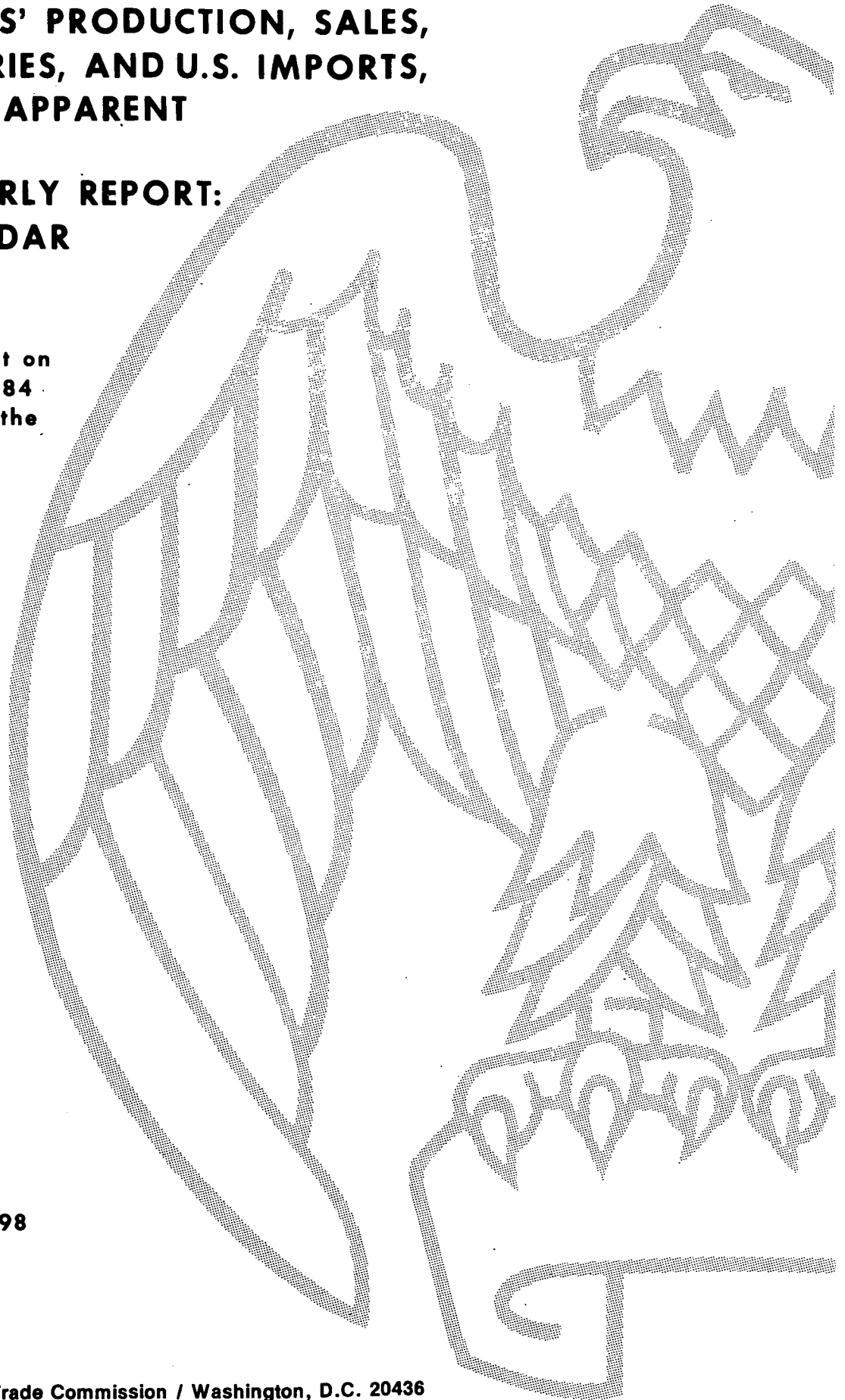


**PROCESSED MUSHROOMS:
U.S. PRODUCERS' PRODUCTION, SALES,
AND INVENTORIES, AND U.S. IMPORTS,
EXPORTS, AND APPARENT
CONSUMPTION
TENTH QUARTERLY REPORT:
SECOND CALENDAR
QUARTER 1979**

**Report to the President on
Investigation No. 332-84
Under Section 332 of the
Tariff Act of 1930,
as Amended**

**USITC PUBLICATION 998
AUGUST 1979**



UNITED STATES INTERNATIONAL TRADE COMMISSION

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August 29, 1979

USITC 79-071

USITC PUBLISHES TENTH REPORT OF CERTAIN QUARTERLY STATISTICS FOR PROCESSED MUSHROOMS

The United States International Trade Commission has completed its tenth quarterly report on processed mushrooms made pursuant to a Presidential request dated March 10, 1977. It covers April-June of 1978 and 1979, and the marketing years 1976/77, 1977/78, and 1978/79.

This report, which is sent to the Special Representative for Trade Negotiations, provides information for monitoring import competition in the U.S. market for processed mushrooms. It also contains data on the inventories, production, and sales of U.S. canners of mushrooms, by container size and style of pack; U.S. sales of frozen mushrooms; U.S. imports for consumption, by country of origin; U.S. exports; and apparent U.S. consumption.

For the second quarter of 1979, apparent U.S. consumption of processed mushrooms amounted to 49.6 million pounds, down slightly from the level of the comparable quarter of 1978. U.S. imports of processed mushrooms during April-June 1979 declined to 25.8 million pounds, a decrease of over 12 percent compared to the same quarter of 1978. Imports supplied 52 percent of apparent consumption in the latest quarter, compared with 54 percent during the second quarter of 1978. U.S. production in the second quarter was 12 percent lower than domestic output in the second quarter of 1978.

A comparison of data for the marketing years 1977/78 and 1978/79 shows that U.S. production, sales by domestic producers (except for sales of frozen mushrooms), imports, and consumption were all down in the most recent period with the ratio of imports to consumption dropping from 48 percent to 47 percent. The data for the most recent marketing year also indicate that compared to two years ago (i.e., the marketing year 1976/77) canned mushroom production and sales decreased, while sales of frozen mushrooms as well as imports and apparent consumption increased. The ratio of imports to consumption rose from 42 percent to 47 percent over the same 3-year period.

Copies of the report (USITC Publication 998) can be obtained by calling (202)523-5178, or from the Office of the Secretary, 701 E Street NW., Washington, D.C. 20436.

HIGHLIGHTS OF THE TENTH QUARTERLY REPORT ON PROCESSED MUSHROOMS

For the second quarter of 1979, a period normally characterized by high domestic production because of favorable climatic conditions, both production and sales of canned mushrooms dropped appreciably compared to the same quarter a year earlier. Imports also decreased on a comparable basis. During the second quarter domestic production totaled 23.6 million pounds; sales, 21.2 million pounds; and imports, 25.8 million pounds. On a percentage basis, the decreases for these categories amounted to 12 percent, 10 percent, and 12 percent, respectively. Inventories of canned mushrooms also declined in the second quarter--to 20 million pounds, a 6 percent decrease. Apparent consumption correspondingly fell and totaled 49.6 million pounds, down 8 percent. The ratio of imports to consumption decreased from 54 percent to 52 percent. The only category that showed an increase between the two second quarter periods was sales of frozen mushrooms--more than doubling to 2.7 million pounds.

Imports from Taiwan, the principal U.S. supplier, at 11.9 million pounds, were off substantially both in quantity and share of the U.S. import market. However, the Republic of Korea (the second principal supplier) and Hong Kong increased their shipments to the United States in both quantity (to just over 8.8 million pounds and to 4.1 million pounds, respectively) and share of U.S. imports. The market share of the Republic of Korea rose from 28 percent to 34 percent and that of Hong Kong from 8 percent to 16 percent.

The performance of the processed mushroom industry in the second quarter is indicative of the industry's performance for the most recent marketing year (July 1978-June 1979). Production and sales of canned mushrooms, as well as imports and apparent consumption, declined compared to the preceding marketing year (1977/78), with the ratio of imports to consumption declining from 48 percent to 47 percent. In the most recent marketing year, domestic production totaled 90.3 million pounds; sales, 90.7 million pounds; and imports, 86.2 million pounds. On a percentage basis, these figures indicate decreases from the preceding marketing year of 5 percent for domestic production and sales and of 6 percent for imports. Apparent consumption correspondingly fell 4 percent to 184.1 million pounds.

During the 3-year period, 1976/77 to 1978/79, the performance of the processed mushroom industry was quite varied. Production, sales, and ending inventories of canned mushrooms were in a declining trend but domestic imports and apparent consumption as well as sales of frozen mushrooms all increased, with the ratio of imports to consumption rising from 42 percent to 47 percent during the period. In regard to frozen mushrooms, sales over the 3-year period increased steadily both in quantity and relative to sales of canned mushrooms and reached 7.8 million pounds in 1978/79. In 1976/77, sales of frozen mushrooms were equivalent to 4 percent of canned mushroom sales and by 1978/79 sales of frozen mushrooms had increased to nearly 9 percent of canned mushroom sales.

A REPORT OF CERTAIN QUARTERLY STATISTICS FOR PROCESSED MUSHROOMS
FOR SPECIFIED PERIODS

(The information provided in this report was compiled by the United States International Trade Commission as requested by the President in accordance with section 332(g) of the Tariff Act of 1930, as amended (19 U.S.C. 1332(g)), in order to monitor import competition in the domestic market for processed mushrooms. Data included herein cover the stocks, production, and sales of U.S. producers of canned mushrooms, sales of U.S. processors of frozen mushrooms, imports under item 144.20 of the Tariff Schedules of the United States, exports, and apparent consumption)

(In thousands of pounds, drained-weight basis)

Item	April-June		Marketing year		
	1978	1979	July 1, 1976- June 30, 1977	July 1, 1977- June 30, 1978	July 1, 1978- June 30, 1979
Carry-in stocks of					
canned mushrooms-----	18,545	17,666	10,745	22,744	21,389
Carry-out stocks of					
canned mushrooms:					
9 ounces or less:					
Whole-----	815	765	932	815	765
Sliced-----	1,831	1,714	2,604	1,831	1,714
Other-----	12,752	13,251	12,693	12,752	13,251
Total-----	15,389	15,730	16,229	15,398	15,730
Over 9 ounces:					
Whole-----	196	129	143	196	129
Sliced-----	742	828	946	742	828
Other-----	5,053	3,357	5,426	5,053	3,357
Total-----	5,991	4,314	6,515	5,991	4,314
Total carry-out					
stocks-----	21,389	20,044	22,744	21,389	20,044
Production of canned					
mushrooms:					
9 ounces or less:					
Whole-----	1,336	1,009	5,637	5,435	4,334
Sliced-----	2,752	1,706	11,373	9,520	9,269
Other-----	13,541	13,083	44,808	44,059	45,010
Total-----	17,629	15,798	61,818	59,014	58,613
Over 9 ounces:					
Whole-----	244	134	746	894	606
Sliced-----	1,880	1,652	9,371	8,277	7,147
Other-----	7,124	6,047	29,594	26,435	23,908
Total-----	9,248	7,833	39,711	35,606	31,661
Total production--	26,877	23,631	101,529	94,620	90,274

(The information provided in this report was compiled by the United States International Trade Commission as requested by the President in accordance with section 332(g) of the Tariff Act of 1930, as amended (19 U.S.C. 1332(g)), in order to monitor import competition in the domestic market for processed mushrooms. Data included herein cover the stocks, production, and sales of U.S. producers of canned mushrooms, sales of U.S. processors of frozen mushrooms, imports under item 144.20 of the Tariff Schedules of the United States, exports, and apparent consumption)

(In thousands of pounds, drained-weight basis)

Item	April - June		Marketing year		
	1978	1979	July 1, 1976- June 30, 1977	July 1, 1977- June 30, 1978	July 1, 1978- June 30, 1979
Sales:	:	:	:	:	:
Canned mushrooms:	:	:	:	:	:
9 ounces or less:	:	:	:	:	:
Whole-----:	1,295	1,021	5,174	5,606	4,327
Sliced-----:	2,441	2,047	11,156	10,300	9,369
Other-----:	12,070	10,603	39,551	45,471	45,250
Total-----:	15,806	13,671	55,881	61,377	58,946
Over 9 ounces:	:	:	:	:	:
Whole-----:	182	174	675	734	670
Sliced-----:	1,889	1,705	9,063	8,665	7,434
Other-----:	5,645	5,690	25,222	24,326	23,697
Total-----:	7,716	7,569	34,960	33,725	31,801
Total sales,	:	:	:	:	:
canned-----:	23,522	21,240	90,841	95,102	90,747
Frozen mushrooms <u>1/</u> ----	1,240	2,719	3,522	4,417	7,752
Exports <u>2/</u> -----:	99	101	256	258	577
Imports from--	:	:	:	:	:
Taiwan-----:	17,413	11,889	42,984	57,218	42,128
Republic of Korea-----:	8,308	8,811	22,213	23,656	27,002
Hong Kong-----:	2,455	4,078	963	7,372	12,613
All other-----:	1,262	983	3,274	3,650	4,464
Total-----:	29,438	25,761	69,434	91,896	86,207
Apparent consump-	:	:	:	:	:
tion <u>3/</u> -----:	54,172	49,619	163,541	191,157	184,129
Ratio of imports to	:	:	:	:	:
consumption percent --:	54	52	42	48	47

1/ Data on frozen mushrooms converted to drained-weight equivalents.

2/ Data on exports of canned mushrooms prior to July 1978 were compiled from official statistics of the Canadian Ministry of Industry, Trade, and Commerce. Beginning with July 1978, export data were compiled from official statistics of the U.S. Department of Commerce and represent shipments to more than 25 countries. There were 25,886 pounds of canned mushrooms exported to Canada during the 2nd quarter of 1979.

3/ Data do not take into account disappearance from losses or waste of domestic canners or changes in stocks of producers of frozen mushrooms or importers.

Source: Stocks, production, and sales were estimated from data submitted in response to questionnaires of the U.S. International Trade Commission; imports and exports were compiled from official statistics of the U.S. Department of Commerce, except as noted.

Note.--Data on stocks, production, and sales may not add because of losses.

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