*	*	o	o	*	#
Accumulated from beginning of marketing year <u>8/</u>							
Flue-cured	Mil. lb.	282.4	290.0	270.7	325.7	358.6	124
Burley	Mil. lb.	15.1	15.5	8.1	12.8	14.8	95
Maryland	Mil. lb.	3.4	3.4	1.9	3.4	4.5	132
Virginia fire- & sun-cured	Mil. lb.	1.2	1.3	2.1	2.3	3.1	238
Ky.-Tenn. fire-cured	Mil. lb.	6.7	7.0	3.1	4.5	7.1	101
Ky.-Tenn. dark air-cured	Mil. lb.	.3	.3	.4	.4	*	---
Black Fat	Mil. lb.	.8	.8	.6	1.1	1.4	175
Cigar wrapper	Mil. lb.	2.4	2.4	2.5	2.6	2.9	121
Connecticut binder	Mil. lb.	.2	.2	.1	.1	.9	450
Wisconsin binder	Mil. lb.	.2	.2	.3	.3	.3	150
Exports of manufactured tobacco in bulk	Mil. lb.	1.0	.1	.9	.5	.8	#
Accumulated from Jan. 1	Mil. lb.	8.6		9.3	9.8		114

Quarterly data

		1962-63		1963-64		
		Oct.-Dec.	Jan.-Mar.	Oct.-Dec.	Jan.-Mar.	
Tobacco stocks--1st of quarter <u>9/</u> :						
Domestic types						
(farm-sales weight)						
Flue-cured	Mil. lb.	2,587	2,817	2,627	2,879	102
Burley	Mil. lb.	1,137	1,442	1,228	1,519	105
Maryland	Mil. lb.	76	67	86	76	113
Fire-cured	Mil. lb.	109	100	113	103	103
Dark air- and sun-cured	Mil. lb.	60	60	63	64	107
Cigar filler	Mil. lb.	185	167	198	180	108
Cigar binder	Mil. lb.	81	76	77	74	97
Cigar wrapper	Mil. lb.	28	29	26	29	100
Under Government loan <u>10/</u>	Mil. lb.	558	714	724	982	138
Tobacco sheet <u>11/</u>						
Cigarette types	Mil. lb.	5.6	5.9	5.7	5.3	90
Cigar types	Mil. lb.	2.6	2.5	2.0	2.2	88
Foreign types (unst. equiv.)						
Cigarette and smoking	Mil. lb.	269	267	265	256	96
Cigar	Mil. lb.	67	69	62	59	86
Tobacco outlets <u>12/</u>						
Seasonally adjusted data, annual rates, for charts, p.2:						
Cigarettes						
Production	Bil.	544	539	552		101
Taxable removals	Bil.	507	495	513		101
Cigar production	Bil.	6.91	6.96	7.49		108
Smoking production	Mil. lb.	70.4	72.5	70.8		101
Chewing production						
Scrap	Mil. lb.	32.3	35.5	34.1		106
Plug and other	Mil. lb.	32.1	29.2	32.2		100
Snuff production	Mil. lb.	34.5	29.4	31.5		91
Exports of leaf						
Total	Mil. lb.	522	463	643	530	114
Flue-cured	Mil. lb.	404	382	527	440	115

1/ 1962 and 1963 crops respectively. 2/ Prices paid by farmers including interest, taxes and wage rates. 3/ Seasonally adjusted. 4/ Seasonally adjusted, annual rate. 5/ Excise tax excluded. 6/ Federal and applicable state and local taxes included. 7/ Unstemmed equivalent. 8/ July 1 for flue-cured and cigar wrapper and October 1 for others. 9/ Holdings of manufacturers and dealers including grower cooperatives. 10/ Reported by grower cooperatives. 11/ Weight of tobacco leaf not including stems added. 12/ Data for most recent quarter are preliminary estimates.

\* Less than 50,000 pounds. # January 1963 exports and imports were small because of dock strike.

Index of Special Items, Tables, and Charts in 1963 Issues of the Tobacco Situation

Each issue of the Tobacco Situation carries discussion and standard statistical tables which cover (1) cigarettes, cigars, and other manufactured tobacco products, (2) exports, foreign production and United Kingdom data, (3) imports and (4) each of the different kinds of leaf tobacco. The discussion and regular tables contain current estimates and comparable data for earlier years. Also included in each issue are 6 standard charts that depict recent trends in manufactured tobacco products and leaf tobacco exports. In addition, various issues of the Tobacco Situation contain special items, special-purpose tables and charts; the following index provides references to such material published during calendar year 1963:

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\* In this issue presented on basis of per capita 18 years and over.



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