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## INTELLIGENCE BRIEF

PROSPECTS FOR AGRICULTURE  
IN COMMUNIST COUNTRIES AS OF MID-AUGUST 1965

DIRECTORATE OF INTELLIGENCE  
Office of Research and Reports

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PROSPECTS FOR AGRICULTURE  
IN COMMUNIST COUNTRIES AS OF MID-AUGUST 1965

Production of crops in the USSR this year will be well below the excellent harvest of 1964, but livestock production is expected to be substantially improved. An extensive drought in the "new lands" area combined with poor harvesting weather in other areas adversely affected grain production, tentatively estimated at about 10 to 15 percent below that of 1964.\* The current wheat crop is likely to be some 10 to 20 percent below that of 1964, prompting the USSR to purchase more than 7 million metric tons (mt) of wheat from Western sources since the first of July.\*\* With these purchases, the USSR apparently has covered most of its wheat import requirements as foreseen at this stage of the harvest. If adverse weather in September were seriously to impede the harvest of spring wheat, however, it is likely that the USSR would seek to purchase additional quantities abroad.

The total grain harvest in Eastern Europe is currently estimated to be about 5 percent below last year's good crop. Production of breadgrain is up in most countries, but the quality of the grain is down in the northern countries because of wet harvesting conditions. Production of most spring-planted grains, especially corn, and other crops is not expected to be as good as in 1964. In some countries, local shortages of bread and hoarding of flour have been reported. Imports of grain in 1965/66 could exceed the 9 million mt imported during the 1964/65 trade year, when nearly 6 million mt came from the Free World. Eastern Europe already has agreements and contracts with Free World nations and with the USSR for imports during the 1965/66 trade year totaling some 5 million to 5.5 million mt and may still be in the market for as much as 3.5 million to 5 million mt. Limited wheat supplies and transport capabilities in other exporting countries suggest that Eastern Europe might seek to purchase some 2 million to 4 million mt of US wheat. The countries most likely to approach the US for wheat are Yugoslavia, Poland, and Czechoslovakia. Of these, only Yugoslavia purchased US wheat in 1964/65.

It now appears that in 1965 the harvest of grain in Communist China will be somewhat less than the mediocre crop of last year. The harvest of early grain -- tentatively estimated to be 40 million mt -- is believed to be 5 million mt less than last year. Although it is too early to predict what the more important late (fall) harvest of grain will be, prospects currently do not promise an increase in production sufficient to offset the

\* For production of grain in Communist countries, see Table 1.

\*\* For information on these purchases, see CIA/RR CB 65-47, Recent Soviet Purchases of Canadian and Argentine Wheat, August 1965, SECRET. For imports of grain by Communist countries, see Table 2.

poor early harvest. Growing conditions are currently believed to be generally favorable in most of the major rice-growing areas but are unfavorable in much of northern China, where most of the fall-harvested miscellaneous grains and spring wheat are grown. Chinese purchases of wheat during 1965 now total a record 6.8 million mt,\* of which about 1 million mt is expected to be delivered in the first half of 1966.

North Vietnam apparently has harvested another bumper spring rice crop as well as a record level of subsidiary crops. Nevertheless, unless the fall crop is unusually good, the current harvest will provide only temporary relief to the tight food situation.

The outlook for grain in North Korea is for a second successive poor harvest, and the regime may be forced to increase imports significantly.

1. USSR

Agricultural prospects in the USSR as of mid-August are somewhat mixed. Production of crops almost certainly will be below the excellent harvest of 1964, but production of livestock is expected to be considerably above that of last year.

In mid-July, Soviet Minister of Agriculture Matskevich described prospects for the grain harvest as about average. Since then, however, a continuation of a drought almost as severe as that of 1963 in the "new lands" area and poor harvesting conditions resulting from excessive rainfall in many parts of European USSR have dealt a double blow to the grain crop. It is tentatively estimated that grain production in the USSR this year will be some 10 to 15 percent below last year's estimated crop of 120 million mt (excluding immature corn converted to grain equivalents).

The Soviet wheat crop, reportedly described as "poor" by a Soviet official, has been especially hard hit. Production is expected to be some 10 to 20 percent below the 58 million mt estimated for 1964. A prolonged and severe drought in the "new lands," which is the principal region producing spring wheat, has adversely affected production of spring wheat, although the situation is not believed to be as serious as that of 1963. A generally good winter wheat crop has been produced, but excessive rainfall in many areas has hampered harvesting operations and has resulted in abnormally high losses as well as in some reduction in the quality of grain.

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\* According to preliminary estimates, about 5.4 million mt were imported during the crop year (July-June) 1964/65. Contracts signed as of 15 August 1965 call for imports of about 4.1 million mt in the crop year 1965/66; new contracts for delivery of additional quantities of grain in 1965/66 are expected.

Soviet concern over the domestic wheat situation, which will directly affect food supplies, has already been demonstrated by the purchase since July of more than 7 million mt of wheat from Western suppliers. A small part of these purchases will be used to meet export commitments. In addition, the Soviet press has been waging a vigorous campaign stressing the need to harvest "every kernel of grain." The new purchase prices adopted in March 1965 are expected to facilitate the procurement of grain by the state. Although the wheat situation in the USSR does not appear to be as critical as in 1963, the Soviet consumer may once again be subjected to an overall reduction in the quality of bread and a continuation of the absence of flour in retail outlets and limitation on the amount of bread that can be purchased at one time.

A shortage of food similar to that of 1963/64, however, is not likely. Unlike 1963, when all crops except cotton suffered from drought, fairly good crops of potatoes, sugar beets, vegetables, and sunflowers are expected. There is some indication, however, that production of potatoes has been affected to some degree by the rainy weather in certain areas. An excellent crop of fiber flax has been produced in most areas, although there have been some difficulties with harvesting because of lodging. On the other hand, a shortage of water for irrigation is expected to reduce production of cotton somewhat.

Livestock production in 1965 is expected to be the best in a number of years. For example, milk yields in collective and state farms are currently the highest in five years as a result of a good carryover of feed from the 1964 harvest and of favorable pasture growth. The production of feed crops is expected to be good in many parts of European USSR where most of the livestock industry is concentrated. In the areas affected by the drought, supplies of livestock feed have been adversely affected, and some distress slaughtering of animals probably will occur, although a situation similar to that in 1963 when the number of hogs was reduced by more than 40 percent is highly unlikely.

## 2. Eastern Europe

The final outcome of the 1965 grain harvest in the Communist countries of Eastern Europe\* remains uncertain because of unfavorable harvesting conditions and a delayed harvest in several countries. It is tentatively estimated that output of wheat and rye will exceed last year's

\* Albania, Bulgaria, Czechoslovakia, East Germany, Hungary, Poland, Rumania, and Yugoslavia.

S-E-C-R-E-T

good harvest in all countries except Albania, Hungary, and Yugoslavia. Record yields of winter wheat are being claimed by some countries. The northern countries, nevertheless, are currently harvesting wet and lodged grain, which can reduce yields and lower the milling quality of grain. The outlook for coarse grains (barley, oats, and corn) is not as favorable as for breadgrains, and output, especially for corn, may fall well below that of 1964. Thus the overall production of grain in Eastern Europe this year is currently estimated at about 5 percent below that of 1964, or approximately equal to the annual average for 1957-61.

Wet, cool weather since last spring, which delayed planting and retarded crop development throughout much of Eastern Europe, continued to plague agriculture in the northern countries during July and early August. Furthermore, storms, hail, and wind increased the area of lodged grain -- 50 percent of the grain acreage in Czechoslovakia -- and has made harvesting operations the most difficult in many years. As a result, the grain harvest in parts of East Germany, Poland, and Czechoslovakia is as much as four weeks behind schedule. Military personnel and industrial workers in those countries are being used extensively in the harvest to prevent losses. Reports of the delivery of unripe grain and with nearly 30 percent moisture content, however, portend high storage losses. The southern countries are completing their harvest of small grains under relatively favorable conditions.

Production prospects for nearly all row crops are currently not as good as a year ago. Planted acreage for the important crops of potatoes and sugar beets is down, and potential yields have been adversely affected by weeds, unfavorable weather conditions, insects, and late planting. The level of corn production that will be obtained this year in the Balkans is expected to fall below that of 1964. Although soil moisture conditions are good in both Yugoslavia and Hungary, a shorter growing season may prevent all the crops from maturing. In Rumania, Bulgaria, and Albania, yields of corn as well as other summer crops are being adversely affected by drought.

Forage crops and pastures have generally benefited from good soil moisture this spring and summer. Although some countries have had difficulties in haying operations as a result of rain, yields are at record levels, except for Bulgaria and Rumania. Production and procurement of milk and meat in Poland, East Germany, and Czechoslovakia are higher this year than last as a result of the good fodder situation. A shortfall in output of feed grain and potatoes, however, will depress production of meat in 1966.

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Consumer supplies of green vegetables, fruit, and early potatoes continue to be tighter and higher priced than a year ago with no relief in sight. The availability of pork is generally better than a year ago, but beef and veal continue to be in short supply. There are reports that retail outlets in East Germany and Poland are limiting purchases of sugar and flour to prevent hoarding. An excellent wheat harvest in Bulgaria, however, should contribute toward eliminating the bread shortage in that country.

It is estimated that Eastern Europe will need to import approximately 9 million to 10 million mt of grain in 1965/66. This amount is approximately the same as imports in 1964/65 (estimated at 9 million mt), of which nearly 6 million mt (mostly wheat) came from the Free World. The projected shortfall in the Soviet wheat harvest will mean that Eastern Europe must depend on the Free World for most of its grain imports. Except for honoring its long-term agreements, it is unlikely that the USSR will expend hard currency to purchase grain for Eastern Europe. Rumania, the only net exporter of grain, may be forced to reduce exports of corn as a result of a short crop.

### 3. Communist China

The 1965 harvest of early grain in Communist China is tentatively estimated to be 40 million mt, or some 5 million mt below the spring harvest of 1964. The early grain harvest, consisting of winter wheat, winter miscellaneous grains, and early rice, normally accounts for about one-quarter of the annual production of grain. Although the output of early rice is believed to be about 1 million mt greater than the above-average crop of 1964, the increase is not sufficient to compensate for the very poor harvest of winter grains.

Growing conditions for early rice were better than last year in most of the major early rice area, which was up about 350,000 hectares. In the major producing areas, only in Chekiang was the early rice crop reduced significantly by drought. Although wet, cool weather in April reportedly caused some seed rot in Hunan and Kiangsi Provinces and typhoons caused some plant losses in Kwangtung and Fukien, overall losses are not believed to have been as high as in 1964.

The harvest of winter wheat and winter miscellaneous grains, although better than in the calamity years (1959-61), was very poor. The acreage of winter wheat and winter miscellaneous grains is estimated to have been

10 and 25 percent less than in 1964, respectively. Yields of winter grain were also significantly less than last year. Prolonged rainfall throughout most of the fall sowing period delayed or prohibited the sowing of winter wheat in many areas of North, East, and Northwest China and the sowing of winter barley in East, Central, and Southwest China. In addition, many fields had to be replanted when seed failed to germinate. The weather then turned unusually dry, warm, and windy, crusting the soil and retarding plant growth. Drought conditions, prevailing throughout the winter and spring months, adversely affected yields of winter grain. Attempts to recoup losses of winter grain by planting such rapidly maturing crops as buckwheat, spring wheat, and barley were only partly successful.

Prospects for the more important fall grain harvest are mixed. Growing conditions remained generally favorable through July in most of the major rice-producing areas of South, Central, and Southwest China. Although below-normal precipitation in some of these areas has caused some concern about the intermediate and late rice crops, it is doubtful that yields will be affected unless the drought persists. The combined acreage of intermediate and late rice probably is about the same as in 1964. It now appears likely that the late rice harvest will be better than the below-average harvest of last year.

In contrast with the good prospects for late rice, those for other late crops are generally unfavorable. In much of the North China Plain, which accounts for about one-fifth of China's cultivated area and for roughly 15 percent of the autumn-harvested grain (excluding tubers), yields have been adversely affected by excessive rainfall. Light to heavy rainfall has fallen continuously in the area south of the Yellow River from late June through mid-August. This rainfall has caused flooding and waterlogging in some areas, although the size of the area affected cannot be determined at this time. North of the Yellow River, precipitation remained below normal through July. Although the plan for sowing spring crops on winter fallow was underfulfilled, the acreage sown was significantly larger than in 1964. There also was some substitution of grain for industrial crops, especially cotton. The summer sowing plan (following the harvest of winter crops) also was underfulfilled because some fields were too dry for planting.

The outlook for spring wheat is unsatisfactory as a result of prolonged drought that will reduce yields in much of the major producing area. In addition, the area of spring wheat probably is smaller than in 1964.



Communist China is continuing to import considerable quantities of grain from the Free World. The contract signed in July with Canada for an additional 670,000 mt of wheat brings the total known purchases of grain from the Free World in 1965 to a record 6.8 million mt, of which about 1 million mt is expected to be delivered in the first half of 1966.

4. North Vietnam

Despite earlier reports of low rainfall, North Vietnamese officials now claim that the spring-harvested rice crop -- normally about one-third of the annual rice harvest -- has been good. On the basis of official statements, the spring rice crop, sown on a larger area than in 1964, is estimated at 1.8 million mt, about 40,000 mt above last year's bumper crop. Production of subsidiary crops -- corn, manioc, sweet potatoes, and green beans -- also apparently was somewhat above last year's record level of more than 800,000 mt in rice equivalents.\* Nevertheless, unless the fall crop is unusually good, the current harvest will provide only temporary relief to the tight food situation.

Bombing attacks by US planes reportedly have interfered with food distribution, and local food shortages have been reported.

5. North Korea

Overall production of grain in North Korea this year may be even less than the very poor harvest of last year. Major agricultural areas suffered from excessive rainfall, heavy flooding, or waterlogging and from prolonged cloudy weather throughout July. The west coastal region of North Korea -- where most of the country's crops are grown -- received from 8 to more than 21 inches of rain during July -- more than 200 percent of normal in some areas.

In recent years, North Korea has been self-sufficient in the production of grain, but at a low level of per capita consumption. Small quantities of wheat have been imported annually for industrial use. The poor 1964 harvest, however, probably has reduced stocks to near minimum levels, and rations of foodstuffs were reported to have been reduced. Another poor harvest may force North Korea to significantly increase imports of grain during 1965/66.

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\* Subsidiary crops are converted to paddy rice equivalents on the basis of one unit of beans or corn or four units of sweet potatoes or manioc to one unit of paddy rice.

Table 1

Production of Grain in Communist Countries  
1963, 1964, 1965 Forecast, and Annual Average

|                                      | Million Metric Tons |           |         |                                 |
|--------------------------------------|---------------------|-----------|---------|---------------------------------|
|                                      | 1965<br>Forecast    | 1964      | 1963    | Annual<br>Average <sup>a/</sup> |
| USSR                                 |                     |           |         |                                 |
| Total grain <sup>b/</sup>            | 105 <sup>c/</sup>   | 120 [125] | 92 [95] | 105 [111]                       |
| Of which:                            |                     |           |         |                                 |
| Wheat                                | 49 <sup>d/</sup>    | 58        | 40      | 55                              |
| Eastern Europe <sup>e/</sup>         |                     |           |         |                                 |
| Total grain                          | 54                  | 56.1      | 54.2    | 53.5                            |
| Of which:                            |                     |           |         |                                 |
| Breadgrains                          | 28                  | 27.2      | 26.7    | 27.2                            |
| Communist China                      |                     |           |         |                                 |
| Total grain <sup>f/</sup>            | N.A.                | 170       | 175     | 174                             |
| Of which:                            |                     |           |         |                                 |
| Harvested early summer <sup>g/</sup> | 40                  | 45        | 43      | N.A.                            |
| North Vietnam                        |                     |           |         |                                 |
| Total rice                           | N.A.                | 4.51      | 4.30    | 4.65                            |
| Of which:                            |                     |           |         |                                 |
| Spring rice                          | 1.8                 | 1.78      | 1.56    | 1.57                            |

a. 1958-62 for the USSR and Communist China, 1957-61 for Eastern Europe, and 1959-62 for North Vietnam.

b. Excluding immature corn. The figures in brackets include immature corn converted to grain equivalents.

c. Midpoint of range of 102 million to 108 million for 1965.

d. Midpoint of estimated range of 46 million to 52 million.

e. Including Albania and Yugoslavia.

f. Including tubers on a grain equivalent basis of 4 metric tons of tubers to 1 metric ton of grain.

g. Excluding tubers.

Table 2

Imports of Grain by Communist Countries from the Free World  
1963/64 - 1965/66

| Country         | Thousand Metric Tons |                           |                         |
|-----------------|----------------------|---------------------------|-------------------------|
|                 | 1963/64              | Preliminary a/<br>1964/65 | Contracts a/<br>1965/66 |
| USSR            | 11,357 <u>b/</u>     | 3,549 <u>b/</u>           | 7,225                   |
| Communist China | 5,854                | 5,362                     | 4,070                   |
| Eastern Europe  | <u>5,787</u>         | <u>5,967</u>              | <u>2,227</u>            |
| Bulgaria        | 421                  | 500                       | 100                     |
| Czechoslovakia  | 501                  | 850                       | 380                     |
| East Germany    | 635                  | 850                       | 600                     |
| Hungary         | 704                  | 300                       | 100                     |
| Poland          | 2,829                | 2,055                     | 800                     |
| Yugoslavia      | 697                  | 1,412                     | 247                     |
| Total           | <u>22,998</u>        | <u>14,878</u>             | <u>13,522</u>           |

a. Based on information available on contracts or shipments as of 15 August 1965.

b. Including wheat contracted for but not necessarily delivered and wheat or flour shipped to Cuba and Eastern Europe.

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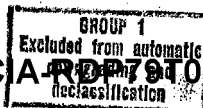
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10 September 1965

**MEMORANDUM FOR:** Chief, Dissemination Control Branch, DD/CR  
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**SUBJECT :** Transmittal of Material

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