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DIRECTORATE OF
INTELLIGENCE

Intelligence Memorandum

Shipping to Cuba in the Second Quarter of 1968

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AUGUST 1968

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Foreword

All ship tonnages reported are expressed as gross register tons (GRT), which is a measure of the cubic space of a ship expressed in tons at the rate of 1 gross register ton per 100 cubic feet. The GRT figures assigned to the shipping discussed are taken from *Lloyd's Register of Shipping*. The volume of cargo is expressed in metric tons. Dry cargo data include that carried on passenger ships as well as on dry cargo ships. Yugoslav shipping is included in Free World shipping. Data for 1968 are preliminary. Because of rounding, components may not add to the totals shown.

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CENTRAL INTELLIGENCE AGENCY
Directorate of Intelligence
August 1968

INTELLIGENCE MEMORANDUM

Shipping to Cuba in the Second Quarter of 1968

Summary

The continued absence of military equipment deliveries to Cuba during the second quarter of 1968 (the last military shipment arrived in mid-February) is further evidence that arms shipments under the probable 1966 agreement with the USSR have been essentially completed. Cuba's seaborne trade in the second quarter reached the second highest level since 1962 and was only 11 percent below the record volume of the second quarter of 1967. Imports and exports were down 13 percent and 7 percent, respectively, in comparison with April-June 1967, as shown in the following tabulation:

Note: This memorandum was produced by CIA. It was prepared by the Office of Economic Research and was coordinated with the Office of Strategic Research.

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April-June

	1967		1968		Percentage Change
	Thousand Tons	Per- cent	Thousand Tons	Per- cent	
Volume of seaborne trade	4,868		4,354		-11
Imports	<u>2,987</u>	<u>100</u>	<u>2,608</u>	<u>100</u>	-13
From Communist countries	2,507	84	2,174	83	-13
From Free World countries	480	16	434	17	-10
Exports	<u>1,881</u>	<u>100</u>	<u>1,746</u>	<u>100</u>	-7
To Communist countries	1,265	67	1,173	67	-7
To Free World countries	616	33	573	33	-7

The decline in imports stemmed principally from a drop in deliveries of crude oil and petroleum products. Crude oil imports for the first half of 1968, however, were about the same as in the first half of 1967, while imports of petroleum products were down for the half year. Imports of general and miscellaneous cargoes were at a new high in the quarter because of increased Soviet shipments of machinery and equipment. A drop of about 200,000 tons in sugar exports in the second quarter from the same period a year ago more than offset increases in molasses and ore shipments and accounted for all of the shortfall in exports.

There were 263 ship arrivals in the quarter, 20 fewer than the record level in the second quarter of 1967. Free World ship arrivals, which dropped from 57 to 44, accounted for the major part of the decline. The first Japanese-flag ship to call at a Cuban port since January 1963 arrived in the second quarter with a cargo of rice from North Korea. Soviet arrivals (166) equaled the record high of the previous quarter. A Soviet tanker that carried

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fuel oil to Cuba continued to Venezuela and loaded crude oil for Finland. Subsequently the Venezuelan government prohibited any further loading of Soviet tankers in Venezuela.

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Ship Arrivals

1. There were 263 ship arrivals in Cuba in the second quarter of 1968, compared with 283 arrivals in the corresponding quarter in 1967 (see Table 1). Free World ships accounted for the major part of the decline, as shown in the following tabulation:

Flag	April-June		Percentage Change
	1967	1968	
Total	283	263	- 7
Soviet	163	166	+ 2
Eastern Europe	32	26	-19
Cuban	31	27	-13
Free World	57	44	-23

2. The 166 Soviet arrivals equaled the record high number of the previous quarter. Soviet dry cargo ships (109) delivered 64 percent of Cuba's dry cargo imports (see Table 2). Soviet tankers (54) sailing principally from Black Sea ports delivered all of Cuba's crude oil imports and 97 percent of its imports of petroleum products.

3. The Soviet tanker *Adler*, after delivering fuel oil to Cuba in June, continued to Venezuela, where it loaded crude oil for Finland. This practice was initiated by European consignees to take advantage of the low freight rates for backhaul offered by the USSR. Heretofore Soviet tankers delivering petroleum to Cuba have returned to the USSR in ballast. After a *démarche* by the US ambassador in Caracas, the Venezuelan government prohibited any further loading of Soviet tankers in Venezuela. Because Soviet tanker rates on the return voyage from Venezuela to Europe are almost \$3.00 a ton cheaper than the going rate, continued pressure to use Soviet tankers is likely to be exerted on suppliers in Venezuela by Western European customers. Rumania may also wish to use these Soviet tankers to transport some of the 11 million tons of crude oil it intends to purchase from Venezuela during the next ten years.

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4. The 23-percent decline in Free World arrivals reflects a decrease in dry cargo arrivals from 49 to 35, as a result of the poor sugar harvest. Free World tanker arrivals increased from 8 to 9. Most of them arrived in ballast to load molasses; only one -- an Italian tanker -- delivered petroleum (diesel oil and aviation gasoline loaded in the USSR).

5. The United Kingdom and Cyprus together accounted for more than two-thirds of the total Free World arrivals in the quarter as shown in the following tabulation:

	<u>April-June</u>	
	<u>1967</u>	<u>1968</u>
Cyprus	11	13
Greece	8	1
Lebanon	4	5
United Kingdom	23	17
Other	11	8
<i>Total</i>	57	44

The drop in Greek-flag arrivals resulted from Achilles Frangistas' transferring ships from Greek registry to Cypriot or Somalian registry. The *Chokyu Maru*, the first Japanese-flag ship to call at a Cuban port since January 1963, arrived from North Korea with 9,280 tons of rice and sailed for North Korea with a cargo of sugar. The Director of the Shipping Bureau of Japan's Ministry of Transportation later stated publicly that Japan would take appropriate steps regarding Japanese ships calling at Cuba. He added, however, that the government had no legal power to prevent such calls.

6. Free World ships delivered only 10 percent of the import volume during the quarter. UK ships, although first in number in Free World arrivals, carried only 1 percent of total imports; Cypriot ships carried 4 percent.

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Cargoes

7. The volume of seaborne trade handled at Cuban ports in the second quarter of 1968 was 11 percent below the record level of the corresponding quarter in 1967, but was the second highest quarterly volume since 1962 (see Tables 3, 4, 5, 6, 8, and 9 and Figure 1). Both imports and exports declined, as shown in the following tabulation:

	<u>April-June</u>		
	<u>Thousand Tons</u>		<u>Percentage Change</u>
	<u>1967</u>	<u>1968</u>	
<i>Volume of trade</i>	4,868	4,354	-11
Imports, by carrier	2,987	2,608	-13
Soviet	2,524	2,149	-15
East European	66	40	-40
Cuban	135	169	+25
Free World	262	250	-5
Exports, by carrier	1,881	1,746	-7
Soviet	953	855	-10
East European	246	182	-26
Cuban	119	178	+50
Free World	561	531	-5

8. The decline in imports stemmed principally from a drop of 16 percent (191,000 tons) in crude oil and of 28 percent (156,000 tons) in petroleum products from the record deliveries in the second quarter of 1967. Imports of jute bags, metal products, fertilizer, chemicals, cereals, and food-stuffs also declined. The increase in total imports for the first half of 1968 compared with the first half of 1967, however, was negligible, slightly more than 1 percent (see Table 7). Crude oil imports, moreover, were off less than 1 percent from the first half of 1967, and for 1968 as a whole probably will be close to the levels of the past two years.

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This level is all that Cuba's refineries can process. Imports of petroleum products for the half year were down 16 percent (123,000 tons) from the first half of 1967.

9. General cargo was one of the few import categories to increase during the second quarter, and its volume exceeded the previous high of the first quarter of 1968. This increase reflects larger Soviet shipments of industrial machinery (much of it for sugar refineries), tractors, combines, vehicles and vehicle spare parts, road building equipment, and spare parts for civil aircraft.

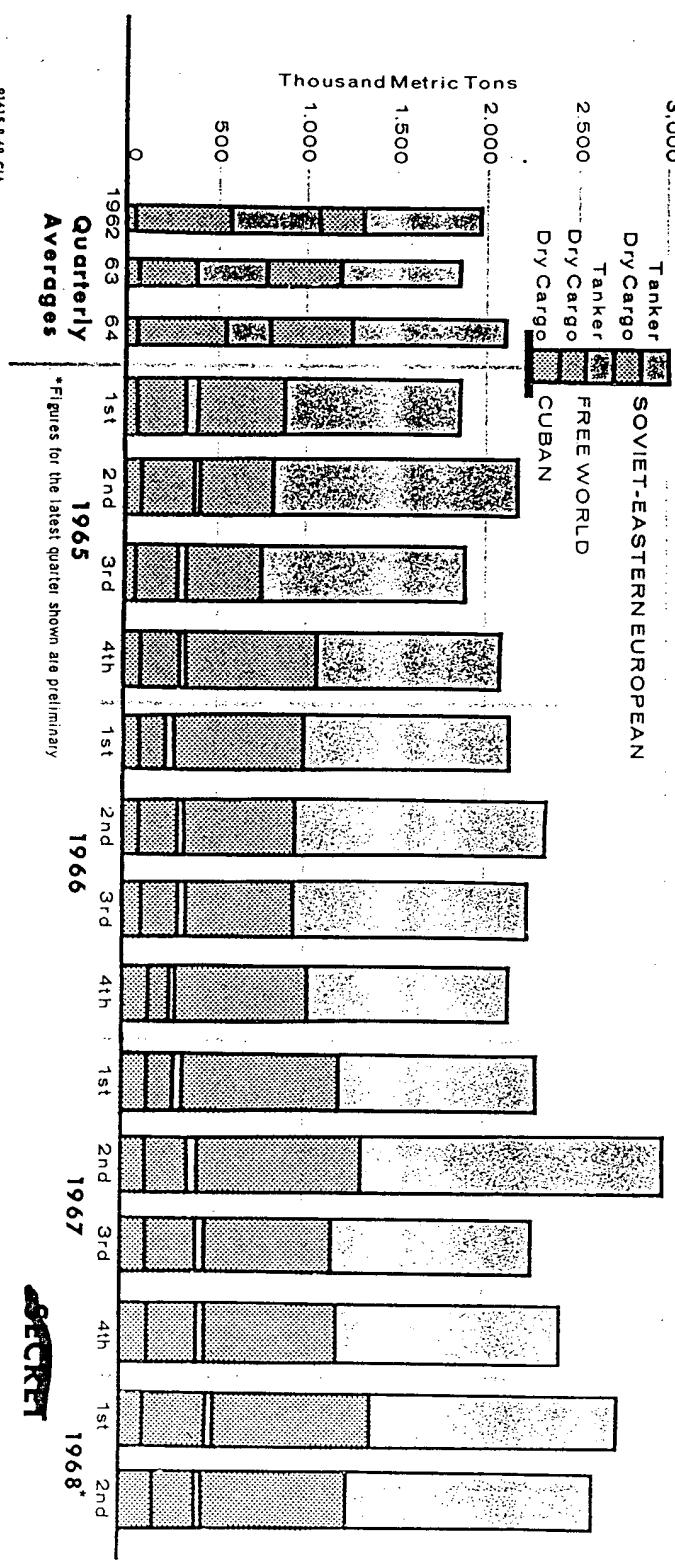
10. There have been no Soviet military deliveries to Cuba since mid-February 1968. The continued absence of arms shipments during the second quarter of 1968 indicates that deliveries under the probable 1966 arms agreement have been essentially completed. Deliveries under that agreement probably began in mid-September 1966 and involved a total of 31 Soviet ships which carried 64,000 tons of military cargoes to Cuba.

11. Eighty-three percent of Cuba's imports in the second quarter of 1968 originated in Communist countries. The USSR provided 79 percent, Eastern European countries and Communist China delivered less than 2 percent each, and North Korea supplied 1 percent. Rice accounted for almost three-fourths of Cuba's imports from China (see Figure 2).

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**Cuban Imports Carried by Soviet-Eastern European,
Cuban, and Free World Shipping**

FIGURE 1



*Figures for the latest quarter shown are preliminary

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1968*

FIGURE 2

Cuban Imports From Communist China
By Quarter
First Quarter 1965 - Second Quarter 1968

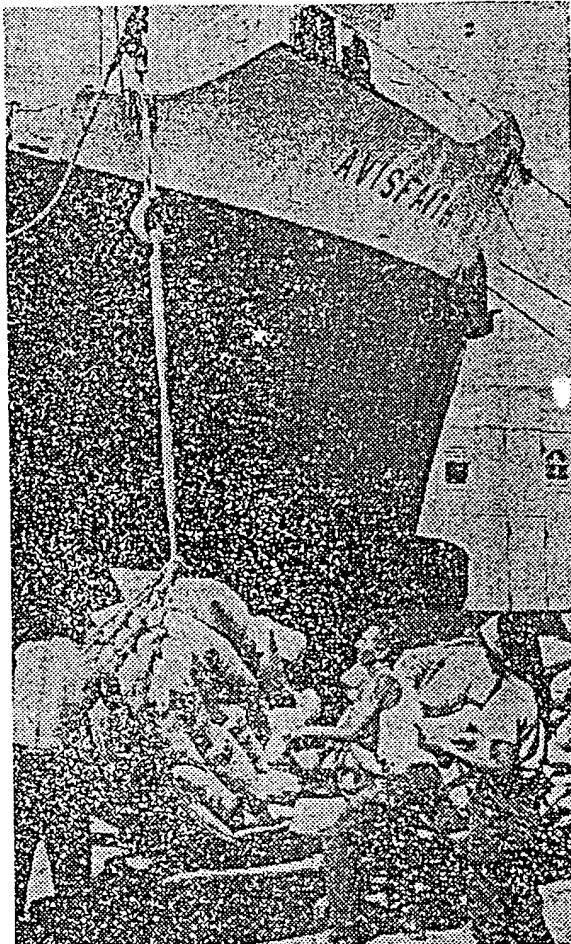


*Figures for the latest quarter shown are preliminary

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Figure 3



Fertilizer from Italy being unloaded from the British ship Avisfaith in Havana in early June 1968.

12. Free World countries provided 17 percent of Cuba's imports during the quarter. Fertilizer (see Figure 3) accounted for almost one-half of these imports. Foodstuffs were the next largest commodity; Soviet ships delivered wheat and flour from Canada (100,000 tons) and corn from Mexico (28,000 tons). Other cargoes included chemicals from Italy, drugs from Japan, and trucks from France (see Figure 4).

13. Cuban exports declined 7 percent in the second quarter of 1968 because of a 13-percent drop in exports of sugar. Purchases by the Free World and Communist China declined by about 100,000 tons each as shown in the following tabulation of Cuban sugar exports by destination:

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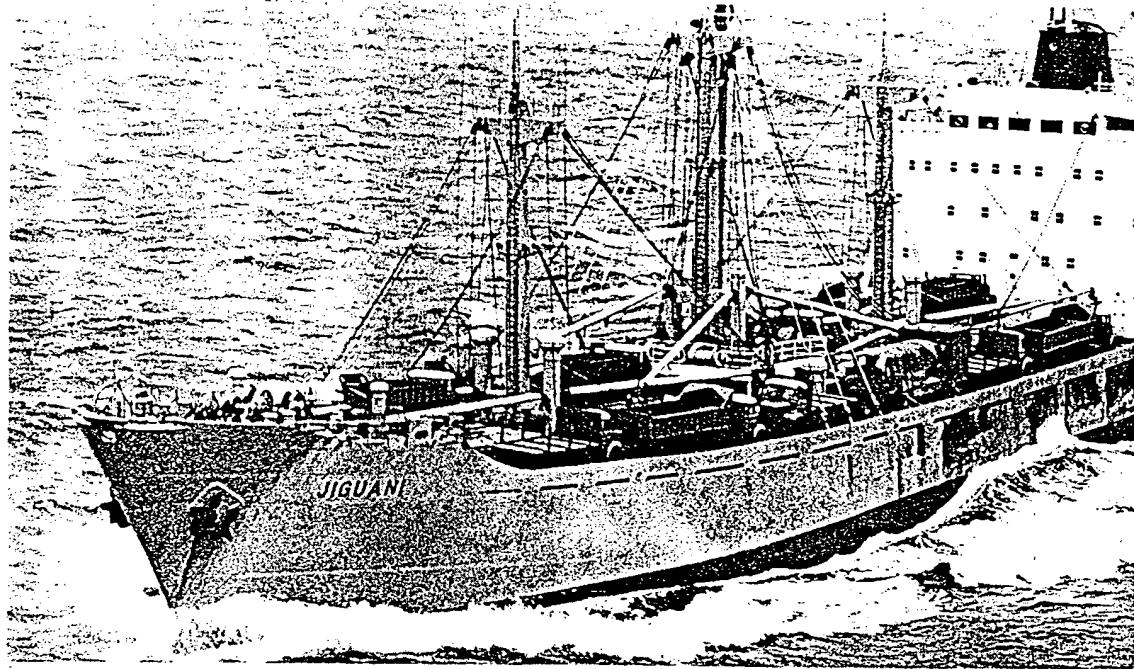
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	<u>April-June</u>		
	<u>Thousand Tons</u>		<u>Percentage Change</u>
	<u>1967</u>	<u>1968</u>	
Communist countries	<u>1,172</u>	<u>1,053</u>	-10
USSR	699	711	+ 2
Communist China	206	118	-43
Other	266	223	-16
Free World countries	<u>485</u>	<u>395</u>	-19
Total	<u>1,657</u>	<u>1,447</u>	-13

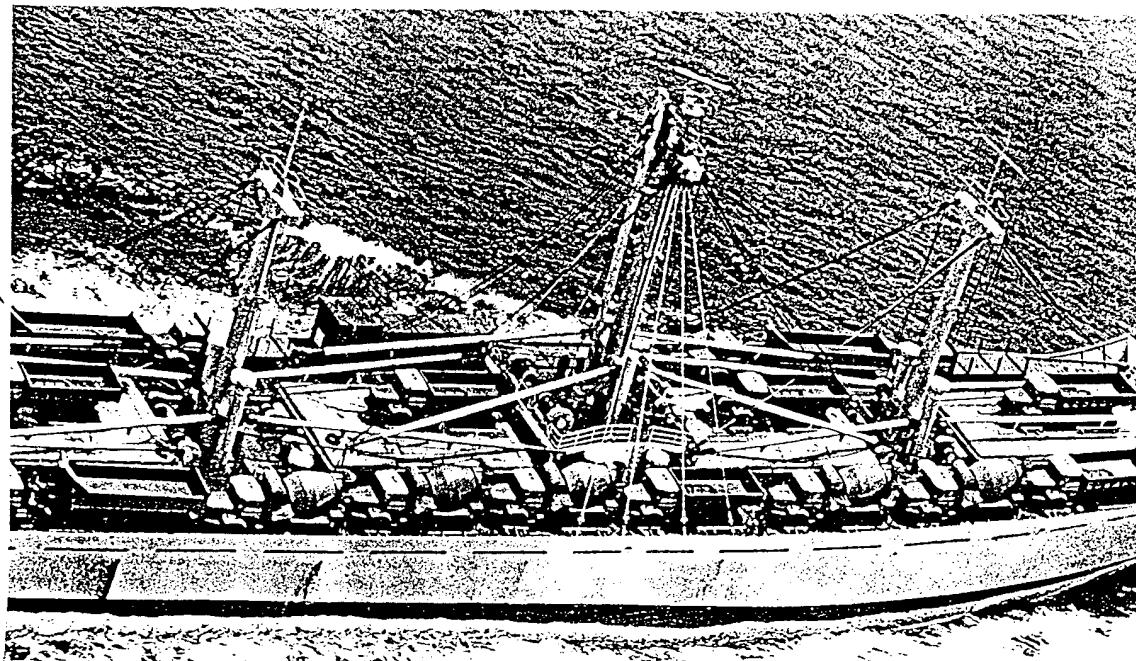
14. Cuba sold sugar to 13 Free World countries in the quarter, more than one-half of it to Japan. Cuban exports of molasses increased 36 percent; the United Kingdom and Bulgaria were the largest purchasers.

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Figure 4



The Cuban ship Jiguani (9,390 GRT) enroute to Cuba on 10 May 1968 with 8,724 tons of cargo from the United Kingdom and France, including a deck cargo of assorted French trucks.



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Table 1

Ship Arrivals in Cuba, by Flag of Ship
April-June 1967 and April-June 1968

Type of Ship	Arrivals						Thousands Gross Register Tons			
	1967	April-June	1968	May	June	April-June	1967	April	May	June
Total passenger	1	1	1	2	3	4	11.2	4.9	23.0	27.8
Soviet										
Eastern European	1		1	2	3		11.9	4.9	11.0	15.9
Total dry cargo	212	83	56	26	25	195	1,653.0	638.2	455.5	429.1
Communist a/	132	59	41	33	133		1,139.1	468.8	341.1	267.1
Soviet	102	50	31	28	109	24	927.2	395.9	274.7	227.6
Eastern European	30	9	10	5			211.9	72.9	66.4	39.5
Cuban	31	13	5	9	27		141.6	90.5	31.8	49.3
Free World	49	11	10	14	35		372.2	79.0	82.7	112.7
Total tanker	70	21	25	18	64		1,361.3	335.2	455.6	327.2
Soviet	61	16	23	15	54		1,266.0	282.6	429.3	297.4
Eastern European	1	1	1	1			11.7	11.7		1,009.3
Free World	8	4	2	3	9		83.6	40.9	26.3	29.8
Total all types	283	104	82	77	263		3,026.2	973.5	916.0	779.3
Total Communist a/	195	76	65	51	192		2,428.8	763.1	775.3	587.5
Soviet	163	66	55	45	166		2,193.2	678.5	708.9	536.0
Eastern European	32	10	10	6	26		235.6	84.6	66.4	51.5
Total Cuban	31	13	5	2	27		141.6	90.5	31.8	49.3
Total Free World	27	15	12	17	44		455.8	119.2	102.0	142.5

a. Excluding Cuba.

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Table 2

Cuban Imports Carried, by Type of Ship
 April-June 1967 and April-June 1968

Type of Ship	April-June 1967	April 1967	May 1968	June 1968	April-June 1968
Total passenger	<u>3.6</u>		<u>0.2</u>	<u>2.9</u>	<u>3.1</u>
Soviet Eastern European	3.6		0.2	2.9	0.2 2.9
Total dry cargo	<u>1,261.2</u>	<u>497.3</u>	<u>351.4</u>	<u>364.9</u>	<u>1,213.6</u>
Communist a/	899.0	331.9	249.9	225.8	807.7
Soviet Eastern European	851.9 47.2	317.2 14.8	237.4 12.5	216.1 9.7	770.7 37.0
Cuban Free World	134.7 228.1	89.9 75.5	31.6 69.8	47.2 92.0	168.7 237.3
Total tanker	<u>1,721.7</u>	<u>412.8</u>	<u>618.3</u>	<u>360.3</u>	<u>1,391.5</u>
Soviet Eastern European Free World	1,672.0 15.6 34.1	399.8 13.0	618.3	360.3	1,378.5 13.0
Total all types	<u>2,987.1</u>	<u>910.1</u>	<u>969.9</u>	<u>728.1</u>	<u>2,608.1</u>
Total Communist a/	<u>2,590.2</u>	<u>731.8</u>	<u>868.4</u>	<u>589.0</u>	<u>2,189.2</u>
Soviet Eastern European	2,523.8 66.3	717.0 14.8	855.9 12.5	576.4 12.6	2,149.3 39.9
Total Cuban Total Free World	<u>134.7</u> <u>262.3</u>	<u>89.9</u> <u>88.5</u>	<u>31.6</u> <u>69.8</u>	<u>47.2</u> <u>92.0</u>	<u>168.7</u> <u>250.3</u>

a. Excluding Cuba.

Table 3

Free World and Eastern European Ship Arrivals in Cuba, by Flag and Type
April-June 1967 and April-June 1968

Flag	April-June 1967			April-June 1968			Total
	Dry Cargo		Tanker	Arrivals		Gross Register Tons	
	Arrivals	Gross Register Tons	Arrivals	Arrivals	Arrivals	Gross Register Tons	
Cyprus	11	78.7	11	80.7	2	22.8	13
Finland	3	21.2					103.5
France	1	2.9					
Greece	8	60.4	1	7.2	1	11.0	1
Italy	2	22.2	1	9.3			20.3
Japan	4	28.1	1	8.6			8.6
Lebanon	1	7.2	5	29.3			29.3
Malta			1	7.3			7.3
Somali Republic			1	7.3	1	14.7	2
United Kingdom	23	202.1	12	108.7	5	48.6	17
Yugoslavia	4	33.1	2	16.0			16.0
Total Free World	27	455.8	35	274.4	9	97.0	44
Bulgaria	11	81.8	6	45.9	1	11.7	7
Czechoslovakia	4	25.7	6	34.4			57.7
East Germany	15	121.5	12	107.3			34.4
Poland	2	6.6	1	3.2			107.3
Total Eastern European	32	235.6	25 a/	190.8	1	11.7	26
							202.5

a. Includes one passenger ship.

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TABLE 4

Cuban Imports, by Commodity and Flag of Carrier a/
April-June 1968

Commodity	Soviet Ships	Eastern European Ships	Cuban Ships	Thousand Metric Tons	
				Free World Ships	Total
Crude oil	969.5		0.3	13.0	969.5
Petroleum products	383.8		65.8	36.8	397.1
Cereals and foodstuffs	250.2 b/	7.0	0.7	2.3	359.9
Metal products	70.7	1.3	57.3	144.3	75.0
Fertilizer	146.5		0.5	0.2	348.2
Wood products	44.9		5.1	0.2	50.6
Jute bags	6.7				6.7
Chemicals	41.6	2.4	4.0	2.2	50.2
Ammonia	4.2				4.2
Cement	52.9	0.2	8.8	33.1	95.0
Military equipment					
General cargo (including vehicles, industrial machinery, and unidentified cargo)	178.4		28.4	26.6	251.7
Total	2,149.2	39.2	168.7	250.3	2,608.1

- a. In some instances, cargo tonnages are estimated on the basis of trends in utilization of cargo capacity in known shipments to Cuba.
 b. Including 10,738 tons of foodstuffs carried by tankers and excluding 9,409 tons of foodstuffs by Soviet ships attached to the fishing fleet.

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Table 5
Cuban Imports Carried by Free World Ships, by Flag and Type of Ship
April-June 1968

Flag	Thousands Metric Tons		
	Dry Cargo	Tanker	Total
Cyprus	107.5		107.5
Greece	10.5		10.5
Italy		13.0	13.0
Japan	9.3		9.3
Lebanon	38.5		38.5
Malta	9.9		9.9
Somali Republic	5.8		5.8
United Kingdom	33.1		33.1
Yugoslavia	22.6		22.6
Total Free World	237.3	<u>13.0</u>	<u>250.3</u>

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Table 6

Cuban Imports Carried by Soviet Ships, by Commodity
April-June 1965-68

Commodity	April-June (Thous and Metric Tons)			Percentage Change April-June 1968 over April-June 1967
	1965	1966	1967	
Crude oil	973.1	1,144.7	1,160.8	969.5 -16.5
Petroleum products	353.5	234.2	503.3	383.8 -23.7
Cereals and foodstuffs	138.3 ^{a/}	197.4 ^{b/}	270.6 ^{c/}	250.2 ^{d/} -7.5
Metal products	17.2	50.8	75.8	70.7 -6.7
Fertilizer	89.9	129.4	218.1	146.5 -32.8
Wood products	15.7	26.7	22.2	44.9 +102.3
Jute bags	0.4	10.6	11.3	6.7 -40.7
Chemicals	16.7	30.8	43.0	41.6 -3.3
Ammonia	3.9	3.0	4.2	4.2 0
Cement		32.9	75.0	52.9 -29.5
Military equipment ^{e/}	0.1	2.7	9.3	-100.0
General cargo (including vehicles, industrial machinery, and unidentified cargo)	116.9	98.9	130.2	178.4 +37.0
Total	<u>1,725.8</u>	<u>1,962.1</u>	<u>2,523.8</u>	<u>2,149.3</u> -14.8

- a. Including 19,741 tons of foodstuffs carried by tanker.
- b. Including 18,276 tons of foodstuffs carried by tanker.
- c. Including 8,662 tons of foodstuffs carried by tanker.
- d. Including 10,738 tons of foodstuffs carried by tanker.
- e. This cargo was declared to be general cargo, but it is believed to have been military cargo.

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Table 7

Cuban Imports, by Commodity
January-June 1967 and January-June 1968

Commodity	Thousand Metric Tons			Percentage Change April-June 1968 over April-June 1967		January-June (Thousands Metric Tons) 1968		Percentage Change January-June 1968 over January-June 1967	
	1967			1968		1967		1968	
	April-June	April	June	April-June	June	April-June	1967	1968	1967
Crude oil	1,160.8	286.7	438.0	244.8	969.5	-16.5	2,074.5	2,063.3	-0.5
Petroleum products	553.2	113.0	169.1	115.0	397.1	-28.2	783.5	660.4	-15.7
Cereals and foodstuffs	367.4	155.7 ^{a/}	107.5 ^{b/}	96.7 ^{c/}	359.9	+2.0	663.5	776.6	+17.0
Metal products	91.7	35.1	14.1	26.7	75.0	+18.2	141.3	152.3	+7.8
Fertilizer	409.4	123.5	101.6	123.1	348.2	+14.9	738.0	749.6	+1.6
Wood products	33.7	23.7	5.5	21.6	50.6	+50.1	151.1	136.7	-9.5
Jute bags	11.3	6.7			6.7	+40.7	17.8	10.5	-40.9
Chemicals	52.9	13.8	11.4	25.0	50.2	+5.1	95.6	108.3	+11.3
Ammonia	4.2	2.4	0.5	1.2	4.2	0	7.2	8.3	+15.3
Cement	95.4	55.5	34.7	4.7	95.0	+0.4	222.9	195.7	-12.2
Military equipment ^{d/}	9.3					+100.0	20.3	6.1	-69.7
General cargo (including machinery, industrial vehicles, and uniden- tified cargo)	197.7	95.0	87.3	69.4	251.7	+27.3	382.7	491.2	+28.3
Total	2,987.1	220.1	269.9	228.1	2,608.1	-12.7	5,298.4	5,359.1	+1.1

- a. Excluding 1,745 tons of foodstuffs carried by three Soviet ships attached to the fishing fleet.
 b. Including 10,738 tons carried by tankers and excluding 6,373 tons carried by four Soviet ships attached to the fishing fleet.
 c. Excluding 1,291 tons of foodstuffs carried by three Soviet ships attached to the fishing fleet.
 d. This cargo was declared to be General cargo, but it is believed to have been military cargo.

Table 8

Cuban Imports, by Country of Origin
April-June 1968

Origin	Thousands of Metric Tons			Percent of Total
	April	May	June	
Free World	<u>169.9</u>	<u>128.8</u>	<u>135.3</u>	<u>434.0</u> <u>16.6</u>
Communist	<u>740.2</u>	<u>841.1</u>	<u>592.8</u>	<u>2,174.2</u> <u>83.4</u>
USSR	689.5	812.5	553.8	2,055.8 78.8
Eastern Europe	14.5	18.6	13.1	46.2 1.8
Communist China	14.0	10.0	16.6	40.7 1.6
North Korea	21.3		9.3	30.6 1.2
North Vietnam	0.9			0.9 Negl.
Total	<u>910.1</u>	<u>969.9</u>	<u>728.1</u>	<u>2,608.1</u> <u>100.0</u>

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Table 9

Cuban Exports, by Destination
April-June 1967 and April-June 1968

Destination	April-June						Total
	Sugar	Molasses	Ores	Other &			
Free World	1967	1968	1967	1968	1967	1968	1968
Algeria	21.7	394.7	125.1	162.4	1.7	7.1	572.6
Canada	12.3	18.4	2.6	11.0			
Canary Islands							
Ceylon							
Egypt	10.0	11.8	29.8				
Finland							
France	40.1	10.6					
Iran							
Iraq	9.9	22.0					
Italy							
Japan	144.0	200.1	16.5	32.1	0.3	0.8	232.5
Malaysia	35.5						
Malta							
Mexico	3.0						
Morocco	42.2						
Netherlands	45.0	3.0	15.1	15.8	3.1	1.1	42.2
Spain	32.3	57.9			1.5	0.7	61.2
Sweden	10.5	6.0			0.2	1.0	33.0
Switzerland							10.8
Syria	18.0	31.9					
United Kingdom	10.0	93.5	72.4				18.0
West Germany		42.0					103.5
Yugoslavia	20.0	12.3					0.3

Thous and Metric Tons

Table 9

Cuban Exports, by Destination
 April-June 1967 and April-June 1968
 (Continued)

Thousand Metric Ton

Destination	April-June						Total
	Sugar	Molasses	Ores	Other a/	1967	1968	
Communist countries	<u>1,172.0</u>	<u>1,052.7</u>	<u>62.6</u>	<u>23.2</u>	<u>18.1</u>	<u>19.6</u>	<u>12.7</u>
Bulgaria ^a	100.1	86.5	62.6	62.3			Negl.
Communist China	206.4	118.4			2.0		162.7
Czechoslovakia	25.9	15.4			8.3	0.8	206.4
East Germany	95.2	60.4			5.0	0.4	120.
Hungary		7.3			1.2	3.5	35.
North Korea	29.2					0.1	63.
North Vietnam		23.3					1.2
Poland	15.8	19.2			14.1	4.4	29.2
Rumania		10.9			15.8	0.6	Negl.
USSR	699.4	711.1			4.1	2.2	30.4
Total	<u>1,657.3</u>	<u>1,447.4</u>	<u>187.7</u>	<u>255.6</u>	<u>19.8</u>	<u>26.7</u>	<u>16.5</u>
							<u>1,881.3</u>
							<u>1,746.</u>

a. Including foodstuffs (meat, honey, fruits, and vegetables), tobacco and cigarettes, rum, alcohol, and unidentified cargoes.