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SECURITY INFORMATION

INTELLIGENCE MEMORANDUM

PRODUCTION AND UTILIZATION OF WOOL
IN THE SOVIET BLOC
1952

CIA/RR IM-372

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CENTRAL INTELLIGENCE AGENCY

Office of Research and Reports

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CIA/RR IM-372
(ORR Project 21.3.1)

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SECURITY INFORMATION

PRODUCTION AND UTILIZATION OF WOOL IN THE SOVIET BLOC*
1952

Summary

Wool production in the Soviet Bloc has maintained a slow upward trend since World War II, reaching the prewar level in 1951 and exceeding it in 1952. The weight of wool obtained in 1952 is estimated at 244,000 metric tons.** This yield is less than 10 percent greater than the estimated prewar yield, although sheep numbers are more than 20 percent greater than prewar numbers. The difference represents a lower yield of wool per sheep. Fleece weight and quality have not recovered from wartime losses of high-quality wool-bearing sheep and from wartime negligence in breeding, nutrition, and management.

As a result of a large increase in wool production in Asiatic USSR, wool production has risen more rapidly in the USSR since World War II than in other countries of the Soviet Bloc. Even though wool production in the European Satellites has recovered less rapidly, it is greater than prewar production. Wool production in Communist China is still below prewar levels.

All the Soviet Bloc countries plan increases in sheep numbers in the next few years. On the whole, the implied increase in Bloc wool production (to an estimated 428,000 metric tons) appears unattainable, although some of the European Satellites probably will achieve their plans. Only the USSR has announced targets for wool production. The Fifth Five Year Plan (1951-55) projects large gains both in the average yield per sheep and in sheep numbers, gains which, if achieved, would more than double wool production in the USSR between 1951 and 1955, bringing it to almost 330,000 metric tons. Actual wool production in the USSR in 1955 is expected to fall far short of this goal.

* This memorandum contains information available as of 31 March 1953.

** Estimates of wool given herein include both apparel and carpet wool (grease basis). All figures for wool production and sheep numbers are summarized in Table 3, Appendix A. These data do not represent measured quantities but are estimates and approximations. The range of fluctuation in estimates is no less than plus or minus 3 percent.

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About 17 percent of the wool utilized in the Soviet Bloc in 1952 was used by agriculture, since it was too coarse for economical processing by the woolen industry. Of the remaining 207,000 metric tons which were processed, 173.4 thousand metric tons (83.8 percent) were produced domestically, and 33.6 thousand metric tons (16.2 percent) were imported. The Soviet Bloc is likely to remain dependent on these imports for some years if domestic and military consumption of woolen products is to be maintained at current levels. The amount of apparel wool produced in the Bloc is more than adequate, however, to supply current military requirements, which are estimated at 19,000 metric tons a year.

1. Postwar Trends.

a. Production.

Prewar wool production in the area now constituting the Soviet Bloc, estimated at 223,000 metric tons, dropped during World War II (1941-45) to about 210,000 metric tons. Since the war, wool production has maintained a slow upward trend, approaching a total of 228,000 metric tons in 1951. Wool production in the Soviet Bloc countries in 1952 is estimated at 244,000 metric tons, an increase of approximately 16,000 metric tons (7 percent) over the 1951 production figures.

The USSR has remained the chief source of wool production in the Soviet Bloc area, accounting for 59 percent in 1938 and 65 percent in 1952. The area of the European Satellites produced 23 percent of the total in 1938,* and 21 percent of the total in 1952. Prewar production in China amounted to about 18 percent of the total; 1952 production in China, to about 14 percent of the total.

b. Sheep Numbers.

Since the end of World War II, sheep numbers in the Soviet Bloc countries have increased steadily and were estimated at 142 million head at the beginning of 1952, an increase of 15 percent over

* For purposes of comparison, figures for wool production in those areas now composing the European Satellites have been combined.

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numbers at the beginning of 1951 and 22 percent over prewar numbers in the same area.

c. Average Clip per Sheep.

The 1952 clip per sheep in the Soviet Bloc was generally below prewar levels despite efforts to raise the low level during the post-war period. Comparative figures for 1938 and 1952 are shown in Table 1.

Table 1

Trend in Average Clip per Sheep in the Soviet Bloc
1938 and 1952

<u>Country</u>	<u>1938</u> <u>(Kilograms)</u>	<u>1952</u> <u>(Kilograms)</u>	<u>Change</u> <u>(Percent)</u>
USSR	2.05	1.70	-17
European Satellites	1.96 a/	1.89	- 4
China	1.57	1.58	+ 1
Soviet Bloc	1.92	1.71	-11

a. Those areas currently included in the European Satellites.

2. 1952 Production.

a. USSR.

Wool production in the USSR proper for 1952 is estimated at 158,000 metric tons, an 8-percent increase over the 146,000 metric tons produced in 1951 and a 20-percent increase over the 132,000 metric tons produced in 1938.

During the prewar period, European USSR produced about 62 percent of the country's wool. Only about 45 percent of the wool currently produced in the USSR comes from European USSR. The most

S-E-C-R-E-T

important wool-producing regions* in European USSR are the Ukraine Region, the Southeast (Lower Don-North Caucasus) Region, the Volga Region, and the Central Region. In 1952 these 4 regions produced about 84 percent of the wool in European USSR and 37 percent of the wool in the entire USSR. The other 6 wool-producing regions in European USSR yielded only 8 percent of the total Soviet production.

Asiatic USSR has assumed a greater importance than European USSR as a wool-producing area since the prewar period. In 1952, wool production in Asiatic USSR amounted to 55 percent of the total Soviet wool production. This production represents a substantial gain over prewar figures, which indicate that this area produced only 38 percent of the total Soviet production in 1938. In 1952 the Kazakhstan Region produced about 24 percent of the wool in the USSR; the Central Asiatic Region, 14 percent; and the Transcaucasus Region, 7 percent. The Urals area** and West Siberia regions combined produced 7 percent. The regions of East Siberia and the Far East combined produced only 3 percent of the total Soviet production.

b. European Satellites.

The European Satellites produced about 51,000 metric tons, or 21 percent, of the total wool production for the Soviet Bloc in 1952. Rumania, producing 46 percent of the total European Satellite production in 1952, and Bulgaria, producing 28 percent, are the chief wool producers in the European Satellites.

c. Communist China.

Communist China produced about 34,000 metric tons, or about 14 percent, of the total wool production for the Soviet Bloc in 1952. Sheep numbers and wool production have not yet reached their prewar level.

* The term region in this memorandum refers to economic regions as defined and numbered on CIA Map 12048.1, 9-51 (First Revision, 7-52), USSR: Economic Regions.

** East of the Ural Mountains.

S-E-C-R-E-T

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3. Future Plans.

Planned wool production in the Soviet Bloc for 1955 is estimated at 428,000 metric tons (grease basis), an increase of approximately 200,000 metric tons (88 percent) over the 1951 total and an increase of about 205,000 metric tons (92 percent) over prewar production. On the whole, the implied increase in Bloc wool production appears to be unattainable, although some of the European Satellites probably will achieve their aims.

a. USSR.

The Soviet 1955 Plan envisions a 60-percent increase in sheep numbers and an average clip of 2.53 kilograms per sheep. If this average clip is attained by 1955, wool production would be 329,000 metric tons, which is more than double the estimated 1951 production.

It is believed that the planned increases in sheep numbers are unrealistic. Sheep numbers for 1952 were near the record high, and the capacity of ranges and pastures as well as roughage resources are insufficient to maintain the planned increases in all classes of livestock at the same time. The planned increase in sheep numbers would, of necessity, require a downward revision of the 1955 numbers planned for other classes of livestock, except possibly for swine.

The planned wool production for 1955 is also unrealistic. The average clip per sheep may be increased by better breeding, nutrition, and management practices, but a practical effectuation of the Plan requires a longer period than the time allotted. For example, the clip per sheep in the USSR is still below the prewar level despite efforts to increase wool production since the end of the war.

An average of 2.53 kilograms per sheep will be impossible to attain in 3 or 4 years, because a large percentage of the sheep in the USSR are of the coarse-wool type. In the US, where the percentage of medium- and fine-wool sheep is larger, clip per sheep averages almost 4 kilograms. Even in the US, however, increases in clip per sheep from year to year are relatively small.

b. European Satellites.

The European Satellites have confined their planning to sheep numbers, and not all of the countries have plans extending

S-E-C-R-E-T

S-E-C-R-E-T

to 1955. Plans of Albania, Hungary, Poland, and Rumania propose an increase in sheep numbers to almost 20.6 million head by 1955, or about 22 percent above the 1952 level of 16.9 million head. It is believed that the planned increases in sheep numbers can be accomplished in all of these countries except Hungary. The 1955 Hungarian Plan, which envisions an increase of 265 percent during the 1952-55 period, is unrealistic. The Bulgarian Plan, which envisions an 11-percent increase during the 1952-54 period, probably cannot be attained, because of the reduction in sheep numbers caused by the 1952 drought. Czechoslovakia plans to increase sheep numbers to 600,000 head by 1953, about 13 percent greater than 1952 numbers. This planned increase is probably a little higher than can be attained. East Germany plans to increase sheep numbers to about 1.7 million head by 1955, or about 37 percent greater than the 1952 production of 1.24 million head. It is believed that these planned increases can be attained.

Wool production plans of the European Satellites are not available. However, wool production should increase at relatively the same rate as sheep numbers or perhaps slightly more rapidly if emphasis is placed on better nutrition and management practices.

c. Communist China.

Agricultural planning in Communist China does not extend to 1955. The 1952 Plan for Communist China called for an 18-percent increase in sheep numbers, but wool production was not indicated.

If clip per sheep remained at the 1951 level and the planned sheep numbers were attained, wool production in 1952 is estimated at 36,000 metric tons, or about 14 percent less than the prewar production of 41,000 metric tons.

Sheep numbers have increased slowly since the war in Communist China and have not yet reached their prewar level of 26 million head. Because of the limited feed and pastures, it is not likely that sheep numbers were increased by 18 percent in 1952 along with planned increases in other classes of livestock.

4. Current Utilization.

The 1952 total current supply (production and imports) of wool in the Soviet Bloc countries is estimated at about 277,000 metric

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tons (grease basis). Indigenous production supplied 243,500 metric tons, or 88 percent of the total, requiring net imports of about 33,600 metric tons, or 12 percent.

If all the wool produced in the Soviet Bloc countries were of suitable quality for processing by the woolen industry, it would more than fulfill the domestic and military needs for manufactured woolen products. Table 2 shows the estimated current utilization of wool in the Bloc countries in 1952.

Table 2

Current Utilization of Wool in the Soviet Bloc
1952

<u>End Use</u>	<u>Quantity (Thousand Metric Tons)</u>	<u>Percent of Total</u>
Agriculture	42	17
Household	163	65
Military	19	8
Industry	25	10
Total	<u>249 a/</u>	<u>100</u>

a. A total of 28,000 additional metric tons is left available for accretion and stocks.

About 17 percent of the currently utilized wool was too coarse for economical processing by the woolen industry and was utilized by agriculture. Of the remaining 207,000 metric tons (83 percent) which were processed, 173,400 metric tons (83.8 percent) were produced domestically, and 33,600 metric tons (16.2 percent) were imported.

It is believed that the Soviet Bloc countries will not be able to produce enough apparel wool to fulfill domestic and military requirements for manufactured woolen products for a number of years to come. If the unrealistic 1955 planned wool production were attained, there would not be a deficit of apparel wool provided domestic military consumption of woolen products remained at about current levels.

S-E-C-R-E-T

S-E-C-R-E-T

It is estimated that after other utilizations of the 1952 production and imports have been accounted for, the Soviet Bloc had enough wool or woolen products (28,000 metric tons, grease basis) available for accretion and stocks. Such a quantity would be sufficient to supply current military needs (19,000 metric tons) for about 1-1/2 years.

S-E-C-R-E-T

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APPENDIX A

SHEEP AND WOOL: NUMBERS, PRODUCTION, AND PLANNED PRODUCTION IN THE SOVIET BLOC a/*
1938, 1951, 1952, AND 1955 PLANS

Table 3

Area	1938 b/		1951		1952 c/		1955 Plan d/	
	Sheep (Thousand)	Wool (Thousand Metric Tons)	Sheep (Thousand)	Wool (Thousand Metric Tons)	Sheep (Thousand)	Wool (Thousand Metric Tons)	Sheep (Thousand)	Wool (Thousand Metric Tons)
European USSR								
Northwestern (Ia)	991.7	1.48	1,895.8	1.89	2,050.0	2.05	2,865.5	4.38
Northern USSR (Ib)	700.2	1.04	769.0	0.77	831.5	0.83	1,162.3	1.78
Baltic (IIa)	1,817.2	2.38	1,104.7	1.65	1,194.5	1.79	1,669.7	3.70
Belorussia (IIb)	2,554.1	5.19	1,621.6	2.11	1,753.5	2.28	2,451.0	4.74
Ukraine (III)								
(Includes Moldavia)	6,609.2	15.10	5,805.0	10.45	6,277.0	11.30	8,774.0	23.70
Southeast (IV)	6,870.1	14.53	7,833.1	14.89	8,470.0	16.10	11,839.4	33.63
Volga (VI)	5,107.6	10.81	7,595.8	13.67	8,213.5	14.78	11,480.8	30.82
Central (VII)	11,140.7	23.57	9,689.6	16.46	10,477.5	17.80	14,645.4	37.18
Urals (European Part) (VIII)	3,421.7	7.24	3,064.3	3.68	3,313.5	3.98	4,631.6	8.30
Total European USSR	39,212.5	81.34	39,378.9	65.57	42,581.0	70.91	59,519.7	148.15
Asiatic USSR								
Urals (Asiatic Part) (VIII)	1,105.1	2.34	944.3	1.19	1,057.2	1.29	1,503.0	2.71
West Siberia (IX)	5,710.2	11.60	5,679.2	9.65	6,141.0	10.44	8,584.0	21.55

Footnotes for Table 3 follow on p. 11.

- 9 -

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APPENDIX A

SHEEP AND WOOL: NUMBERS, PRODUCTION, AND PLANNED PRODUCTION IN THE SOVIET BLOC a/
1938, 1951, 1952, AND 1955 PLANSTable 3
(Continued)

Area	1938 b/		1951		1952 c/		1955 Plan d/		
	Sheep (Thousand)	Wool (Thousand Metric Tons)	Sheep (Thousand)	Wool (Thousand Metric Tons)	Sheep (Thousand)	Wool (Thousand Metric Tons)	Percent by Areas	Sheep (Thousand)	Wool (Thousand Metric Tons)
Asiatic USSR (Continued)									
Kazakh SSR (Xa)	4,551.4	10.28	18,863.1	35.84	20,397.0	38.75	22	28,511.0	80.40
Central Asia (Xb)	6,205.2	13.33	11,771.8	20.01	12,729.0	21.64	14	17,792.6	44.91
East Siberia (XI)	3,066.1	4.58	2,607.0	2.59	2,819.0	2.80	3	3,904.4	5.79
Far East (XII)	58.4	0.09	783.3	0.79	847.0	0.85	1	1,184.0	1.81
Transcaucasus (V)	4,274.2	8.32	5,928.9	10.67	6,411.0	11.54	7	8,961.3	23.90
Total Asiatic USSR	24,970.6	50.54	46,627.7	80.74	50,419.2	87.31	54	70,476.3	181.07
Total USSR	64,183.1	131.88	86,006.6	146.32	93,000.2	158.22	100	129,996.0	329.22
European Satellites									
Poland	1,941.0	3.10	2,160.0	2.70	2,484.0	3.23	8	3,800.0	4.94
East Germany	1,771.0	6.19	1,087.0	3.26	1,236.0	3.71	4	1,659.0	5.00
Czechoslovakia	492.0	1.07	530.0	1.17	530.0	1.17	2	600.0	1.32
Hungary	1,490.0	6.20	727.0	2.83	945.0	3.69	3	2,500.0	9.75
Rumania	9,736.0	18.50	11,077.0	22.15	11,740.0	23.48	43	12,500.0	25.00

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SHEEP AND WOOL: NUMBERS, PRODUCTION, AND PLANNED PRODUCTION IN THE SOVIET BLOC a/
1938, 1951, 1952, AND 1955 PLANS

Table 3
(Continued)

Area	1938 b/		1951		1952 c/		1955 Plan d/	
	Sheep (Thousand)	Wool (Thousand Metric Tons)	Sheep (Thousand)	Wool (Thousand Metric Tons)	Percent by Areas	Wool (Thousand Metric Tons)	Sheep (Thousand)	Wool (Thousand Metric Tons)
European Satellites (Continued)								
Bulgaria	8,746.0	13.30	8,330.0	13.33	33	13.44	9,283.0	14.85
Albania	1,574.0	2.00	1,700.0	2.20	7	2.57	1,785.0	2.67
Total European Satellites	25,750.0	50.36	25,611.0	47.64	100	51.29	32,268.0	63.53
China e/	26,000.0	40.80	21,500.0	34.00	100	34.00	25,370.0	35.52
Total Soviet Bloc	115,933.1	223.04	133,117.6	227.96		243.51	187,634.0	428.27

For sources of information used in this table, see Appendix B.

Based on preliminary
Preliminary;

d. The planned data used in this table are based on the following plans: Albania, Hungary, Poland, and Rumania, the 1955 Plans; Czechoslovakia, the 1953 Plan; China, the 1952 Plan; Bulgaria, the 1954 Plan; and East Germany, an interpolation from its 1956 planned numbers.

e. The Chinese data include Manchuria but do not include Outer Mongolia.

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APPENDIX B

SOURCES

Except for the sources noted below, all figures for wool production and sheep numbers are based upon estimates made by CIA and the Office of Foreign Agricultural Relations, US Department of Agriculture. These estimates, in turn, are based upon Soviet statistics collated and used in previously published CIA and OFAR reports.

In addition to the sources noted above, the following sources were used in the compilation of this memorandum: the New York Times, "The Fifth Five Year Plan," New York, 23 Aug 1952, p. 6, and FBIS, No. 214, Far East, 30 Oct 1952. R.

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CONTENTS

	<u>Page</u>
Summary	1
1. Postwar Trends	2
a. Production	2
b. Sheep Numbers	2
c. Average Clip per Sheep	3
2. 1952 Production	3
a. USSR	3
b. European Satellites	4
c. Communist China	4
3. Future Plans	5
a. USSR	5
b. European Satellites	5
c. Communist China	6
4. Current Utilization	6

Appendixes

Appendix A. Sheep and Wool: Numbers, Production, and Planned Production in the Soviet Bloc, 1938, 1951, 1952, and 1955 Plans (Table 3)	9
Appendix B. Sources	13

S-E-C-R-E-T