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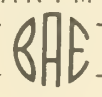
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Tobacco

SITUATION

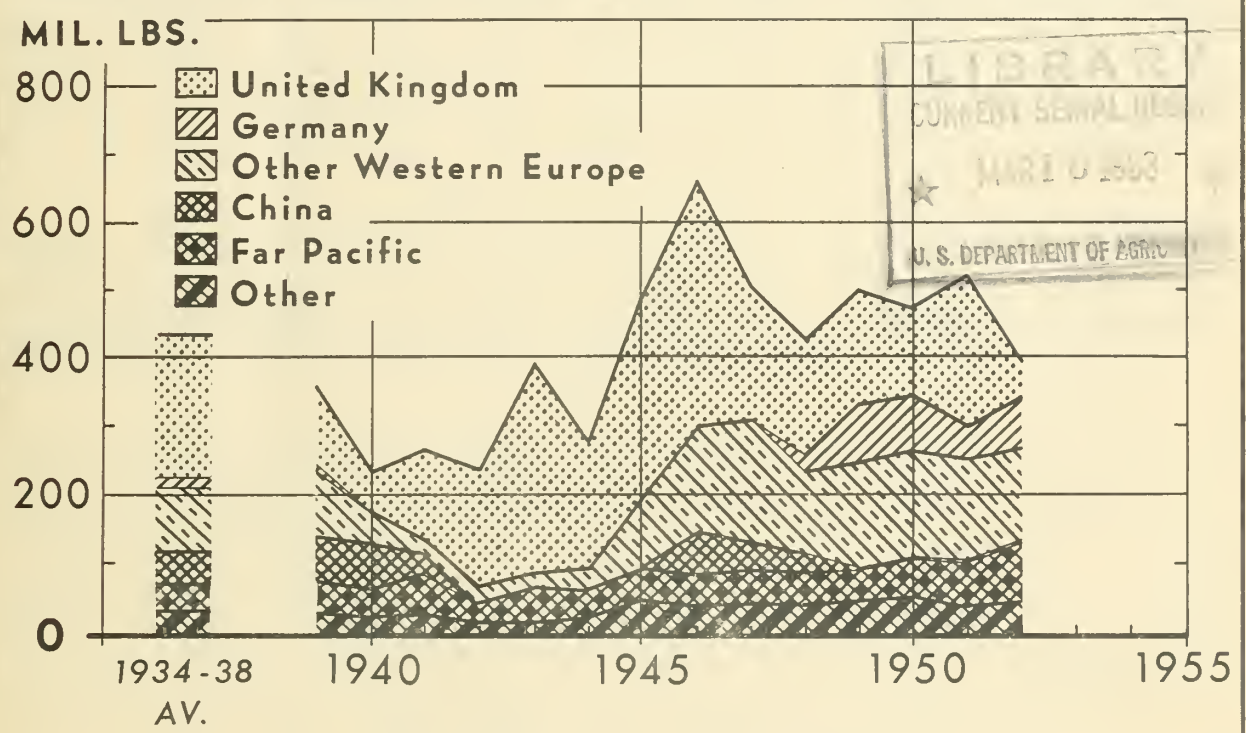
BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

TS- 63



FEBRUARY 1953

EXPORT MARKETS for U. S. TOBACCO



EXPORT WEIGHT OF UNMANUFACTURED TOBACCO

U. S. DEPARTMENT OF AGRICULTURE

NEG. 49036-XX BUREAU OF AGRICULTURAL ECONOMICS

Exports of unmanufactured tobacco from this country declined to 395 million pounds (export weight) in 1952—almost one-fourth lower than the 1951 total, which was the largest since 1946. The major drop was in the quantity going to the United Kingdom, which restricted tobacco imports as part of its effort to restore gold and dollar reserves. Tobacco exports to Germany increased from 1951 to 1952. Germany and other western European countries have

taken considerably more United States tobacco in recent years than in the pre-World War II period. In recent years, China has been practically eliminated as an important export outlet but other countries of the Far Pacific have been taking considerably more than before the war.

Total exports of tobacco in 1953 are expected to show some increase above last year's.

STATISTICAL SUMMARY

Item	Unit or base period	1951				1952				Last data available as per centage of a year earlier
		Sept.	Oct.	Nov.	Dec.	Sept.	Oct.	Nov.	Dec.	
Average prices at auctions										
Flue-cured	Cents per lb.	51.8	56.0	50.8	43.8	50.7	51.2	47.4	42.5	97
Burley	Cents per lb.	C-1-o-s-e-d		54.2	52.4	C-1-o-s-e-d			51.4	98
Maryland	Cents per lb.	C-1-o-s-e-d	C-1-o-s-e-d			C-1-o-s-e-d	C-1-o-s-e-d			---
Fire-cured	Cents per lb.	C-1-o-s-e-d		37.8	39.1	C-1-o-s-e-d			35.4	91
Dark air-cured (35-36)	Cents per lb.	C-1-o-s-e-d			33.8	C-1-o-s-e-d			32.1	95
Virginia sun-cured (37)	Cents per lb.	C-1-o-s-e-d		34.8	34.4	C-1-o-s-e-d			30.9	90
Parity prices										
Flue-cured	Cents per lb.	56.1	56.3	56.5	56.5	55.6	55.0	54.8	54.8	97
Burley	Cents per lb.	55.3	55.5	55.7	55.7	54.4	53.9	53.7	53.7	96
Maryland	Cents per lb.	60.6	60.8	61.1	61.1	58.7	58.1	57.9	57.9	95
Fire-cured	Cents per lb.	33.6	33.7	33.8	33.8	34.5	34.1	34.0	34.0	101
Dark air-cured (35-36)	Cents per lb.	29.6	29.7	29.8	29.8	30.2	29.9	29.8	29.8	100
Virginia sun-cured (37)	Cents per lb.	37.5	37.6	37.8	37.8	37.3	36.9	36.8	36.8	97
Parity index 1/										
	1910=100	282	283	284	284	285	282	281	281	99
Tax-paid withdrawals										
Cigarettes, small	Billion	31	38	34	24	35	37	30	30	125
Cigars, large	Million	491	591	554	368	527	625	498	439	119
Chewing and smoking	Mill. lb.	17	12	20	11	16	18	13	12	109
Snuff	Mill. lb.	2.9	2.1	4.1	3.3	3.1	3.8	2.8	3.2	97
Accumulated from Jan. 1										
Cigarettes, small	Billion	285	323	357	380	297	335	365	395	104
Cigars, large	Million	4,221	4,812	5,366	5,735	4,120	5,046	5,544	5,983	104
Chewing and smoking	Mill. lb.	141	153	173	184	134	152	165	176	96
Snuff	Mill. lb.	29	31	36	39	29	33	36	39	100
Tax-free removals										
Cigarettes, small	Billion	3	3	4	4	4	4	3	3	75
Cigars, large	Million	5	6	10	9	12	17	6	6	60
Chewing and smoking	Mill. lb.	.5	.3	.3	.5	.5	.5	.6	.5	100
Accumulated from Jan. 1										
Cigarettes, small	Billion	28	32	35	39	30	35	38	41	105
Cigars, large	Million	59	65	75	84	72	89	95	105	127
Chewing and smoking	Mill. lb.	4.8	5.1	5.4	5.9	4.4	4.9	5.5	6.0	102
Personal income 2/										
	Bill. dol.	257	262	261	263	274	276	276	279	106
Index of industrial production 3/										
	1935-39=100	218	218	219	218	227	229	234	235	108
Employment										
Labor force employed	Million	61.6	61.8	61.3	61.0	62.3	61.9	62.2	61.5	101
	Percent	97.5	97.5	97.1	97.3	97.7	98.0	97.8	97.8	101
Exports (farm-sales wt.)										
Flue-cured	Mill. lb.	75.2	90.4	60.4	59.9	47.7	40.5	40.7	31.7	53
Burley	Mill. lb.	2.1	3.4	2.2	2.4	4.3	1.7	2.9	2.8	117
Maryland	Mill. lb.	.7	.7	.6	.6	1.0	.3	.2	.6	150
Fire-cured	Mill. lb.	2.8	2.3	3.0	2.9	2.2	3.0	3.6	3.9	134
Dark air-cured	Mill. lb.	2.0	.6	.8	.9	.3	.5	.2	.7	78
Cigar	Mill. lb.	.9	.7	.4	1.0	.9	.7	.7	1.1	110
Accumulated from beginning of marketing yr. 4/										
Flue-cured	Mill. lb.	146.0	236.5	296.9	356.8	102.5	143.0	183.7	215.4	60
Burley	Mill. lb.	30.0	3.4	5.7	8.1	31.5	1.7	4.6	7.4	91
Maryland	Mill. lb.	8.4	.7	1.3	1.7	6.6	.3	.6	1.2	71
Fire-cured	Mill. lb.	39.8	2.3	5.3	8.1	28.1	3.0	6.5	10.5	130
Dark air-cured	Mill. lb.	10.3	.6	1.3	2.3	8.2	.5	.7	1.3	57
Cigar filler and binder	Mill. lb.	3.7	.4	.6	1.1	3.9	.3	.8	1.3	118
Cigar wrapper	Mill. lb.	1.2	1.5	1.7	2.2	.8	1.3	1.6	2.1	95
U.S. imports, all commodities										
Accumulated from Jan. 1	Mill. dol.	8,318	9,190	10,017	10,817	7,961	8,927	9,723	10,745	99
Sterling area gold and dollar reserves 5/										
	Mill. dol.	3,269	2,953	2,707	2,335	1,685	1,767	1,895	1,846	79
Stocks of domestic types (farm-sales weight) 6/										
Flue-cured	Mill. lb.		1,935		2,268		2,054		2,442	108
Burley	Mill. lb.		981		1,188		1,061		1,241	104
Maryland	Mill. lb.		64		59		73		65	110
Fire-cured	Mill. lb.		147		137		147		136	99
Dark air-cured	Mill. lb.		72		77		73		76	99
Cigar, filler	Mill. lb.		205		181		203		185	102
Cigar, binder	Mill. lb.		142		141		135		130	92
Cigar, wrapper	Mill. lb.		25		28		24		28	100

1/ Prices paid, interest, taxes, and farm wage rates. 2/ Annual rate, seasonally adjusted. 3/ Adjusted for seasonal variation. 4/ July 1 for flue-cured and cigar wrapper and October 1 for other types. 5/ Held in London. 6/ Dealers' and manufacturers' holdings in United States and Puerto Rico on first day of quarter.

 THE TOBACCO SITUATION

Approved by the Outlook and Situation Board February 25, 1953

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SUMMARY

A firm domestic demand for most tobacco is expected in the year ahead. Employment and consumer incomes seem likely to continue at a high level, and consumption of cigarettes, cigars, and snuff probably will be as large or larger than in 1952. Smoking tobacco consumption may be about as large as last year but use of chewing tobacco seems likely to continue its gradual drift downward.

Cigarette manufacture in 1953 probably will rise above the record high of 4.35 1/2 billion in 1952, but the increase is likely to be less than the 4 percent gain from 1951 to 1952. The 1952 consumption per person (15 years and over) in the United States and by overseas forces is estimated at 3,719 (about 10 per day)--4 percent above 1951 and nearly 13 percent above the 1946-50 average. With the removal of OFS ceilings on February 25, leading cigarette manufacturers announced price advances which add about 1 cent to the retail price per single pack. The indicated rise in manufacturers' prices (excluding tax and discounts) was near 10 percent.

Cigar consumption in 1952 in the United States and by overseas forces is estimated at a little over 6 billion. Indicated tax-paid withdrawals were 4 percent above 1951 and the highest since 1930 except for 1942. The number in the two major price groups, 4.1-6.0 cents and 8.1-15.0 cents, increased 7 and 2 percent, respectively, from 1951 to 1952.

Output of smoking tobacco was about 97 million pounds, down 4 1/2 percent from 1951, while chewing tobacco production declined 1 3/5 percent to 85 million pounds. Both were the lowest in the last 50 years. Snuff output was about 39 million pounds in each of the last 2 years and has remained relatively stable for many years.

Export demand for the 1953 crop is uncertain but there are some favorable factors. Stocks of United States tobacco in western European countries are low relative to use, and the American-type cigarette is preferred by many smokers in foreign countries. There is evidence of improvement in the economic positions of several important importing countries. The sterling area gold and dollar reserves have gradually increased from the low of last April. Germany's dollar position improved in 1952. Also in several important countries, prices of exports were higher and those of imports were lower in the last half of 1952 than a year earlier. Factors on the other side are the still inadequate level of gold and dollar reserves abroad, the restrictions placed on imports of United States tobacco by some countries, and the increased production of tobacco in nondollar supplying areas. Also some countries that formerly imported sizable quantities are producing more of their own requirements.

Exports of unmanufactured tobacco from the United States in 1952 totaled 395 million pounds (declared weight) valued at 245 million dollars. Both volume and value were about 24 percent lower than in 1951. The major decline was in exports to the United Kingdom. However, a substantial quantity now being held under British option in United States Government loan stocks is expected to move out this year. This, together with expected purchases from the 1953 crop, assuming the usual shipment pattern, would almost certainly exceed exports in 1952.

Growers of flue-cured and Burley tobacco will harvest smaller acreages in 1953 than in 1952 since allotments for most farms were reduced about 8 and 10 percent, respectively. Flue-cured and Burley production seem likely to approximate 1,325 and 570 million pounds if yields are close to the average for recent years. Together with probable carry-overs, 1953-54 supplies of flue-cured would be around 3,200 million pounds and those of Burley, 1,725 million. Supplies of both would be a little above the 1952-53 levels. Auctions for 1952 flue-cured close in early January and for Burley, in the latter part of February. The 1952 crop of flue-cured averaged 50.4 cents per pound--nearly 4 percent less than the 1951 crop. The larger proportion of lower quality tobacco was a major factor in reducing the general average. The 1952 crop of Burley averaged 50.2 cents--2 percent lower than the 1951 crop--and general quality was reported as slightly lower than a year earlier. More of both flue-cured and Burley were placed under Government loan in the recent marketing seasons than a year earlier.

The 1953 support levels for flue-cured and Burley, which are mandatory at 90 percent of parity, seem likely to be lower than those for the 1952 crops. The adjusted base price from which the 1953 parities are computed are lower in each case than in 1952. Also, the parity index (prices paid by farmers, including interest, taxes, and wage rates) as of January 1953 was about 2 percent lower than January 1952.

Supplies of Maryland tobacco, primarily a cigarette type, are at a peak. A quota was not in effect on the 1952 crop but will be in effect on the 1953 crop since it was approved in a referendum last October. Price support on the 1953 crop is mandatory at 90 percent of parity; but for the 1952 crop to be marketed this spring and summer, Government price support cannot be made available under existing law.

Acres allotments for the 1953 fire-cured and dark air-cured crops will be about the same size as in 1952. If yields are average, the 1953-54 supplies of fire-cured may be a little lower but dark air-cured would be about the same as in 1951-52 and 1952-53. For most of these types, the 1952 marketings have been completed and prices averaged below the record 1951 levels except for Western District Kentucky fire-cured, which was slightly higher. The 1953 support levels for fire-cured and dark air-cured tobacco seem likely to be a little lower than in the past season.

The 1952-53 supply of cigar filler tobacco is 7 percent lower than the 1951-52 supply because of the sharp decline in Pennsylvania Seedleaf production. The 1952-53 total supply of the combined binder types is 4 percent below 1951-52. All continental cigar filler and binder types will be under the marketing quota and allotment program in 1953 except Pennsylvania Seedleaf, and Government price supports will be in effect at 90 percent of parity. Growers of cigar filler and binder (types 42-44 and 51-55) approved a quota for 1 year in the referendum held on October 29, 1952.

The 1952-53 total supply of domestically grown cigar wrapper exceeds the 1951-52 level despite a 3 percent decrease in production from 1951 to 1952.

TOBACCO PRODUCTS

Cigarettes

In 1952, cigarette manufacture was at a record high of 435 1/2 billion--4 percent above 1951 and 11 percent above 1950. Domestic consumption in 1952, at about 394 billion, accounted for nine-tenths of total output. The 1953 cigarette output probably will reach a new high although the rate of increase is likely to lessen. Employment and consumer income are expected to continue high; and for the year as a whole, there are likely to be more smokers--reflecting the increase in the number of people of smoking age. About one-tenth of the total cigarette output is tax-free--principally for overseas shipments. A little over 5 percent of the total output of cigarettes went to the armed forces overseas, ships' stores, and so forth, and less than 4 percent was exported to foreign countries. The remainder is accounted for by shipments mainly to Puerto Rico and inventory adjustment. The overseas military shipments apparently increased some from 1951 to 1952 but the exports to foreign countries were a little lower.

Table 1.- Cigarettes: Output, domestic consumption, and exports, for specified periods

Period	Total	Domestic 1/	Tax-free	removals 2/
	output	consumption:	Total	Exports
	Billion	Billion	Billion	Billion
Average:				
1935-39	164.2	157.0	7.2	5.5
1940-44	256.9	223.5	33.3	5.8
1945	332.2	267.2	65.0	6.9
1946	350.0	321.7	30.7	24.1
1947	369.7	335.4	34.3	22.8
1948	386.8	348.5	38.7	25.2
1949	385.0	351.8	33.2	19.5
1950	392.0	360.2	31.8	14.3
1951	418.8	379.7	38.9	16.8
1952	435.5	394.1	40.9	16.4
July-December 1951	212.3	192.5	19.3	8.7
July-December 1952	225.0	202.6	22.1	8.6

1/ As indicated by tax-paid removals. 2/ In addition to exports, tax-free removals include principally shipments to forces overseas, to United States possessions, and ships' stores.

Bureau of Agricultural Economics. Compiled from reports of the United States Treasury and Commerce Departments.

The 1952 consumption of cigarettes per capita (15 years and over) in the United States and by overseas forces is estimated at 3,719--4 percent above 1951, nearly 13 percent above the 1946-50 average and 116 percent above the 1936-40 average. Over the past several years, these increases have come about due to more people smoking and an average of more cigarettes consumed per smoker. The actual number of men and women who smoke cigarettes is not known, but the proportion of women smoking has increased during the past 15 or 20 years. The total number of people, 15 years and over, in the last several years has not increased at as high a rate as total United States population. This reflects the lower rate of births in the 1930's than in the early 1940's and the postwar years.

Retail cigarette prices in the United States probably averaged between 21 and 22 cents per pack during the last half of 1952--about 10 percent higher than in the 1950 period prior to the Korean conflict. The increase has been due principally to a 6 percent advance in the manufacturers' price which occurred in late July 1950 and a 14 percent increase in the Federal excise tax which became effective November 1, 1951. Government price ceilings on cigarettes, in effect since early 1951, were terminated on February 25, 1953. Following the removal of price ceilings, leading cigarette manufacturers announced advances in prices, which add 1 cent to the retail price per individual pack. In some areas, retail

prices of cigarettes have increased during the past 2 1/2 years due to either advances in existing State cigarette tax rates or imposition of a cigarette tax by a State or city which had none previously. The 1952 Federal tax collection (not including floor taxes) on cigarettes was near 1,580 million dollars--16 percent more than in 1951. The 1952 State tax collections on tobacco products, mainly cigarettes, are estimated at about 500 million dollars--roughly 9 percent above the 1951 level. Under existing law, the present Federal excise tax of 8 cents per package of 20 cigarettes will revert to the pre-November 1951 rate of 7 cents on April 1, 1954.

Table 2.- Cigarette exports from the United States, average 1934-38, annual 1950-52, with percentages

Country	Average	1950 1/	1951 1/	1952 1/	1952
	1934-38	Million	Million	Million	as per- centage of 1951
Tangier & Fr. Morocco	12	1,394	1,850	2,269	123
Venezuela	39	1,055	1,700	1,570	92
France	307	295	739	852	115
Netherlands Antilles	1,221	968	769	846	110
Panama & Canal Zone	389	616	658	817	124
Belgium	63	950	878	814	93
Hong Kong	22	1,143	1,199	710	59
Switzerland	16	513	853	700	82
Philippines, Rep. of	2,544	1,526	1,215	693	57
Sweden	80	336	600	653	109
Other countries	77	5,512	6,347	6,428	101
Total all countries	4,770	14,308	16,808	16,352	97

1/ Preliminary.

Bureau of Agricultural Economics. Compiled from publications and records of the United States Department of Commerce.

Cigars

Cigar consumption in 1952, as indicated by tax-paid withdrawals, totaled 5,983 million--4 percent above 1951 and 8 percent above 1950. The 1952 level is the highest since 1930 except for 1942. Cigar consumption during 1953 may show some further increase since a continuation of personal income at a high level will favor it. Tax-free removals, most of which went to overseas forces, totaled about 100 million in 1952 compared with 84 million in 1951 and 47 million in 1950. Commercial exports of cigars to foreign countries were only about 3 1/3 million in each of the last 2 years.

Table 3.- Consumption of cigarettes and cigars in the United States and by overseas forces, total number and number per capita (15 years and over), 1920-52

Year	Cigarettes		Cigars ^{1/}	
	Total	Per capita 15 years and over	Total	Per capita 15 years and over
	Billions	Number	Millions	Number
1920	44.4	611	8,518.2	117
1921	50.5	682	6,967.5	94
1922	53.2	707	7,232.0	96
1923	64.2	836	7,397.5	96
1924	70.7	901	6,985.7	89
1925	70.7	885	6,929.1	87
1926	88.9	1,093	6,930.6	85
1927	97.2	1,174	6,863.6	83
1928	105.6	1,255	6,790.3	81
1929	118.2	1,381	6,838.7	80
1930	118.9	1,365	6,237.5	72
1931	113.6	1,287	5,672.8	64
1932	102.4	1,147	4,677.6	52
1933	111.2	1,230	4,589.7	51
1934	125.3	1,368	4,857.3	53
1935	133.9	1,442	4,999.0	54
1936	152.2	1,618	5,391.2	57
1937	162.3	1,704	5,500.8	58
1938	162.8	1,687	5,356.5	56
1939	171.5	1,754	5,469.5	56
1940	180.9	1,827	5,585.1	56
1941	207.5	2,071	5,910.4	59
1942	243.5	2,402	5,966.4	59
1943	282.8	2,759	5,402.7	53
1944	295.3	2,852	4,837.6	47
1945	339.4	3,250	5,094.4	49
1946	343.4	3,253	5,942.1	56
1947	344.1	3,226	5,680.5	53
1948	359.0	3,333	5,832.8	54
1949	362.4	3,331	5,651.4	52
1950	369.6	3,362	5,632.2	51
1951	396.8	3,573	5,780.4	52
1952 ^{2/}	417.0	3,719	6,030.0	54

^{1/} Large cigars. ^{2/} Preliminary.

Note.--No adjustment made for quantities lost, destroyed, bartered, etc., under war and postwar conditions, but such adjustments probably would be small in relation to total.

The major part of the gain in domestic cigar consumption over 1951 was a 7 percent increase in those in the 4.1-6.0-cent price bracket, which includes most cigarillos. Cigars in this group accounted for 37 percent of the total. The number of 8.1-15.0 cent cigars, accounting for 43 percent of the total, increased 2 percent for 1952 as a whole but practically all of the gain was realized in the last half of the year.

Nearly 6 percent of all cigars were in the higher-priced classifications, selling for 15.1-20.0 cents and over 20 cents. The number in these two groups increased about 5 and 11 percent, respectively, from 1951 to 1952. A substantial proportion came from bonded manufacturing warehouses using imported tobacco exclusively. Cigar imports totaled nearly 14 2/3 million--2 percent more than in 1951 and 85 percent of them came from Cuba. Most of the rest came from the Philippine Republic which although more than in 1951, was far below prewar.

Price ceilings on cigars were suspended in August 1952 and since that time, have shown only a very minor increase according to BLS retail price indexes. In the last half of 1952, cigar prices in large cities were about 2 to 3 percent above the average during 1950 prior to the Korean conflict.

Shipments of cigars from Puerto Rico have been very small since 1946 but can be expected to increase in 1952 with the operation of a new modern factory there.

The 1952 cigar consumption per capita (15 years and over) in the United States and by overseas forces was 3 3/4 percent more than in 1951. Measured on this basis, cigar consumption is 8 1/2 percent below the peak of the early war years, 4 percent below the prewar average, and 35 percent below the level of the late 1920's.

Smoking Tobacco

The manufacture of smoking tobacco in 1952 declined to about 97 million pounds--4 percent lower than in 1951 and the lowest in the last 50 years. The tax-paid consumption was nearly 93 million pounds and tax-free exports to foreign countries and shipments for overseas use were a little less than 4 million pounds. Smoking tobacco consumption, following a sharp decline from 1945 to 1946, remained quite stable through 1950. However, in each of the last 2 years, a significant decline occurred. It seems likely that the 1953 level of consumption will hold fairly close to that of 1952. Smoking tobacco is used in pipes and "roll your own" cigarettes and is generally a more economical form of tobacco consumption. Tax-paid cigarette papers dropped more than one-fifth from 1951 to 1952, but statistics are not yet available on the distribution of tax-free cigarette papers which comprise the predominant share of total cigarette papers. According to BAE data, smoking tobacco cost farmers about 7.2 cents per ounce in September 1952--7 percent more than in June 1950. According to BLS indexes, retail prices for pipe tobacco in selected large cities have risen about 4 percent since the pre-Korean period of 1950. Price ceilings, in effect on smoking tobacco since early 1951, were removed February 25, 1953.

Exports of smoking tobacco totaled nearly 2.9 million pounds in 1952--about four-fifths in bulk and one-fifth packaged. The bulk exports were up 21 percent from 1951 and the largest since 1946. The major increases from 1951 to 1952 were to the Philippine Republic, Dominican Republic, Haiti, and Spain, but less went to Bolivia, the leading destination in 1951. The packaged smoking tobacco exports declined 12 percent. Canada, accounting for about two-fifths of the total, took less. The rest went in comparatively small amounts to a large number of countries.

Table 4.- Output of manufactured tobacco in the United States for specified periods

Period	Smoking	Chewing				Total	Snuff
		Plug	Twist	Fine-cut	Scrap		
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Average:							
1935-39	195.3	56.8	6.0	4.8	43.8	111.4	37.3
1940-44	176.2	54.8	6.0	4.6	47.9	113.3	40.7
1945	168.5	59.7	6.7	4.0	47.7	118.1	43.8
1946	106.4	51.8	5.8	3.8	46.1	107.5	39.4
1947	104.7	47.3	5.2	3.8	42.2	98.5	39.2
1948	107.6	45.3	5.6	3.2	42.1	96.2	40.8
1949	108.1	41.9	5.6	2.8	39.6	89.9	40.9
1950	107.7	40.3	5.5	2.7	39.0	87.5	40.0
1951	101.3	39.9	4.6	2.8	39.1	86.4	39.5
1952	96.8	39.1	4.8	2.8	38.3	85.0	38.7

Bureau of Agricultural Economics. Compiled from reports of the Bureau of Internal Revenue.

Chewing Tobacco

The 1952 output of the four groups of chewing tobacco was 85 million pounds--about $1\frac{1}{3}$ million pounds less than in 1951. The gradual decline in chewing tobacco consumption has been going on for many years and seems likely to continue. The 1952 output was 14 percent less than 5 years earlier and nearly 24 percent below the prewar average. Tax-paid consumption was 82.8 million pounds and tax-free shipments were about 2.4 million pounds. Of the tax-free shipments, the commercial exports to foreign countries amounted to 1.9 million pounds, the largest in 3 years. Substantially more than in 1951 went to the two leading foreign outlets, Australia and the Philippine Republic, which, together accounted for 85 percent of the total. Plug and twist made up the bulk of the exported chewing tobacco.

The distribution of total chewing tobacco manufacture in 1952 was about as follows: plug, 46 percent; scrap, 45 percent; twist, 5 2/3 percent; and fine-cut, 3 1/3 percent. Plug and scrap each declined about 2 percent from a year earlier but twist increased 5 1/2 percent and fine-cut held nearly even.

The BLS wholesale price indexes indicate that plug chewing tobacco prices were virtually unchanged during 1952. On November 1, 1951, the excise tax on smoking, chewing, and snuff was cut from 18 to 10 cents per pound. At that time, OFS permitted manufacturers to increase their prices by about an offsetting amount. BLS indexes indicate that manufacturers' prices of chewing tobacco were increased at about that time. On February 25, 1953, price ceilings were removed from chewing tobacco.

Snuff

The 1952 output and consumption of snuff were both close to 39 million pounds--practically the same as in 1951. Practically all the snuff produced in the United States goes into domestic consumption. Major consuming areas are in the South and in certain areas of the northwest. Snuff consumption is expected to remain stable during 1953. Since the 9 percent drop from the 1945 peak of 43.6 million pounds, annual snuff consumption has stayed within 3 1/2 percent of 40 million pounds. Wholesale prices of snuff are moderately above their pre-Korean level. Price ceilings were removed on February 25, 1953.

EXPORTS OF UNMANUFACTURED TOBACCO FROM THE UNITED STATES 1/

The exports of unmanufactured tobacco in calendar year 1953 seem likely to exceed the relatively low level of 1952 when they declined sharply from 1951, primarily because of the unusually small shipments to the United Kingdom. A substantial quantity is now being held in Government loan stocks that is earmarked for Britain under the option arrangement worked out last year between United Kingdom buyers and growers' cooperative associations. This is likely to move out this year; and if purchases made from the 1953 crop are shipped according to the usual pattern, total United States exports of tobacco in this calendar year can be expected to exceed those in 1952.

Although the prospect for export demand for the 1953 crop is uncertain, there appears to be some favorable factors. The stocks of United States tobacco in western European countries are still low relative to use. Some improvement in the supply of dollar exchange is evident in the United Kingdom, which has been restricting imports because of dollar scarcity. The sterling area gold and dollar reserves, which declined from 3,269 million dollars at the end of September 1951 to a low of 1,662 million dollars on April 30, 1952, have gradually increased. By the end of January 1953, sterling area reserves had risen to 1,978 million dollars despite capital

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

and interest payments of 181 million dollars on the United States and Canadian loans at the end of 1952. However, the December 1952 Economic Conference of the Commonwealth indicated that, although steady improvement had been made, reserves were still insufficient to permit a substantial relaxation of import restrictions. The United Kingdom realized a small increase in exports to the United States from 1951 to 1952. The terms of trade for Britain improved between the last half of 1951 and the last half of 1952--import prices declined about 8 percent while export prices held about even. Several other important importers of United States tobacco have improved their economic position over the past year. Germany's dollar position improved during 1952. Assisted by Mutual Security aid and expenditures of United States military forces, Germany's dollar accounts were about in balance in 1952. The terms of trade for Germany have improved with import prices showing a decline from the last half of 1951 to the last half of 1952 while export prices averaged a little higher. The foreign exchange position of Denmark was considerably better at the end of 1952 than a year earlier and considerable improvement occurred in United States and Canadian dollar reserves. Other countries that showed an increase in combined gold and foreign exchange holdings from late 1951 to late 1952 included Netherlands, Sweden, Switzerland, Portugal, Ireland, Belgium, and France.

Although the United States supplies more tobacco that moves into foreign trade than any other country, other supplying countries such as Southern Rhodesia, Canada, India, and Turkey are expanding their exports considerably above prewar levels. Also, France and Italy are producing considerably more in their own countries than in prewar. The scarcity of dollars abroad aids this development except in Canada. The Philippine Republic, a sizable foreign outlet in 2 of the recent 3 years, has placed into effect an import quota that will reduce her takings this year and in successive years.

The principal means by which foreign countries can obtain the dollars to buy United States tobacco and other products produced in this country is by selling to this country. General imports by this country during 1952 totaled 10.7 million dollars--2 1/3 percent less than in 1951. If foreign purchasers are to buy a substantial volume of tobacco and other products here, our imports of goods and services must be maintained at a high level. General economic activity in the United States is expected to continue at a relatively high rate during 1953; and since the level of imports is related to economic activity in this country, the outlook for imports this year may be considered favorable.

Exports of unmanufactured tobacco from the United States in 1952 totaled 395 million pounds (declared weight) valued at 245 million dollars. Both volume and total value were about 24 percent lower than in 1951. The 1952 volume was the lowest for any peace-time year since 1918 but was substantially above practically all of the war years, 1939 through 1944. Flue-cured tobacco composed almost 81 percent of total unmanufactured exports and Burley and Kentucky-Tennessee fire-cured ranked second and third, accounting for about 7 and 5 1/2 percent, respectively. In 1951, the proportions

Table 5.- United States exports of unmanufactured tobacco, to principal importing countries, by types, for specified periods
(Declared weight)

Country and type	1951		1952		July-December			1952 as percent-age of 1951
	Average 1934-38	1/	1/	Average 1934-38	1951 1/	1952 1/		
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Percent.
Flue-cured	324.9	433.8	318.0	216.6	316.6	190.5	60	
Burley	11.6	25.2	26.9	5.5	11.9	16.6	139	
Maryland	5.5	8.0	5.8	2.2	3.1	2.9	94	
Va. fire-cured	9.7	4.5	2/ 5.0	4.7	2.6	3.3	127	
Ky. & Tenn. "	53.7	29.2	21.8	19.4	9.5	10.7	113	
One Sucker	.7	3.6	1.5	.5	2.4	.7	29	
Green River	3.0	1.9	2.3	.9	.3	.3	100	
Black Fat, etc.	9.0	4.9	3.2	4.6	3.0	1.5	50	
Cigar	1.3	6.9	6.8	.8	3.9	4.3	110	
Perique	.1	.1	.1	(3/)	.1	(3/)	---	
Stems, trimmings, and scrap	17.8	4.0	3.6	9.5	2.1	2.0	95	
Total	437.3	522.1	395.0	264.7	355.5	232.8	65	
Country of destination								
United Kingdom	213.9	223.4	54.2	159.9	201.9	36.2	18	
France	21.0	10.0	6.7	1.4	2.4	5.2	217	
Belgium	15.5	29.6	15.6	8.4	17.7	7.8	44	
Netherlands	15.6	24.3	35.9	8.3	8.2	19.8	241	
Germany	12.6	47.7	4/ 79.6	6.7	25.2	4/ 52.3	208	
Portugal	4.8	6.0	5.0	2.3	2.7	1.9	70	
Denmark	4.6	9.1	9.5	2.9	5.4	6.4	119	
Ireland	7.4	17.6	16.2	4.8	11.8	8.5	72	
Switzerland	3.8	12.4	10.7	2.0	5.4	6.1	113	
Norway	4.7	6.6	7.8	2.9	3.9	5.0	128	
Sweden	7.2	15.0	13.0	5.1	10.5	11.4	109	
Italy	1.1	2.2	2.9	.6	(3/)	.1	---	
China	48.2	.0	.0	22.9	.0	.0	0	
Australia	18.4	20.3	23.6	8.8	12.2	16.1	132	
India-Pakistan	2.6	6.1	5.8	1.5	2.2	2.0	91	
New Zealand	2.5	7.1	5.4	1.5	4.0	2.9	72	
Philippine Rep.	1.2	9.5	29.7	.6	5.8	12.7	219	
Other countries	52.2	75.2	73.4	24.1	36.2	38.4	106	
Total	437.3	522.1	395.0	264.7	355.5	232.8	65	

1/ Preliminary. 2/ Includes 277,216 pounds of Virginia sun-cured. 3/ Less than 50,000 pounds. 4/ Includes .4 million pounds to East Germany.

Table 6.- United States exports of unmanufactured tobacco, by types, to specified countries, 1949-52 ^{1/}
(Declared weight)

Country and year	Flue-cured Million pounds	Burley Million pounds	Maryland Million pounds	Fire-cured		One Sucker Million pounds	Green River Million pounds	Black Fat Million pounds	Cigar leaf Million pounds	Stems, trimmings, and scrap Million pounds	Total ^{2/} Million pounds
				Virginia Million pounds	Kentucky-Tennessee Million pounds						
United Kingdom											
1949	163.8	0.8	0.1	0.7	1.2	0.0	0.6	0.0	0.1	0.0	167.3
1950	130.5	.2	.0	.5	1.1	.1	.6	.0	(3/)	(3/)	133.1
1951	220.6	.3	.0	.6	1.4	.0	.5	.0	(3/)	.0	222.5
1952	49.8	.3	.0	.2	2.6	(3/)	1.3	.0	.0	.0	54.2
France											
1949	1.1	.0	.2	.0	10.5	3.0	1.1	.0	(3/)	.0	15.8
1950	3.3	.4	(3/)	.0	4.7	.0	.0	.0	(3/)	.0	8.5
1951	1.9	.6	1.0	.0	6.4	.0	.0	.0	.0	.0	10.0
1952	5.7	1.0	.0	.0	.0	.0	.0	.0	.0	.0	6.7
Belgium											
1949	11.1	4.2	.2	.3	1.5	.2	.3	.0	.6	(3/)	18.4
1950	19.2	5.0	.3	.1	1.9	.4	.3	.0	.6	(3/)	27.7
1951	21.6	2.5	.2	.1	3.4	.5	.2	.0	.8	.1	29.6
1952	10.8	2.7	.1	.1	1.0	.2	.0	.0	.5	(3/)	15.6
Netherlands											
1949	24.6	2.4	.1	.3	3.7	.4	.6	(3/)	1.0	.8	33.8
1950	23.4	3.5	.4	.4	3.6	(3/)	.0	.0	.5	.2	32.2
1951	16.4	1.3	.4	.1	4.7	.2	(3/)	.0	.7	.5	24.3
1952	26.7	.8	.4	(3/)	7.1	(3/)	.3	(3/)	.5	(3/)	35.9
Germany											
1949	58.1	10.9	.4	.5	2.5	.3	.2	.0	14.0	.2	87.1
1950	64.4	11.6	.4	.3	.8	.1	.0	.0	3.7	.5	81.8
1951	38.0	5.4	.1	.2	.7	(3/)	.0	.0	3.1	.2	47.7
1952	66.3	7.7	.2	.4	.7	.0	.0	.0	4.0	.2	79.6
Portugal											
1949	3.8	6.7	(3/)	(3/)	.4	.0	.0	.0	.1	.0	11.1
1950	1.8	3.8	.0	.0	.4	.0	.0	(3/)	.0	.0	6.1
1951	1.4	4.2	.0	.1	.4	.0	.0	(3/)	.0	.0	6.0
1952	2.9	1.9	.0	.0	.4	.0	.0	.0	.0	.0	5.0
Denmark											
1949	8.1	1.6	(3/)	.1	.4	.0	.0	.0	1.1	.2	11.6
1950	10.6	1.8	.1	.4	.9	.0	.0	.0	.4	.6	14.8
1951	6.4	1.4	.1	(3/)	.4	.0	.0	.0	.7	.2	9.1
1952	7.0	1.7	(3/)	(3/)	.5	.0	.0	.0	.1	.3	9.5
Ireland											
1949	24.5	(3/)	.0	(3/)	.7	.0	.1	.0	.0	.0	25.3
1950	17.1	(3/)	(3/)	(3/)	.4	.0	.0	.0	(3/)	.0	17.6
1951	16.9	.0	.0	(3/)	.7	.0	.0	.0	.0	.0	17.6
1952	15.1	.0	.0	(3/)	1.0	.0	(3/)	.0	.0	(3/)	16.2
Switzerland											
1949	3.1	.5	5.6	.2	1.1	(3/)	(3/)	.0	.1	.0	10.7
1950	5.5	.6	5.0	.3	2.7	.0	.0	.0	.1	.1	14.4
1951	4.6	.7	4.5	.5	2.0	.0	.0	.0	(3/)	.1	12.4
1952	2.9	.3	4.5	.5	2.3	(3/)	.0	.0	(3/)	.1	10.7
Norway											
1949	4.4	1.1	(3/)	1.3	.3	(3/)	.0	.0	.1	.1	7.4
1950	3.6	1.3	(3/)	2.0	.6	(3/)	.0	.0	(3/)	.2	7.7
1951	3.8	.9	(3/)	1.6	.2	(3/)	(3/)	.0	(3/)	.1	6.6
1952	4.3	.7	.0	4/2.1	.4	(3/)	.0	.0	.0	.6	7.8
Sweden											
1949	1.6	1.3	.0	(3/)	1.7	.0	.0	.0	.1	1.2	5.8
1950	6.3	2.9	.0	.6	2.5	.0	(3/)	.0	(3/)	1.3	13.7
1951	12.0	1.5	.0	.0	.5	.0	.0	.0	.1	1.0	15.0
1952	6.6	2.9	.0	.9	1.7	.0	.0	.0	.1	.9	13.0
Australia											
1949	19.3	.2	.0	.2	.0	.0	.0	.0	(3/)	.0	19.6
1950	17.6	.2	(3/)	.3	.0	.0	.0	.0	(3/)	.0	18.1
1951	20.1	.1	.0	.1	.0	.0	.0	.0	(3/)	.0	20.3
1952	23.2	.1	.0	.2	.0	.0	.0	.0	.0	.0	23.6
New Zealand											
1949	5.7	.0	.0	.4	.1	.0	.0	.0	(3/)	.0	6.2
1950	6.2	.0	.0	.2	.1	.0	.0	.0	.0	.0	6.5
1951	6.6	.0	.8	.4	.1	.0	.0	.0	(3/)	.0	7.1
1952	5.1	.0	.0	.2	.1	.0	.0	.0	.0	.0	5.4
Philippine, Rep. of											
1949	1.0	(3/)	.0	(3/)	.0	.0	.0	.0	.1	.0	1.1
1950	23.5	.8	.2	1.7	.0	.0	.0	.0	.2	.6	27.1
1951	8.4	.9	(3/)	(3/)	.0	.0	.0	.0	(3/)	(3/)	9.5
1952	28.4	1.2	.0	.0	.0	.0	.0	.0	(3/)	(3/)	29.7
India and Pakistan											
1949	7.2	.0	.0	(3/)	.0	.0	.0	.0	(3/)	.0	7.2
1950	5.5	.0	.0	(3/)	.0	.0	.0	.0	.0	.0	5.5
1951	6.1	(3/)	.0	(3/)	(3/)	.0	.0	.0	(3/)	.0	6.1
1952	5.8	.0	.0	.0	.0	.0	.0	.0	.0	.0	5.8
Total above countries											
1949	337.4	29.7	6.6	4.0	24.1	3.9	2.9	.0	17.3	2.5	428.4
1950	338.5	32.1	6.4	6.8	19.7	.6	.9	.0	5.5	3.5	414.8
1951	384.8	19.8	6.3	3.7	20.9	.7	.7	.0	5.4	2.2	443.8
1952	260.6	21.3	5.2	4/4.6	17.8	.2	1.8	.0	5.2	1.9	318.7
Total all countries											
1949	379.9	35.1	7.9	4.6	28.5	6.6	3.2	4.8	22.4	5.1	498.2
1950	382.6	37.5	6.7	5.7	24.0	2.0	1.2	3.6	7.3	5.4	476.1
1951	433.8	25.2	8.0	4.5	29.2	3.6	1.9	4.9	6.9	4.0	521.0
1952	318.0	26.9	5.8	4/5.1	21.8	5/1.5	5/2.3	5/3.2	6.8	3.6	395.0

^{1/} Preliminary. ^{2/} Detailed figures may not add to totals due to rounding. ^{3/} Less than 50,000 pounds. ^{4/} Includes .3 million pounds of sun-cured. ^{5/} Major destinations: One Sucker--1.2 million pounds to Nigeria; Green River--.3 million pounds to Indonesia; Black Fat--1.5 million pounds to Nigeria, 1.3 million pounds to Gold Coast.

Bureau of Agricultural Economics. Compiled from publications and records of the United States Department of Commerce.

were flue-cured 83 percent, Kentucky-Tennessee fire-cured 6 percent, and Burley 5 percent. All export classifications of unmanufactured tobacco except Burley, Virginia fire-cured. Green River, cigar filler, and Perique declined between 1951 and 1952. The average value per pound of the flue-cured exported was slightly lower in 1952. For each other type, the 1952 average values per pound were higher, some by considerable margins, than in 1951 except cigar wrapper which averaged lower than a year earlier.

The major decline in exports from 1951 to 1952 was in flue-cured tobacco to the United Kingdom--80 percent. In 1952, Britain got the smallest proportion of total United States tobacco exports in 60 years or more. In 1951, the share going to Britain was the largest since 1946, although less than in 1934-38. The decline in tobacco exports to Britain from 1951 to 1952 was partially offset by larger takings by Germany, the Philippine Republic, Netherlands, Australia, and Japan. However, exports to Belgium, Sweden, France, and Ireland, other usually sizable outlets, were less in 1952 than in 1951. For comparisons of tobacco exports by country and type in the past 4 years, see table 6.

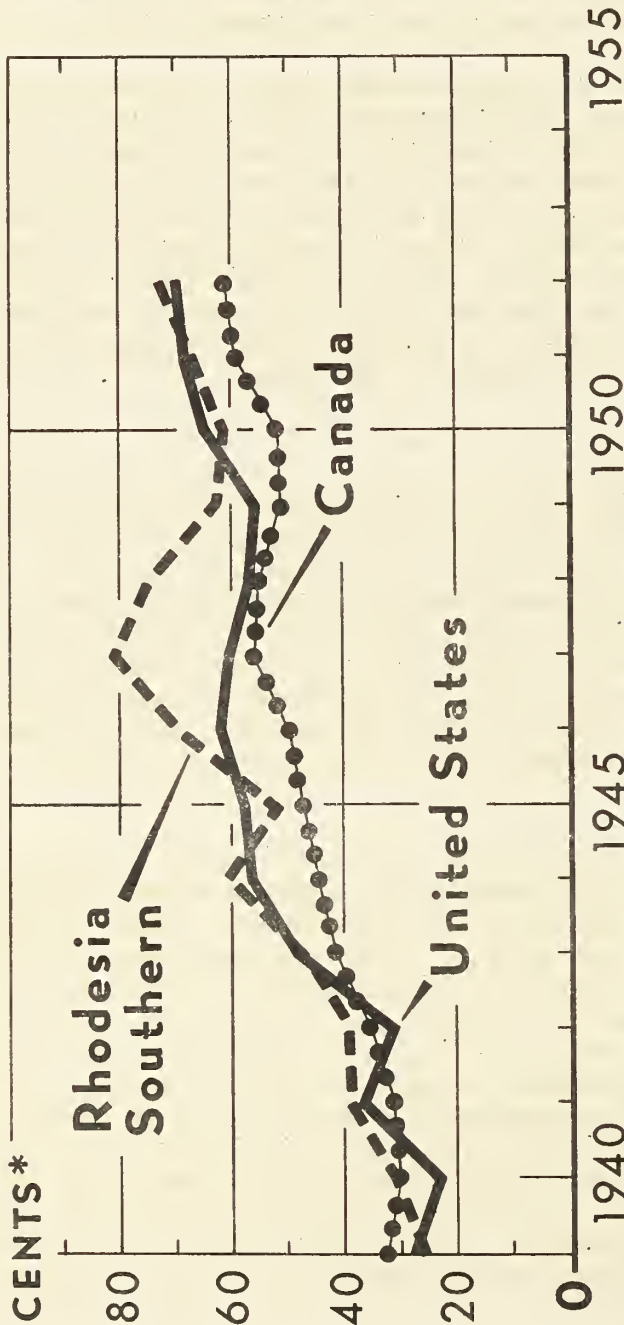
British Tobacco Situation

Consumption of tobacco in the United Kingdom in 1952 is estimated at 217 million pounds (dry weight)--about 2 percent less than in 1951. Both 1951 and 1952 exceeded each of the years 1943 to 1950. For the recent 5 years, consumption averaged approximately 13 percent higher than in 1938 (last full year before World War II) but 14 percent lower than the record 1946 level. The proportion of the total that originates in Commonwealth areas has steadily increased in the last 5 years. In 1938, 1946, and 1947, it was less than 25 percent; but it then rose to 23 percent in 1943, 33 percent in 1950, and perhaps as much as 45 percent in 1952.

In addition to her own needs, Britain's total leaf tobacco requirements include a substantial quantity to be manufactured, mainly into cigarettes for export. The 1952 total manufacture tobacco exports totaled about $47\frac{1}{2}$ million pounds--a drop of about 8 percent below 1951 but 9 percent above 1950. The proportion of Commonwealth tobacco used in the tobacco products exported is considerably less than in the case of home consumption but it has been increasing. In the last 3 years, the proportion of Commonwealth tobacco in exported tobacco products probably ranged from 17 to 20 percent compared with around 11 percent in 1933 and 1947-48. The principal declines in Britain's cigarette exports from 1951 to 1952 were in those to Australia, Malaya, Singapore, Hong Kong, Nigeria, and Belgian Congo, while those going to Gold Coast, Germany, France, Egypt and Burma increased. Australia, usually the second largest outlet, got about $4\frac{1}{2}$ million pounds less tobacco products in 1952 than a year earlier--a 52 percent drop.

VALUE PER POUND OF TOBACCO IMPORTS by the UNITED KINGDOM

Unstemmed Flue-Cured, by Country of Origin



* UNITED KINGDOM PENCE CONVERTED TO UNITED STATES CENTS USING APPROPRIATE YEARLY AVERAGE EXCHANGE RATES

U. S. DEPARTMENT OF AGRICULTURE

NEG. 49037-XX BUREAU OF AGRICULTURAL ECONOMICS

The value per pound of flue-cured tobacco imported into the United Kingdom rose during World War II, declined from 1947 to 1949, and then again increased through 1952. The 1952 average values of unstemmed flue-cured tobacco from Southern Rhodesia, the United States, and Canada were about 73, 69, and 61 cents per pound, respectively. The average value of Southern Rhodesian flue-cured increased 8 percent from 1951 to 1952 but tobacco from the other two rose only 1 to 4 percent. Tobacco from the United States has had a higher average value than that from Canada since 1942. From 1946 to 1949, the average value per pound of Southern Rhodesian tobacco was higher than that from the United States. In 1950 and 1951, the United States value exceeded that for Southern Rhodesia and reflected increase in prices following the Korean outbreak. Also reflected is the devaluation of sterling in September 1949, which had the effect of increasing the costs of dollar imports to British importers. Southern Rhodesia is within the sterling area. Average import values reflect prices, freight, and other cost items at the entry ports but exclude duties.

On November 30, 1952, tobacco stocks in the United Kingdom totaled 433 million pounds--11 percent less than a year earlier when they were near a postwar peak. United Kingdom tobacco imports in 1951 were heavy, and stocks rose from 445 million pounds at the beginning of the year to 505 million pounds at the end. Stocks were built up to their highest point since prewar, although they were still about one-eighth less than in 1938 and even lower in relationship to use.

Britain imported 224 million pounds in calendar year 1952--131 million pounds less than in 1951 and the smallest quantity since 1941. The major drop was in imports from the United States--68 percent. Imports from Southern Rhodesia, the second ranking supplier, were up 16 percent from 1951 and the second largest in history. Imports from India, the third ranking supplier, were 4½ percent lower than in 1951 but from Canada, ranking fourth, were the largest on record--up 50 percent from 1951. In contrast to the tobacco from other countries, a large proportion of the Indian tobacco is stripped. All the above four leading suppliers ship predominantly flue-cured tobacco to the United Kingdom. About 27 percent less of mostly dark-fired tobacco entered Britain from Nyasaland. Only a small quantity was imported from Turkey, but imports from Greece were nearly the same in each of the last 2 years. Although not shown separately in table 7, a moderate-sized amount of nonflue-cured tobacco was imported from Netherlands in 1952.

Table 7.- United Kingdom: Imports of unmanufactured tobacco
by principal sources for specified periods

Period	Total imports	United States	Commonwealth countries				Total 1/	Turkey	Greece
			India	Southern Rhodesia	Nyasaland	Canada			
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	
Average:									
1925-29	213.3	175.7	9.5	5.4	10.6	4.7	32.9	.7	1.0
1930-34	211.2	165.8	10.9	9.2	12.4	8.6	42.3	.2	.3
1935-39	269.2	200.8	19.6	15.7	12.4	14.3	63.6	.6	.6
1940-44	240.3	168.0	17.8	20.3	13.3	7.9	61.5	3.3	1.2
1945	368.3	309.8	10.1	20.6	11.6	12.1	56.0	2.4	.0
1946	432.7	365.8	17.6	23.0	10.9	9.2	62.3	3.1	.6
1947	295.6	201.2	22.9	23.0	11.9	22.2	82.1	.4	10.5
1948	280.9	172.4	22.8	43.9	14.1	12.7	97.3	10.2	.1
1949	301.2	154.1	38.4	46.4	17.8	13.0	119.0	25.0	5.8
1950	305.8	143.7	43.1	61.1	17.4	15.8	146.4	10.8	1.0
1951 2/	354.9	212.0	40.1	50.4	16.1	21.6	131.4	3.2	1.3
1952 2/	223.7	66.8	33.3	58.4	11.8	32.4	143.4	.6	1.2

1/ Includes all Commonwealth countries.

2/ Preliminary.

Bureau of Agricultural Economics. Compiled from Annual Statement of Trade of the United Kingdom, 1925-48; and Accounts Relating to Trade and Navigation, 1949-52.

Table 8.- United States imports for consumption of unmanufactured tobacco, from principal supplying countries, for specified periods

Classification and country of origin	(Declared weight)						
	1951			1952			July-December 1952
	Average: 1934-38	1/	1/	Average: 1934-38	1/	1/	as per-centage of 1951
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Percent
Cigarette leaf							
Unstemmed							
Turkey	18.2	53.0	55.0	9.7	26.3	28.3	108
Greece	18.8	12.4	14.5	9.2	6.6	7.8	118
Syria	.5	4.0	3.7	.3	2.2	1.8	82
Bulgaria	.6	3.0	(2/)	.3	2.7	.0	---
U.S.S.R.	.1	6.1	(2/)	.1	3.2	.0	---
So. Rhodesia	(2/)	.6	.6	.0	.3	.2	67
Yugoslavia	.0	.3	.8	.0	.2	.5	250
Total 3/	44.4	81.4	75.9	22.6	43.9	39.4	90
Cigar leaf (filler)							
Cuba							
Stemmed	7.1	10.9	9.9	3.8	5.5	4.4	80
Unstemmed	4.1	4.1	4.0	2.1	2.1	2.1	100
Philippine, Rep.							
Stemmed	(4/)	.1	1.9	(4/)	.0	1.2	---
Unstemmed	(4/)	.7	.2	(4/)	.6	.1	17
Total 3/	11.3	15.8	16.0	5.9	8.3	7.8	94
Scrap							
Cuba	2.9	6.0	8.1	1.4	3.0	4.2	140
Philippine, Rep.	4/ 3.2	.0	1.2	4/ 1.2	.0	1.1	---
Total 3/	6.1	6.1	9.4	2.6	3.0	5.4	180
Cigar wrapper							
Indonesia	5/ 1.9	.9	.8	1.1	.4	.3	75
Cuba	.2	.3	.3	.1	.1	.2	200
Total 3/	2.1	1.3	1.1	1.2	.5	.5	100
Total imports 6/	66.3	104.8	103.1	33.5	56.0	53.5	96

1/ Preliminary, 2/ Less than 50,000 pounds, 3/ Includes relatively small quantities from other countries not separately listed, 4/ Reported as leaf in 1934 and 1935 and as scrap in 1936-38, 5/ Formerly shown as originating in Netherlands Indies or Netherlands, 6/ Includes tobacco stems, not cut, ground, or pulverized, not shown separately.

IMPORTS AND UNITED STATES STOCKS OF FOREIGN GROWN TOBACCO 2/

In 1952, tobacco imports into the United States for consumption totaled 103 million pounds valued at 81 million dollars compared with nearly 105 million pounds valued at 75 million dollars in 1951.

Cigarette leaf imports accounted for almost three-fourths of the total and the remainder was almost entirely tobacco used in cigars. The cigarette leaf imports came principally from Turkey and Greece. Those from Greece were the largest since prewar years. The 1952 imports from Syria, the principal source of smoke-cured katakia, were lower than in 1951. Quantities from Russia and Bulgaria were negligible compared with about 9 million pounds in 1951. Higher duty rates on tobacco from these countries became effective about a year ago. The stocks of foreign grown cigarette and smoking tobacco on January 1, 1953, were about 168 million pounds compared with nearly 170 million a year earlier.

Less stemmed and unstemmed cigar filler came in from Cuba in 1952 than in 1951; but this was more than offset by a sizable increase in scrap tobacco from Cuba, which is also largely used in cigars. The January 1, 1953, stocks of Cuban tobacco in the United States totaled 16.8 million pounds compared with 17.1 million a year earlier. There was a substantial increase in imports of stemmed cigar filler and scrap from the Philippine Republic from 1951 to 1952 which offset by far the decrease in imports of unstemmed filler from that source. The January 1, 1953, stocks of Philippine Island tobacco in the United States were 1.7 million pounds compared with .6 million a year earlier and only 79,000 pounds 2 years earlier.

Imports of wrapper from Indonesia were lower in 1952 than in 1951. The January 1953 stocks of Sumatra and Java tobacco in the United States were .4 million pounds--reflecting a relatively sharp decline from a year earlier.

OUTLOOK AND SITUATION FOR TOBACCO LEAF

Flue-cured, types 11-14

Prices

The season average price received for the 1952 crop of flue-cured tobacco was 50.4 cents per pound--nearly 4 percent lower than in 1951. The average price in each of the past 2 years was reduced below the 1950 figure by the larger proportions of poorer quality tobacco resulting from the less favorable growing seasons.

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

Comparisons of 1951 and 1952 prices for selected groups of grades indicate some differences among the flue-cured Belts. In the Georgia-Florida Belt, where, in contrast to the other four Belts, tobacco is marketed untied, prices for nearly all "better," "medium," and "poorer" grades were above last season. In late July when the Georgia-Florida markets opened, the crop prospects for flue-cured as a whole were in considerable doubt because of the prolonged hot, dry weather. The Border Belt had numerous "better" grade prices that were the same as in 1952 but several "better" and "medium" grade prices averaged higher than in 1952. In the Eastern Belt, some of the "better" grade prices held even with a year ago but a large number of "better," "medium," and "poorer" grades were lower than in the 1951 season. In the Middle Belt, most "better" grade prices were practically the same or above last season's but a large group of "poorer" grades brought lower average prices. In the Old Belt, nearly all "better" grade prices equaled last season's but many "medium" and "lower" grade prices dropped below their 1951 levels. Prices for several grades tended to be a little higher in the Middle and Border Belts than in the Eastern and Old Belts. Prices for most grades in the Border and Middle Belts averaged 4 to 9 cents above the respective loan rates and in the Eastern and Old Belts, 2 to 7 or 8 cents above the respective loan rates. However, for several grades, prices were the same in all four Belts at 1 cent above the loan rate. In the earliest markets to open, Georgia-Florida, prices for most grades averaged 6 to 15 cents over the respective loan rates.

Table 9.- Flue-cured tobacco; Average prices for gross sales (includes resales) by belt, 1947-52

Crop Year	Old Belt : type 11(a)	Middle Belt : type 11(b)	Eastern : N. C. : type 12	Border : Belt : type 13	Geo.-Fla. : type 14
	: Cents per : pound	: Cents per : pound	: Cents per : pound	: Cents per : pound	: Cents per : pound
1947	: 38.1	: 42.2	: 43.0	: 41.9	: 37.8
1948	: 49.2	: 50.1	: 49.3	: 50.5	: 47.2
1949	: 45.5	: 47.7	: 48.8	: 48.9	: 40.1
1950	: 53.4	: 56.2	: 56.5	: 55.4	: 48.1
1951	: 50.5	: 53.8	: 55.1	: 51.9	: 46.3
1952 <u>1/</u>	: 48.4	: 49.4	: 50.5	: 51.9	: 49.2

1/ Preliminary.

The Government support level for the 1952 season was 50.6 cents per pound--nearly the same as the 50.7 cents in 1951. The 1953 crop will be supported at 90 percent of parity. The 1953 support level is likely to be lower than the 1952 level. The adjusted base price from which the 1953 flue-cured parity is computed is lower than in 1952. Also, the parity index (prices paid by farmers, including interest, taxes, and wage rates) in January was 1 to 2 percent less than it was in January or June 1952. Ninetypercent of the January 1953 flue-cured parity price is 48.2 cents per pound.

The flue-cured placed under Government loan in the 1952 season is classified in two categories: (1) the "regular" loan quantities and (2) that which was received in connection with the British option arrangements. A total of 165 million pounds or 12 percent of the crop went into regular loans compared with 142 million pounds, nearly 10 percent, of the 1951 crop. In the 1952 season the proportions of the marketings in each Belt that went into regular loans were about as follows: type 14, 4 percent; type 13, 7 percent; types 12 and 11(b), 12 percent; and type 11(a), 21 percent. In the 1952 season, considerably less of types 14 and 13 but considerably more of types 12 and 11 went under loan than in 1951.

The quantity of 1952 flue-cured held in loan stocks under British option amounts to almost 80 million pounds (farm-sales weight).

All flue-cured remaining in Government loan stocks as of January 31 totaled about 330 million pounds (farm-sales weight). About 74 percent was 1952 crop tobacco; 22 percent, 1951 crop; and the remaining 4 percent, 1950 crop.

Supplies

The 1952-53 total supply of flue-cured tobacco at 3,099 million pounds is 3 percent larger than in 1951-52. The 1952 crop of 1,368 million pounds was 6 percent below the 1951 crop but still the second largest ever produced. The carry-over on July 1, 1952, was 1,731 million pounds--11 percent above the previous July 1 figure.

The 1953 flue-cured marketing quota announced in July 1952 called for about a 12 percent reduction in 1953 acreage allotments. However, the quota figure was revised upward in early January. Consequently, the 1953 acreage allotments for most farms will be about 8 percent less than in 1952. The 1953 total allotment amounts to about 1,048,000 acres. If harvested acreage in 1953 comes within 1 or 2 percent of the allotment and yields approximate the recent 3-year average, production would be about 1,325 million pounds. Carry-over on July 1, 1953, seems likely to be near 1,875 million pounds and with this year's crop, will provide total supplies for 1953-54 amounting to around 3,200 million pounds--3 percent above the 1952-53 level.

Table 10.- Flue-cured tobacco, types 11-14; Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-52

Year	(Farm-sales weight)						Average price per pound
	Production	Stocks July 1	Supply	Disappearance 1/			
	Million pounds	Million pounds	Million pounds	Total	Domestic	Exports	
Ave. 1934-38	741	845	1,586	704	338	366	22.9
1939	1,171	946	2,117	707	417	290	14.9
1940	760	1,410	2,170	577	421	156	16.4
1941	650	1,593	2,243	783	492	291	28.1
1942	812	1,460	2,272	893	604	289	38.4
1943	790	1,379	2,169	980	625	355	40.2
1944	1,087	1,189	2,276	1,150	696	454	42.4
1945	1,173	1,126	2,299	1,152	667	485	43.6
1946	1,352	1,147	2,499	1,212	659	553	48.3
1947	1,317	1,287	2,604	1,054	695	359	41.2
1948	1,090	1,550	2,640	1,102	720	382	49.6
1949	1,115	1,538	2,653	1,168	729	439	47.2
1950	1,257	1,485	2,742	1,184	756	428	54.7
1951 2/	1,452	1,558	3,010	1,279	777	502	52.4
1952 2/	1,368	1,731	3,099				50.4

1/ Year beginning July 1.

2/ Subject to revision.

Domestic Use and Exports

During the current marketing year (July 1952-June 1953), the domestic use of flue-cured is expected to top the 777 million pound record of 1951-52 and probably exceed 800 million pounds. During the first half of 1952-53, domestic cigarette manufacture was running about 5 percent ahead of that in the same period a year earlier. In addition to the gain in numbers, the proportion which is "king" size, and thus utilizes more tobacco per cigarette, has increased. Flue-cured exports during 1952-53 may drop as much as 20 percent below the 1951-52 figure of 502 million pounds (farm-sales weight), which was the second largest on record. It appears unlikely that they will go above 415 million pounds in the current marketing year.

During July-December 1952, flue-cured exports totaled 215 million pounds (farm-sales weight) compared with 362 million pounds in the same period of 1951. The United Kingdom took 82 percent less but all other countries combined took 34 percent more. Western Germany, the second ranking destination in recent years, got about 2 1/3 times as much as in 1951; third, Australia, 32 percent more; fourth, Netherlands, about 3 times as much; fifth, the Philippine Republic, over twice as much, sixth, Ireland, 29 percent less; seventh, Indonesia, 72 percent more; eighth, Sweden, 20 percent less; ninth, Japan got over 6 million pounds in

contrast to about three-fourths of a million in 1951; and tenth, Belgium, 59 percent less. All of the above countries took quantities of flue-cured ranging upward from 5 million pounds in July-December 1952. Numerous other countries also take significant, though smaller, quantities of flue-cured. Norway, Finland, Thailand, Mexico, Indochina, and Pakistan each took more in July-December 1952 than in the same period a year earlier but Denmark, Portugal, Switzerland, Malta, Egypt, British East Africa, India, Hong Kong, and New Zealand took less.

Domestic demand for the 1953 crop of flue-cured is expected to remain strong since manufacturers will continue to require a large volume of leaf to meet consumer demand for cigarettes. The export demand for flue-cured is much more uncertain although there seems to be some likelihood that more may be exported in 1953-54 than in the current year. Stocks of United States flue-cured abroad are on the low side in relation to consumption. The major problem will continue to be the availability of dollar exchange to foreign purchasers.

Burley, Type 31

Prices

Burley auction markets began on December 1 and by mid-February, sales were practically completed. Auction prices averaged 50.2 cents per pound--about 1 cent less than the record season average for the 1951 crop. The general quality of the crop was slightly lower than last season's. Prices of most better grades were 1 or 2 cents above or the same as 1951 season prices. There were some declines in some poorer grades of "leaf" and "tips." About 54 percent of the Burley crop was sold before the holiday closings--compared with 64 percent in the 1951-52 season and 57 percent in the 1950-51 season. The crop turned out larger than anticipated, and following mid-January, prices for about half of the grades declined by varying amounts.

The 1952 support price was 49.5 cents per pound compared with 49.8 cents in the 1951 season. For the majority of grades, season prices averaged from 2 to 5 cents or more above the loan rates. Growers placed about 104 million pounds of tobacco under Government loan--approximately 16 percent of total deliveries. In 1951-52, the proportion was practically the same; but the quantity amounted to 97 1/2 million pounds, since the 1951 crop was smaller. The stocks of Burley tobacco in Government loan stocks at the end of January totaled about 209 million pounds (farm-sales-weight equivalent)-- 48 percent, 1952 crop; 43 percent, 1951 crop; and 9 percent, 1950 crop. The price support for the 1953 crop (at 90 percent of parity) may be a little lower than it was for the 1952 crop. The adjusted base price from which the 1953 Burley parity is computed is lower than in 1952. The parity index (prices paid by farmers, including interest, taxes, and wage rates) in January 1953 was 2 percent below what it was in January 1952 and 1 percent lower than the September 1952 level. The parity index is not expected to increase enough in the next several months to result in a support level that would equal that applying to the 1952 crop.

Supplies Increase

Total supplies of Burley for 1952-53 (based on October 1 stocks and estimated producers' marketings) approximate 1,706 million pounds--7 percent larger than in 1951-52. The 1952 crop turned out larger than anticipated earlier--probably 4 percent above the previous record crop of 1951. The carry-over on October 1, 1952, was 1,061 million pounds--8 percent larger than a year earlier.

The 1953 marketing quota for Burley, proclaimed in early November 1952, results in acreage allotments totaling 430,000 compared with 474,750 allotted in 1952. For most farms, the acreage allotment will be about 10 percent smaller in 1953 than in 1952. The general reduction in allotments for 1953 does not apply to allotments of seven-tenths of an acre or less unless they exceed 25 percent of the cropland on the farm. This is in accord with Public Law 528, approved in July 1952. A further provision was that no allotment of 1 acre could be reduced by more than one-tenth of an acre in any year.

If the 1953 harvested acreage coincides fairly closely with the allotted acreage and yields per acre equal either the most recent 3- or 5-year averages (1950-52 or 1948-52), this year's crop will be nearly 570 million pounds. Carry-over next October 1 may approximate 1,155 million pounds and added to the crop would provide 1953-54 total supplies of 1,725 million pounds. This would be only slightly above the present estimate of this year's supply.

Table 11.- Burley tobacco, type 31: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-52

(Farm-sales weight)

Year	: Production :	: Stocks : : Oct. 1 :	: Supply :	: Disappearance 1/ :			: Average price per pound :
				: Total :	: Domestic 2/ :	: Exports 2/ :	
	: Million pounds :	: Million pounds :	: Million pounds :	: Million pounds :	: Million pounds :	: Million pounds :	: Cents :
Av. 1934-38	: 287	: 701	: 988	: 314	: 302	: 12	: 22.2
1939	: 395	: 684	: 1,079	: 317	: 305	: 12	: 17.3
1940	: 377	: 762	: 1,139	: 341	: 335	: 6	: 16.2
1941	: 337	: 798	: 1,135	: 380	: 374	: 6	: 29.2
1942	: 344	: 755	: 1,099	: 413	: 407	: 6	: 41.8
1943	: 392	: 686	: 1,078	: 427	: 418	: 9	: 45.6
1944	: 591	: 651	: 1,242	: 483	: 474	: 9	: 44.0
1945	: 577	: 759	: 1,336	: 483	: 448	: 35	: 39.4
1946	: 614	: 853	: 1,467	: 526	: 476	: 50	: 39.7
1947	: 485	: 941	: 1,426	: 524	: 496	: 28	: 48.5
1948	: 603	: 902	: 1,505	: 531	: 489	: 42	: 46.0
1949	: 561	: 974	: 1,535	: 535	: 494	: 41	: 45.2
1950	: 499	: 1,000	: 1,499	: 518	: 488	: 30	: 49.0
1951 2/	: 618	: 981	: 1,599	: 538	: 506	: 32	: 51.2
1952 2/	: 3/645	: 1,061	: 1,706				: 4/50.2

1/ Year beginning October 1. 2/ Subject to revision. 3/ Estimated producers' sales. 4/ Auction average.

On November 22, 1952, 97 percent of the 179,493 Burley growers voting favored marketing quotas applicable to the 1953, 1954, and 1955 crops. The proportion in favor of quotas for 1953 was 98.3 percent.

Domestic Use and Exports

During the marketing year ending September 30, 1952, domestic use of Burley at 507 million pounds was at a record high--nearly 4 percent larger than in 1951-52. The greater use in cigarette manufacture more than offsets the probable smaller use in smoking and chewing tobacco. The October 1951-September 1952 cigarette manufacture was 6.7 percent larger than in 1950-51 but smoking and plug chewing declined 7.4 and 1.5 percent, respectively. The domestic use of Burley in 1952-53 seems likely to exceed that of 1951-52 since cigarette output is expected to reach a new high.

The 1951-52 exports of Burley at 31 1/2 million pounds (farm-sales weight) were 5 percent above 1950-51 but about one-fourth below each of the previous 2 years. Germany, accounting for about three-tenths of the total in 1951-52, took 50 percent more than in 1950-51 and Belgium, accounting for almost one-sixth, took 33 percent more. Next ranking outlets and the changes from 1950-51 were: Portugal, 32 percent less; Sweden, about the same in both years; Mexico, 16 percent more; Denmark, 19 percent less; and Austria, 6 percent more. All of the foregoing took upwards of 1 million pounds of Burley. Among other important foreign destinations were France, Egypt, Republic of the Philippines, Finland, the United Kingdom, Guatemala, and Chile, all of which took larger amounts in 1951-52 than in 1950-51 and Norway, Netherlands, Switzerland, Italy, Argentina, all of which took less. Spain and Italy took a sizable quantity in 1950-51 but none in 1951-52.

In the first quarter of 1952-53 (October-December 1952), Burley exports totaled 7.4 million pounds (farm-sales weight) compared with 8.1 million pounds in the same period a year earlier. Principal destinations were Sweden, Mexico, Denmark, Belgium, Germany, the Philippines, and Portugal.

Maryland, Type 32 3/

Prices

Maryland tobacco auctions usually open before mid-May of the year following production. Approximately nine-tenths of Maryland tobacco is marketed at auction and the rest at the Baltimore hogshead market. For the 1952 calendar year, the preliminary average price received, principally for 1951 crop tobacco, was 44.3 cents per pound--7 percent less than a year earlier and the lowest in 4 years. Better quality than in the previous season kept the general average from dropping even more. Many individual grade prices declined more than 7 percent. Growers previously had

3/ In 1952, the Congress amended the Agricultural Adjustment Act of 1938 to provide that for the purposes of marketing quotas and, when in effect, the sliding scale price supports, the carry-over and total supply of Maryland tobacco would be computed on the basis of January 1 following the beginning of the marketing year instead of on the basis of October 1, as heretofore. Inasmuch as the definition of the marketing year, itself, was not changed, the discussion and statistical table are in terms of the October-September period.

disapproved marketing quotas for the 1951 crop, making it ineligible for Government price support. Also disapproved was a quota on the 1952 crop so that under existing law, no price support will be available when auctions commence this spring.

The 1953 crop, most of which will be marketed in the spring and summer of 1954, will receive Government price support at 90 percent of parity. The growers voted in favor of a quota on the 1953 crop by 74 percent in a referendum held on October 29, 1952. Growers are given the alternatives of approving quotas for 3 years, 1 year, or disapproving them. About 64 1/2 and 9 1/2 percent of the growers favored quotas for 3 years and 1 year, respectively. A two-thirds majority is required to place a marketing quota into effect. The January 1953 parity price for Maryland tobacco was 56.4 cents per pound--4.6 percent less than in January 1952. The adjusted base price from which the 1953 parity is computed and also the parity index (prices paid by farmers including interest, taxes, and wage rates) are lower than a year ago.

The quantity of Maryland tobacco remaining under Government loan from the 1948-50 support programs at the end of January 1953 was 7 3/4 million pounds--68 percent, 1950 crop; 13 percent, 1949 crop; and 19 percent, 1948 crop.

Table 12.- Maryland tobacco, types 32: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-52

Year	Production : Million : pounds	Stocks : Oct. 1 : Million : pounds	(Farm-sales weight)				Average : price per : pound : Cents	Stocks : following : Jan. 1 : Million : pounds
			Production: plus Oct. 1: stocks : Million : pounds	Disappearance 1/				
				Total : Million : pounds	Domestic: 2/ : Million : pounds	Exports: 2/ : Million : pounds		
Average:								
1934-38:	27.5	41.3	68.8	26.5	21.1	5.4	19.7	38.4
1939	32.8	41.4	74.2	26.5	22.6	3.9	21.1	36.3
1940	32.6	47.7	80.3	28.5	25.9	2.6	33.0	43.2
1941	31.2	51.8	83.0	27.2	26.1	1.1	30.1	45.0
1942	28.1	55.8	83.9	34.4	32.2	2.2	56.5	47.7
1943	20.8	49.5	70.3	25.1	23.8	1.3	45.3	43.8
1944	38.2	45.2	83.4	31.2	28.8	2.4	55.5	37.6
1945	18.4	52.2	70.6	30.3	24.2	6.1	57.0	46.5
1946	46.2	40.3	86.5	34.0	28.3	5.7	44.5	32.4
1947	37.8	52.5	90.3	34.3	27.0	7.3	42.8	44.8
1948	35.0	56.0	91.0	37.0	27.7	9.3	54.4	46.9
1949	41.2	54.0	95.2	35.4	28.0	7.4	48.3	45.5
1950	40.0	59.8	99.8	35.5	27.1	8.4	48.2	53.4
1951 2/:	41.6	64.3	105.9	33.3	26.7	6.6	44.9	59.3
1952 2/:	40.8	72.6	113.4					64.9

1/ Year beginning October 1. 2/ Subject to revision. 3/ Public Law 464-82nd Congress (an amendment to previous Agricultural legislation) provides that for the purposes of marketing quotas and when in effect, the sliding-scale price support, the carry-over and total supply of Maryland tobacco shall be computed as of January 1 following the beginning of the marketing year--defined as the October 1-September 30 period.

Stocks and Production

Manufacturers' and dealers' stocks of Maryland tobacco on October 1, 1952; totaled 72.6 million pounds--13 percent larger than a year earlier and above any previous October 1 figure. The 1952 production is estimated at 40.8 million pounds--2 percent smaller than in 1951.

The 1952-53 total supply, according to the legal definition applying to Maryland tobacco; is the 1952 production plus the January 1, 1953, carry-over. January 1 stocks were 64.9 million pounds. Thus, total supply on this basis would be 105.7 million pounds--almost 5 percent above the corresponding figure for a year earlier.

The 1953 marketing quota results in allotments of approximately 52,900 acres. The 1952 harvested acreage is estimated at 51,000. If the 1953 harvested acreage should approximate the allotment and yields per acre are near the average of recent years, the 1953 crop would reach about 42 million pounds. A crop of this size plus probable stocks next January 1 would provide a total supply probably 2 or 3 percent above the 105.7 million pound level for the current year.

Domestic Use and Exports

Domestic use of Maryland tobacco (largely in cigarettes) during October 1951-September 1952 amounted to 26.7 million pounds--slightly lower than in 1950-51 despite the increase in cigarette manufacture. Some increase in domestic use may occur in 1952-53.

The 1951-52 exports of Maryland tobacco at 6.6 million pounds (farm-sales weight) dropped by more than one-fifth from 1950-51 and were the smallest since 1946-47. Switzerland, accounting for almost three-fourths of the total, got practically the same in both recent years, but France, the second ranking outlet in 1950-51 (getting over 1 million pounds), got only a negligible quantity in 1951-52. Spain got nearly one-half million pounds in 1950-51 but only about one-fifth as much in 1951-52. Also, less went to Netherlands, Germany, and French Morocco, although more went to Belgium, Tunisia, and Algeria.

In October-December 1952, exports of Maryland tobacco totaled only 1.2 million pounds (farm-sales weight) compared with 1.7 million pounds in the same period a year earlier. Major destinations were Switzerland, Netherlands, and Germany.

Fire-Cured, Types 21-23

Prices

Auctions of Virginia fire-cured (type 21) opened in early December and for Kentucky-Tennessee fire-cured, about mid-January. The marketing season for type 21 closed about mid-February and prices for the season's sales averaged 35.4 cents per pound, 9 percent less than the record high for the previous season and 2 percent less than the 1950 season average. Through late February, the average price received for type 22 (Eastern District Kentucky-Tennessee) was 39.2 cents per pound--4 percent lower than in the comparable period of last season. The average price received for type 23 (Western District--mostly Kentucky) was 35.1 cents per pound--about 1 percent higher than a year earlier. The 1951 season averages for both Kentucky-Tennessee types of fire-cured were above any previous seasons'.

The 1952 price support level (computed at 75 percent of the Burley loan rate) is 37.1 cents per pound—slightly lower than in the 1951 marketing season. Growers placed about 2.4 million pounds of type 21, 4.7 million pounds of type 22, and 1.1 million pounds of type 23 under Government loan. These quantities represented about 19, 17, and 10 percent, respectively, of total deliveries to market through late February. Compared with last season as a whole, the proportions of types 22 and 23 going under loan this season were larger but for type 21 the proportion was about the same in both seasons. Total fire-cured tobacco under Government loan at the end of January amounted to 51 1/2 million pounds (equivalent farm-sales weight). About 8 percent was 1952 crop tobacco, 12 percent from the 1951 crop, 20 percent from the 1950 crop, and 60 percent from the 1946-49 crops.

Table 13.- Fire-cured tobacco, types 21-24: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-52.

Year	Production	Stocks Oct. 1	Supply			Disappearance 1/		Average price per pound
			Total	Domestic	Exports	2/	2/	
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Cents
Av. 1934-38:	110.2	194.2	304.4	123.0	53.2	69.8		10.2
1939	99.4	136.2	235.6	94.0	55.1	38.9		10.6
1940	106.5	141.6	248.1	64.2	45.6	18.6		9.5
1941	69.7	183.9	253.6	69.0	51.5	17.5		14.1
1942	71.5	184.6	256.1	76.3	60.7	15.6		17.1
1943	64.9	179.8	244.7	71.2	54.5	16.7		23.4
1944	66.1	173.5	239.6	107.8	43.9	63.9		24.5
1945	58.3	131.8	190.1	85.2	37.6	47.6		31.5
1946	108.9	104.9	213.8	70.4	36.0	34.4		26.0
1947	86.4	143.4	229.8	67.2	36.9	30.3		29.5
1948	73.2	162.6	235.8	78.6	35.4	43.2		31.9
1949	72.2	157.2	229.4	64.7	35.4	29.3		29.8
1950	58.3	164.7	223.0	75.7	35.9	39.8		31.2
1951 <u>2/</u>	59.5	147.3	206.8	59.9	31.8	28.1		40.0
1952 <u>2/</u>	55.7	146.9	202.6					3/37.4

1/ Year beginning October 1.

2/ Subject to revision.

3/ Auction average.

The 1953 price support for fire-cured may be a little lower than for 1952 since it appears that the Burley loan level will be down a little.

Supplies

Total supply of fire-cured tobacco for 1952-53 is nearly 203 million pounds, 2 percent lower than that for 1951-52 and the lowest since 1945-46. Carry-over on October 1, 1952, was 147 million pounds--practically the same as a year earlier; while 1952 production, at a little less than 56 million pounds, was down 6 percent. The 1952 crop was the smallest on record.

The 1953 allotment totals almost 57,500 acres. If growers harvest about the same proportion of the total allotment as in the last 2 years and yields per acre equal the 1943-52 average, the 1953 production would be about 57 million pounds--up slightly from 1952. Carry-over next October 1 is expected to be around 138 million pounds; and with this year's crop, 1953-54 supplies may be 195 million pounds. This would be about 4 percent smaller than for 1952-53.

Domestic Use and Exports

During the year ending September 30, 1952, domestic use of fire-cured amounted to a little less than 32 million pounds--11 percent below the preceding year. The manufacture of snuff (the major domestic outlet) declined only 2 percent between 1950-51 and 1951-52. This suggests that some other kind may have replaced fire-cured tobacco to some extent in the 1951-52 manufacture of snuff. Snuff manufacture is expected to continue stable in 1952-53.

The 1951-52 exports of all fire-cured tobacco at 28 million pounds (farm-sales weight) were nearly 30 percent lower than in 1950-51 and below any other year since 1943-44. Kentucky-Tennessee fire-cured tobacco leaf exports, accounting for nearly four-fifths of the total, dropped about one-third and Virginia fire-cured dropped about one-eighth. The major drop in Kentucky-Tennessee fire-cured exports was to France--from about 7 million pounds in 1950-51 to zero in 1951-52. The next ranking outlets in 1950-51, Switzerland and Belgium, decreased their takings by more than one-half in 1951-52. Other countries taking less were Sweden, French West Africa, Spain and Spanish Africa, Denmark, and Italy. The Netherlands and the United Kingdom were the two ranking foreign outlets for Kentucky-Tennessee fire-cured in 1951-52, taking one-half and two-thirds more, respectively, than in 1950-51. Other countries taking more were Germany, Ireland, Norway, Portugal, New Zealand, Indonesia, Cameroon, Tunisia, and Belgian Congo. More than one-fourth of the total Virginia fire-cured exports in 1951-52 went to Norway, but this was 44 percent less than her 1950-51 takings. Austria was the second ranking destination for Virginia fire-cured and took a much larger quantity than a year earlier and Germany, ranking third, took more than three times as much as in 1950-51. Australia, Trinidad, and Belgium also got more. Switzerland, Sweden, United Kingdom, Portugal, and New Zealand took less in 1951-52 than in 1950-51.

In the first quarter of the 1952-53 marketing year (October-December 1952) fire-cured tobacco exports were 10 1/2 million pounds (farm-sales weight) compared with 8 million pounds in the same period a year ago. Major destinations were Netherlands, Sweden, Switzerland, and Belgium for the Kentucky-Tennessee types and Norway and Sweden for the Virginia type.

Dark Air-Cured, Types 35-37

Prices

Auctions for Kentucky-Tennessee dark air-cured and Virginia sun-cured began during the first half of December. Sales for Green River (type 36) and Virginia sun-cured (type 37) closed at the end of January and for One Sucker (type 35), by February 12. Prices for One Sucker and Green River averaged 32.2 and 30.2 cents per pound--6 and 11 percent, respectively, below the record 1951 season averages. The 1952 averages were the second highest ever received. Quality was not as good as the year before. The 1952 season average price of Virginia sun-cured was 31.4 cents per pound--9 percent lower than the record 1951 season average. The 1952 average for Virginia sun-cured has been exceeded in several previous seasons. The quality of the recent crop was notably poorer than a year earlier.

The 1952 price support level for types 35-37 (computed at 66 2/3 percent of the Burley loan rate) was 33.0 cents per pound--slightly less than the 1951 level. Growers placed about 7.4 million pounds of One Sucker, 2.3 million pounds of Green River, and probably around 60,000 pounds of Virginia sun-cured under Government loan. These loan quantities represented about 37 percent, 22 percent, and between 1 and 2 percent, respectively, of total deliveries to the markets. In the 1951 season, 30 percent of One Sucker, 20 percent of Green River, and 1 1/2 percent of Virginia sun-cured went under Government loan. The dark air-cured tobacco remaining under Government loan at the end of January totaled about 38 million pounds (equivalent farm-sales weight). About 20 percent was 1952 crop tobacco, 19 percent from the 1951 crop, 10 percent from the 1950 crop, and 51 percent from the 1946-49 crops.

The 1953 price support for types 35-37 may be a little lower than for 1952 since it appears that the Burley loan level will be down a little.

Supplies

The 1952-53 total supply of types 35-37 (based on October 1 stocks and estimated producers' marketings) is about 105 million pounds--slightly above the 1951-52 level but below any other year since 1945-46. The carry-over on October 1 at 73 million pounds was about 1 1/2 million above a year earlier, while producers' sales were slightly larger than the combined 1951 production of types 35-37.

Table 14,- Dark air-cured tobacco, types 35-37: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-52

Year	(Farm-sales weight)						Average price per pound
	Production	Stocks Oct. 1	Supply	Disappearance 1/	Exports		
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	
Av. 1934-38	35.5	62.8	98.3	39.0	27.0	12.0	9.4
1939	44.2	56.1	100.3	34.7	27.3	7.4	7.3
1940	42.5	65.6	108.1	33.7	29.0	4.7	7.7
1941	31.5	74.4	105.9	41.9	38.9	3.0	12.0
1942	35.2	64.0	99.2	33.9	29.8	4.1	15.0
1943	30.0	65.3	95.3	37.6	34.4	3.2	27.2
1944	44.9	57.7	102.6	42.2	35.9	6.3	23.3
1945	43.6	60.4	104.0	43.6	30.5	13.1	25.2
1946	49.6	60.4	110.0	37.3	29.7	7.6	22.5
1947	37.2	72.7	109.9	32.7	26.3	6.4	25.8
1948	34.8	77.2	112.0	37.9	23.1	14.8	28.7
1949	36.2	74.1	110.3	30.5	24.3	6.2	28.2
1950	28.6	79.8	108.4	36.7	26.4	10.3	24.6
1951 ^{2/}	31.7	71.7	103.4	30.3	22.4	7.9	34.3
1952 ^{2/}	^{3/} 32.0	73.1	105.0				^{4/} 31.5

1/ Year beginning October 1.

2/ Subject to revision.

3/ Estimated producers' sales.

4/ Auction average.

The 1953 acreage allotment for types 35-36 totals about 26,600 and for type 37, 4,900 acres. The change from the 1952 allotment is relatively small. If growers harvest the same proportion of this year's total allotments as in 1952 and yields per acre equal the 1948-52 average, the 1953 crop would be roughly 30 million pounds. This, together with a probable carry-over of around 75 million pounds next October 1, would provide a total supply of 105 million pounds for 1953-54. This would be unchanged from the 1952-53 level.

Domestic Use and Exports

Domestic use of dark air-cured tobacco in the year ending September 30, 1952, was a little over 22 million pounds--about 4 million pounds lower than in the preceding year and the smallest on record. Most dark air-cured tobacco is used in chewing tobacco, which declined only slightly from 1950-51 to 1951-52.

Dark air-cured exports during the 1951-52 marketing year at 8 million pounds (farm-sales weight) were about one-fifth lower than in 1950-51. The 1951-52 exports of dark air-cured were about three-fifths in leaf form and nearly two-fifths as Black Fat. The major decline from 1950-51 to 1951-52 was in One Sucker leaf exports--more than 50 percent. Nigeria, accounting for five-eighths of One Sucker leaf, got 20 percent less. However, the big drop was in that going to Spain--from 1 1/4 million pounds in 1950-51 to none in 1951-52. Belgium also decreased her takings over 35 percent. Netherlands, Liberia, and French West Africa also took less One Sucker.

The 1951-52 exports of Green River were 6 percent smaller than in 1950-51. The United Kingdom, accounting for almost three-fifths of the total, increased her takings by more than 50 percent but this was largely offset by Spain getting none in contrast to .9 million pounds in 1950-51. Also, Belgium and Liberia took less Green River but Netherlands and Ireland took some in 1951-52 in contrast to none in 1950-51. Total exports of Black Fat declined only 3 percent from 1950-51 to 1951-52. Nigeria, accounting for 37 percent of it, got 10 percent less; but the Gold Coast, accounting for 32 percent of it, got 19 percent more. French West Africa, French Equatorial Africa and Other Portuguese Africa got less, but Camroon got more.

In October-December 1952 (first quarter of the 1952-53 marketing year), exports of One Sucker and Black Fat were substantially lower than in the same period of 1951 but Green River exports were higher. The major shipments of One Sucker went to Nigeria--of Green River, to Netherlands and of Black Fat, to Gold Coast and Nigeria.

Cigar, Types 41-62

Prices

Marketing of most cigar tobacco takes place at the "barn door" during the fall and winter. Prices for the small 1952 Pennsylvania filler crop averaged substantially above the 1951 season price of 19 cents per pound--the lowest in 8 years. The 1952 Connecticut Valley Havana Seed crop was bought unusually early following the harvest. A preliminary estimate of the 1952 crop average is 51 cents per pound compared with 42.6 cents for the 1951 crop. A considerable proportion of the 1952 Connecticut Valley Broadleaf (type 51) was sold by growers on a sorted basis at prices equal to or slightly less than in the 1951 season. Sales of Broadleaf on an unsorted bundle basis averaged about 50 cents per pound--considerably above the 1951 season average of 43 cents, when a sizeable proportion of the crop was injured by hail and pole rot. Prices for Northern Wisconsin binder grades averaged higher than a year earlier for marketings through mid-February but stemming grades and filler were substantially lower. Prices for Southern Wisconsin binder averaged lower than a year earlier and stemming ends, straight strip and crop lots were much lower. Price data for 1952 crops of other types are not yet available.

In accordance with the law, Government price supports were not made available on any 1952 crops of the continental cigar types because growers disapproved quotas on the crop in December 1951. Government price support will be in effect for the 1953 crop of types 42-44 (Ohio filler) and all binder types inasmuch as a quota on the crop was approved by more than the required two-thirds majority of growers voting in the referendum held last October. The level of price support is mandatory at 90 percent of parity.

Price support loans have been made on each crop of Puerto Rican tobacco (type 46) since 1946. A Federal marketing quota has not been in effect on Puerto Rican tobacco since supplies have been maintained in line with demand. The support level for the 1952-53 Puerto Rican tobacco is 33.1 cents per pound compared with 32.6 cents per pound a year earlier. The 1951-52 crop averaged 30 cents per pound--20 percent above the previous one.

The quantity of cigar tobacco remaining under Government loan or in CCC inventories at the end of January was 15.5 million pounds--7.7 million, type 54 (Southern Wisconsin); 2.0 million, type 52 (Connecticut Valley Havana Seed); 2.3 million, type 41 (Pennsylvania Seedleaf); 2.0 million, types 42-44 (Ohio filler); 1.1 million, type 51 (Connecticut Broadleaf); 0.4 million, type 46 (Puerto Rican); and a negligible amount of type 53 (New York and Pennsylvania Havana Seed).

Supplies

Filler: The 1952-53 total supply of continental filler types 41-44 is 205 million pounds--7 percent below the 1951-52 level. The October 1952 carry-over was 161 million pounds--2 percent more than a year earlier but the largest since 1942. The 1952 crop is estimated at 44 1/2 million pounds--29 percent less than in 1951 and the smallest since 1934. All the reduction was in the Pennsylvania Seedleaf (type 41) where acreage decreased sharply and the average yield per acre was lower. Production of the Ohio filler (types 42-44) increased moderately from 1951 to 1952.

The 1951 crop of Puerto Rican filler (type 46), harvested mostly in the early months of 1952, was about 28 million pounds--one-tenth larger than a year earlier. Early indications are that the 1952 acreage (harvestings mainly in early 1953) is up 4 percent from 1951. The January 1 stocks of Puerto Rican filler in the United States were 28.7 million pounds and on the Island, 9.1 million pounds compared with 23.1 and 13.3 million a year earlier.

Binder: The 1953-54 total supply of binder types 51-55 is near 135 million pounds--4 percent lower than for 1951-52 and 7 1/2 percent lower than 2 years ago. The October 1952 carry-over, at a little below 135 million pounds, was 5 percent below a year earlier. The 1952 production at just over 50 million pounds was slightly above that of 1951 but below any other year since 1936. The 1952 crops of Connecticut Valley Havana Seed (type 52), Southern Wisconsin (type 54), and New York and Pennsylvania Havana Seed (type 53) were smaller but the Connecticut Broadleaf (type 51) and Northern Wisconsin (type 55) were larger than a year earlier.

Table 15.- Cigar tobacco, types 41-55: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-52

Type and Year	(Farm-sales weight)				Average price per pound
	Production	Stocks October 1	Supply 1	Disappearance year beginning October 1	
	Million pounds	Million pounds	Million pounds	million pounds	Cents
Filler types 41-44 ^{2/}					
Average 1934-38	48.9	159.9	208.8	54.4	10.4
1939	63.1	141.9	205.0	54.0	11.7
1940	64.7	151.0	215.7	58.7	12.0
1941	71.2	157.0	228.2	61.4	12.5
1942	53.8	166.8	220.6	67.0	13.2
1943	47.0	153.6	200.6	55.2	18.6
1944	54.6	145.4	200.0	57.1	19.5
1945	45.4	142.9	188.3	59.5	24.0
1946	57.3	128.8	186.1	63.9	32.8
1947	60.6	122.2	182.8	59.1	30.6
1948	68.3	123.7	192.0	60.1	25.8
1949	65.4	131.9	197.3	53.5	26.2
1950	65.7	143.8	209.5	52.1	25.2
1951 ^{3/}	63.0	157.4	220.4	59.4	19.6
1952 ^{3/}	44.5	161.0	205.5		
Binder types 51-55 ^{4/}					
Average 1934-38	41.8	165.1	206.9	60.5	12.5
1939	63.3	116.6	179.9	45.0	16.6
1940	67.9	134.9	202.8	66.1	14.5
1941	61.6	136.7	198.3	60.4	16.9
1942	55.2	137.9	193.1	66.4	20.4
1943	51.0	126.7	177.7	69.2	30.3
1944	57.7	108.5	166.2	63.9	30.9
1945	63.5	102.3	165.8	62.3	47.7
1946	74.1	103.5	177.6	53.9	52.7
1947	69.4	123.7	193.1	67.3	43.4
1948	60.5	125.8	186.3	63.1	41.2
1949	61.7	123.2	184.9	49.8	36.0
1950	65.0	135.1	200.1	57.6	35.8
1951 ^{3/}	49.8	142.5	192.3	57.5	37.9
1952 ^{3/}	50.4	134.8	185.2		

^{1/} Year beginning October 1.

^{2/} Includes small quantity of type 45 in 1934-38 average.

^{3/} Subject to revision.

^{4/} Includes small quantity of type 56 through 1948.

Table 16.- Shipments of tobacco from Puerto Rico to the United States, average 1934-38, 1949-52

Classification	Average	1949	1950	1951	January-October	
	1934-38				1951	1952
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Stemmed...	17.4	10.1	9.9	10.2	6.0	10.7
Unstemmed...	.1	.2	1/	3.5	2.6	.5
Scrap.....	5.0	7.6	9.3	3.1	2.5	5.5
Total...	22.5	17.9	19.2	16.8	11.1	16.7

1/ Less. than 50,000 pounds.

1953 Marketing Quota: On October 29, 1952, growers of continental cigar filler and binder tobacco, except Pennsylvania Seedleaf (type 41), approved a marketing quota on the 1953 crop. Almost 62 percent favored marketing quotas for 3 years and in addition, 13 percent favored them for 1 year. The legal requirement to place a quota into effect is two-thirds of those voting. The 1953 acreage allotment for Ohio filler (types 42-44) is about 7,300 acres and for the binder (types 51-55, mainly in Connecticut, Massachusetts, Wisconsin, Minnesota, New York, and Pennsylvania), it is about 42,600 acres. In addition, there is about a 500-acre reserve for establishing allotments for farms upon which no tobacco of these types has been grown in the last 5 years. The 1953 allotments exceed the estimated 1952 harvested acreages in each State. The size of the 1953 crop will depend on how fully the allotments are planted and the average yields per acre. If yields are near those of recent years, the 1953 cigar filler and binder crop is likely to be above last year's. The marketing quota and acreage allotment program on types 42-44 and 51-55 was not in effect in 1952 because less than the required two-thirds majority of growers favored it, but it was in effect on the 1951 crop.

In the referendum on Pennsylvania Seedleaf (type 41), nearly 62 percent of the growers voting disapproved a quota on their 1953 crop. Some increase from the exceptionally small 1952 Pennsylvania tobacco acreage seems likely in 1953.

Wrapper: The 1952-53 supplies of cigar wrapper (types 61-62) total nearly 36 million pounds—almost 1 million pounds above the 1951-52 level. The record carry-over on July 1, 1952, was over 21 million pounds and the 1952 crop was about 14½ million pounds. A decrease of 14 percent in the Georgia-Florida (type 62) production was partially offset by a 6-percent increase in the Connecticut Valley crop (type 61) so that the total wrapper crop in 1952 was only 3 percent below 1951.

Table 17.- Cigar tobacco, types 61-62: Domestic supplies, disappearance, and season average price, average 1934-38, annual 1939-52

(Farm-sales weight)					
Type and year	Production	Stocks July 1	Supply	Disappearance year beginning July 1	Average price per pound
	Million pounds	Million pounds	Million pounds	Million pounds	Cents
Wrapper types 61-62					
Average 1934-38...	8.4	11.8	20.2	9.3	78.3
1939.....	11.4	10.1	21.5	7.9	67.7
1940.....	9.5	13.6	23.1	10.4	77.6
1941.....	10.1	12.7	22.8	9.6	98.4
1942.....	9.2	13.2	22.4	9.4	132.1
1943.....	10.0	13.0	23.0	8.7	167.7
1944.....	11.3	14.3	25.6	10.9	196.1
1945.....	11.2	14.7	25.9	12.3	197.3
1946.....	12.5	13.6	26.1	12.7	234.0
1947.....	13.5	13.4	26.9	12.4	296.0
1948.....	15.1	14.5	29.6	13.0	274.0
1949.....	17.3	16.6	33.9	14.5	201.0
1950.....	15.5	19.4	34.9	14.9	203.0
1951 ^{1/}	14.9	20.0	34.9	13.7	193.0
1952 ^{1/}	14.5	21.2	35.7		

^{1/} Subject to revision.

Domestic Use and Exports

The total disappearance of Pennsylvania and Ohio cigar filler in the year ending September 30, 1952, was about 59 million pounds compared with the 52-54 million pound level of the preceding 2 years. The great bulk was domestic use, primarily in cigars. Exports amounted to only about 1 million pounds (farm-sales weight). A sizeable quantity of cigar filler went to Indochina and also Tunisia in 1951-52 in contrast to little, if any, in 1950-51, but much less went to Algeria and Belgium. The main outlet, cigars manufactured in domestic factories, increased nearly 4 percent from 1950-51 to 1951-52.

The total disappearance of the combined binder types 51-55 in 1951-52 was about 57½ million pounds compared with an average of 54 million in the previous 2 years. Domestic use is mainly in cigars and, for certain lower grades, scrap chewing. Although, as pointed out above, cigar manufacture increased from 1950-51 to 1951-52, scrap chewing

manufacture declined about 2 percent. The 1951-52 exports of cigar binder, at nearly 3 million pounds (farm-sales weight), were 5 percent above the previous year's. More than twice as much as a year earlier went to Germany--accounting for over two-fifths of the total binder exports. Austria also got substantially more, but the quantities going to Netherlands, Belgium, Denmark, and Sweden decreased sharply. During 1952, the cigar binder exports were made up of 57 percent Connecticut Valley Havana Seed, 27 percent Connecticut Broadleaf, and 16 percent Wisconsin and other. Exports were not reported for these individual classifications prior to January 1952.

The total disappearance of wrapper (types 61-62) during July 1951-June 1952 was 13.7 million compared with the record 14.9 million in the preceding year. Exports amounted to a little over 3-1/2 million pounds (farm-sales weight) in each of the last 2 years. Germany has taken around two-thirds of the total exports of domestic wrapper in the last 2 years. In the first half of 1952-53 (July-December 1952), exports of wrapper were 6 percent lower than in the same period a year earlier. About 68 percent went to Germany--nine-tenths to West Germany and one-tenth to East Germany. Belgium and Netherlands got more than in the same period a year earlier but Denmark, Austria, and Brazil got considerably less.

Table 18.- Internal Revenue collections from tobacco products for specified periods

Period	Cigars 1/	Cigarettes 2/	Chewing and smoking	Snuff	Total 3/
	Million dollars	Million dollars	Million dollars	Million dollars	Million dollars
Average:					
1930-34	14.3	344.6	56.9	6.9	423.9
1935-39	12.8	472.0	54.9	6.7	547.6
1940-44	21.0	750.5	50.4	7.3	833.3
1945	38.2	937.2	48.6	7.9	1,034.2
1946	47.5	1,125.2	38.0	7.1	1,218.4
1947	47.1	1,175.9	35.9	7.1	1,266.7
1948	46.7	1,220.6	35.9	7.5	1,311.5
1949	43.6	1,233.1	34.9	7.4	1,320.0
1950	42.8	1,262.7	34.3	7.2	1,348.1
1951	44.0	1,359.9	30.7	6.4	1,445.8
1952	45.8	1,579.6	17.6	3.9	1,661.8

1/ Includes small cigars.

2/ Includes large cigarettes.

3/ Total includes cigarette papers and tubes, cigarette and cigar floor-taxes, and leaf dealer penalties not shown separately in this table.

Bureau of Agricultural Economics. Compiled from reports of the Bureau of Internal Revenue.

Table 19.- Acreage of tobacco in the United States, by class and type, annual 1949-52, and percentages

Class and type	1949	1950	1951 1/	1952 1/	Percentage change 1951 to 1952
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	Percent
Old and Middle Belt, type 11	332.0	348.0	399.0	400.0	+ 0.3
Eastern North Carolina, type 12	304.0	307.0	356.0	356.0	.0
South Carolina, type 13	188.0	193.0	224.0	224.0	.0
Georgia and Florida, type 14	111.4	110.4	134.1	134.3	+ .1
Total flue-cured, types 11-14	935.4	958.4	1,113.1	1,114.3	+ .1
Virginia, type 21	10.7	9.8	10.0	9.9	- 1.0
Kentucky and Tennessee, type 22	34.4	29.8	28.2	27.9	- 1.1
Kentucky and Tennessee, type 23	15.5	13.3	10.8	9.1	- 15.7
Henderson, type 24	.1	.0	.0	.0	.0
Total fire-cured, types 21-24	60.7	52.9	49.0	46.9	- 4.3
Burley, type 31	447.4	408.3	456.1	462.7	+ 1.4
Maryland, type 32	50.0	50.0	53.0	51.0	- 3.8
One Sucker, type 35	17.9	16.2	15.0	14.7	- 2.0
Green River, type 36	10.0	9.3	8.0	8.0	.0
Virginia sun-cured, type 37	4.0	3.2	3.5	3.4	- 2.9
Total dark air-cured, types 35-37	31.9	28.7	26.5	26.1	- 1.5
Pennsylvania Seedleaf, type 41	35.4	36.8	34.6	23.2	- 32.9
Miami Valley, types 42-44	7.0	7.8	4.9	5.7	+ 16.3
Total cigar filler, types 41-44	42.4	44.6	39.5	28.9	- 26.8
Connecticut Valley Broadleaf, type 51	9.0	10.1	8.7	9.6	+ 10.3
Conn. Valley Havana Seed, type 52	8.6	8.8	6.6	5.9	- 10.6
N. Y. and Pa. Havana Seed, type 53	1.0	1.0	.6	.5	- 16.7
Southern Wisconsin, type 54	8.5	9.3	6.9	6.6	- 4.3
Northern Wisconsin, type 55	12.4	12.8	8.9	9.8	+ 10.0
Georgia and Florida sun-grown, type 56	.0	.0	.0	.0	.0
Total cigar binder, types 51-56	39.5	42.0	31.7	32.4	+ 2.2
Conn. Valley Shade-grown, type 61	10.5	8.3	8.4	7.8	- 7.1
Ga. and Fla. Shade-grown, type 62	5.1	5.4	5.2	5.1	- 1.9
Total cigar wrapper, types 61-62	15.6	13.7	13.6	12.9	- 5.1
Louisiana Perique, type 72	.3	.4	.4	.3	- 25.0
Total all types	1,623.2	1,599.0	1,782.9	1,775.5	- .4

1/ Preliminary.

Table 20.- Tobacco manufactures: Net sales, net income, and profit ratios, annual 1947-51, by quarters 1951-52

Year and quarter:	Net sales	Net income		Profit			
		: Before federal tax	: After federal tax	Per dollar of sales		As percentage of stockholders' equity (annual basis)	
				: Before federal tax	: After federal tax	: Before federal tax	: After federal tax
	Million dollars	Million dollars	Million dollars	Cents	Cents	Percent	Percent
1947	2,641	178	109	6.7	4.1	16.6	10.1
1948	3,081	257	159	8.3	5.2	22.0	13.7
1949	3,061	250	156	8.2	5.1	20.2	12.6
1950	3,129	281	152	9.0	4.9	21.3	11.5
1951	3,329	294	129	8.8	3.9	21.8	9.6
				New Series 1/			
1951	3,378	295	129	8.7	3.8	21.7	9.5
1951							
1	762	68	32	8.9	4.2	20.3	9.5
2	840	69	34	8.2	4.0	20.4	10.0
3	865	76	30	8.8	3.5	22.4	8.8
4	911	82	33	9.0	3.6	23.8	9.6
1952							
1	846	61	25	7.2	3.0	17.7	7.3
2	919	69	28	7.5	3.0	19.1	7.7
3	978	80	33	8.2	3.4	21.9	9.0

1/ Although not strictly comparable to the series previously published for the years 1947-50, the differences disclosed by comparing the new series with the old series for the year 1951 are relatively minor.

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