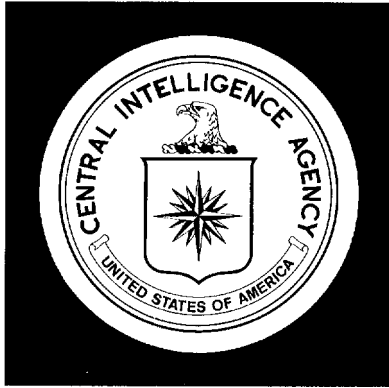


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Economic Intelligence Weekly

Secret
ER EIW 77-027
7 July 1977

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| NOCONTRACT- | Not Releasable to Contractors or Contractor/Consultants |
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| NFIBONLY- | NFIB Departments Only |
| ORCON- | Dissemination and Extraction of Information Controlled by Originator |
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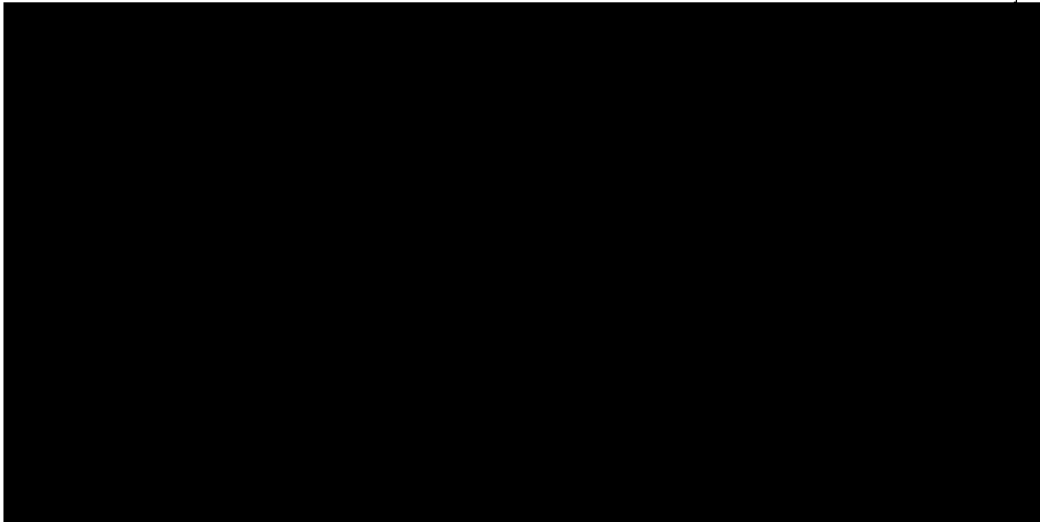
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ECONOMIC INTELLIGENCE WEEKLY

7 July 1977

25X6



Argentina: Improved Foreign Financial Situation 12

The junta, which came to power in March 1976, has brought Argentina back from the verge of international bankruptcy to a comparatively favorable trade and payments position.

Publications of Interest, Statistics

25X6

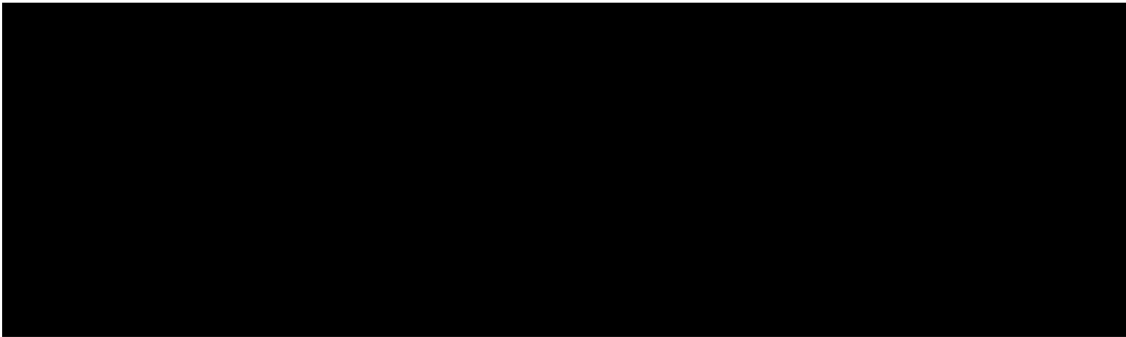
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* * * * *

ARGENTINA: IMPROVED FOREIGN FINANCIAL SITUATION*

The military junta that took over last year has brought Argentina back from the verge of international bankruptcy to a state of comfortable solvency. International obligations are being met, and reserves have reached an alltime high. The government must now induce industry to exploit the favorable foreign balance by importing more of the materials needed for raising domestic production. Economic prospects for the remainder of 1977 are good even though the government still faces serious domestic problems—inflation, a large budget deficit, and lagging industrial production. Its handling of these problems over the next year or so will help determine whether it remains in power long enough to consolidate its gains.

Inherited Problems

When the military ousted the Peronist government in March 1976, the economy was approaching disaster. The trade balance had registered a half billion dollar deficit in 1975—compared with a \$1.3 billion surplus two years earlier, when a good grain harvest boosted exports, and an \$800 million surplus in 1974. The 1975 drop resulted from a poor grain harvest, the loss of EC markets for meat, and an unrealistic exchange rate that made Argentine manufactures uncompetitive while encouraging importers to buy heavily abroad in anticipation of a major devaluation. Although the higher cost of oil imports also contributed, oil costs are less significant for Argentina than for most oil-importing countries because domestic oil production covers 85-90 percent of requirements. In addition, poor debt planning had allowed a concentration of foreign debt payments to build up in 1976. Reserves were near the vanishing point.

*This article is the fourth in a series on the foreign financial gap faced by individual LDCs. In these articles, *financial gap* is defined as the current account deficit plus amortization of medium- and long-term debt; shifts in short-term capital are not included. Previous articles have covered Mexico, the Philippines, and South Korea.

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Domestic production, furthermore, was stagnant. Government policies had discouraged agricultural output, while manufacturers found themselves in a profit squeeze between rising costs and regulated prices. Inflation was spiraling upward so rapidly that, if left unchecked, the 1976 rate would have approached 1,000 percent. With a bloated bureaucracy and an inadequate revenue structure, the government deficit was rising rapidly, and the regime was increasingly covering expenditures by issuing more currency. For their part, workers were demanding and getting sizable wage increases in an effort to offset rising prices. Argentina's foreign credit rating was poor, and the Peronist government had not yet lined up funds to cover its foreign financial gap. This gap had widened from a half billion dollars in 1974 to \$2 billion in 1975.

Argentina: Foreign Financial Gap

| | 1973 | 1974 | 1975 | 1976 ¹ | 1977 ² |
|---------------------------------------|----------------------|-------------|---------------|-------------------|-------------------|
| | Million US \$ | | | | |
| Exports, f.o.b. | 3,266 | 3,931 | 2,961 | 3,895 | 4,500 |
| Imports, f.o.b. | 1,983 | 3,160 | 3,431 | 2,652 | 3,500 |
| Net services and transfers | -563 | -644 | -815 | -632 | -790 |
| Current account balance | 720 | 127 | -1,285 | 611 | 210 |
| Debt amortization | -573 | -600 | -800 | -1,000 | -1,000 |
| Financial gap | 147 | -473 | -2,085 | -389 | -790 |
| Medium- and long-term capital inflows | 594 | 723 | NA | 1,300 | NA |
| Net short-term capital inflows | 180 | -301 | NA | 290 | NA |
| Change in reserves | 921 | -51 | -791 | 1,201 | -300 |
| External debt, yearend | 4,672 | 4,873 | 4,695 | 5,189 | 4,679 |
| | Percent | | | | |
| Debt service ratio | 20 | 17 | 30 | 29 | 25 |

¹Preliminary.²Projected.

1976—The Bail Out

The new junta immediately focused on the need to stimulate exports, with emphasis on agricultural products. It reversed the previous policy of keeping

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agricultural prices low to benefit urban workers. Sharply increased prices for farm products, improved availability of credits, and abolition of the marketing monopoly of the state grain board led to a 10-percent increase in grain areas planted. Favorable weather during the growing and harvesting seasons then contributed to a bumper crop. Although world wheat prices dropped, aggressive marketing by private Argentine grain sales agencies—pushed by a shortage of facilities to store the record crop—accounted for a large share of the \$900 million increase in total exports in 1976. This trend continued into 1977, when the remainder of the harvest was marketed.

Meat exports nearly doubled in 1976 compared with the depressed 1975 level, aided by more realistic exchange rates. With continual “microdevaluations” of the peso to offset inflation and the gradual elimination of the dual exchange rate, the government also succeeded in stimulating exports of nontraditional products by yearend. Imports dropped 23 percent in 1976 as inventories were drawn down and as demand was damped by recession.

In addition to initiating the export promotion program, Economics Minister Martinez de Hoz launched a worldwide effort to obtain foreign loans. In personal approaches to banks and international financial institutions in the United States, Canada, Western Europe, and Japan he succeeded in lining up nearly \$1 billion in four- to five-year loans. Together with \$300 million from the IMF, these loans enabled Argentina to meet upcoming debt obligations and to improve the debt maturity profile.

By yearend 1976, debt payment coverage was assured. Moreover the trade balance had swung from 1975's \$500 million deficit to a \$1.2 billion surplus. The current account balance totaled \$600 million, compared with a \$1.3 billion deficit the year before. International reserves had trebled. Gains on the domestic front promised further improvement in the general economic climate and the restoration of foreign confidence in Argentina's financial soundness:

- GDP, although down 2.9 percent for 1976 as a whole, was rising in the last quarter.
- The inflation rate was down from more than 400 percent (annual basis) in first half 1976 to about 100 percent in the second half
- The national budget deficit, which equaled 13.5 percent of GDP in first half 1976, was down to about half that level in the second half; for the year as a whole, 41 percent of expenditures were covered by revenues, compared with only 23 percent in 1975.

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1977—Maintaining the Pace

The foreign financial situation has remained highly favorable so far. Exceptionally large grain shipments boosted exports to \$1.8 billion in the first four months, double the level of imports. More than 85 percent of imports consisted of industrial inputs and capital goods, signaling an upturn in industrial output. To encourage this trend, the government has removed practically all restrictions on imports. If production picks up, imports should be considerably larger in the remainder of the year; exports will decline until the next harvest begins in November. The government's economic team projects the year's exports at \$4.3 billion to \$4.5 billion, the trade surplus at close to \$1 billion, and the current account surplus at \$200 million.

The junta is continuing its program of incentives for agriculture and expects another large grain harvest in 1977/78. It is also counting on realistic exchange policies to boost exports of manufactured goods.

Debt payments due in 1977 are close to the 1976 level of \$1 billion and will require additional borrowing to cover. Although an improved credit rating will make loans easier to obtain, new borrowing is expected to total less than one-third the 1976 level because of record foreign reserves. Buenos Aires almost certainly will choose to reduce its external debt rather than accumulate additional reserves.

Farther Down the Road

Longer range prospects for the Argentine economy are clouded by political uncertainties. If the present economic team remains in power and adheres to current policies, the economic recovery is likely to accelerate, and the foreign financial situation should continue improving. In light of past Argentine experience, however, it cannot be assumed that this will happen.

The well-organized and traditionally influential labor sector has been a major factor forcing previous military governments to abandon promising economic reform programs. Much of the burden of the present economic readjustment has fallen on the working class, whose purchasing power—as the regime concedes—may have dropped by one-third in the past year. Labor organizations have lost most of their political influence and lack a central rallying point since Juan Peron's death. If public opinion turns against the junta, however, labor elements could probably exert enough pressure to force the government to ease restrictions on wages and union

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activities. Continuation of the present economic program would then be impossible. If changes were made that favored urban labor at the expense of agriculture, the problems that characterized much of the last three decades would reappear.

Another possible development would be the ascendancy of a more hard-line group within the military that would replace the present gradualist, free-enterprise approach with stricter controls. Although this policy might bring down inflation more rapidly, it could stifle the reviving manufacturing sector and cause extensive unemployment. Any change from the present government would probably have a generally destabilizing effect.

Foreign investors are wary because of past experience with Buenos Aires' vacillating economic policies and are waiting for more solid evidence of political stability before investing heavily. They are favorably impressed, however, with the junta's liberalization of foreign investment laws and with its efforts to settle outstanding disputes with several foreign firms. Increasing numbers of businessmen are visiting Argentina to study investment opportunities. Some foreign firms—especially oil companies—are increasing their exposure.

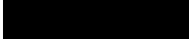
The financial gap should decline moderately over the next few years, as annual debt payments diminish with better debt scheduling. The current account surplus may not increase substantially, since rising imports will probably limit trade surpluses. Agricultural exports—in which Argentina has a comparative advantage—should remain large; exports of manufacturers, especially autos and other transport equipment, probably will increase. Covering even a sizable financial gap should present no problem. (Confidential Noform)

* * * * *

Publications of Interest*

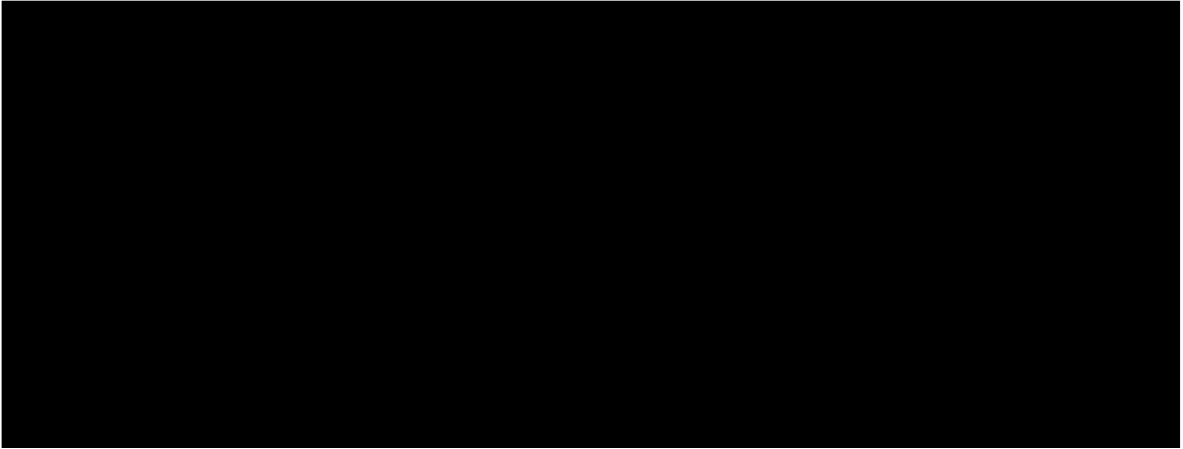
Major Oil and Gas Fields of the Free World (ER 77-10313, June 1977, Unclassified)

This publication details oil and gas reserves for major fields in the Free World. Specific characteristics of individual fields are presented.

* Copies of these publications may be ordered by calling  Code 143, Extension 5203.

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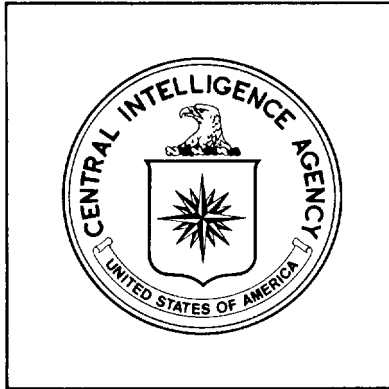
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ECONOMIC INDICATORS

Prepared by
The Office of Economic Research

ER EI 77-027
7 July 1977

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FOREWORD

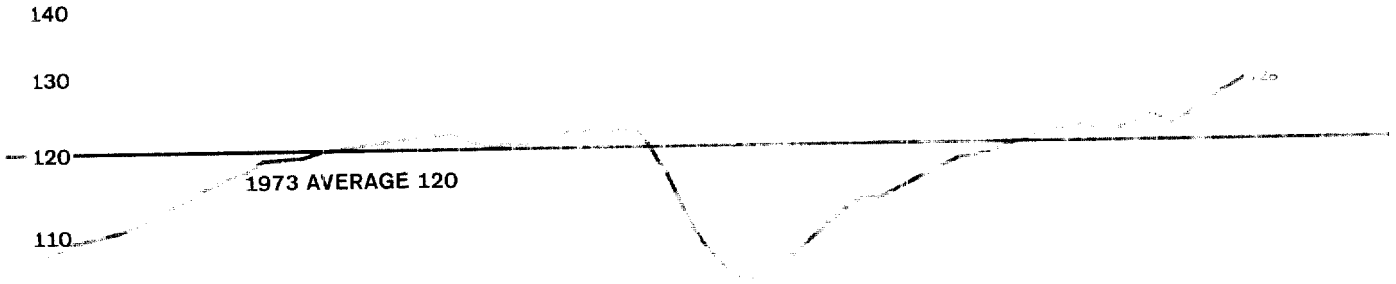
1. The **Economic Indicators** provide up-to-date information on changes in the domestic and external economic activities of the major non-Communist developed countries. To the extent possible, the **Economic Indicators** are updated from press ticker and Embassy reporting, so that the results are made available to the reader weeks—or sometimes months—before receipt of official statistical publications. US data are provided by US government agencies.

2. Source notes for the **Economic Indicators** will be published quarterly. The most recent data of publication is 20 April 1977. Comments and queries regarding the **Economic Indicators** are welcomed.

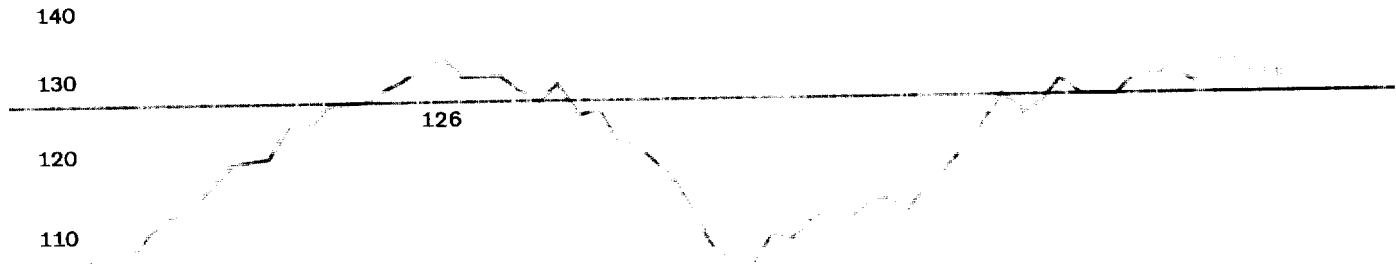
INDUSTRIAL PRODUCTION INDEX: 1970=100, seasonally adjusted

Semilogarithmic Scale

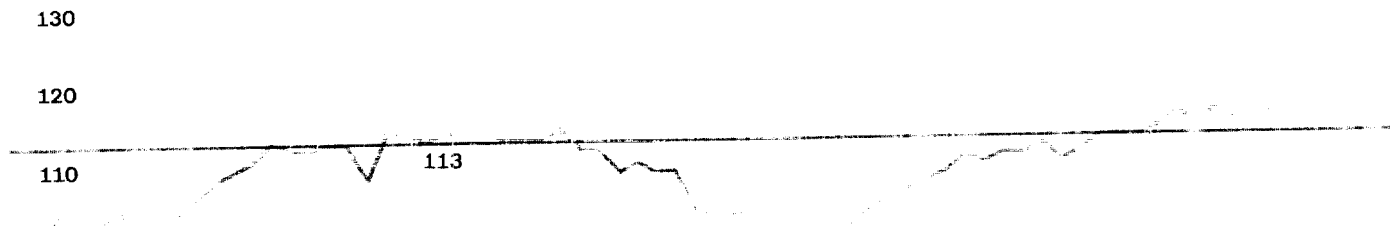
United States



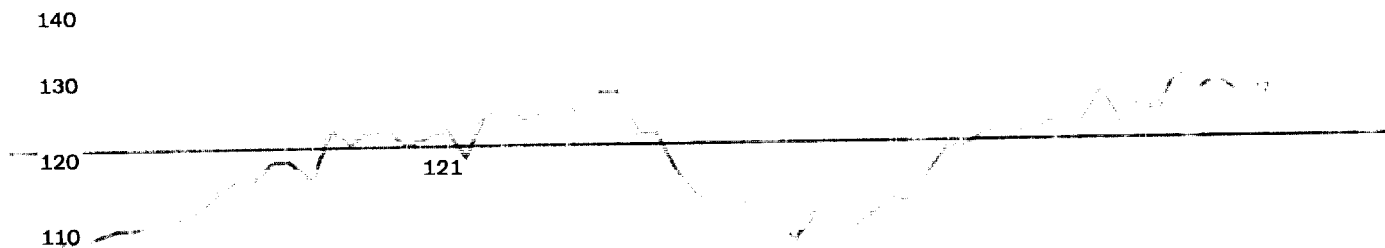
Japan



West Germany

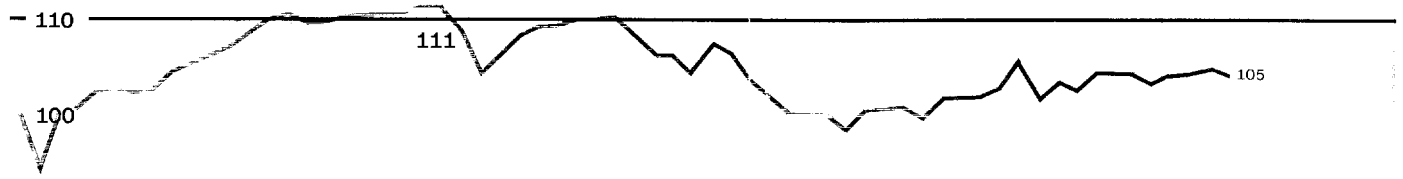


France

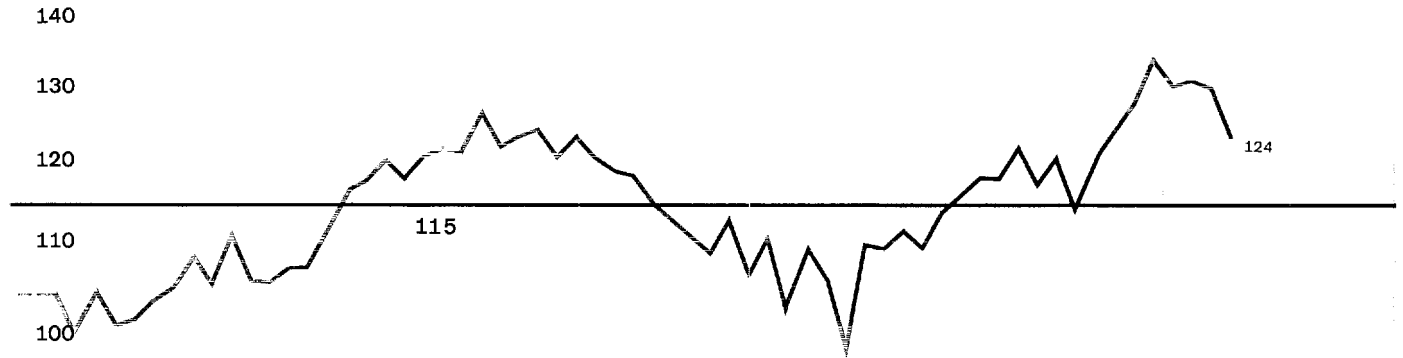


United Kingdom

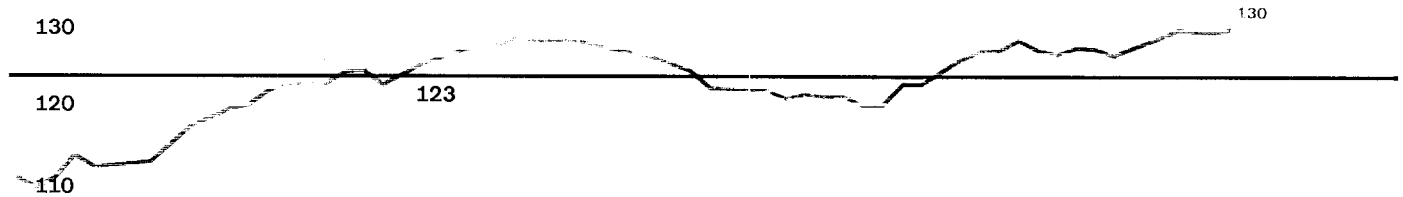
Semilogarithmic Scale



Italy



Canada



JAN APR JUL OCT JAN APR JUL OCT JAN APR JUL OCT JAN APR JUL OCT JAN APR JUL OCT
1972 1973 1974 1975 1976 1977

| | LATEST MONTH | Percent Change from Previous Month | AVERAGE ANNUAL GROWTH RATE SINCE | | | LATEST MONTH | Percent Change from Previous Month | AVERAGE ANNUAL GROWTH RATE SINCE | | | |
|---------------|--------------|------------------------------------|----------------------------------|----------------|-------------------------------|----------------|------------------------------------|----------------------------------|----------------|-------------------------------|-----|
| | | | 1970 | 1 Year Earlier | 3 Months Earlier ¹ | | | 1970 | 1 Year Earlier | 3 Months Earlier ¹ | |
| United States | MAY 77 | 1.1 | 3.6 | 6.3 | 11.4 | United Kingdom | APR 77 | 0.8 | 0.7 | 1.5 | 2.1 |
| Japan | MAY 77 | 2.0 | 3.9 | 4.3 | 6.1 | Italy | APR 77 | 5.3 | 3.2 | 5.4 | 6.4 |
| West Germany | APR 77 | 0.8 | 2.3 | 4.5 | 2.3 | Canada | APR 77 | 0.3 | 3.9 | 2.2 | 3.7 |
| France | APR 77 | 1.6 | 3.6 | 4.1 | 3.2 | | | | | | |

¹Average for latest 3 months compared with average for previous 3 months.

UNEMPLOYMENT PERCENT OF LABOR FORCE

United States

9
8
7
6
5

1965-74 AVERAGE ————— 4.6 —

Japan

2

1.2 —

West Germany

5
4
3
2

1.2 —

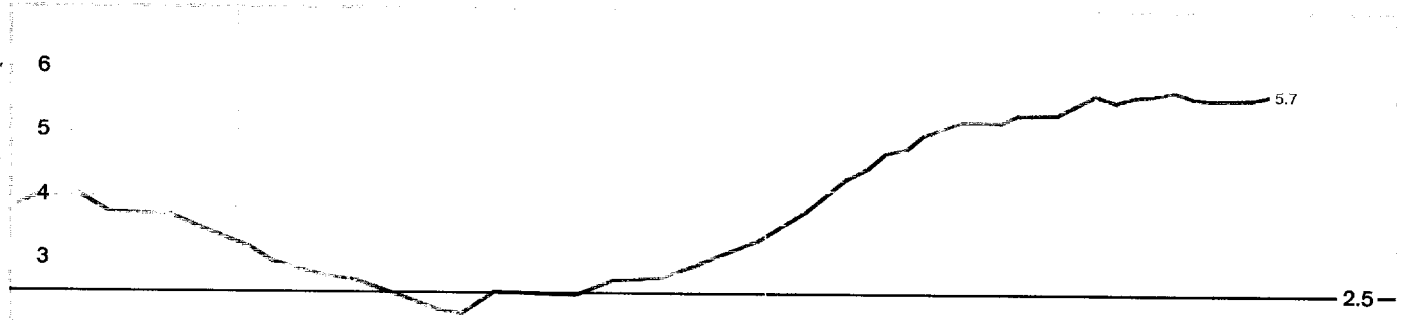
France

5
4
3
2

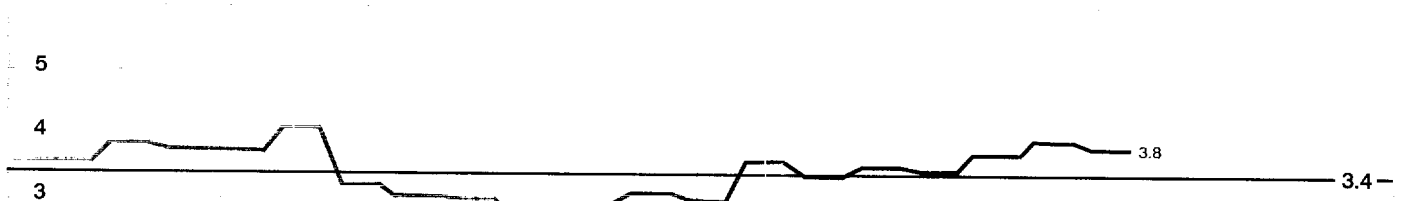
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JAN APR JUL OCT JAN APR JUL OCT JAN APR JUL OCT JAN APR JUL OCT JAN APR JUL OCT
1972 1973 1974 1975 1976 1977

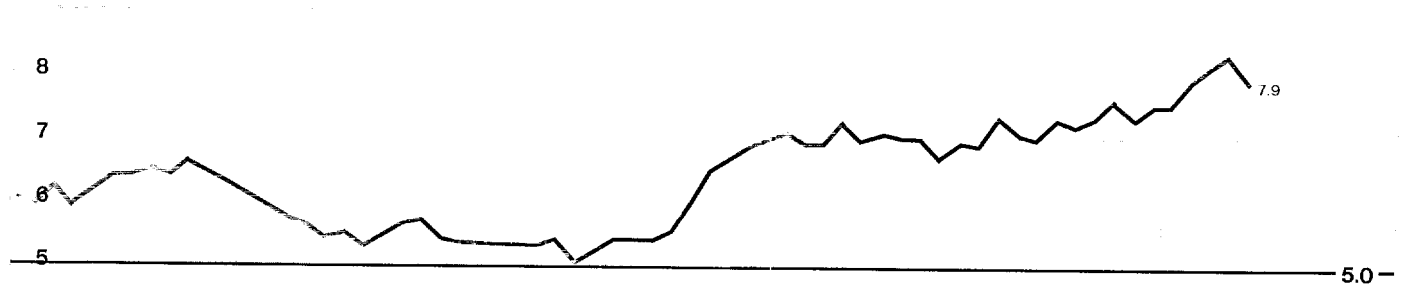
United Kingdom



Italy (quarterly)



Canada



JAN APR JUL OCT JAN APR JUL OCT JAN APR JUL OCT JAN APR JUL OCT JAN APR JUL OCT
1972 1973 1974 1975 1976 1977

THOUSANDS OF PERSONS UNEMPLOYED

| | LATEST MONTH | 1 Year Earlier | 3 Months Earlier | | LATEST MONTH | 1 Year Earlier | 3 Months Earlier | | |
|----------------------|--------------|----------------|------------------|-------|-----------------------|----------------|------------------|-------|-------|
| United States | MAY 77 | 6,750 | 6,911 | 7,183 | United Kingdom | JUN 77 | 1,353 | 1,261 | 1,321 |
| Japan | MAR 77 | 1,050 | 1,040 | 980 | Italy | 76 IV | 777 | 699 | 776 |
| West Germany | MAY 77 | 1,022 | 1,053 | 996 | Canada | MAY 77 | 841 | 731 | 829 |
| France | MAY 77 | 1,097 | 953 | 972 | | | | | |

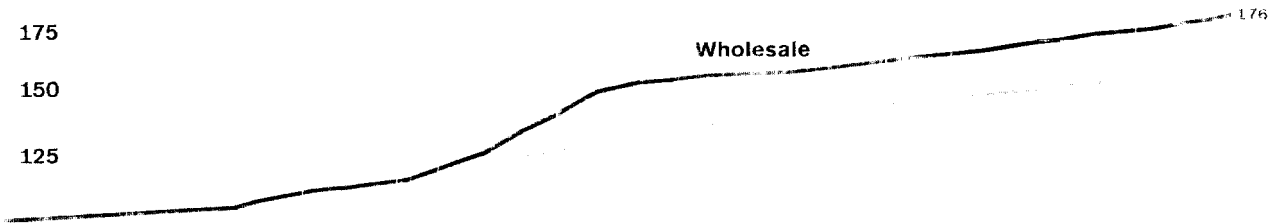
NOTE: Data are seasonally adjusted. Unemployment rates for France are estimated. The rates shown for Japan, Italy and Canada are roughly comparable to US rates. For 1975-77, the rates for France and the United Kingdom should be increased by 5 percent and 15 percent respectively, and those for West Germany decreased by 20 percent to be roughly comparable with US rates.

573372 6-77

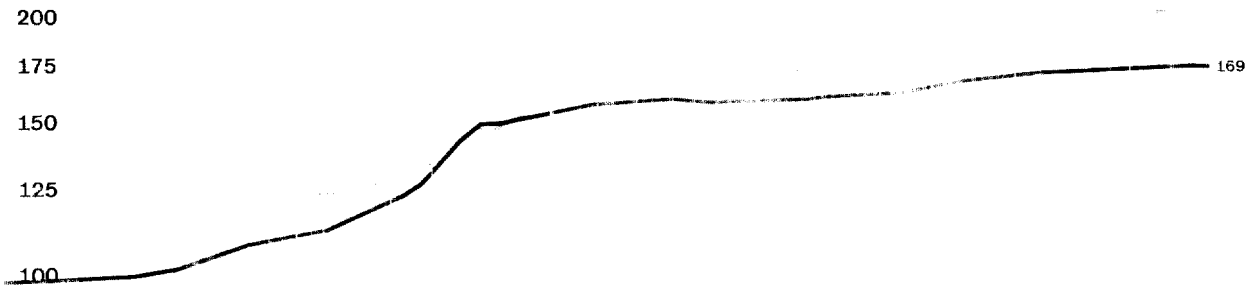
DOMESTIC PRICES¹ INDEX: 1970=100

United States

Semilogarithmic Scale



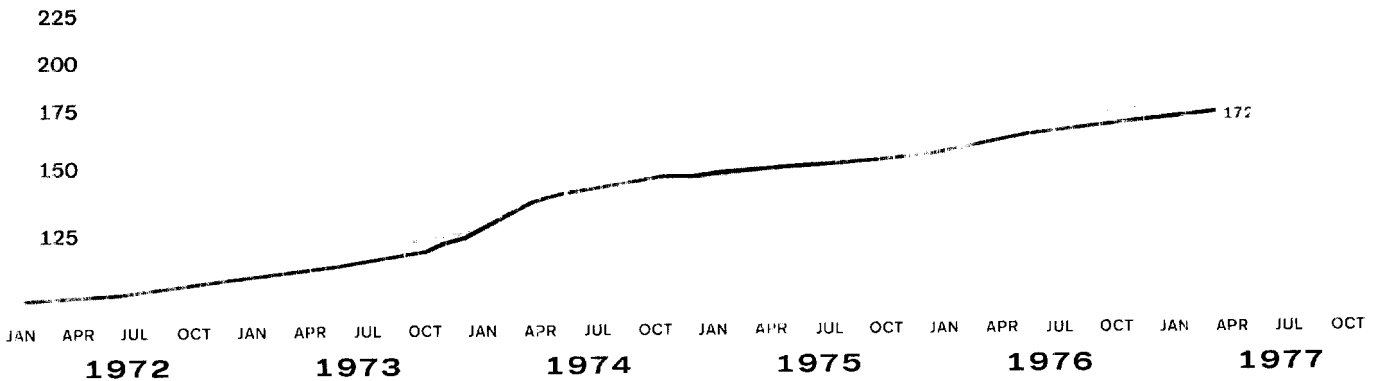
Japan



West Germany



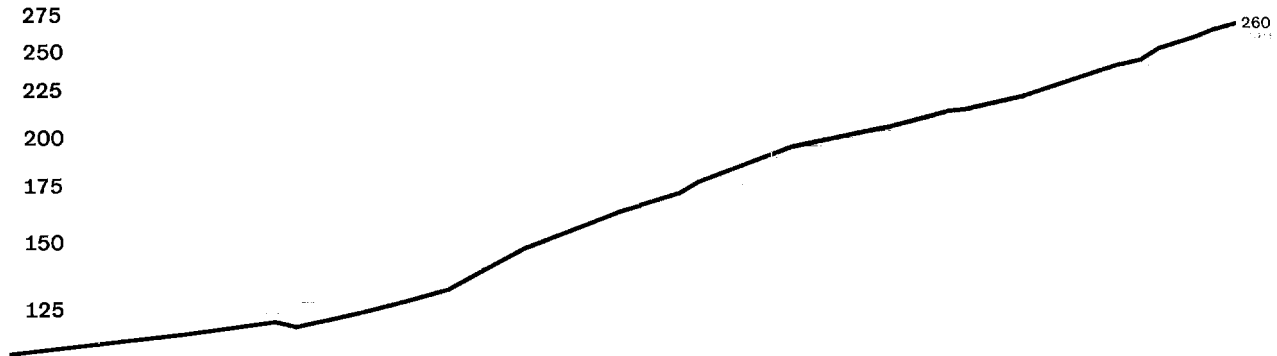
France



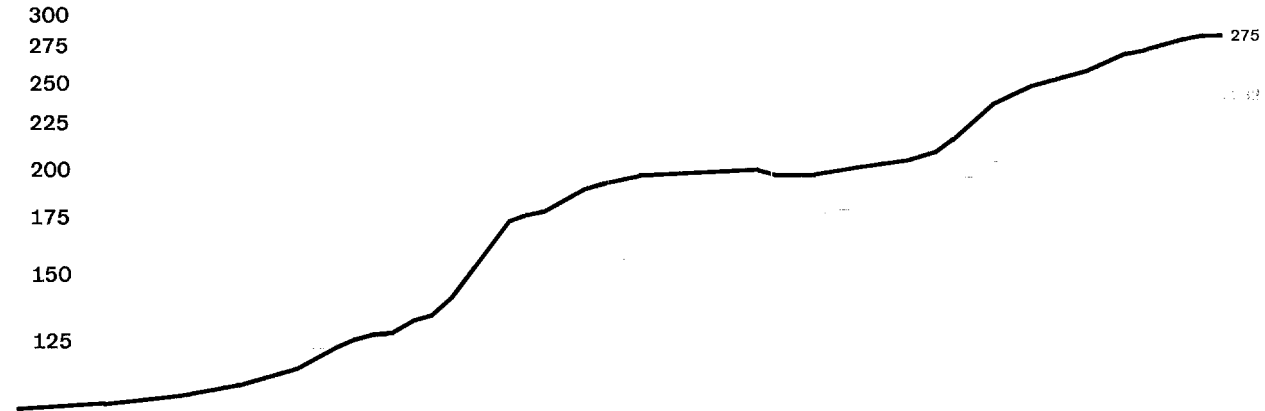
¹Wholesale price indexes cover industrial goods.

United Kingdom

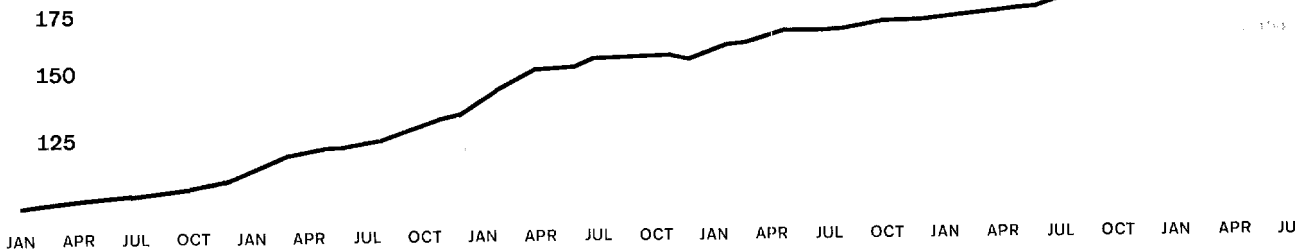
Semilogarithmic Scale



Italy



Canada



JAN APR JUL OCT JAN APR JUL OCT JAN APR JUL OCT JAN APR JUL OCT JAN APR JUL OCT

1972 1973 1974 1975 1976 1977

| | LATEST MONTH | Percent Change from Previous Month | AVERAGE ANNUAL GROWTH RATE SINCE | | | LATEST MONTH | Percent Change from Previous Month | AVERAGE ANNUAL GROWTH RATE SINCE | | | |
|---------------|--------------|------------------------------------|----------------------------------|----------------|------------------|----------------|------------------------------------|----------------------------------|----------------|------------------|------|
| | | | 1970 | 1 Year Earlier | 3 Months Earlier | | | 1970 | 1 Year Earlier | 3 Months Earlier | |
| United States | MAY 77 | 0.5 | 8.6 | 7.6 | 9.4 | United Kingdom | MAY 77 | 1.6 | 14.9 | 20.9 | 19.7 |
| Japan | APR 77 | -0.1 | 8.1 | 3.6 | 1.4 | Italy | APR 77 | 0.7 | 16.1 | 19.8 | 13.5 |
| West Germany | APR 77 | 0.3 | 5.5 | 3.5 | 4.3 | Canada | MAR 77 | 1.8 | 10.3 | 11.2 | 13.8 |
| France | MAR 77 | 0.9 | 8.4 | 8.2 | 7.6 | | | | | | |

GNP

Constant Market Prices

| | Latest Quarter | Percent Change from Previous Quarter | Average Annual Growth Rate Since | | |
|----------------|----------------|--------------------------------------|----------------------------------|----------------|------------------|
| | | | Percent Change | | |
| | | | 1970 | 1 Year Earlier | Previous Quarter |
| United States | 77 I | 1.3 | 2.9 | 4.1 | 5.2 |
| Japan | 77 I | 2.5 | 5.5 | 4.9 | 10.2 |
| West Germany | 76 IV | 1.8 | 2.5 | 4.5 | 7.3 |
| France | 76 IV | 0 | 3.9 | 4.9 | 0 |
| United Kingdom | 76 IV | 2.1 | 2.0 | 2.6 | 8.8 |
| Italy | 76 IV | 4.8 | 3.4 | 5.4 | 20.6 |
| Canada | 76 IV | -0.6 | 4.8 | 3.4 | -2.5 |

¹ Seasonally adjusted.

RETAIL SALES

Constant Prices

| | Latest Month | Percent Change from Previous Month | Average Annual Growth Rate Since | | |
|----------------|--------------|------------------------------------|----------------------------------|----------------|-------------------------------|
| | | | Percent Change | | |
| | | | 1970 | 1 Year Earlier | 3 Months Earlier ² |
| United States | May 77 | 0.4 | 3.6 | 8.5 | 8.7 |
| Japan | Feb 77 | 1.0 | 10.6 | 4.2 | 10.1 |
| West Germany | Apr 77 | -4.2 | 1.9 | 0.9 | -1.1 |
| France | Feb 77 | -5.1 | -0.9 | 0 | -1.4 |
| United Kingdom | May 77 | 0.1 | 0.6 | -3.1 | -12.7 |
| Italy | Mar 77 | 0.2 | 2.9 | -0.3 | 16.3 |
| Canada | Feb 77 | -1.3 | 4.8 | 4.7 | 12.2 |

¹ Seasonally adjusted

² Average for latest 3 months compared with average for previous 3 months.

FIXED INVESTMENT¹

Non-residential; constant prices

| | Latest Quarter | Percent Change from Previous Quarter | Average Annual Growth Rate Since | | |
|----------------|----------------|--------------------------------------|----------------------------------|----------------|------------------|
| | | | Percent Change | | |
| | | | 1970 | 1 Year Earlier | Previous Quarter |
| United States | 77 I | 3.4 | 1.6 | 8.3 | 14.3 |
| Japan | 77 I | 0.2 | 0.9 | 3.9 | 0.8 |
| West Germany | 76 IV | 3.3 | 1.1 | 5.0 | 13.8 |
| France | 75 IV | 8.8 | 4.2 | 2.9 | 40.1 |
| United Kingdom | 76 IV | -6.7 | 0.2 | 0.5 | -24.3 |
| Italy | 76 IV | 10.6 | 3.1 | 15.7 | 49.6 |
| Canada | 76 IV | 8.5 | 6.8 | 5.1 | 38.7 |

¹ Seasonally adjusted.

WAGES IN MANUFACTURING¹

| | Latest Period | Percent Change from Previous Period | Average Annual Growth Rate Since | | |
|----------------|---------------|-------------------------------------|----------------------------------|----------------|-------------------------------|
| | | | Percent Change | | |
| | | | 1970 | 1 Year Earlier | 3 Months Earlier ² |
| United States | May 77 | 0.8 | 7.5 | 7.8 | 7.3 |
| Japan | Mar 77 | -1.4 | 17.5 | 11.2 | 7.2 |
| West Germany | 77 I | 4.0 | 9.6 | 7.7 | 17.1 |
| France | 77 I | 2.3 | 14.1 | 13.9 | 9.5 |
| United Kingdom | Nov 76 | 0.3 | 16.0 | 9.0 | 1.8 |
| Italy | Apr 77 | 0.3 | 20.5 | 34.9 | 38.2 |
| Canada | Mar 77 | 0.2 | 11.4 | 11.5 | 14.9 |

¹ Hourly earnings (seasonally adjusted) for the United States, Japan, and Canada; hourly wage rates for others. West German and French data refer to the beginning of the quarter.

² Average for latest 3 months compared with that for previous 3 months.

MONEY MARKET RATES

| Representative rates | Latest Date | Percent Rate of Interest | | | | |
|----------------------|-------------------------------------|--------------------------|----------|---------|------|------|
| | | Year | 3 Months | Month | | |
| | | Earlier | Earlier | Earlier | | |
| United States | Commerical paper | Jun 22 | 5.40 | 5.85 | 4.75 | 5.48 |
| Japan | Call money | Jun 24 | 5.63 | 7.00 | 6.50 | 5.25 |
| West Germany | Interbank loans (3 months) | Jun 22 | 4.23 | 4.10 | 4.69 | 4.31 |
| France | Call money | Jun 24 | 8.75 | 7.50 | 9.38 | 9.00 |
| United Kingdom | Sterling interbank loans (3 months) | Jun 22 | 7.75 | 0.99 | 9.60 | 7.51 |
| Canada | Finance paper | Jun 22 | 7.14 | 9.57 | 7.48 | 7.44 |
| Eurodollars | Three-month deposits | Jun 22 | 5.80 | 6.14 | 5.24 | 5.98 |

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EXPORT PRICES
US \$

| | Latest Month | Percent Change from Previous Month | Average Annual Growth Rate Since | | |
|----------------|--------------|------------------------------------|----------------------------------|----------------|------------------|
| | | | 1970 | 1 Year Earlier | 3 Months Earlier |
| | | | United States | Mar 77 | 0.8 |
| Japan | Apr 77 | 1.7 | 11.0 | 18.4 | 14.7 |
| West Germany | Apr 77 | 0.8 | 11.5 | 9.5 | 1.6 |
| France | Feb 77 | 0.4 | 11.6 | 2.7 | 14.9 |
| United Kingdom | May 77 | 1.9 | 10.8 | 14.6 | 15.2 |
| Italy | Feb 77 | 2.9 | 11.3 | 17.6 | 29.1 |
| Canada | Jan 77 | 1.2 | 9.4 | 0.3 | 0.9 |

EXPORT PRICES
National Currency

| | Latest Month | Percent Change from Previous Month | Average Annual Growth Rate Since | | |
|----------------|--------------|------------------------------------|----------------------------------|----------------|------------------|
| | | | 1970 | 1 Year Earlier | 3 Months Earlier |
| | | | United States | Mar 77 | 0.8 |
| Japan | Apr 77 | 0.1 | 6.7 | 9.2 | -7.3 |
| West Germany | Apr 77 | 0.1 | 4.6 | 2.6 | -1.5 |
| France | Feb 77 | 0.3 | 9.8 | 14.4 | 14.0 |
| United Kingdom | May 77 | 1.8 | 16.3 | 20.7 | 13.0 |
| Italy | Feb 77 | 3.1 | 17.3 | 35.1 | 39.2 |
| Canada | Jan 77 | 1.6 | 8.5 | -1.6 | 7.3 |

IMPORT PRICES
National Currency

| | Latest Month | Percent Change from Previous Month | Average Annual Growth Rate Since | | |
|----------------|--------------|------------------------------------|----------------------------------|----------------|------------------|
| | | | 1970 | 1 Year Earlier | 3 Months Earlier |
| | | | United States | Mar 77 | 2.7 |
| Japan | Apr 77 | -7.0 | 10.6 | -4.1 | -23.8 |
| West Germany | Apr 77 | 1.3 | 4.6 | 3.7 | 2.7 |
| France | Feb 77 | 2.1 | 10.8 | 19.3 | 16.8 |
| United Kingdom | May 77 | 0.1 | 19.9 | 18.7 | 11.0 |
| Italy | Feb 77 | 4.6 | 21.9 | 39.3 | 33.4 |
| Canada | Jan 77 | 4.8 | 9.2 | 0.7 | 32.2 |

OFFICIAL RESERVES

| | Latest Month | Billion US \$ | | | |
|----------------|--------------|---------------|----------|----------------|------------------|
| | | End of | Jun 1970 | 1 Year Earlier | 3 Months Earlier |
| | | United States | Apr 77 | 18.9 | 14.5 |
| Japan | May 77 | 17.3 | 4.1 | 15.2 | 16.8 |
| West Germany | Apr 77 | 34.6 | 8.8 | 34.4 | 34.4 |
| France | Mar 77 | 9.8 | 4.4 | 11.1 | 9.7 |
| United Kingdom | Nov 76 | 5.2 | 2.8 | 5.6 | 5.0 |
| Italy | Sep 76 | 5.1 | 4.7 | 5.8 | 5.2 |
| Canada | Apr 77 | 5.2 | 4.3 | 5.8 | 5.7 |

CURRENT ACCOUNT BALANCE ¹

| | Latest Period | Million US \$ | Cumulative (Million US \$) | | |
|----------------|---------------|---------------|----------------------------|--------|--------|
| | | | 1977 | 1976 | Change |
| | | | United States ² | 77 I | -4,317 |
| Japan | May 77 | 120 | 2,237 | 428 | 1,809 |
| West Germany | Apr 77 | 356 | 1,185 | 1,278 | -93 |
| France | 76 IV | -1,238 | N.A. | N.A. | N.A. |
| United Kingdom | 77 I | -502 | -502 | -466 | -36 |
| Italy | 76 IV | -882 | N.A. | N.A. | N.A. |
| Canada | 77 I | -1,624 | -1,624 | -1,911 | 287 |

¹ Converted to US dollars at the current market rates of exchange.

² Seasonally adjusted.

BASIC BALANCE ¹

Current and Long-Term-Capital Transactions

| | Latest Period | Million US \$ | Cumulative (Million US \$) | | |
|----------------|---------------|---------------|----------------------------|----------------------------------|--------|
| | | | 1976 | 1975 | Change |
| | | | United States | No longer published ² | |
| Japan | May 77 | -120 | 2,703 | -888 | 3,591 |
| West Germany | Apr 77 | -640 | 3,460 | -2,838 | 6,298 |
| France | 76 IV | -721 | -6,843 | -81 | -6,761 |
| United Kingdom | 76 IV | -205 | -2,092 | -4,171 | 2,079 |
| Italy | 76 III | 779 | -2,232 | 1,096 | -3,329 |
| Canada | 77 I | -583 | 3,128 | -1,052 | 4,180 |

¹ Converted to US dollars at the current market rates of exchange.

² As recommended by the Advisory Committee on the Presentation of Balance of Payments Statistics, the Department of Commerce no longer publishes a basic balance.

EXCHANGE RATES

Spot Rate

As of 24 Jun 77

| | US \$ Per Unit | Percent Change from | | | |
|---------------------------------|----------------|---------------------|----------------|------------------|-----------|
| | | 19 Mar 73 | 1 Year Earlier | 3 Months Earlier | 17 Jun 77 |
| | | Japan (yen) | 0.0037 | -3.23 | 9.62 |
| West Germany (Deutsche mark) | 0.4249 | 19.99 | 9.43 | 1.64 | 0.02 |
| France (franc) | 0.2025 | -8.12 | -3.93 | 0.67 | 0.08 |
| United Kingdom (pound sterling) | 1.7197 | -30.12 | -2.95 | 0.02 | 0.01 |
| Italy (lira) | 0.0011 | -36.16 | -4.56 | 0.27 | 0 |
| Canada (dollar) | 0.9425 | -5.53 | -8.64 | -0.65 | -0.33 |

TRADE-WEIGHTED EXCHANGE RATES ¹

As of 24 Jun 77

| | Percent Change from | | | |
|----------------|---------------------|----------------|------------------|-----------|
| | 19 Mar 73 | 1 Year Earlier | 3 Months Earlier | 17 Jun 77 |
| | United States | 6.06 | 0.87 | -0.28 |
| Japan | 2.48 | 11.71 | 1.69 | 0.31 |
| West Germany | 24.58 | 7.31 | 1.40 | 0.06 |
| France | -7.91 | -7.85 | -0.02 | 0.11 |
| United Kingdom | -30.44 | -4.86 | -0.02 | 0.07 |
| Italy | -38.40 | -7.23 | -0.41 | 0 |
| Canada | -3.28 | -9.10 | -0.78 | -0.34 |

¹ Weighting is based on each listed country's trade with 16 other industrialized countries to which the same trade-weighting is applied. It is not intended to reflect variations among the major currencies.

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Developed Countries: Direction of Trade ¹

Million US \$

| | Exports to (f.o.b.) | | | | | | Imports from (c.i.f.) | | | | | |
|----------------------|---------------------|-----------|------------|-------------------|------------|--------|-----------------------|-----------|------------|-------------------|------------|--------|
| | World | Big Seven | Other OECD | OPEC ² | Com-munist | Other | World | Big Seven | Other OECD | OPEC ² | Com-munist | Other |
| UNITED STATES | | | | | | | | | | | | |
| 1974 | 97,908 | 45,884 | 16,870 | 6,690 | 2,258 | 26,206 | 107,997 | 53,332 | 10,912 | 17,256 | 1,078 | 25,419 |
| 1975 | 107,191 | 46,941 | 16,180 | 10,768 | 3,421 | 29,881 | 103,414 | 49,807 | 8,818 | 18,371 | 1,253 | 25,165 |
| 1st Qtr | 27,098 | 12,101 | 4,848 | 2,430 | 618 | 7,101 | 26,315 | 12,897 | 2,584 | 4,785 | 266 | 5,783 |
| 2d Qtr | 26,360 | 11,886 | 3,808 | 2,597 | 538 | 7,431 | 24,733 | 12,150 | 2,114 | 4,166 | 206 | 6,097 |
| 3d Qtr | 25,800 | 10,511 | 3,562 | 2,707 | 692 | 8,328 | 25,969 | 14,551 | 2,091 | 4,519 | 193 | 4,615 |
| 4th Qtr | 27,933 | 12,443 | 3,962 | 2,934 | 1,573 | 7,021 | 26,397 | 10,209 | 2,029 | 4,901 | 588 | 8,670 |
| 1976 | 114,997 | 51,298 | 17,607 | 12,552 | 3,935 | 29,605 | 129,565 | 60,387 | 9,738 | 24,995 | 1,572 | 32,873 |
| 1st Qtr | 27,360 | 12,184 | 4,159 | 2,751 | 1,144 | 7,122 | 29,339 | 13,717 | 2,479 | 5,570 | 356 | 7,217 |
| 2d Qtr | 29,695 | 13,383 | 4,527 | 3,113 | 1,036 | 7,636 | 31,650 | 15,247 | 2,491 | 5,582 | 333 | 7,997 |
| 3d Qtr | 27,437 | 11,944 | 4,114 | 3,103 | 850 | 7,426 | 33,734 | 16,693 | 2,401 | 7,156 | 423 | 7,061 |
| 4th Qtr | 30,505 | 13,787 | 4,807 | 3,585 | 905 | 7,421 | 34,842 | 14,730 | 2,367 | 6,687 | 460 | 10,598 |
| 1977 | | | | | | | | | | | | |
| 1st Qtr | 29,458 | 13,681 | 4,602 | 2,936 | 951 | 7,288 | 37,361 | 16,070 | 2,745 | 8,972 | 397 | 9,177 |
| Apr | 10,548 | 4,686 | 1,613 | 1,080 | 352 | 2,817 | 13,249 | 5,714 | 873 | 3,280 | 152 | 3,230 |
| JAPAN | | | | | | | | | | | | |
| 1974 | 54,480 | 19,101 | 7,477 | 5,446 | 3,915 | 18,541 | 62,046 | 18,780 | 7,303 | 19,965 | 3,119 | 12,879 |
| 1975 | 54,822 | 16,567 | 6,091 | 8,406 | 5,283 | 18,475 | 57,856 | 16,529 | 6,084 | 19,427 | 3,383 | 12,033 |
| 1st Qtr | 13,064 | 4,013 | 1,394 | 1,891 | 1,447 | 4,319 | 14,545 | 4,442 | 1,431 | 4,637 | 797 | 3,238 |
| 2d Qtr | 13,404 | 3,897 | 1,362 | 2,072 | 1,353 | 4,720 | 14,272 | 4,356 | 1,417 | 4,892 | 895 | 2,712 |
| 3d Qtr | 13,454 | 3,945 | 1,585 | 2,231 | 1,290 | 4,403 | 14,091 | 4,131 | 1,544 | 4,615 | 821 | 2,980 |
| 4th Qtr | 14,900 | 4,712 | 1,750 | 2,212 | 1,193 | 5,033 | 14,948 | 4,000 | 1,692 | 5,284 | 870 | 3,102 |
| 1976 | 67,364 | 22,406 | 8,588 | 9,277 | 5,049 | 22,044 | 64,895 | 17,534 | 7,778 | 21,877 | 2,926 | 14,780 |
| 1st Qtr | 14,429 | 4,848 | 1,827 | 1,872 | 1,289 | 4,593 | 14,832 | 4,083 | 1,696 | 5,213 | 671 | 3,169 |
| 2d Qtr | 16,431 | 5,402 | 2,092 | 2,271 | 1,348 | 5,318 | 15,903 | 4,347 | 1,943 | 5,400 | 677 | 3,536 |
| 3d Qtr | 17,542 | 5,897 | 2,272 | 2,476 | 1,135 | 5,762 | 16,818 | 4,497 | 2,137 | 5,406 | 747 | 4,031 |
| 4th Qtr | 18,962 | 6,259 | 2,397 | 2,659 | 1,277 | 6,370 | 17,342 | 4,607 | 2,002 | 5,858 | 831 | 4,044 |
| 1977 | | | | | | | | | | | | |
| 1st Qtr | 17,911 | 5,848 | 2,449 | 2,461 | 1,409 | 5,744 | 17,452 | 4,717 | 1,845 | 6,246 | 801 | 3,843 |
| WEST GERMANY | | | | | | | | | | | | |
| 1974 | 89,188 | 30,998 | 37,605 | 4,268 | 6,884 | 9,433 | 68,962 | 23,762 | 26,079 | 8,406 | 3,209 | 7,506 |
| 1975 | 90,063 | 28,331 | 36,407 | 6,777 | 9,029 | 9,519 | 74,986 | 27,085 | 27,755 | 8,228 | 4,167 | 7,751 |
| 1st Qtr | 22,518 | 7,052 | 9,368 | 1,490 | 1,683 | 2,925 | 18,034 | 6,439 | 6,856 | 1,890 | 807 | 2,042 |
| 2d Qtr | 23,637 | 7,280 | 9,580 | 1,701 | 1,895 | 3,181 | 19,779 | 7,287 | 7,293 | 2,091 | 1,121 | 1,987 |
| 3d Qtr | 20,776 | 6,389 | 8,290 | 1,814 | 3,136 | 1,147 | 17,563 | 6,371 | 6,390 | 1,956 | 1,060 | 1,786 |
| 4th Qtr | 23,132 | 7,610 | 9,169 | 1,772 | 2,315 | 2,266 | 19,610 | 6,988 | 7,216 | 2,291 | 1,179 | 1,936 |
| 1976 | 101,989 | 33,372 | 41,720 | 8,231 | 8,575 | 10,091 | 88,230 | 31,008 | 31,351 | 9,718 | 5,050 | 11,103 |
| 1st Qtr | 22,467 | 7,855 | 9,437 | 1,705 | 2,064 | 1,406 | 20,147 | 6,790 | 7,114 | 2,189 | 1,046 | 3,008 |
| 2d Qtr | 24,570 | 8,147 | 10,019 | 1,832 | 1,771 | 2,801 | 21,571 | 7,478 | 7,778 | 2,222 | 1,127 | 2,966 |
| 3d Qtr | 26,147 | 8,134 | 10,445 | 2,235 | 2,385 | 2,948 | 21,792 | 8,136 | 7,900 | 2,575 | 1,550 | 1,631 |
| 4th Qtr | 28,805 | 9,236 | 11,819 | 2,459 | 2,355 | 2,936 | 24,720 | 8,604 | 8,559 | 2,731 | 1,327 | 3,499 |
| 1977 | | | | | | | | | | | | |
| 1st Qtr | 27,804 | 9,281 | 11,609 | 2,307 | 2,156 | 2,451 | 24,084 | 8,465 | 8,828 | 2,578 | 1,270 | 2,943 |
| FRANCE | | | | | | | | | | | | |
| 1974 | 46,388 | 19,345 | 15,245 | 3,164 | 1,874 | 6,760 | 52,820 | 22,040 | 13,874 | 8,848 | 1,547 | 6,511 |
| 1975 | 53,005 | 19,959 | 15,183 | 4,952 | 3,094 | 9,817 | 54,238 | 23,040 | 14,350 | 9,448 | 1,591 | 5,809 |
| 1st Qtr | 13,511 | 5,042 | 4,136 | 1,202 | 716 | 2,415 | 13,988 | 5,352 | 3,762 | 2,507 | 441 | 1,426 |
| 2d Qtr | 14,496 | 5,415 | 4,229 | 1,378 | 824 | 2,650 | 14,027 | 6,312 | 3,759 | 2,307 | 177 | 1,772 |
| 3d Qtr | 11,627 | 4,435 | 3,037 | 1,094 | 679 | 2,382 | 11,903 | 5,389 | 2,971 | 2,059 | 450 | 1,343 |
| 4th Qtr | 13,371 | 5,067 | 3,781 | 1,278 | 875 | 2,370 | 14,320 | 6,087 | 3,858 | 2,584 | 523 | 1,268 |

Developed Countries: Direction of Trade¹
(Continued)

Million US \$

| | Exports to (f.o.b.) | | | | | | Imports from (c.i.f.) | | | | | |
|--------------------|---------------------|-----------|------------|-------------------|------------|-------|-----------------------|-----------|------------|-------------------|------------|-------|
| | World | Big Seven | Other OECD | OPEC ² | Com-munist | Other | World | Big Seven | Other OECD | OPEC ² | Com-munist | Other |
| FRANCE (Continued) | | | | | | | | | | | | |
| 1976 | 55,680 | 22,438 | 16,081 | 5,080 | 3,558 | 8,523 | 64,255 | 27,750 | 16,894 | 11,359 | 2,384 | 5,868 |
| 1st Qtr | 13,639 | 5,524 | 3,921 | 1,240 | 917 | 2,037 | 15,529 | 6,567 | 4,157 | 2,817 | 595 | 1,393 |
| 2d Qtr | 14,769 | 5,911 | 4,395 | 1,222 | 1,059 | 2,182 | 16,187 | 7,149 | 4,324 | 2,610 | 593 | 1,511 |
| 3d Qtr | 12,409 | 4,922 | 3,446 | 1,292 | 729 | 2,020 | 14,840 | 6,431 | 3,733 | 2,746 | 577 | 1,352 |
| 4th Qtr | 14,863 | 6,081 | 4,319 | 1,326 | 853 | 2,284 | 17,699 | 7,603 | 4,680 | 3,185 | 619 | 1,612 |
| UNITED KINGDOM | | | | | | | | | | | | |
| 1974 | 37,160 | 11,765 | 17,006 | 2,567 | 1,197 | 4,625 | 54,510 | 18,272 | 18,253 | 8,020 | 1,849 | 8,116 |
| 1975 | 41,731 | 12,339 | 16,515 | 4,553 | 1,480 | 6,844 | 53,147 | 18,301 | 18,274 | 6,962 | 1,771 | 7,839 |
| 1st Qtr | 10,454 | 3,107 | 4,266 | 962 | 306 | 1,813 | 13,877 | 4,930 | 4,551 | 1,960 | 387 | 2,049 |
| 2d Qtr | 10,837 | 3,167 | 4,183 | 1,232 | 411 | 1,844 | 13,426 | 4,709 | 4,498 | 1,808 | 434 | 1,977 |
| 3d Qtr | 9,592 | 2,744 | 3,696 | 1,179 | 338 | 1,635 | 12,699 | 4,281 | 4,526 | 1,579 | 442 | 1,871 |
| 4th Qtr | 10,848 | 3,321 | 4,370 | 1,180 | 425 | 1,552 | 13,145 | 4,382 | 4,699 | 1,614 | 508 | 1,942 |
| 1976 | 46,352 | 14,026 | 17,803 | 5,132 | 1,625 | 7,768 | 56,224 | 19,332 | 19,271 | 7,291 | 2,240 | 8,090 |
| 1st Qtr | 11,615 | 3,409 | 4,414 | 1,238 | 433 | 2,121 | 13,639 | 4,357 | 4,975 | 1,825 | 510 | 1,972 |
| 2d Qtr | 11,560 | 3,531 | 4,379 | 1,254 | 422 | 1,974 | 14,133 | 5,058 | 4,626 | 1,738 | 590 | 2,121 |
| 3d Qtr | 11,089 | 3,437 | 4,186 | 1,265 | 389 | 1,812 | 13,861 | 4,746 | 4,573 | 1,891 | 597 | 2,054 |
| 4th Qtr | 12,088 | 3,649 | 4,821 | 1,376 | 381 | 1,861 | 14,591 | 5,171 | 5,097 | 1,836 | 543 | 1,944 |
| 1977 | | | | | | | | | | | | |
| 1st Qtr | 13,150 | 4,008 | 5,145 | 1,521 | 413 | 2,063 | 15,575 | 5,786 | 5,068 | 1,783 | 514 | 2,424 |
| Apr | 4,427 | 1,264 | 1,754 | 531 | 152 | 726 | 5,064 | 1,875 | 1,666 | 501 | 185 | 837 |
| ITALY | | | | | | | | | | | | |
| 1974 | 30,261 | 13,796 | 7,681 | 2,427 | 1,721 | 4,636 | 40,977 | 18,003 | 7,216 | 9,313 | 1,944 | 4,501 |
| 1975 | 34,230 | 15,345 | 7,468 | 3,710 | 2,895 | 4,812 | 37,793 | 17,072 | 6,367 | 6,993 | 2,304 | 5,057 |
| 1st Qtr | 8,070 | 3,525 | 1,873 | 823 | 545 | 1,304 | 9,016 | 4,165 | 1,527 | 1,816 | 480 | 1,028 |
| 2d Qtr | 8,621 | 3,742 | 1,921 | 938 | 863 | 1,157 | 9,350 | 4,412 | 1,671 | 1,797 | 518 | 952 |
| 3d Qtr | 8,123 | 3,689 | 1,823 | 950 | 725 | 936 | 8,614 | 3,821 | 1,475 | 1,906 | 604 | 808 |
| 4th Qtr | 9,416 | 4,389 | 1,851 | 845 | 762 | 1,569 | 10,813 | 4,674 | 1,694 | 2,293 | 702 | 1,450 |
| 1976 | 35,364 | 16,698 | 8,276 | 4,165 | 2,591 | 3,634 | 41,789 | 18,585 | 7,559 | 8,124 | 3,000 | 4,321 |
| 1st Qtr | 7,398 | 3,513 | 1,713 | 811 | 597 | 764 | 9,092 | 4,063 | 1,708 | 1,816 | 608 | 897 |
| 2d Qtr | 8,705 | 4,157 | 2,040 | 958 | 623 | 927 | 10,716 | 4,786 | 1,918 | 2,106 | 744 | 1,162 |
| 3d Qtr | 9,398 | 4,505 | 2,191 | 1,056 | 656 | 990 | 10,335 | 4,497 | 1,860 | 2,029 | 792 | 1,157 |
| 4th Qtr | 9,863 | 4,523 | 2,332 | 1,340 | 715 | 953 | 11,646 | 5,239 | 2,273 | 2,173 | 856 | 1,105 |
| CANADA | | | | | | | | | | | | |
| 1974 | 32,904 | 27,092 | 2,004 | 548 | 659 | 2,601 | 33,309 | 26,727 | 1,777 | 2,698 | 257 | 1,850 |
| 1975 | 32,201 | 26,582 | 1,689 | 700 | 1,153 | 2,077 | 35,435 | 27,887 | 1,621 | 3,174 | 310 | 2,443 |
| 1st Qtr | 7,535 | 6,350 | 430 | 160 | 133 | 462 | 8,576 | 6,720 | 408 | 882 | 63 | 503 |
| 2d Qtr | 8,570 | 6,918 | 513 | 234 | 320 | 585 | 9,429 | 7,555 | 424 | 879 | 82 | 489 |
| 3d Qtr | 7,712 | 6,450 | 382 | 142 | 182 | 556 | 8,341 | 6,783 | 365 | 732 | 72 | 389 |
| 4th Qtr | 8,384 | 6,864 | 364 | 164 | 518 | 474 | 9,089 | 6,829 | 424 | 681 | 93 | 1,062 |
| 1976 | 36,840 | 30,783 | 2,077 | 928 | 1,259 | 1,793 | 38,705 | 31,118 | 2,034 | 3,154 | 369 | 2,030 |
| 1st Qtr | 8,422 | 7,103 | 381 | 167 | 328 | 443 | 9,404 | 7,572 | 473 | 868 | 87 | 404 |
| 2d Qtr | 9,964 | 8,408 | 480 | 184 | 346 | 546 | 10,244 | 8,174 | 683 | 930 | 96 | 361 |
| 3d Qtr | 9,112 | 7,465 | 576 | 270 | 349 | 452 | 9,378 | 7,417 | 473 | 715 | 96 | 677 |
| 4th Qtr | 9,342 | 7,807 | 640 | 307 | 236 | 352 | 9,679 | 7,955 | 405 | 642 | 90 | 587 |
| 1977 | | | | | | | | | | | | |
| 1st Qtr | 9,670 | 8,201 | 524 | 247 | 231 | 467 | 10,025 | 8,164 | 406 | 771 | 90 | 594 |

¹ Data are unadjusted. Because of rounding, components may not add to the totals shown.² Including Gabon.

FOREIGN TRADE BILLION US \$, f.o.b., seasonally adjusted

United States

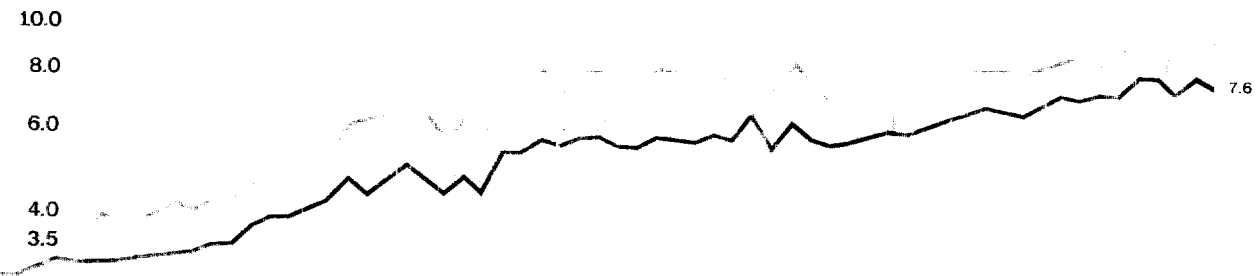
Semilogarithmic Scale



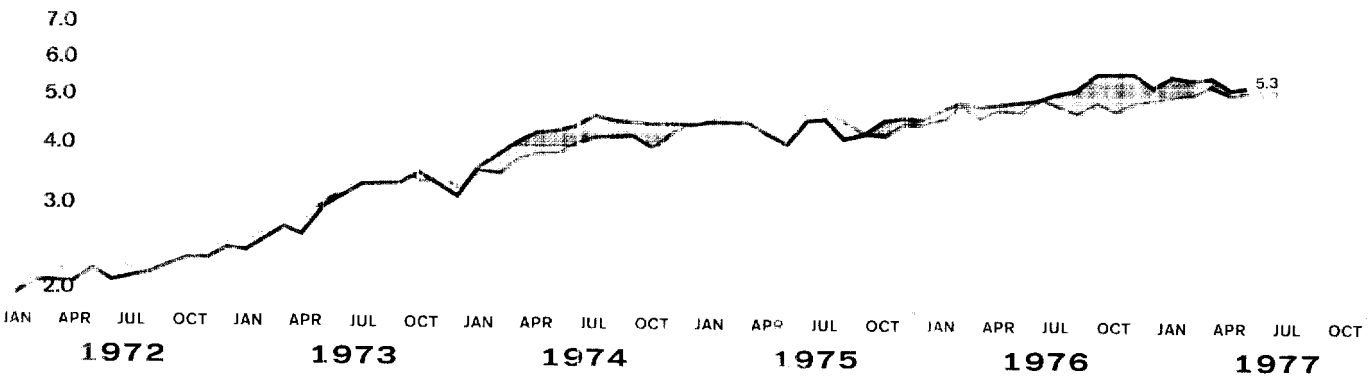
Japan



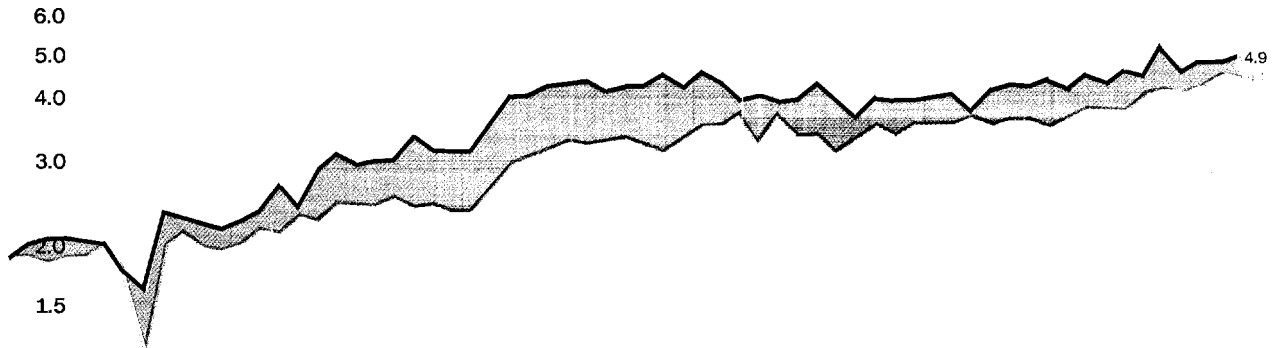
West Germany



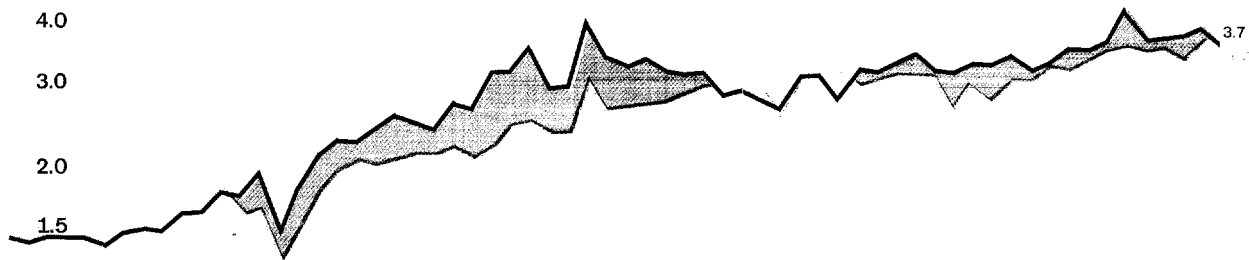
France



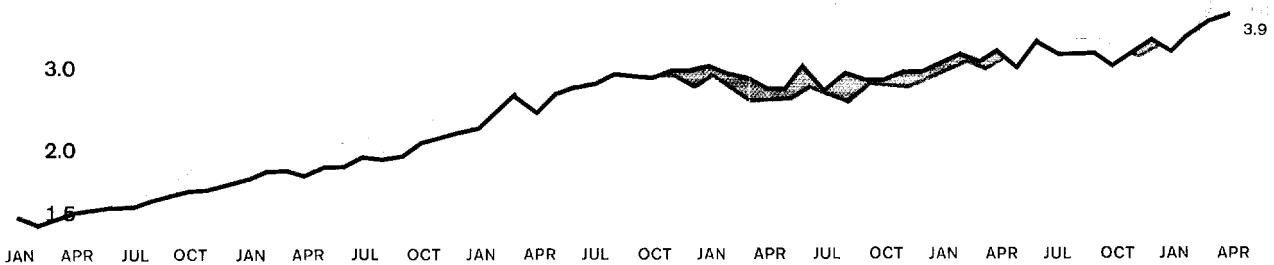
United Kingdom



Italy



Canada



JAN APR JUL OCT JAN APR JUL OCT JAN APR JUL OCT JAN APR JUL OCT JAN APR JUL OCT
1972 1973 1974 1975 1976 1977

| | LATEST MONTH | MILLION US \$ | CUMULATIVE (MILLION US \$) | | | LATEST MONTH | MILLION US \$ | CUMULATIVE (MILLION US \$) | | | |
|----------------------|--------------|---------------|----------------------------|--------|--------|-----------------------|---------------|----------------------------|--------|--------|-------|
| | | | 1977 | 1976 | CHANGE | | | 1977 | 1976 | CHANGE | |
| United States | MAY 77 | 11,616 | 59,611 | 46,328 | 28.7% | United Kingdom | MAY 77 | 4,915 | 24,021 | 20,237 | 18.7% |
| | Balance | -1,221 | -9,768 | -361 | 9,407 | | Balance | -419 | -2,299 | -2,216 | -83 |
| Japan | MAY 77 | 5,135 | 25,290 | 21,680 | 16.7% | Italy | APR 77 | 3,736 | 14,831 | 12,638 | 17.4% |
| | Balance | 1,096 | 7,069 | 4,563 | 2,507 | | Balance | -51 | -721 | -1,450 | 730 |
| West Germany | APR 77 | 7,647 | 31,097 | 26,069 | 19.3% | Canada | APR 77 | 3,863 | 14,365 | 12,608 | 13.9% |
| | Balance | 1,813 | 6,292 | 5,528 | 764 | | Balance | 93 | 730 | 379 | 1,110 |
| France | MAY 77 | 5,271 | 27,022 | 23,867 | 13.2% | | | | | | |
| | Balance | -101 | -1,211 | -677 | 533 | | | | | | |

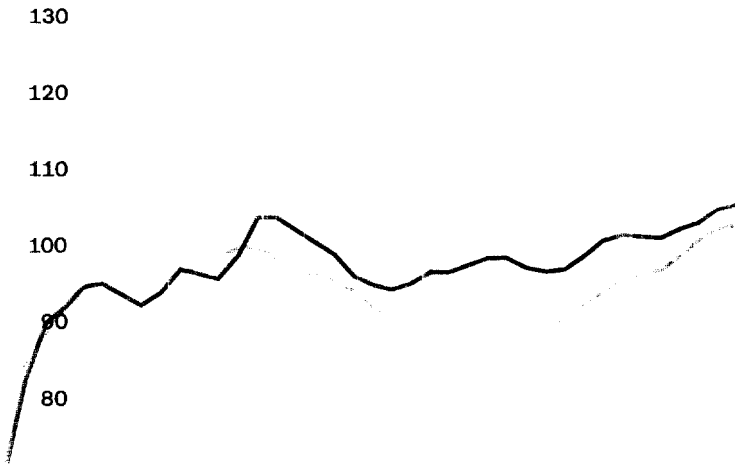
Approved For Release 2001/04/11 : CIA-RDP79B00457A001100060001-5
FOREIGN TRADE PRICES IN US \$¹

United States

INDEX: JAN 1975 = 100



Japan



West Germany



JAN APR JUL OCT JAN APR JUL OCT JAN APR JUL OCT JAN APR JLL OCT

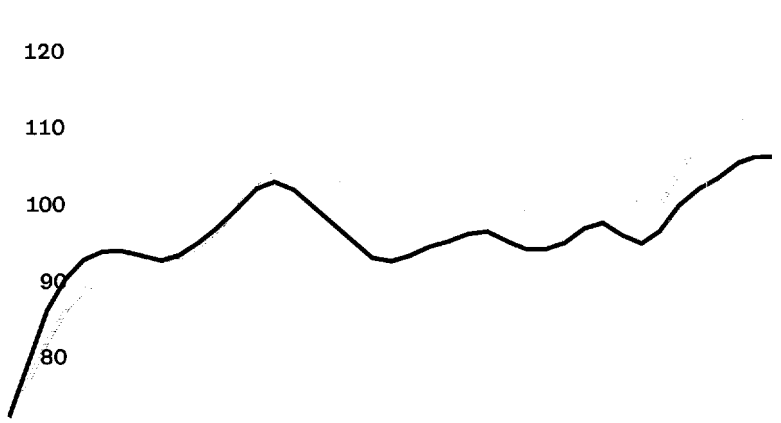
Approved For Release 2001/04/11 : CIA-RDP79B00457A001100060001-5

¹Export and import plots are based on five month weighted moving averages.

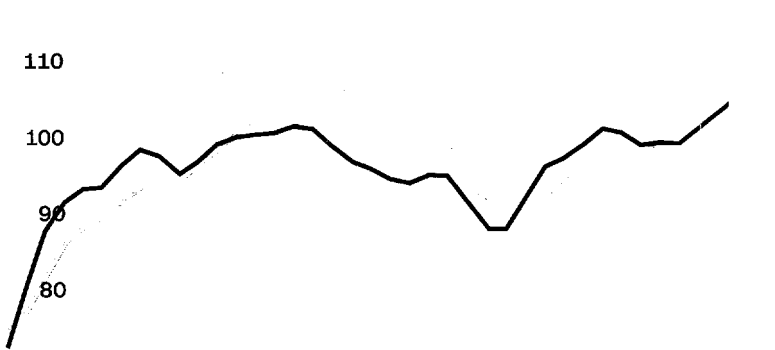
France



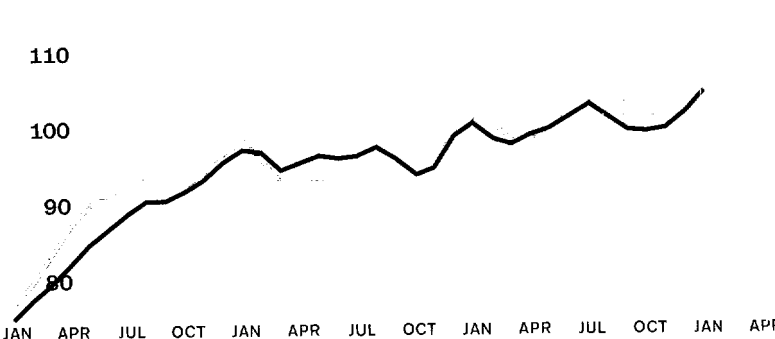
United Kingdom



Italy



Canada



JAN APR JUL OCT JAN APR JUL OCT JAN APR JUL OCT JAN APR JUL OCT

INDUSTRIAL PRODUCTION ¹

| | Latest Period | Percent Change from Previous Period | Average Annual Growth Rate Since | | |
|-------------|------------------|---|-------------------------------------|---------|----------------------|
| | | | 1 Year | | 3 Months |
| | | | 1970 | Earlier | Earlier ² |
| Brazil | 76 II | 0.1 | 11.0 | 10.7 | 0.4 |
| India | Oct 76 | 0.2 | 4.2 | 6.7 | -12.6 |
| South Korea | Apr 77 | 3.5 | 21.8 | 11.8 | 1.0 |
| Mexico | Feb 77 | 3.2 | 5.2 | -1.5 | -7.4 |
| Nigeria | 76 II | 2.4 | 18.7 | 60.3 | 9.8 |
| Taiwan | Apr 77 | -0.3 | 14.6 | 10.3 | -11.0 |

¹ Seasonally adjusted.

² Average for latest 3 months compared with average for previous 3 months.

MONEY SUPPLY ¹

| | Latest Month | Percent Change from Previous Month | Average Annual Growth Rate Since | | |
|-------------|-----------------|--|-------------------------------------|---------|----------------------|
| | | | 1 Year | | 3 Months |
| | | | 1970 | Earlier | Earlier ² |
| Brazil | Jan 77 | -3.1 | 35.5 | 28.2 | 49.6 |
| Egypt | Feb 77 | 5.1 | 18.3 | 22.7 | 22.3 |
| India | Jan 77 | 1.2 | 12.2 | 18.3 | 19.9 |
| Iran | Feb 77 | 0.9 | 28.2 | 35.2 | 11.0 |
| South Korea | Mar 77 | 3.0 | 30.7 | 32.4 | 41.5 |
| Mexico | Jun 76 | -0.3 | 17.0 | 16.6 | 19.6 |
| Nigeria | Dec 76 | 5.2 | 35.0 | 49.5 | 43.3 |
| Taiwan | Jan 77 | -6.2 | 22.6 | 5.7 | 13.0 |
| Thailand | Jan 77 | -0.4 | 13.1 | 11.0 | 9.4 |

¹ Seasonally adjusted.

² Average for latest 3 months compared with average for previous 3 months.

CONSUMER PRICES

| | Latest Month | Percent Change from Previous Month | Average Annual Growth Rate Since | |
|-------------|-----------------|--|-------------------------------------|---------|
| | | | 1 Year | |
| | | | 1970 | Earlier |
| Brazil | Apr 77 | 3.3 | 26.6 | 44.4 |
| India | Jan 77 | 0.3 | 8.1 | 3.0 |
| Iran | Feb 77 | 2.6 | 11.3 | 26.2 |
| South Korea | Apr 77 | 0.1 | 14.6 | 9.6 |
| Mexico | May 77 | 0.9 | 14.7 | 31.4 |
| Nigeria | Jan 77 | 4.5 | 15.0 | 13.5 |
| Taiwan | Apr 77 | 0.8 | 10.4 | 2.0 |
| Thailand | Jan 77 | 0.6 | 8.3 | 3.6 |

WHOLESALE PRICES

| | Latest Month | Percent Change from Previous Month | Average Annual Growth Rate Since | |
|-------------|-----------------|--|-------------------------------------|---------|
| | | | 1 Year | |
| | | | 1970 | Earlier |
| Brazil | Apr 77 | 4.3 | 27.3 | 45.9 |
| India | Jan 77 | 0.5 | 9.2 | 7.2 |
| Iran | Feb 77 | 3.3 | 10.8 | 24.1 |
| South Korea | Apr 77 | 0.3 | 16.8 | 9.9 |
| Mexico | May 77 | 2.2 | 16.6 | 50.8 |
| Taiwan | Apr 77 | 0.8 | 9.3 | 4.7 |
| Thailand | Jan 77 | 0.7 | 9.9 | -0.2 |

EXPORT PRICES

US \$

| | Latest Period | Percent Change from Previous Period | Average Annual Growth Rate Since | |
|-------------|------------------|---|-------------------------------------|---------|
| | | | 1 Year | |
| | | | 1970 | Earlier |
| Brazil | Oct 76 | -0.4 | 14.5 | 26.5 |
| India | Jun 76 | 4.8 | 9.9 | -5.9 |
| Iran | Mar 77 | 0 | 37.6 | 18.7 |
| South Korea | 76 IV | 2.4 | 8.9 | 15.0 |
| Nigeria | May 76 | -0.1 | 33.2 | 8.2 |
| Taiwan | Jan 77 | 0.9 | 12.2 | 6.5 |
| Thailand | Oct 76 | 12.0 | 13.1 | 6.3 |

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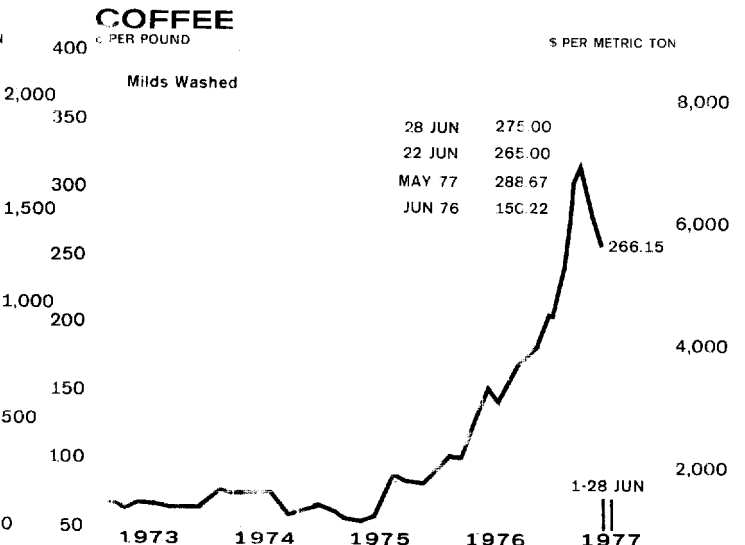
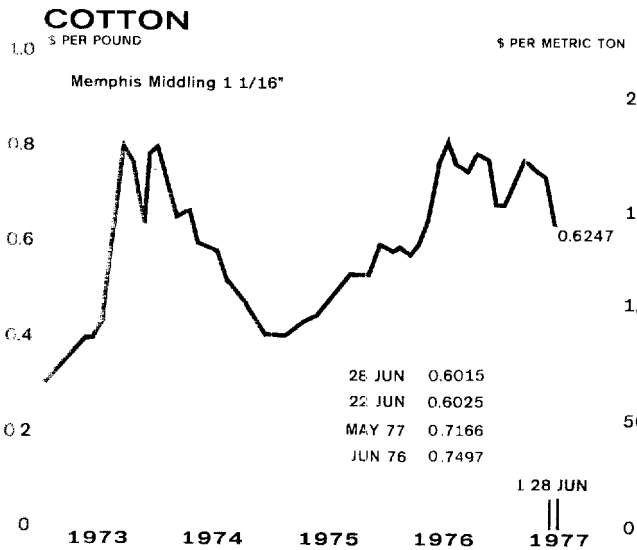
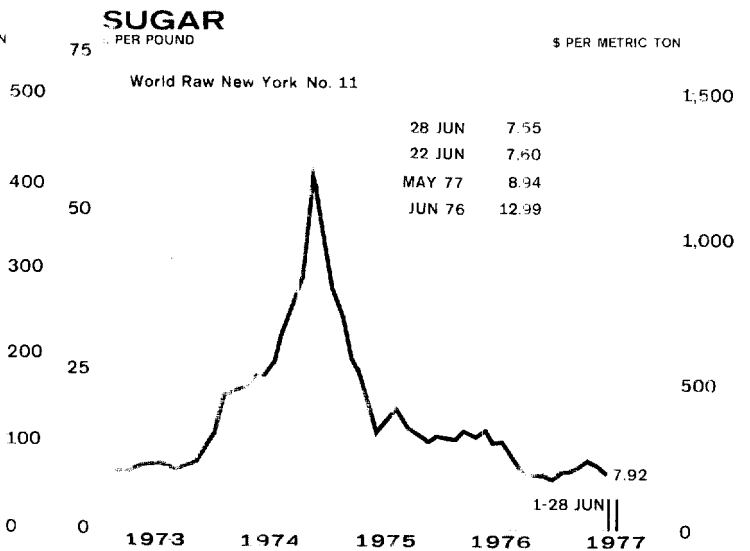
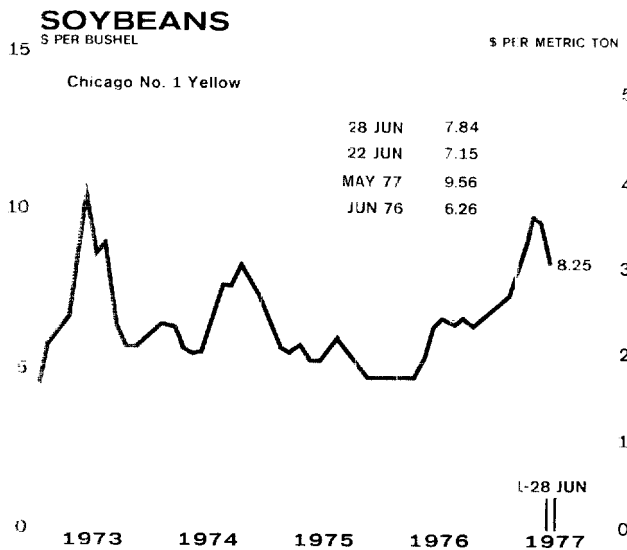
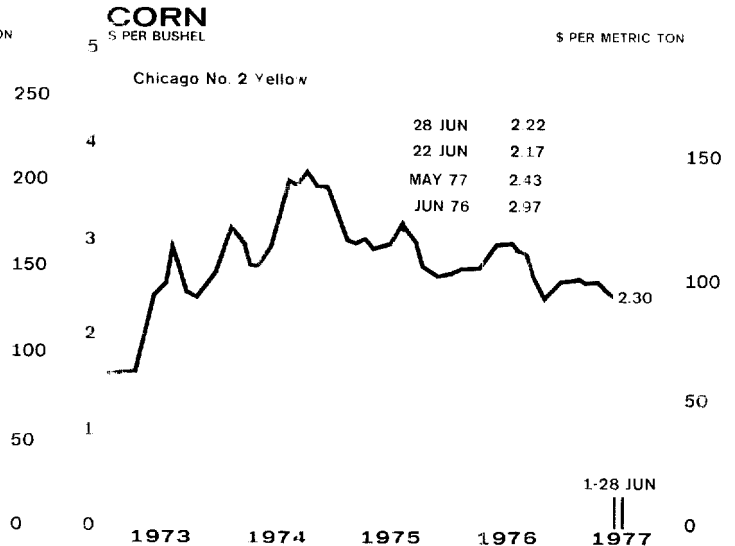
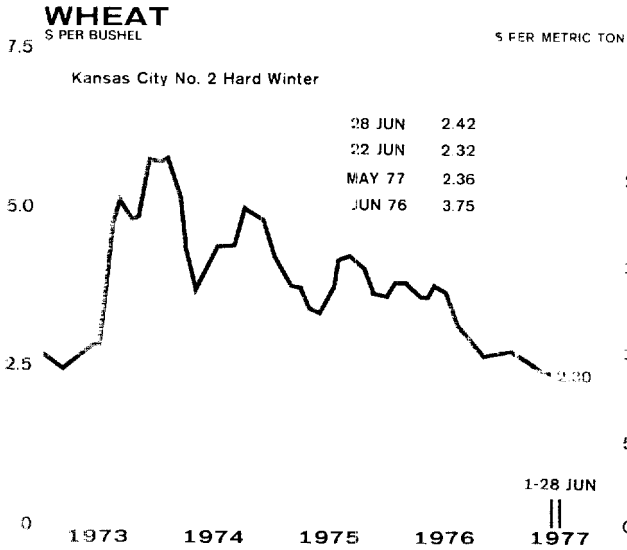
| | Latest Month | End of Month | Million US \$ | Million US \$ | |
|-------------|--------------|-----------------|---------------|---------------|---------|
| | | | | 1 Year | |
| | | | | Jun 1970 | Earlier |
| Brazil | Feb 77 | 5,873 | 1,013 | 3,667 | 5,139 |
| Egypt | Feb 77 | 377 | 155 | 285 | 347 |
| India | Feb 77 | 3,481 | 1,006 | 1,837 | 3,003 |
| Iran | Apr 77 | 10,548 | 208 | 7,951 | 8,965 |
| South Korea | Mar 77 | 3,212 | 602 | 1,702 | 2,961 |
| Mexico | Mar 76 | 1,501 | 695 | 1,479 | 1,533 |
| Nigeria | Apr 77 | 4,784 | 148 | 6,165 | 4,738 |
| Taiwan | Feb 77 | 1,414 | 531 | 1,097 | 1,676 |
| Thailand | Apr 77 | 2,005 | 978 | 1,924 | 1,885 |

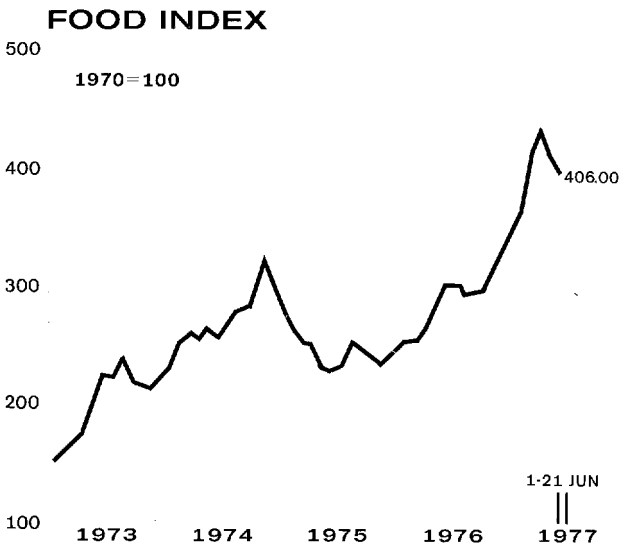
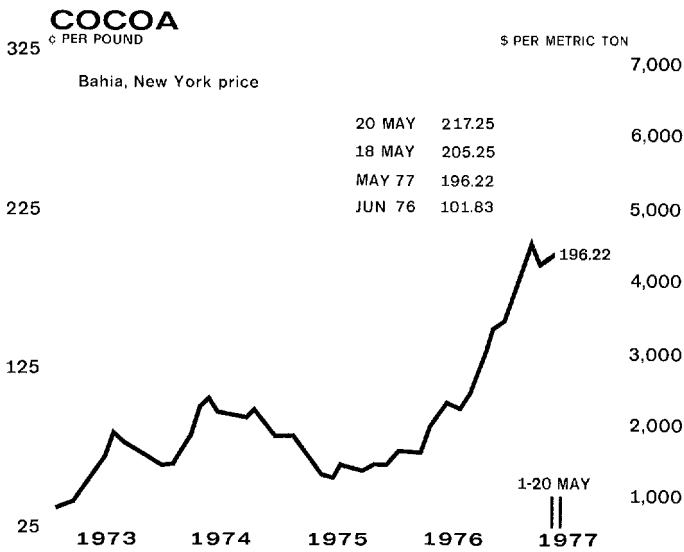
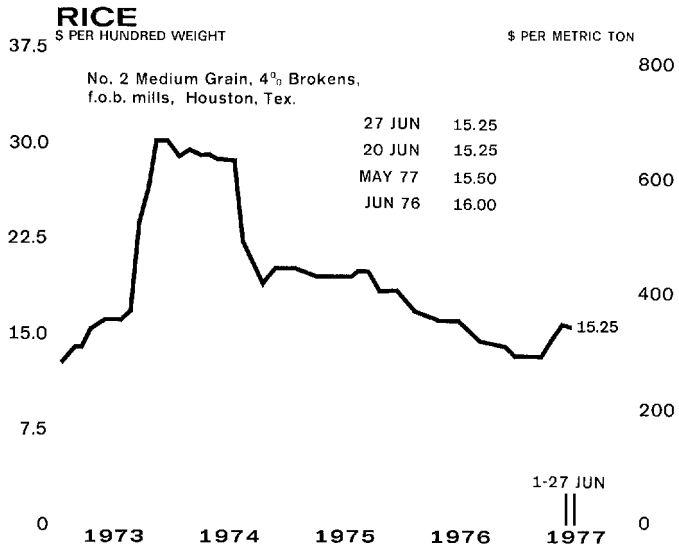
FOREIGN TRADE, f.o.b.

| | | | Latest 3 Months Percent Change from | | Cumulative (Million US \$) | | |
|---------------|--------|---------|--|---------|----------------------------|--------|--------|
| Latest Period | | | 3 Months | 1 Year | 1976 | 1975 | Change |
| | | | Earlier ¹ | Earlier | | | |
| Brazil | Apr 77 | Exports | -1.2 | 38.6 | 10,136 | 8,655 | 17.1% |
| | Apr 77 | Imports | -11.5 | -1.1 | 12,291 | 12,169 | 1.0% |
| | Apr 77 | Balance | | | -2,155 | -3,514 | 1,359 |
| Egypt | 76 IV | Exports | -97.9 | -47.8 | 1,354 | 1,546 | -12.4% |
| | 76 IV | Imports | -93.5 | -54.7 | 2,501 | 3,731 | -33.0% |
| | 76 IV | Balance | | | -1,147 | -2,186 | 1,039 |
| India | Dec 76 | Exports | -6.3 | 17.3 | 5,036 | 4,299 | 17.1% |
| | Dec 76 | Imports | 15.9 | -13.4 | 4,498 | 5,477 | -17.9% |
| | Dec 76 | Balance | | | 538 | -1,178 | 1,716 |
| Iran | Mar 77 | Exports | -12.6 | 22.8 | 23,460 | 19,906 | 17.9% |
| | Nov 76 | Imports | -37.0 | 9.8 | 11,292 | 8,369 | 34.9% |
| | Nov 76 | Balance | | | 9,978 | 9,974 | 4 |
| South Korea | Jan 77 | Exports | 16.1 | 40.5 | 7,715 | 4,945 | 56.0% |
| | Jan 77 | Imports | 22.2 | 17.6 | 7,940 | 6,583 | 20.6% |
| | Jan 77 | Balance | | | -224 | -1,638 | 1,414 |
| Mexico | Apr 77 | Exports | 71.9 | 45.1 | 3,298 | 2,859 | 15.4% |
| | Apr 77 | Imports | -33.8 | -17.6 | 5,770 | 6,327 | -8.8% |
| | Apr 77 | Balance | | | -2,472 | -3,469 | 997 |
| Nigeria | Mar 77 | Exports | 44.9 | 23.0 | 10,527 | 8,885 | 18.5% |
| | Aug 76 | Imports | -16.3 | 15.1 | 4,283 | 3,095 | 38.4% |
| | Aug 76 | Balance | | | 2,419 | 1,907 | 513 |
| Taiwan | Apr 77 | Exports | -43.8 | 3.0 | 8,061 | 5,309 | 51.8% |
| | Apr 77 | Imports | -27.0 | 5.3 | 7,032 | 5,506 | 27.7% |
| | Apr 77 | Balance | | | 1,029 | -197 | 1,226 |
| Thailand | Dec 76 | Exports | 70.1 | 50.0 | 2,985 | 2,208 | 35.2% |
| | Jan 77 | Imports | 41.9 | 24.2 | 3,923 | 3,276 | 19.8% |
| | Dec 76 | Balance | | | -277 | -773 | 496 |

¹ At annual rates.

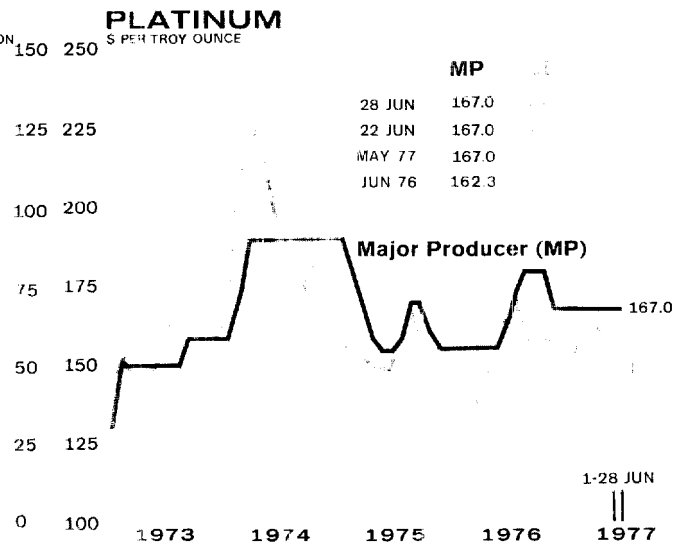
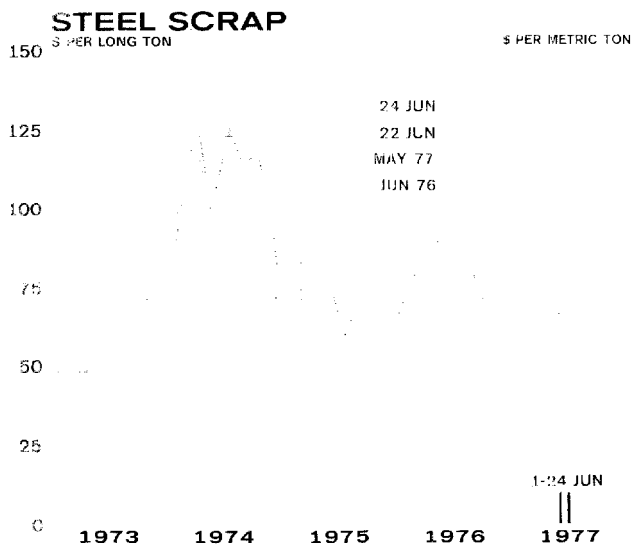
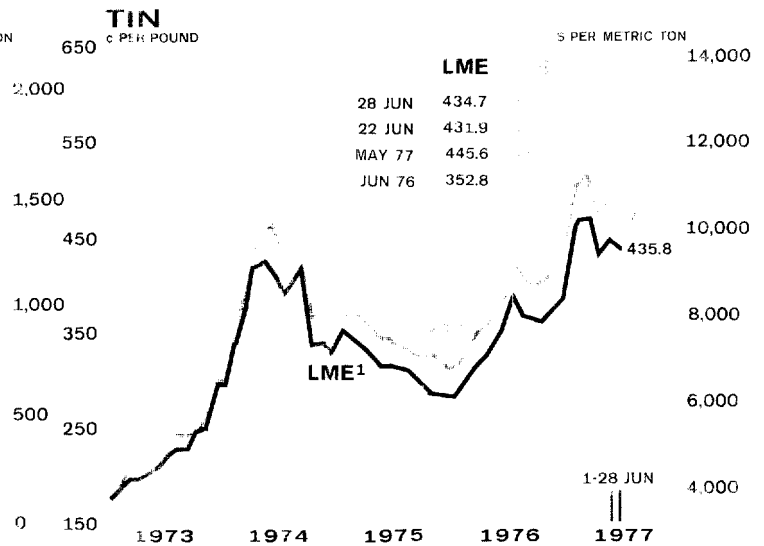
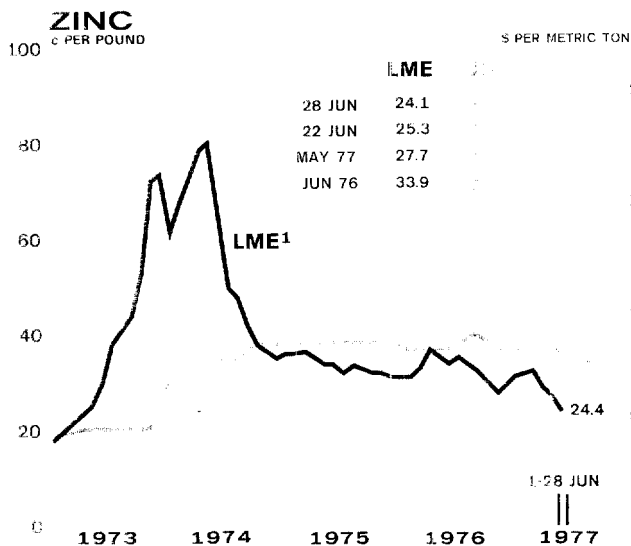
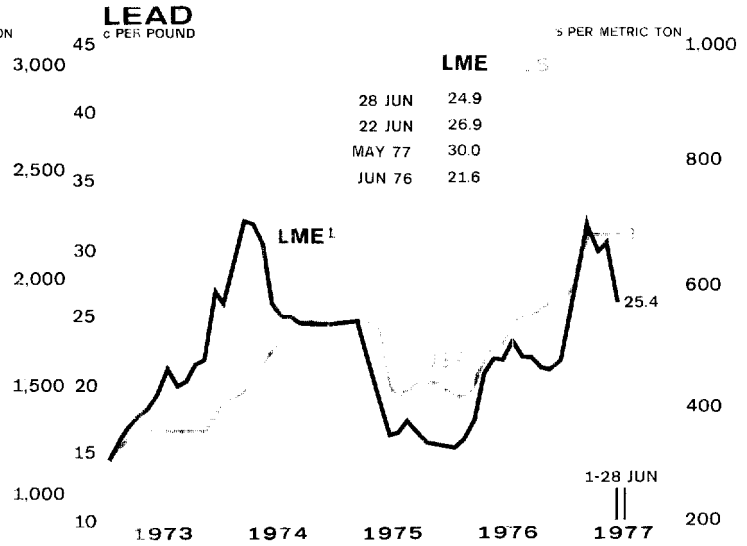
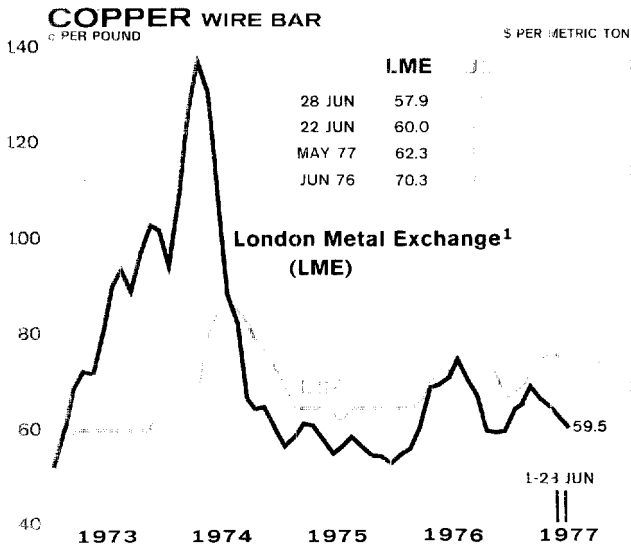
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AGRICULTURAL PRICES MONTHLY AVERAGE CASH PRICE





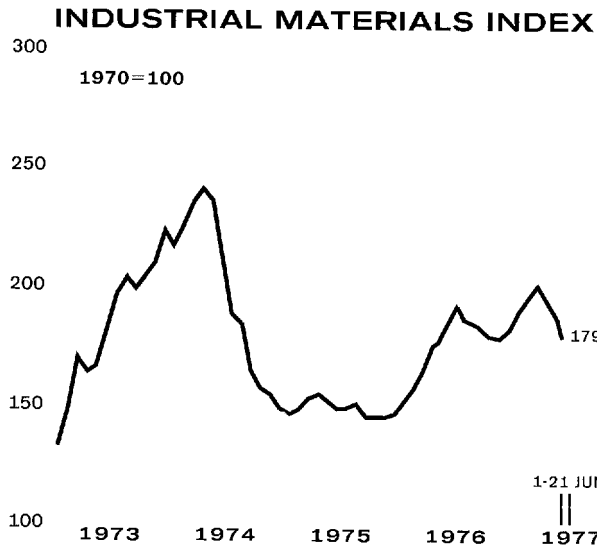
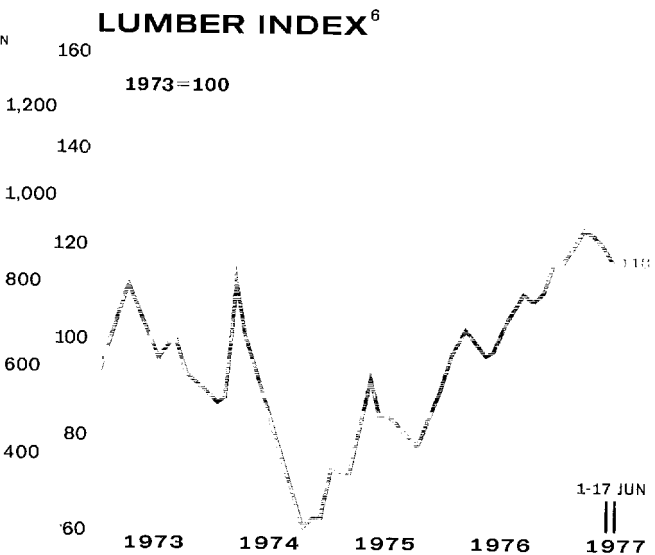
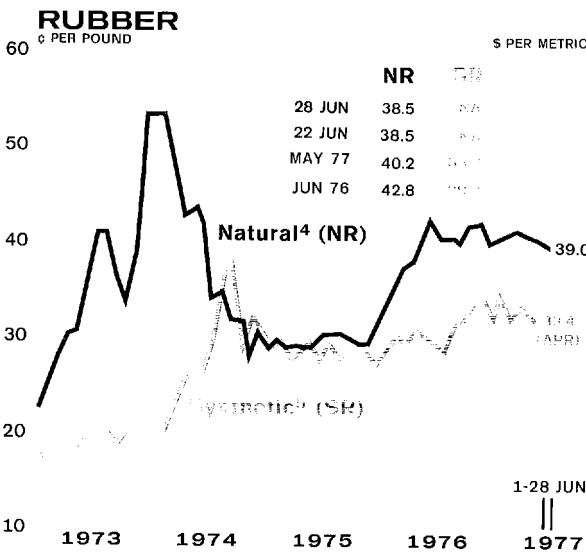
NOTE: The food index is compiled by the Economist for 16 food commodities which enter international trade. Commodities are weighted by 3-year moving averages of imports into industrialized countries.

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INDUSTRIAL MATERIALS PRICES MONTHLY AVERAGE CASH PRICE



SELECTED MATERIALS

| | | | CURRENT | DEC 76 | JUN 76 | JUN 75 |
|----------------------|-------------------------------|-----------------------|-----------|----------|----------|----------|
| ALUMINUM | Major US Producer | £ per pound | 51.00 | 48.00 | 44.00 | 39.00 |
| US STEEL | Composite | \$ per long ton | 339.27 | 333.78 | 316.36 | 289.23 |
| IRON ORE | Non-Bessemer Old Range | \$ per long ton | 21.43 | 20.51 | 19.50 | 17.53 |
| CHROME ORE | Russian, Metallurgical Grade | \$ per metric ton | 150.00 | 150.00 | 150.00 | 135.00 |
| CHROME ORE | S. Africa, Chemical Grade | \$ per long ton | 58.50 | 42.00 | 39.00 | 35.05 |
| FERROCHROME | US Producer, 66-70 Percent | £ per pound | 43.00 | 43.00 | 45.00 | 53.50 |
| NICKEL | Major US Producer Cathode | \$ per pound | 2.41 | 2.41 | 2.20 | 2.01 |
| MANGANESE ORE | 48 Percent Mn | \$ per long ton | 72.00 | 72.00 | 72.00 | 67.20 |
| TUNGSTEN ORE | 65 Percent WO ₃ | \$ per short ton | 10,584.70 | 8,581.80 | 6,525.25 | 5,262.84 |
| MERCURY | NY | \$ per 76 pound flask | 120.00 | 134.50 | 110.00 | 155.19 |
| SILVER | LME Cash | £ per troy ounce | 446.35 | 434.62 | 478.82 | 449.19 |
| GOLD | London Afternoon Fixing Price | \$ per troy ounce | 140.31 | 133.79 | 125.71 | 164.15 |



- ¹Approximates world market price frequently used by major world producers and traders, although only small quantities of these metals are actually traded on the LME.
- ²Producers' price, covers most primary metals sold in the US.
- ³As of 1 Dec 75, US tin price quoted is "Tin NY lb composite."
- ⁴Quoted on New York market.
- ⁵S-type styrene, US export price.
- ⁶This index is compiled by using the average of 13 types of lumber whose prices are regarded as "bell wethers" of US lumber construction costs.
- ⁷Composite price for Chicago, Philadelphia, and Pittsburgh.

NOTE: The industrial materials index is compiled by the Economist for 19 raw materials which enter international trade. Commodities are weighted by 3-year moving averages of imports into industrialized countries.

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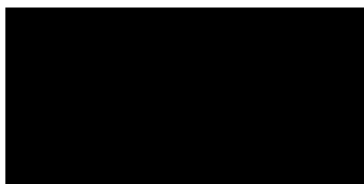
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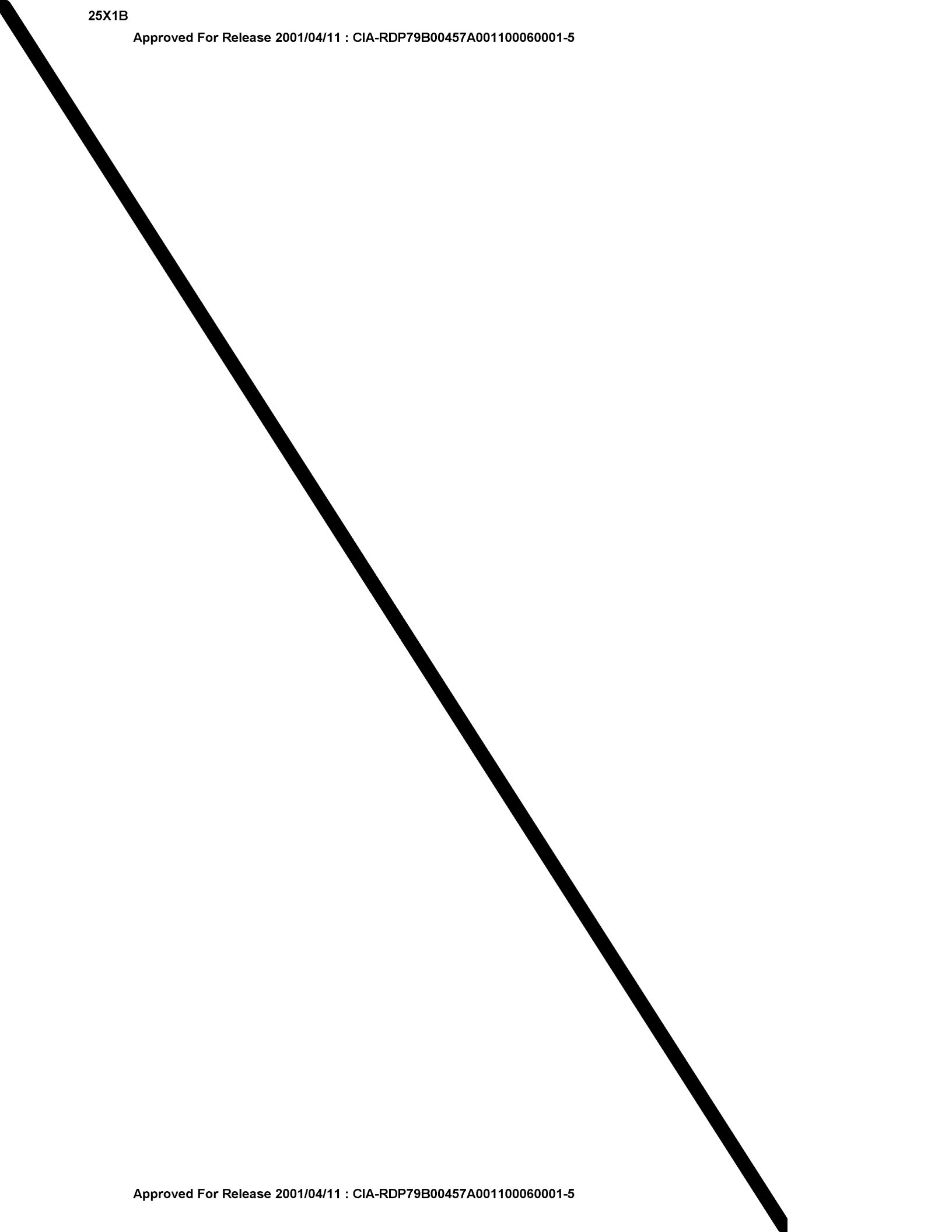
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03 OSR 06 OCR 08 OWI 28 ORPA
30 OIA 40 DIA 60 STATE 59 NSA
JOINT OFFICE (specify): DRPA

KEY INTELLIGENCE QUESTION(S)-KIQ
DOCUMENT TYPE (15-16)
11 12 13 14 04 IM 11 IH 15 TM 53 EIW
05 M 12 IB 32 NID 60 SURVEYOR
07 IR 13 RP 41 SID 61 WIS
08 R 14 BR 51 IOD

17 18 19 20
CLASSIFICATION: SECRET
CLASSIFICATION CONTROLS: NOFORN/NO CONTRACT

TOPICAL CATEGORY
Internal Politics [X]
International Relations [X]
Economics [X]
Military
Science & Technology
Geography
Biography
GEOGRAPHIC AREA CATEGORY
USSR
Eastern Europe
Western Europe
China
Other Far East
Near East/N. Africa
South Asia
Africa
Latin America

LIST SPECIFIC COUNTRIES: JAPAN

TO BE COMPLETED BY R & E

| CONTROL NO. (21-22) | TOPIC (23-24) | AREA (25-28) |
|---------------------|---------------|--------------|
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SECRET

PUBLICATIONS SOURCE SURVEY USE OF INFORMATION FROM COLLECTION PROGRAMS IN FINISHED INTELLIGENCE

GENERAL INSTRUCTIONS

Rating forms will be completed for each finished intelligence publication prepared by DDI/Components. This is a machine-supported system and information must be gathered in a formatted fashion. Therefore, each analyst will complete the NON-SHADED parts of section I and II of this form. Please type or print legibly. Questions should be directed to A/Comp/R&E Room 3E63 x 7871 (black) x 1724 (red).

SECTION I

[REDACTED] X 7234
XX

| CARD TYPE (1-2) | SURVEY NO. (3-8) | DATE PUBLISHED (9-12) | | PUBLICATION NUMBER (13-23) | FOR CRG ONLY CIB PUBLICATION DATE (13-18) | | |
|-----------------|------------------|-----------------------|----|----------------------------|---|-----|----|
| | | MO | YR | | MO | DAY | YR |
| 1 | | 07 | 77 | EFEI W 77-027 | | | |

PUBLICATION TITLE (24-80)

| | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|----|---|---|---|---|---|---|---|---|---|---|--|---|---|---|---|---|---|---|--|---|---|---|---|---|--|---|---|---|
| 24 | I | S | R | A | E | L | : | T | H | E | | E | C | O | N | O | M | Y | | U | N | D | E | R | | B | E | G |
| 53 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

CARD 2 XXX

| CARD TYPE (1-2) | SURVEY NO. (3-8) | OFFICE (9-10) | | | | FOR CRG ONLY CIB PUBLICATION DATE (13-18) | | | | | | | | | | | | | | | | | | | | | | |
|-----------------|------------------|---------------|--------|---------|--------|---|--------|--------|---------|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
| | | 02 OER | 03 OSR | 04 OGCR | 06 OCR | 07 OSI | 08 OWI | 27 CRG | 28 ORPA | | | | | | | | | | | | | | | | | | | |
| 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| KEY INTELLIGENCE QUESTION(S)-KIQ | | | | DOCUMENT TYPE (15-16) | | | |
|----------------------------------|----|----|----|-----------------------|-------|--------|-------------|
| 11 | 12 | 13 | 14 | 04 IM | 11 IH | 15 TM | 16 EIW |
| | | | | 06 M | 12 IB | 32 NID | 60 SURVEYOR |
| | | | | 07 IR | 13 RP | 41 SID | 61 WIS |
| | | | | 08 R | 14 BR | 51 IOD | |

| | | | | | |
|----|----|----|----|-------------------------------|--------------------------------------|
| 17 | 18 | 19 | 20 | CLASSIFICATION: <i>Secret</i> | CLASSIFICATION CONTROLS: <i>None</i> |
|----|----|----|----|-------------------------------|--------------------------------------|

| TOPICAL CATEGORY | GEOGRAPHIC AREA CATEGORY |
|---|---|
| <input type="checkbox"/> Internal Politics <input type="checkbox"/> International Relations <input checked="" type="checkbox"/> Economics <input type="checkbox"/> Military <input type="checkbox"/> Science & Technology <input type="checkbox"/> Geography <input type="checkbox"/> Biography | <input type="checkbox"/> USSR <input type="checkbox"/> Eastern Europe <input type="checkbox"/> Western Europe <input type="checkbox"/> China <input type="checkbox"/> Other Far East <input checked="" type="checkbox"/> Near East/N. Africa <input type="checkbox"/> South Asia <input type="checkbox"/> Africa <input type="checkbox"/> Latin America |

LIST SPECIFIC COUNTRIES: *ISRAEL*

TO BE COMPLETED BY R & E

| CONTROL NO. (21-22) | TOPIC (23-24) | AREA (25-28) |
|---------------------|---------------|--------------|
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Approved For Release 2001/04/11 : CIA-RDP79B00457A001100060001-5

Approved For Release 2001/04/11 : CIA-RDP79B00457A001100060001-5