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SECURITY INFORMATION

INTELLIGENCE MEMORANDUM

SOVIET FULFILLMENT OF AGRICULTURAL GOALS
1952

CIA/RR IM-381

12 October 1953

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CENTRAL INTELLIGENCE AGENCY

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FOREWORD

The Soviet Central Statistical Administration recently has adopted the annual practice of announcing the degree to which the various economic segments of the country have fulfilled their predetermined goals during the preceding year. The announcement, released in January 1953, concerning fulfillment of the 1952 Economic Plan included a section on agriculture and a few brief comments on forestry and on the sale of food to consumers. Except for the comments on food sales, this section was devoted almost exclusively to production goals or to goals related to the improvement or increase of such production factors as the acreage of cultivated land. It omitted mention of many agricultural commodities, and some of those considered were given only general treatment which is not susceptible of statistical evaluation.

The purpose of this memorandum is to evaluate these Soviet claims of goal fulfillment for agricultural commodities and related products. Its scope is limited, therefore, to an analysis of the items mentioned in the announcement. Furthermore, it is confined generally to an analysis of claimed production achievements and an appraisal of the importance of the 1952 production of major commodities in respect to larger Soviet goals. Where applicable, tables showing estimates for the past 2 or 3 production years are given to provide a further basis for evaluation of each Soviet claim.

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(ORR Project 21.12.1)

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SECURITY INFORMATION

SOVIET FULFILLMENT OF AGRICULTURAL GOALS*
1952

Summary

In the latter part of January 1953 the USSR announced the degree of fulfillment of the 1952 Economic Plan. The announcement states that the annual Plan for gross production was fulfilled. Several ministries, however, fell short of their individual goals, including the Ministry of the Timber Industry, with only 90 percent fulfillment; the Ministry of the Fish Industry, with 94 percent; and the Ministry of Agricultural Machine Building, with 96 percent. Most prominent among the Soviet claims for agriculture in 1952 are the following: an increase of 2,765,000 hectares** in the total cultivated acreage; an increase in wheat acreage of 3,320,000 hectares; and an increased grain production amounting to 131 million metric tons, an amount 8 percent greater than the announced production for 1951.

The announced increase in the total cultivated acreage seems to be reasonable in view of the long-standing efforts on the part of the USSR to broaden its agricultural production base by extending crop acreage on marginal lands in northerly areas and in semiarid regions. Small increases in the cultivated acreage also have resulted from the improvement of irrigation and drainage. The announced increase in wheat acreage, although relatively large, is in keeping with the growing emphasis of the USSR on wheat production at the expense of other grains. This increase must have been at the expense of other grains, since the Soviet announcement also claimed increases in acreage and in production both for industrial crops and for fodder and grass crops. These claims seem reasonable, with the exception of the 1951 base figure for sugar production, which is considered to be too high. The 8-percent increase indicated for total grain production represents a normal increase in the trend of postwar production.

Livestock data comprise the most questionable part of the published claims of agricultural Plan fulfillment. No mention was made in the Soviet announcement either of total livestock numbers or of

* This memorandum contains information available as of 1 June 1953.
** A hectare equals 2.471 acres.

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livestock in the private sector of the collective farm economy. Since there has been a drive to transfer livestock from the private sector of ownership by collective farm members to the socialized sector of the collective farm as a whole, it is believed that most, if not all, of the increases in livestock claimed by the government refer to increases of socialized herds and may, therefore, be merely the results of a statistical regrouping of animals already existing.

Despatches received from the American Embassy in Moscow corroborate the Soviet claim that food consumption has improved in both quantity and quality since 1951.

Despite the failure of the Ministry of Agricultural Machine Building to achieve its goal, the USSR states that mechanization in agriculture has increased. This statement is probably true, but the quality of this mechanization, as indicated by many sources of information, is far from satisfactory.

Agricultural production in the USSR fell to dangerously low levels during World War II. Since 1945 the USSR has been attempting to return to or surpass prewar production. During the first years of postwar recovery, gains were fairly easy to attain, but after 7 years the rate of gain has leveled off without the production of most agricultural commodities having reached the prewar level, much less the overambitious goals that the USSR has announced from time to time. Some industrial crops such as cotton and oil-bearing seeds exceeded prewar production in 1952. Grain production was lower than in the best prewar year (1937), but it approached the average of the 4 years 1935, 1936, 1938, and 1939. In the livestock industry, only sheep exceeded the numbers reported before the war.

It appears unlikely that in the near future the USSR can expand significantly its cultivated acreage, increase materially the yields of most of its crops, or enlarge substantially its herds and flocks. Even if prewar production is reached, there will be a net loss in the per capita supply of most agricultural products in view of the increases in population that are taking place. Although some minor sectors of agriculture and related industries may reach the planned goals for 1955, the goals for the major commodities probably will not be achieved.

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1. Introduction.

Each year, as soon after the close of the calendar year as practicable, the Central Statistical Administration attached to the Soviet Council of Ministers publishes an announcement on the success or failure of the various ministries to achieve predetermined goals. In these announcements, successes are hailed, but failures often are omitted or, if mentioned, deplored. Absolute figures rarely appear, and achievements or failures are usually shown as percentages of the previous year's accomplishment or of the goal established for the year just ended, depending on what the Statistical Administration wishes to emphasize.

2. Weather Conditions, 1952.

Although weather is an important determinant of agricultural production, no mention of weather conditions prevailing during 1952 appears in the Soviet announcement.

Available information on weather conditions affecting Soviet crops in 1952 indicates that insufficient moisture retarded the development of crops seeded in the autumn of 1951 for harvest in 1952. Rainfall during the spring and summer of 1952, however, was favorable in amount and distribution in the principal crop-producing areas, counteracting the earlier deficiency. In some areas, harvesting losses may have increased because of somewhat excessive rainfall during the harvest, but the net effect probably was the production of a crop somewhat better than could have been expected under normal weather conditions.

There are indications that rainfall was slightly below normal in the important grazing regions of the Baltic republics and in Kazakhstan. This deficiency, however, was not sufficient to warrant an assumption that decreases in livestock resulted.

3. Crop Goals.

a. Cultivated Acreage.

The cultivated acreage in the USSR in 1952 was reported by the USSR to be 2,765,000 hectares greater than in 1951. At the same time the wheat acreage was reportedly increased by 3,320,000 hectares. Acreage devoted to industrial crops (cotton, sugar beets, and sunflowers), forage crops, and grasses was reported to have increased by unstated amounts.

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Assuming that the total cultivated acreage of the USSR in 1951 was approximately 152 million hectares, 1/* the increase of 2,765,000 hectares would result in an area of 154,765,000 hectares, or 1.8 percent above 1951. These figures are to be compared with a cultivated acreage of 150.4 million hectares in 1940, indicating an increase of 2.9 percent from 1940 to 1952. Increases of this small magnitude appear to be reasonable in view of the long-standing Soviet goal to enlarge the productive area. These increases may be attributed partly to the extension of production into the marginal or sub-marginal arid lands of Central Asia or into northern areas where short growing seasons limit production and where there may have been some increase in lands reclaimed by irrigation or drainage.

Since the reported increase in wheat acreage of 3,320,000 hectares plus indefinite increases in the acreages of industrial crops, forage crops, and grasses exceeds the increase in the total cultivated acreage of the country, the implication is that there were reductions in other crops such as feed grains (barley, oats, and corn) and rye and in the fallow acreage.

Several observations may be made concerning the apparent reduction in feed grain acreage: (1) the possible reduction in rye and fallow acreage may have been proportionately greater than was the decrease in feed grain acreage; (2) part of the land that was formerly fallow may have been sown to feed crops; (3) regional shifts in feed grain acreage could result in little or no decrease in feed production: that is, a relatively small increase in a favorable agricultural region could more than offset the production of a much larger sown area in a submarginal producing region; or (4) the increased use of potatoes for feeding swine and the better use of roughage and pastures for feeding other livestock could reduce the requirements for feed grains, making possible a gradual decline in their acreage. In any case, minor changes in a given year cannot be interpreted to represent changing trends in the agricultural pattern. They may reflect only weather conditions or other factors at sowing time.

The USSR is rapidly approaching the limits of its potential cultivated acreage -- the physical limits imposed by climatic and agronomic factors. There remain no large areas of land that can be

* Footnote references in arabic numerals are to sources listed in the Appendix.

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put into economically profitable production. At best, the draining of swamps and the much-publicized irrigation projects will increase the acreage that can be profitably cultivated by only a few hundred thousand hectares. Faced by these facts, the USSR in its attempt to keep gross agricultural production in line with the increased demands of an increasing population and of a large military force, and with the need for maintaining reserve stocks, has recently been placing greater stress on the increase of yields per unit of land already under cultivation through use of improved strains of seed, greater use of fertilizers, and improved techniques. Grain is the chief food crop in the USSR, but neither the USSR nor the US has in the past been able to increase grain yields greatly. As in the case of cotton, the USSR can disregard poor economic returns from the use of land with low yields and extend cultivation of any crop onto sub-marginal land, but even a large expansion of mechanization and a resort to dry farming on a greater scale than is now being practiced would not solve this problem. If the population trend continues to rise, the combination of the two factors -- limited arable land resources and limits on yield increases -- can be expected to result eventually in food shortages. These shortages may occur during the next generation, forcing the USSR to enter on a long-time program of importing essential foods.

b. Grain.

According to Soviet claims, grain production in 1952 was 8 billion poods (131 million metric tons) in terms of the biological grain crop,* and the over-all production of wheat was 23 percent higher than in 1951. The 1952 grain-production figure represents an 8-percent increase over the official grain-production figure for 1951 of 7.4 billion poods (121.2 million metric tons) and is 5 percent higher than the announced figure of 7.6 million poods (124.5 million metric tons) for 1950.

The indicated increase in grain production for 1952 seems reasonable because of the moderate increase in grain acreage and the weather conditions, which were slightly more favorable for the development of the crop than in 1951. Estimates of grain production in terms of barn harvest** for 1951 and 1952 reflect an increase in

* The biological grain crop is an estimate of the amount of grain growing in the field before harvest.

** The barn harvest is the amount of grain available for utilization after harvesting has been completed.

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1952 over 1951 similar to that given in the Soviet announcements. The estimated 1952 grain production (barn harvest) of 91,570,000 metric tons is about 6 percent higher than the 1951 barn harvest estimate of 86,540,000 metric tons. The discrepancy in the percentage of increase in 1952 grain production over that of 1951 between the Soviet data and the estimates can easily be reconciled by differences in harvesting losses caused by variations in weather during the harvest period.

The claimed increase for 1952 in the over-all production of wheat of 23 percent over 1951 seems somewhat high when compared with estimates of wheat production for the 2 years. Estimates of the wheat crop for 1951 and 1952 are 36,720,000 and 40,240,000 metric tons, respectively. Based on these estimates, wheat production in 1952 exceeded that in 1951 by about 10 percent.

Although the USSR states, in connection with its 1952 grain-production achievement, that the grain problem has been solved finally and irrevocably, its progress toward fulfillment of its Fifth Five Year Plan (1951-55) grain-production goal appears to be falling short. Grain production during the Plan period is supposed to increase by 40 to 50 percent. Fulfillment of this goal by 1955 would entail an average annual increase in the biological grain crop over the 1950 biological crop of 8 to 10 percent. During the first 2 years of the Fifth Five Year Plan, however, no such large increase in grain production has occurred. The following figures released by the Soviet Central Statistical Administration (in millions of metric tons) -- 1950, 124.5; 1951, 121.2; and 1952, 131 -- indicate that the biological grain crop in 1952 was only about 5 percent greater than in 1950 (the base year of the Fifth Five Year Plan). Therefore, if the USSR is to fulfill its 1955 grain-production goal in the remaining 3 years of the Plan, it must increase grain production at the unrealistic rate of 11 to 14.2 percent each year. At present, the 1955 grain-production goal appears to be impossible of attainment.

The 1952 grain crop was the largest in the postwar period, and the per capita supply is higher than it was in 1951, although lower than it was before the war.* The 1952 grain production of almost 92 million metric tons exceeded that of 1951 by approximately 5 million tons. Several alternative uses of this statistical surplus

* The year 1938 has been selected as the prewar comparison base for acreage and production.

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over 1951 production may be visualized: (1) domestic consumption could be expanded to meet the increased requirements of a growing population, (2) state grain reserves could be enlarged, (3) grain shipments to the European Satellites could be used to alleviate the effects of poor harvests in 1952, and/or (4) cheap grain could be shipped to non-Soviet Bloc destinations. Table 1* gives the estimated area, yield, and production of grains in the USSR for 1951 and 1952.

c. Sugar (Sugar Beets).

The USSR claims that sugar production in 1952 was 3 percent above production in 1951. Considering the favorable weather conditions, improved mechanization, and a slight increase in the acreage of sugar beets, this 3-percent increase might appear conservative and reasonable. The data upon which the USSR based this claim are, however, open to question. The USSR claimed a production of 2.9 million metric tons of raw sugar in 1951. A 3-percent increase would indicate a production of 2,987,000 metric tons. Both of these figures are based upon a planned acreage and a yield of 190 centners per hectare. The average prewar (1935-39) yield in the USSR, however, was only 154 centners per hectare, and in the postwar period (1947-51) the average yield was only 136 centners per hectare. The base on which the percentage increase was derived is obviously too high. Based on realistic yields, the estimated raw sugar production for 1952 is about 2.3 million metric tons, which is 9 percent higher than the estimate of about 2.1 million metric tons in 1951, which was an unfavorable sugar production year.

The 1952 production of more than 2.9 million metric tons of raw sugar claimed by the USSR is obviously unrealistic. As a result of large imports from the Satellites, however, the sugar supply situation in the USSR in 1952-53 is better than during any postwar year and even better than before the war, though sugar consumption in the USSR is still low in comparison with sugar consumption in the European Satellites. Production in excess of the very low normal civilian requirements can be used to meet increased military requirements, or it can be moved readily into reserve stocks or into trade channels without materially lowering the standard of living. Although it is not a strategically essential food, sugar

* Table 1 follows on p. 8.

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Table 1
 Estimated Area, Yield, and Production of Grains in the USSR
 1951 and 1952

Commodity	1951			1952		
	Area (Thousand Hectares)	Yield (Centners a/ per Hectare)	Production (Thousand Metric Tons)	Area (Thousand Hectares)	Yield (Centners a/ per Hectare)	Production (Thousand Metric Tons)
Bread Grains	68.92	8.4	58.06	72.24	8.5	61.30
Feed Grains	36.90	7.6	28.11	36.00	8.3	29.90
Rice	0.18	20.6	0.37	0.18	20.6	0.37
Total	<u>106.00</u>	<u>8.2 b/</u>	<u>86.54</u>	<u>108.42</u>	<u>8.4 b/</u>	<u>91.57</u>

a. All references to centners in this memorandum are to metric centners (100 kilograms).
 b. Average yield.

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can be an important morale factor to both civilian and military consumers. The sugar supply situation can be expected to continue to improve during the next few years because of the emphasis on new agricultural techniques and on the increase of sugar-processing capacity.

Table 2* gives the estimated area, yield, and production of sugar beets and production of raw sugar in the USSR for 1950-52.

d. Industrial Crops.

The Soviet report states: "In 1952 the area under cultivation for cotton, sugar beets, sunflower seed, and other industrial plants was increased over 1951."

The acreage seeded to cotton in 1952 is estimated to have been increased by approximately 200,000 hectares over 1951, and slight increases have been estimated for flax and hemp.

The area sown to cotton in 1952 approaches the planned acreage for 1955. Recent increases, however, have largely been on unirrigated lands and have resulted in lower average yields than formerly. Gross production, on the other hand, is approximately 43 percent greater than the 1935-39 average. This increase places the USSR in a self-sufficient position at present levels of utilization by an inadequate textile industry. This self-sufficiency results in a surplus of lint cotton, the greater part of which is exported to the Soviet Bloc countries. Part of this lint cotton imported by the Satellites is later re-exported to the USSR as finished fabrics under existing processing agreements. The USSR is thus integrating, to a certain extent, the textile industries of the Satellites with those of the USSR. Assuming that the USSR does not engage in war, exports to the Satellite countries can be expected to continue. The quantity of these exports, however, will depend on production and changes in the domestic utilization pattern. A war could adversely affect the cotton supply in the Bloc countries, which are now dependent on imports from the USSR, because that supply would probably be curtailed to meet stronger or new demands within the USSR itself. If the Russians discontinued shipments to the Satellites, their present production of cotton might meet the most urgent domestic needs except perhaps in a prolonged war.

* Table 2 follows on p. 10.

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Table 2

Estimated Area, Yield, and Production of Sugar Beets
and Production of Raw Sugar in the USSR
1950-52

Year	Sugar Beets			Sugar	
	Area (Thousand Hectares)	Yield (Centners per Hectare)	Production (Thousand Metric Tons)	Sugar as a Percentage of Beets Production	Production (Thousand Metric Tons)
1950	1,295.0	133.1	17,236.8	12.6	2,176.8
1951	1,335.5	119.6	15,966.7	13.1	2,086.5
1952	1,335.5	139.3	18,597.6	12.2	2,267.0

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Flax and hemp, like cotton, are produced in greater amounts than the established industry can process, although the quality of hemp products is inferior to similar end items produced from hard fibers. Soviet plans give evidence that the linen- and hemp- processing industries are being enlarged, and it is safe to assume that at least some replacement of worn-out equipment and even some expansion have taken place. Under peacetime conditions the industry operates on the basis of meeting immediate current requirements, which may not require maximum output. In the event of a falling market, hard fibers may be imported for stockpiling purposes or for military and industrial uses which require better grades of fiber. In time of war, however, the industry would be pushed to capacity, civilian consumption could be reduced, and, if necessary, cotton could be substituted for hemp fiber or flax tow in many industries.

Table 3* gives the estimated area, yield, and production of specified industrial crops in the USSR for 1950-52.

e. Feed and Forage Crops.

The USSR claims that in 1952 the area under cultivation of fodder was "significantly increased" and that the area under grass was also "enlarged."

Despite unfavorable weather in some grazing areas, no significant decrease in the production of grass and hay is indicated. It appears that the total production of roughages for summer grazing and for carrying livestock over the winter remained approximately the same as in 1951. This production of roughage supports the estimate that in 1952 cattle numbers remained constant and sheep and goat numbers increased by only 2.8 percent, inasmuch as cattle, sheep, and goats are the main consumers of roughages.

It is estimated that the total production of feed grains decreased but that the total production of potatoes increased sufficiently to allow the use of potatoes as feed to support the estimated 1.5-percent increase in swine.

Any increased availability of roughage or other livestock feed, however, may be used to obtain a greater productivity of milk and meat per animal rather than to increase significantly total livestock numbers.

* Table 3 follows on p. 12.

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Table 3
 Estimated Area, Yield, and Production of Specified Industrial Crops
 in the USSR
 1950-52

Commodity	1950			1951			1952		
	Area (Thousand Hectares)	Yield (Centners per Hectare)	Production (Thousand Metric Tons)	Area (Thousand Hectares)	Yield (Centners per Hectare)	Production (Thousand Metric Tons)	Area (Thousand Hectares)	Yield (Centners per Hectare)	Production (Thousand Metric Tons)
Cotton	2,288	12.3	2,820	2,687	11.5	3,085	2,887	9.4	2,700
Flax	2,000	2.7	540	2,100	2.6	540	2,150	2.6	540
Wool	608	2.9	174	616	2.9	174	624	2.9	176

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f. Vegetable Oils.*

The production of vegetable oils in 1952 is claimed by the Russians to be 9 percent higher than in 1951.

A 9-percent increase in the production of vegetable oils does not appear to be keeping pace with the estimated increase in oil-bearing crops available for processing. There is, however, a time lag between harvesting the crops and their processing. The production of vegetable oils in 1952 is assumed to be the output from both raw materials grown domestically in 1951 and raw materials imported in 1951 and 1952. Domestic raw material production in 1952 exceeded that in 1950 by 10 percent. If imports, which are equal to about 15 percent of domestic production, are added, the total increase in production in 1952 should have been more than 9 percent. The Soviet announcement may indicate, therefore, that processing has reached maximum capacity. Because raw materials may be stockpiled, a continued high level of production of vegetable oils in 1953 can be expected.

The 1952 production of vegetable oils from domestic materials is estimated at 885,000 metric tons as against 858,000 metric tons in the prewar period. On a per capita basis, this production is estimated at 4.2 kilograms per year as compared with the prewar average of 4.5 kilograms per year, but postwar imports from Communist China have more than compensated for the loss in the per capita supply. The current supply of 120,000 metric tons of oil for technical use is double the average prewar supply, while the supply of vegetable oils has just about returned to its former level.

The 1953 level of production will probably show no appreciable rise, because of the decrease in cotton seed production for the past year. Imports from Communist China constitute about 15 percent of the vegetable oils used for domestic consumption and about 25 percent of the total used in industry. The USSR is reported to be negotiating with Argentina for the purchase of linseed.

The average of sunflower seed, which provides approximately 40 percent of Soviet vegetable oils, is estimated to have been increased by 150,000 to 200,000 hectares in 1952 over 1951.

* Output basis.

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In addition to postwar increases in the acreage of vegetable oil crops, imports of vegetable oil and oil seeds have been increased to meet domestic requirements. It is expected that, if peace continues, imports will be maintained at present levels or may even be increased. Under wartime conditions the acreage of oil-bearing crops could be increased, but probably not sufficiently to remove the need for some imports. The USSR, therefore, would be vulnerable to a cessation of trade in vegetable oils and oil seeds. Table 4* gives the estimated area, yield, and production of vegetable oil crops in the USSR for 1950-52.

4. Textile Goals.

The USSR claims that the sown area of cotton and other industrial crops was larger in 1952 than in 1951. It also claims that the textile-processing industry showed the following gains in production in 1952 over 1951: ginned cotton, 7 percent; cotton cloth, 6 percent; woolen cloth, 8 percent; and silk cloth, 29 percent. Increases of 39 and 18 percent, respectively, were claimed in the number of looms and spinning frames.

The sown area of cotton in 1952 has been estimated to be approximately 200,000 hectares larger than in 1951. Because of adverse weather during the spring sowing period, however, the 1952 cotton harvest is estimated to be lower than in 1951 despite the increase in acreage. If a greater than normal percentage of the larger production of raw cotton was carried over unginning at the end of the calendar year 1951 to be ginned in 1952 together with a large part of the 1952 production, a 7-percent increase during 1952 in textile production might be statistically possible.

In absolute figures a 6-percent increase in cotton cloth would represent the difference between 4,705 million meters in 1951 and 4,987 million meters in 1952, or 282 million meters. Considering the available ginned cotton, this increase would appear low, unless it is assumed that spinning and weaving equipment has been unable to keep pace with supply.

The textile figures for 1952 must be considered in the light of the time lag between production and processing. Ginnings in 1952 include part of the 1951 crop in addition to part of the 1952 crop.

* Table 4 follows on p. 15.

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Table 4

Estimated Area, Yield, and Production
of Vegetable Oil Crops in the USSR
1950-52

Commodity	1950			1951			1952		
	Area (Thousand Hectares)	Yield (Centners per Hectare)	Production (Thousand Metric Tons)	Area (Thousand Hectares)	Yield (Centners per Hectare)	Production (Thousand Metric Tons)	Area (Thousand Hectares)	Yield (Centners per Hectare)	Production (Thousand Metric Tons)
Sunflower Seed	3,556	5.1	1,814	3,913	5.1	1,995	4,100	5.3	2,173
Butttonseed	2,288	8.3	1,889	2,687	7.7	2,067	2,887	6.2	1,810

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Ginnings in 1951 were reported to be 33 percent above 1950 (the highest production year, prewar or postwar) and would largely represent the supply available for the production of cotton cloth in 1952. A comparison between the 33-percent increase in raw material and the 6-percent increase in the succeeding year's output of cloth points to a bottleneck in the processing industry. The report of increases in the number of looms and spinning frames in 1952 is the first indication from Soviet sources that this problem is receiving serious consideration.

The goal for the production of cotton cloth during the Fifth Five Year Plan (1951-55) is a 61-percent increase over 1950. On the basis of present production of raw cotton and projections of production by 1955, it appears doubtful whether this goal will be attained. The goal will be even less attainable if other Soviet Bloc countries continue to get an increasing share of the raw cotton supplies of the USSR.

The estimated production of woolen cloth in 1952 reached 185 million meters, which is 21 percent more than in 1950. There was a steady increase in the production of woolen cloth during the Fourth Five Year Plan (1946-50). The announced increases for that period seemed to be reasonable because of large annual imports. In 1951-52, however, only relatively small imports of wool were reported, indicating a greater dependence on wool domestically produced and wool imported from the Soviet Bloc. Considering that the number of sheep and goats increased by only 2.8 percent in 1952, the announced increase of 8 percent in the production of woolen cloth either is high or is a result of increased collections and greater use of coarse domestic wool and blends, which would tend to lower the quality of the woolen cloth output.

The per capita supply of cotton textiles for 1940 is estimated at 21 meters. If 1955 goals are attained, the per capita supply will be raised to 29 meters, and woolen textiles will be increased from 0.65 meter per capita in 1940 to 1.1 meters. Accomplishments in the Fifth Five Year Plan through 1952 indicate that the textile goal for 1955 cannot be attained.

There is some evidence that the production of both cotton and woolen textiles is increasing at a slightly more rapid rate than is the population. If this trend continues, the per capita supply of these textiles will be higher in 1955 than it was in 1940, but not so high

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as would be possible if the 1955 goal could be reached. To attain the 1955 goal, it would be necessary for the USSR to increase its plant capacity, reduce exports to the Satellite countries, and increase imports of raw materials from non-Soviet Bloc countries. At the present time, indigenous raw material supplies cannot be expected to reach a level of output sufficient to attain planned goals.

5. Forestry Goals.

The Ministry of the Timber Industry reports 90-percent fulfillment of the 1952 annual Plan of gross production.

It should not be assumed from this statement that total timber production was 10 percent under the Plan, since the output of the Ministry of the Timber Industry is only 35 to 45 percent of all planned timber production in the USSR.

Timber in the USSR is usually broken into two broad categories, based on the end use: industrial (commercial) timber and fuel wood. The Ministry of the Timber Industry was reprimanded for failing to fulfill the Plan for commercial timber haulage. It can further be assumed that the gross production Plan was padded with large amounts of above-quota fuel wood.

The reported 90-percent fulfillment is a drop from the 94-percent fulfillment for 1951. This shortage can be attributed to adverse weather, poor use of equipment, use of seasonal labor, poor transportation, and a goal that was probably set too high. If the reported fulfillment applies to all timber producers, then the total industrial wood production may be almost 200 million cubic meters (roundwood measure). Table 5* gives the estimated timber production in the USSR for 1950-52.

The Ministry of the Paper and Wood-Processing Industry, which processes into finished goods the raw wood furnished by the Ministry of the Timber Industry,** reported overfulfillment of the 1952 gross production Plan by 102 percent, a drop from the 103-percent

* Table 5 follows on p. 18.

** The Ministries of the Timber Industry and the Paper and Wood-Processing Industry have, since March 1953, been recombined into one ministry, the Ministry of Timber and Paper Industry.

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Table 5

Estimated Timber Production in the USSR
1950-52

Million Cubic Meters			
<u>Year</u>	<u>Industrial Wood</u>	<u>Fuel Wood</u>	<u>Total Roundwood</u>
1950	190.00	180.00	370.00 <u>a/</u>
1951	193.00	182.00	375.00
1952	205.00	175.00	380.00

a. Total "planned" roundwood production in 1950 was to have been 280 million cubic meters, of which 190 million cubic meters were to have been industrial wood and 90 million cubic meters fuel wood. "Planned" production does not include local production by collective and state farms, communities, or individuals. The bulk of this local production is fuel wood. The estimated local production has been added to planned production in this table.

overfulfillment reported in 1951. The gross production percentage gives no solid ground for estimates of production of specific commodities or of the quality of the good produced. The bulk of production was probably composed of goods of inferior quality.

Permanent installations; an enlarged permanent work force; and large quantities of sawmill, woodworking, pulp, and paper-mill machinery (chiefly Finnish reparations) are among the factors that have enabled the gross Plan to be fulfilled.

The Soviet timber industry (all producers, not just the Ministry of the Timber Industry) has probably surpassed prewar production levels, even though nonfulfillment of plans has been reported. Mechanization has apparently increased tremendously over prewar levels, and appears in certain fields to exceed US levels: namely, in the development and use of wood-burning gas generator engines and in the electrification of logging equipment.

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Rumors have been cropping up that the USSR plans to increase greatly the exploitation of its timber resources in order to flood the world market with timber. This may indicate only that, with the bulk of reconstruction out of the way, the USSR is ready to resume its prewar role as one of the largest timber exporters.

The Fourth Five Year Plan (1946-50) called for an increase in timber production in areas that were at that time relatively unexploited -- the North, Northwest, and Siberia -- with a decline in activities in those areas where limited timber reserves had been more or less depleted -- the Ukraine and Central regions. Perhaps these timber-dumping rumors are an indication that such a transfer, at least partially, has taken place and that the industry is ready to produce larger quantities than ever before.

6. Livestock Goals.

The USSR has announced the following percentage increases in livestock during 1952 (numbers on hand 1 January 1953): (a) on the socialized sector of collective farms: cows, 6 percent; swine, 4 percent; sheep, 7 percent; horses, 4 percent; and (b) on state farms of the Ministry of State Farms: cows, 5 percent; swine, 4 percent; sheep, 8 percent; and horses, 9 percent.

No reference was made to total livestock numbers or to livestock in the private sector: that is, to livestock owned by collective farm members, independent farmers, workers, and employees. Neither cattle nor goats were specifically mentioned.

a. Types of Livestock.

(1) Cattle.

By omitting any reference to cattle numbers the Russians appear to be admitting tacitly that no gains were made. Even for the preferred socialized sector no increases in cattle were claimed as was done for swine, sheep, and horses.

A comparison between the claimed increase in the number of cattle and the claimed increase in the number of cows on collective farms for the years 1950 to 1952 indicates that cow numbers increased at a faster rate than cattle numbers, as shown in Table 6.*

* Table 6 follows on p. 20.

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Table 6

Estimated Rate of Increase in Cattle and Cow Numbers
on Collective Farms in the USSR
1950-52

<u>Year (1 January)</u>	<u>Percentage Increase over Previous Year</u>	
	<u>Cattle</u>	<u>Cows</u>
1950	21	27
1951	10	20
1952	12	15

Since, during these years, cow numbers in the socialized sector of collective farms increased at a more rapid rate than total cattle in this sector, a 6-percent increase in cow numbers would seem to indicate, at best, less than a 6-percent increase for total cattle numbers in the socialized sector of collective farms. On 1 January 1952, cattle on collective farms totaled 31.7 million head, of which approximately 8 million, or about 25 percent, were cows. An increase of 6 percent in cow numbers during 1952 might indicate an increase of as little as 1.5 percent in total cattle numbers on collective farms.

There has been a tendency in recent years for cattle numbers, as well as numbers of all categories of livestock, to increase in the socialized flocks and herds of collective farms at the expense of those in the private sector,* including collective farm members. Shortcomings in the stockbreeding program of the socialized sector have been made up by acquisitions from the more successful private sector. The Fifth Five Year Plan (1951-55) calls for an increase in the socialized livestock of collective farms, which in reality means a change in ownership rather than a natural increase through breeding. Consequently, if cattle numbers on the collective

* Property held by the private sector includes that which is owned by individual members of collective farms, independent farmers, workers, and employees.

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farms have held their own since 1 January 1952, cattle numbers in the private sector have probably decreased.

Increases in cow numbers, but not in cattle numbers, also were given for state farms, although only for those under the Ministry of State Farms. The proportion of cow numbers to total cattle numbers on state farms is greater than the proportion of cow numbers to total cattle numbers in the socialized herds on collective farms, but the omission of any reference to cattle numbers seems to reflect only slight gains, if any, in total cattle numbers on state farms. A 5-percent increase in cow numbers on state farms is claimed. In the past, moreover, the performance of the Ministry of State Farms in increasing livestock numbers has been better than the over-all performance of all Soviet state farms.

On the basis of all of the above evidence, it is assumed that cattle numbers for 1 January 1953 are not appreciably higher than the figures carried for 1 January 1952 and may be even lower. The preliminary estimate for cattle numbers as of 1 January 1953 is, therefore, approximately the same as the 1 January 1952 total of 58.8 million cattle.

It appears that cattle numbers may be leveling off or at least that the future rate of increase may be somewhat less than the rapid rate at which recovery was being made up through 1951. The Fifth Five Year Plan (1951-55) calls for about 67.5 million cattle on 1 January 1956 as compared with the above estimate of 58.8 million cattle on 1 January 1953. This would require an average increase of 5 percent for each of the next 3 years. Although the USSR has planned to increase substantially the area in summer pastures and the quantity of roughages to be stored as feed to carry cattle through the winter, it is improbable that even under reasonably favorable weather conditions the USSR will be able to increase cattle numbers at an average rate of 5 percent per year. Cattle numbers attainable by 1 January 1956 are estimated at about 61.8 million. On the basis of this estimate, the Soviet goal for 1 January 1956 is unrealistic.

(2) Swine.

There were reported to be 16.1 million swine as of 1 January 1952 in the socialized sector on collective farms in the USSR. When the reported 4-percent increase during 1952 is added to

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this figure, the estimated number of swine in socialized herds on collective farms as of 1 January 1953 becomes 16.7 million. The increase in swine on state farms of the Ministry of State Farms is also reported at 4 percent. If this claimed increase, which seems modest enough, is assumed to cover all state farms, swine numbers on state farms increased from 4.1 million as of 1 January 1952 to 4.3 million as of 1 January 1953.

Swine numbers in the socialized sector have been increasing, as have cattle numbers, at the expense of the private sector. The absence of any mention of total swine numbers for all categories of owners seems to indicate that swine numbers in the private sector have not increased and may even have decreased. The transfer of swine from the usually more successful private sector to the socialized sector of collective and state farms makes the reported increase possible. On the basis of reported figures, the total number of swine in the USSR on 1 January 1952 has been placed at 26.7 million, which, as indicated in Table 7* below, included 16.1 million swine in the socialized herds on collective farms and 6.5 million swine in the herds of collective farm members and other private owners.

As indicated above, there has been a reported increase equivalent to 0.8 million swine in the socialized herds of collective and state farms. On the premise that there was no change in total swine numbers in the USSR, it may be further assumed that the private sector lost 0.8 million swine to the socialized sector. The resulting figure may be accepted as the lower limit of the 1 January 1953 range of swine numbers. For the upper limit of the range of swine numbers, the claimed increase in the socialized sector has been added to swine numbers as of 1 January 1952, and swine numbers in the private sector as of 1 January 1952 have been carried over to 1 January 1953, as indicated in Table 7.

The median between the upper and lower limits for swine numbers is about 27.1 million and is accepted as the preliminary estimate for swine numbers for 1 January 1953, a 1.5-percent gain over the number estimated for 1 January 1952.

* Table 7 follows on p. 23.

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Table 7

Estimated Swine Numbers in the USSR
1952 and 1953

	Million Head		
	<u>1 January 1952</u>	<u>1 January 1953 (Lower Limit)</u>	<u>1 January 1953 (Upper Limit)</u>
State Farms	4.1	4.3	4.3
Socialized Sector of Collective Farms	16.1	16.7	16.7
Private Owners	6.5	5.7	6.5
Total	<u>26.7</u>	<u>26.7</u>	<u>27.5</u>

The Fifth Five Year Plan for swine, less realistic than that for cattle, has a goal of 35 million, a 29-percent increase over estimated 1 January 1953 numbers of 27.1 million. This over-all increase represents an annual increase of about 9 percent for the years 1953 through 1955. Although increases of these proportions in swine numbers are biologically feasible, there is doubt as to whether the availability of feed, particularly grain and potatoes, will support such increases. In the USSR, cattle receive relatively little grain, oilcake, or other concentrates. Swine are fed chiefly grain and potatoes. It is extremely doubtful that over one-third more grain and potatoes could be made available to make possible an increase in swine numbers of 29 percent in 3 years, particularly in view of the demand for grain and potatoes by the increasing human population in the USSR. It is anticipated that swine numbers will level off to about 28.2 million on 1 January 1956.

(3) Sheep and Goats.

It has previously been noted that goat numbers were not mentioned in the report on livestock increases. There is the possibility that the USSR may have used the Russian word for sheep (ovtsa) to refer to both sheep and goats. However, Soviet practice in the past has generally been to distinguish between these categories of livestock. Furthermore, since there are few goats in the socialized sector, it would not be too meaningful for the USSR to

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speak of both sheep and goats in the socialized herds on collective or state farms. In recent years the combined total of sheep and goat numbers (primarily, sheep in the socialized sector and goats in the private sector) has shown greater absolute gains than have all other categories of livestock combined, and the Fifth Five Year Plan reflects optimism as to further increases.

Some of the increase in sheep numbers in the socialized sector is at the expense of the private sector. The continuing increases in goat numbers in the private sector, however, may tend to offset its losses of sheep to the socialized sector. Two assumptions have been made in determining sheep and goat numbers. First, it has been assumed that the reported 7-percent increase in the socialized flocks on collective farms and the 8-percent increase on state farms apply to the few scattered goats in the socialized sector as well as to the overwhelming majority of sheep. It is further assumed that the increase announced for the Ministry of State Farms applies to all state farms, although this may not actually be the case.

On the basis of reported figures, the total number of sheep and goats in the USSR on 1 January 1952 has been placed at 107.5 million. This total includes 73.5 million in the socialized flocks on collective farms and 24.1 million held by collective farm members and other private owners.

The reported increase in the socialized sector is equivalent to 5.9 million sheep and goats. On the premise that there was no change in total sheep and goat numbers in the USSR, it may be further assumed that the private sector lost 5.9 million to the socialized sector. This figure may be accepted as the lower limit of the 1 January 1953 range of sheep and goat numbers. For the upper limit of the range, the claimed increase in the socialized sector was added to sheep and goat numbers for 1 January 1952, and numbers in the private sector for that date were carried over to 1 January 1953, thus assuming smaller requisitions from the private sector and increases in goat numbers in this sector to counterbalance the losses of sheep, as indicated in Table 8.*

The median between the upper and lower limits for sheep and goat numbers is about 110.5 million and is accepted as

* Table 8 follows on p. 25.

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Table 8

Estimated Sheep and Goat Numbers in the USSR
1952 and 1953

	Million Head		
	<u>1 January 1952</u>	<u>1 January 1953 (Lower Limit)</u>	<u>1 January 1953 (Upper Limit)</u>
State Farms	9.9	10.7	10.7
Collective Farms	73.5	78.6	78.6
Private Owners	24.1	18.2	24.1
Total	<u>107.5</u>	<u>107.5</u>	<u>113.4</u>

the preliminary estimate for sheep and goat numbers for 1 January 1953, a 2.8-percent gain over the number estimated for 1 January 1952.

The USSR has set 158.4 million sheep and goats as its goal for 1 January 1956, as contrasted with the estimate of 110.5 million in 1953. The Five Year Plan goal of 158.4 million sheep and goats calls for an increase of about 48 million sheep and goats in 3 years, or an increase of 43 percent from 1 January 1953 to 1 January 1956, which amounts to about a 14-percent increase per year. Despite the fact that sheep and goats in the USSR have shown greater absolute gains than have all other categories of livestock combined, postwar Soviet experience has shown that the average annual increase in sheep and goat numbers for 1949 to 1953 was only about 5.1 percent. Expansion of pastures through construction of irrigation and reclamation projects will enable the USSR to increase sheep and goat numbers to some extent, but far below the planned goals. It is estimated that sheep and goat numbers for 1 January 1956 will be 117.2 million. Thus the Fifth Five Year Plan goal of 158.4 million would seem to be highly unrealistic.

(4) Horses.

The announced 4-percent increase in horse numbers in the socialized herds of the collective farms during 1952 indicates about 12.1 million horses as of 1 January 1953, or a gain of over 400,000

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over the 1 January 1952 figure of 11.7 million horses in the socialized sector of collective farms. Since the Fifth Five Year Plan calls for 12.3 million horses in socialized herds on collective farms by 1 January 1956, it is apparent that the current Five Year Plan figures for horses have almost been met 3 years ahead of plan.

As a result of wartime losses and increased collectivization, horse numbers in the private sector have represented only a small fraction of total horse numbers since the war. Although not many details are available, horse numbers in the private sector are estimated to have been under one-half million on 1 January 1952, with collective farm holdings representing 11.7 million, or 80 percent of the Soviet total of 14.7 million. State farm horse numbers have been assumed to be over 2.5 million.

It may still be possible for the socialized sector to increase horse numbers at the expense of the private sector, as is the case with other categories of livestock. With the virtual disappearance of horses in the private sector, however, any transfer of livestock would have to be on a small scale and at a diminishing rate.

The 1952 horse numbers on state farms are increased by 100,000 to 2.6 million to account for the claimed 9-percent increase in horses on state farms of the Ministry of State Farms.

The planned total horse numbers for 1 January 1956 are 15.1 million. Since the planned collective farm total of 12.3 million horses has not yet been reached, it is safe to assume that 1956 planned total numbers have not yet been attained. Fifteen million, therefore, is taken as the upper limit of total horse numbers for 1 January 1953. The 1 January 1952 total of 14.7 million is taken as the lower limit. The median between the upper and lower limits for horse numbers is 14.85 (or 14.9) million, which is accepted as the preliminary estimate for horse numbers for 1 January 1953, or a 1.4-percent increase over 1952.

The Fifth Five Year Plan goal for horses is 15.1 million on 1 January 1956. As indicated above, this total has virtually been reached and should be maintained through the Plan period.

Table 9* shows estimates of livestock numbers in the USSR for 1952 and 1953 as of 1 January. The percentage of change has also been computed.

* Table 9 follows on p. 27.

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Table 9

Estimated Livestock Numbers in the USSR
as of 1 January 1952 and 1953

	Million Head		
Livestock	1 January 1952 (End of 1951)	1 January 1953 (End of 1952)	Percentage of Change
Cattle			
State Farms	4.3	4.3	0
Collective Farms	31.7	31.7	0
Privately Owned	22.8	22.8	0
Total	<u>58.8</u>	<u>58.8</u>	<u>0</u>
Swine			
State Farms	4.1	4.3	+4
Collective Farms	16.1	16.7	+4
Privately Owned	6.5	6.1	-6
Total	<u>26.7</u>	<u>27.1</u>	<u>+1.5</u>
Sheep and Goats			
State Farms	9.9	10.7	+8
Collective Farms	73.5	78.6	+7
Privately Owned	24.1	21.2	-12
Total	<u>107.5</u>	<u>110.5</u>	<u>+2.8</u>
Horses			
State Farms	2.5	2.6	0
Collective Farms	11.7	12.1	+4
Privately Owned	0.5	0.2	-60
Total	<u>14.7</u>	<u>14.9</u>	<u>+1.4</u>

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b. Livestock Products.

(1) Meat and Dairy Products and Canned Food.

Plan fulfillment claimed for the food ministries in 1952 was as follows: Fish Industry, 94 percent; Meat and Dairy Industry, 100.5 percent; and Food Industry, 103 percent. The 1952 output of various food products in terms of the 1951 output, according to Soviet claims, is given in Table 10.

Table 10

Claimed 1952 Output of Soviet Food Products
as a Percentage of 1951 Output

<u>Category</u>	<u>Percentage of 1951</u>
Meat	115
Butter	104
Milk Products	105
Canned Milk	128
Cheese	115
Canned Goods	111

Failure of the Ministry of the Fish Industry to fulfill the 1952 Plan may indicate an overambitious goal in view of the reported use of obsolete equipment and the reluctance of certain officials of the Ministry to promote the modernization of the industry. 2/ Since World War II the USSR has been rebuilding and re-equipping its fishing fleet. Although the fish catch immediately after the war was lower than before, it is estimated that by 1949 the catch had exceeded that of most prewar years. Since 1949 the rising trend has continued. With the planned replacement of old

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equipment and the adoption of new techniques, such as the use of underwater illumination for night fishing and the use of airplanes for locating schools, it is believed that the catch can be increased still further.

The Russians indicate that the Ministries of the Meat and Dairy Industry and the Food Industry barely met their goals. These ministries may have exceeded their goals in certain segments although failing in others. The Ministry of the Meat and Dairy Industry probably met its goal for 1952 because of the increased availability of meat and dairy products to government distribution channels. The drive to increase the number of livestock in the socialized sector has increased the state's control over production and distribution of dairy products, but this control cannot be expected to improve per capita consumption. Dairy products may, however, move to the various consumer groups in different amounts than formerly. The nonfarm laboring class and other favored groups will have access to more dairy products and, as a result of recent price reductions, at lower cost than in the past.

The base on which the Russians computed the outputs of various commodities was shifted from a comparison with goals to a comparison with the preceding year (1951). This shift presents more favorable achievements than would be possible if goals had been used as a base, as is illustrated by the canned food output, which, although showing an 11-percent increase over 1951, fell 9 percent below the announced goal of a 20-percent increase for the year. The canned food output of the USSR was about 1 billion cans (400-gram standard cans) in 1940. During the war, production fell to low levels. It had attained and exceeded the 1940 output by 1949 and has increased progressively in succeeding years. Production in 1952 is estimated at 1.8 billion cans, and further increases can be expected to occur. Plants are not being used at their maximum capacity, largely because of inefficient management and a lack of skilled labor. It is believed that these inefficiencies contributed to the failure of the industry to attain the announced goals for 1952. Shortages of tinplate could be a drawback if the industry shifted to an all-out military production basis. If, however, production of canned foods adapted to civilian requirements is emphasized, glass containers can be made and used to greater advantage than at the present time.

The increase in meat products was facilitated by the continued expansion of livestock numbers in the socialized sector,

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primarily at the expense of the private sector. It is believed that as a concomitant of the leveling off of cattle, swine, and sheep numbers during 1952, meat production in the USSR increased by almost one-half million tons (3,460,000 metric tons in 1951 as compared with 3,950,000 metric tons in 1952). Assuming reasonably favorable weather and crop conditions for 1953, some increase may be anticipated in livestock numbers. If there is an increase in livestock numbers, a leveling off, it not an actual drop, in meat production may be expected for 1953. A tentative estimate of future Soviet meat production places 1953 production at 3,870,000 metric tons and 1954 production at 3,960,000 metric tons. The estimated meat production for 1952 and 1954 is roughly equal to the 1938 meat production. When the increasing population in the USSR is taken into account, however, it becomes apparent that the 1952 and 1954 per capita meat production is over 10 percent below the 1938 level, as is shown in Table 11.* By way of comparison, per capita meat production figures of the US are included.

A 3-year series of production estimates for specified livestock products is given in Table 12.**

(2) Wool.

The production of raw wool was not reported in the announcement of Plan fulfillment. Woolen textile production for 1952, however, is claimed to be 108 percent of 1951 production.

Increases in sheep numbers justify carrying the amount of the wool clip proportionately higher than in 1951. The 8-percent increase reported, however, is higher than is justified by the estimated increase of 2.8 percent in sheep and goat numbers. The Fifth Five Year Plan goals visualize large gains both in the average yield per sheep and in sheep numbers. If they are achieved, wool production will more than double in the USSR between 1951 and 1955. It is expected that Soviet sheep numbers will fall far short of the established goal. Sheep numbers for 1952 were near the record high, and pastures and roughage resources cannot support the planned increases of sheep and other categories of livestock at the same time. Planned wool yields for 1955 are also unrealistic. The 1952 average

* Table 11 follows on p. 31.

** Table 12 follows on p. 32.

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Table 11

Total and Per Capita Production of Meat
(including Slaughter Fat) in the USSR and the US
1938, 1951-55

Year	USSR <u>a/</u>		US <u>b/</u>	
	Total (Thousand Metric Tons)	Per Capita (Kilograms)	Total (Thousand Metric Tons)	Per Capita (Kilograms)
1938 <u>c/</u>	3,980	21.4	8,259	63.2
1951	3,460	17.0	11,237	72.4
1952	3,950	19.1	11,758	73.8
1953 <u>d/</u>	3,870	18.4	N.A.	N.A.
1954 <u>d/</u>	3,960	18.5	N.A.	N.A.
1955 <u>d/</u>	4,100	18.8	N.A.	N.A.

a. Based on total domestic production of meat and animal fats and on 1 January population estimates.

b. Based on domestic production of carcass meat and lard and on 1 July population estimates.

c. Based on present boundaries.

d. Forecasts are based on the assumption of reasonably favorable weather and crop conditions.

wool clip per sheep of 1.7 kilograms is still below the prewar level of 2.04 kilograms despite efforts to increase production by the use of better feeding and management practices. Time is too short to bring about the significant increases in the average wool clip visualized for 1955.

7. Standard of Living.

The Soviet announcement of 1952 achievement stated that state and cooperative retailers sold to the population 10 percent more goods than in 1951. The percentage of increase in the amount of food products sold through these outlets includes the following: meat, 10 percent; fish products, 13 percent; butter, vegetable oils,

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Table 12

Estimated Production of Selected Livestock Products
in the USSR
1950-52

Commodity	Unit	Production		
		1950	1951	1953
Meat (Commercial)	Million Metric Tons	1.10	1.23	1.41
Butter (Creamery)	Thousand Metric Tons	343	364	379
Canned Milk	Million 400-Gram Cans	72	104	133
Canned Goods (including Meat)	Million 400-Gram Cans	1,363	1,637	1,817

and fats, 17 percent; eggs, 9 percent; milk and dairy products, 17 percent; and sugar, 26 percent. It was also reported that the fifth lowering of the prices of "mass consumption commodities" since the end of rationing (1947) took place on 1 April 1952.

The announcement does not give a clear picture of changes in the availability of food products to consumers, inasmuch as the proportion of the total retail trade handled by the state and cooperative stores is not known. The food distributed through state retail outlets represents less than 50 percent of the food consumption of the nation as a whole. This retail distribution is closely related to the controls which the state enforces to procure these products from the producers, the extent to which the state controls the processing of farm products, and the requirements levied on supplies for the military forces and for stockpiling.

Sugar, which is one of the most completely controlled commodities because it is processed in state-controlled refineries, can easily be put in or withdrawn from retail channels by the state. Only about one-third of all meat is processed under the supervision of the state. The state, therefore, is more limited in the proportion of total production that it can sell at retail than it is in the case of sugar. Such products as eggs and fresh vegetables, which require no processing, are controlled to a lesser extent than meat, and, as a result,

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a relatively large proportion of these commodities is consumed in the households of those who produce them, and to a large extent their sale is confined to private retailing on peasant markets.

Another consideration that precludes unqualified acceptance of the announced increases in state sales as a net gain to the consumer is that no allowance has been made by the USSR for the absolute increase in population between 1951 and 1952, which is estimated at 3.5 million, or 1.72 percent.

Although reports from the American Embassy in Moscow indicate that there has been some improvement in the quantity and quality of the food available for consumption by nonfarmers, it is improbable that a 10-percent increase in retail sales indicates a commensurate improvement in the standard of living of the nation as a whole.

Price reductions announced by the USSR in 1952 are confirmed by the American Embassy. The gains from these reductions accrued chiefly to nonfarming consumers because few commodities purchased by peasants were reduced in price. Price reductions applied largely to agricultural products, with many of these commodities being sold at low, fixed prices in state and cooperative stores. The prices received for them by producers were lower than formerly. The peasants, therefore, were adversely affected in two ways by the price reduction. They were at a relative disadvantage in the prices they paid for the commodities they bought, and they were subjected to absolute decreases in their incomes from the sale of their products.

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APPENDIX

SOURCES AND EVALUATION OF SOURCES

1. Evaluation of Sources.

Only two sources are cited in this report. All other information has been drawn from previously prepared CIA estimates.

The intelligence report published by the Office of Intelligence Research, US Department of State, is considered to be a reliable estimate of the total cultivated acreage of the USSR available for the year indicated.

The Soviet statement, paraphrased from a report of the Foreign Broadcast Information Service, is suspect as a consequence of the official Soviet state policy restricting the dissemination of information about all phases of Soviet activity. The statement paraphrased, however, is probably true.


2. Sources.

Evaluations, following the classification entry and designated "Eval.," have the following significance:

<u>Source of Information</u>	<u>Information</u>
A - Completely reliable	1 - Confirmed by other sources
B - Usually reliable	2 - Probably true
C - Fairly reliable	3 - Possibly true
D - Not usually reliable	4 - Doubtful
E - Not reliable	5 - Probably false
F - Cannot be judged	6 - Cannot be judged

Evaluations not otherwise designated are those appearing on the cited document; those designated "RR" are by the author of this report. No "RR" evaluation is given when the author agrees with the evaluation of the cited document.

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1. State, OIR Intelligence Report No. 5805, 20 May 1952, p. 11.
25X1A8a
A. Eval. RR B-2.
2. 

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