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203

## Current Support Brief

FURTHER SLOWDOWN IN SOVIET INDUSTRIAL GROWTH  
IN THE LAST QUARTER OF 1963



CIA/RR CB 64-20

March 1964

CENTRAL INTELLIGENCE AGENCY

Office of Research and Reports

SECRET

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S-E-C-R-E-T

FURTHER SLOWDOWN IN SOVIET INDUSTRIAL GROWTH  
IN THE LAST QUARTER OF 1963

Preliminary plan fulfillment results reveal that Soviet industry advanced at an exceptionally low rate in the last quarter of 1963. Because of the poor fourth quarter, civilian industrial production -- which had dropped from an annual rate of growth of 9 to 10 percent in the late 1950's to 6.5 to 7 percent in the 3 years 1960-62 -- may have grown considerably less than 7 percent for the year as a whole.\* Rates of growth in 1962-63 for the three major components of civilian industrial production are given in Table 1, and rates of growth for 56 important commodity groups are given in Table 2.

Table 1

USSR: Rates of Growth for Major Components  
of Civilian Industrial Production a/  
1962-63

	Percentage Change from Corresponding Period of Previous Year					
	Full Year 1962	Full Year 1963	Periods in 1963			
			Half-Year		Quarter-Year	
			Jan-Jun	Jul-Dec	Jul-Sep	Oct-Dec
Industrial materials	7.0	5.9	6.8	4.4	6.3	2.4
Civilian machinery	9.7	8.2	8.7	7.0	8.5	5.3
Consumer nondurable goods	5.7	4.1	4.1	4.2	5.7	3.3

a. Explanatory notes for Table 1 are given in Appendix A.

\* The percentages for years before 1963 are derived from the ORR index of Soviet civilian industrial production. The calculations for 1963 are tentative because of the incompleteness of the list of commodities included. See CIA/RR ER 63-29, Index of Civilian Industrial Production in the USSR, September 1963 (UNCLASSIFIED).

S-E-C-R-E-T

A number of developments account for this slowdown in industrial growth. As expected, last year's agricultural reverses held down the production of consumer nondurable goods. In addition, certain of the following possible developments also could have had a detrimental effect: an accelerated retirement of obsolete capital equipment, the changeover of plants to support the new chemical program, altered production schedules for military end products, the technological problems of mastering the more complex processing techniques in newly completed plants, and local shortages of labor.

1. Background

At the end of the first half of 1963 the general expectation was that growth of civilian industrial production for the entire year would be at about the same level as that of the previous 3 years.\* The estimates in Table 1 for the first half of 1963 indicate growth at about that level. Production data recently published for the full year, however, indicate a perceptible reduction in growth for the year as a whole, a reduction largely attributable to the low rate of growth in the fourth quarter. Because of the shortness of the time period and the transitory and speculative nature of several of the possible alternative explanations for the decline, it is too early to judge whether these lower rates of growth will persist into 1964.

2. Details of the Decline in Growth

Although the slowdown in growth in the fourth quarter of 1963 was common to industrial materials, civilian machinery, and consumer nondurable goods, there were notable divergencies within each group in the behavior of separate commodity categories.

Among the industrial materials, there were moderate to sharp downturns in rates of growth for forest products, construction materials, rolled metal, and electric power. The slowdown in the growth of production of electric power in the last quarter of the year apparently was due

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\* In mid-1963, there were indications of a possible slowdown in the rate of expansion, but both Soviet and Western sources suggested that these indications probably were a result of the severe weather conditions in the early months of 1963, which were not expected to affect greatly the results for the entire year (see Appendix A).

to a decline in the rate of increase of demand rather than to the effects of drought or a shortage of generating capacity.

Among the categories of civilian machinery for which data are available, there were lower absolute levels of production for metallurgical and oil equipment, turbines, forging press machines, and sewing machines for the second half as a whole\*; for the fourth quarter, production was lower than in the same quarter in 1962 for electric locomotives, looms, and excavators.\*\* Perhaps as a reflection of current priorities in the USSR, output of agricultural equipment and consumer durables expanded at steady high rates throughout the year.\*\*\*

Production trends in consumer nondurable goods industries depend heavily on events in agriculture. Recent developments in farm output could explain most of the significant changes in production trends. The most surprising result in production of processed foods was the absence of a large increase in production of meat in the last half of 1963 above the previous year. The reduction of 42 percent in inventories of hogs because of a lack of feedstuffs would have suggested a sharp upturn in output of meat. Apparently the light weight of the young animals removed from inventories under the distress slaughtering campaign kept the increase in total output of meat relatively low. The sharp decrease in output of dairy products indicates a shortage of feed supplies other than grain, such as silage and hay. In the USSR, cows are fed only small amounts of grain, and a decrease in milk yields reflects a significant decline in nongrain feeds.

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\* Production data for metallurgical and oil equipment and for sewing machines are available for 6-month periods only; absolute levels of output for these categories of machinery also were lower in the first half of 1963 compared with the last half of 1962.

\*\* In addition, output in physical units of trucks, automobiles, and buses was off 1.0 percent from the fourth quarter of 1962. Because of the Soviet practice of rounding output indicators (physical units or ruble values of output), however, and because of a possible undetected revision of quarterly production data for the preceding year, an error of 2 percentage points either way may be introduced in the output of any one commodity. Major revisions of quarterly or semiannual data for 1962 could be detected and adjustments were made.

\*\*\* The lack of consumer demand for sewing machines (at least for the quality of machine that is produced currently) probably explains the drastic decline in this level of production. An unknown proportion of output of sewing machines is for industrial uses.

3. Alternative Explanations of the Decline in Growth

Other plausible explanations for the slowdown in rates of growth for major sectors of industry in the last quarter of 1963 are as follows:

a. There may have been a slowdown in the rate of increase in net capital formation for 1963. Gross additions to industrial capacity in 1963 were about the same as in recent years -- 12 to 13 percent -- but a possible increase in the proportion of capital stock retired could have lowered the net increase in the stock of plant and equipment.\*

b. There may have been a disruption of production flows from facilities already in use. This effect on output could have been more than normal because of two events. First, commissioning of new capacity, a high proportion of which is normally achieved through expansion or re-equipping of existing facilities, was particularly heavy during the last half of the year. Second, the possible conscription of plants to aid in the expansion of industries supporting the new chemical program may have caused a dropoff in production because of temporary shutdowns of at least part of their facilities.\*\* There could have been a conscious decision to hold down the production of certain consumer goods so that the chemical program could be supported.

c. The longstanding problem of bringing production from new plant and equipment up to rated capacity may have become worse during 1963. Soviet planners, designers, and engineers have had increasing difficulties in recent years in bringing output in the more complex processes embodied in newly completed facilities up to expected levels of output.

d. Substantial changes in production schedules of various military and space programs could cause short-run disruptions in production

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\* The USSR has been able to maintain annual increments to productive capital stock in industry of 12 to 13 percent per year in spite of a sharp downturn in the rates of increase in new fixed investment. This has been accomplished in part by foregoing the retirement of old plant and equipment and in part by drawing on the backlog of unfinished projects.

\*\* The partial or complete conversion of machine building plants from one product line to another. See CIA/RR CB 64-8, Soviet Conscription of Plants to Produce Chemical Equipment, January 1964 (SECRET), for evidence of planned future conscription of machine building plants to produce chemical equipment.

trends. Although there is no evidence that industrial activity related to the defense effort has leveled off or been reduced in absolute size, such a possibility exists. Large-scale diversion of plant capacity to support civilian programs could cause short-run slowdowns of expansion or contraction in such supporting industries as electric power.

e. Soviet planners during the past year have attempted to expand production by increasing the number of shifts of machine building plants. Because of a possible shortage of labor, especially of certain skills, the extra shifts may not have been implemented. The over-all increase in the industrial labor force -- in absolute numbers -- was about the same for 1962 and 1963.

f. Rates of growth in the last quarter of 1963 could have been low either because growth in the last quarter of 1962 was abnormally high or because weather conditions in the last quarter of 1963 were unique. These possibilities are discussed -- and dismissed -- in Appendix B.

The above list, incomplete as it is, appears to cover the more plausible explanations for the deceleration in the fourth quarter of 1963. The impact of each of the above factors on levels of output could be mitigated by the passing of time, with the important exception of a possible secular rise in the rate of retirement of industrial capital stock. This latter factor could be overcome only by a significant increase in new fixed investment for industry.

Table 2

USSR: Rates of Growth in Production of Industrial Commodities a/\*  
1962-63

Percentage Change from Corresponding Period of Previous Year

Commodity	Full Year 1962	Full Year 1963	Periods in 1963			
			Half-Year		Quarter-Year	
			Jan-Jun	Jul-Dec	Jul-Sep	Oct-Dec
Industrial materials						
Metals						
Usable iron ore	8.9	6.9	7.9	6.1	9.1	3.0
Pig iron	8.6	6.1	5.9	6.4	8.0	4.9
Crude steel	7.8	5.1	5.3	4.9	5.3	4.6
Rolled steel	7.4	5.2	6.5	4.0	4.1	3.9
Steel pipe	17.3	10.1	12.9	7.5	8.6	6.5
Fuels and power						
Electric power	12.7	11.6	13.3	9.9	N.A.	N.A.
Of which:						
Central supply <u>b</u> /	13.1	12.3	13.9	10.8	17.8	4.7
Coal	1.3	2.8	1.6	4.1	3.8	4.7
Petroleum, crude	12.1	10.6	10.9	10.4	11.1	9.8
Gas	23.6	21.7	21.9	21.4	23.5	19.8
Chemicals						
Sulfuric acid	7.0	12.0	12.0	12.2	12.7	11.8
Caustic soda	7.1	9.2	9.0	9.3	11.9	6.9
Soda ash	10.3	9.0	9.1	8.9	8.9	8.9
Mineral fertilizers	12.7	15.0	13.3	16.7	14.3	18.8
Artificial and synthetic fibers	10.7	11.1	11.0	11.1	13.6	8.9
Automobile tires	9.7	8.0	7.8	9.4	9.6	9.3

\* Footnotes follow on p. 9.



Table 2

USSR: Rates of Growth in Production of Industrial Commodities  
1962-63  
(Continued)

Commodity	Percentage Change from Corresponding Period of Previous Year					
	Full Year 1962	Full Year 1963	Periods in 1963			
			Half-Year		Quarter-Year	
			Jan-Jun	Jul-Dec	Jul-Sep	Oct-Dec
Construction materials						
Cement	12.7	6.0	10.0	3.2	6.6	0.0
Precast, reinforced structurals (con- crete)	17.5	8.0	9.0	5.9	8.5	3.4
Window glass	8.2	2.1	4.0	0.3	-5.9	5.3
Asbestos cement shingles	9.5	3.0	5.6	-1.1	0.0	-2.2
Forest products						
Commercial timber haulage	3.8	4.0	6.2	1.8	5.9	-2.0
Paper	6.7	4.0	2.9	6.8	2.9	10.3
Furniture <u>c/</u>	15.4	10.0	10.4	9.6	12.5	6.7
Civilian machinery						
Producer durables						
Chemical equipment <u>c/</u>	9.5	9.0	8.0	9.6	12.3	7.1
Metallurgical equip- ment	12.2	-1.7	-0.1	-3.4	N.A.	N.A.
Oil equipment	13.5	-5.1	-0.5	-10.1	N.A.	N.A.
Agricultural equip- ment <u>c/</u>	21.2	17.4	17.0	17.7	17.1	18.4
Instruments <u>c/</u>	15.4	13.0	16.0	7.4	13.2	1.9
Trucks, buses and autos	4.0	1.6	2.1	1.2	3.4	-1.0
Tractors	8.9	13.2	16.9	9.9	10.8	9.1
Metal cutting machine tools	6.7	3.4	4.2	2.8	0.9	4.6

Table 2

USSR: Rates of Growth in Production of Industrial Commodities  
1962-63  
(Continued)

Commodity	Percentage Change from Corresponding Period of Previous Year					
	Full Year 1962	Full Year 1963	Periods in 1963			
			Half-Year		Quarter-Year	
			Jan-Jun	Jul-Dec	Jul-Sep	Oct-Dec
Civilian machinery						
Producer durables (Continued)						
Turbines (kilowatt- hours)	11.2	-0.2	10.9	-9.4	3.7	-18.9
Generators for turbines	16.6	8.2	9.6	6.9	N.A.	N.A.
Electric motors	12.6	9.0	8.8	10.3	11.3	9.4
Diesel locomotives	1.9	2.3	-4.5	8.9	5.8	12.1
Electric locomotives	10.8	4.2	7.4	1.3	5.8	-3.1
Weaving looms	21.2	5.2	11.5	0.9	5.1	-7.0
Excavators	6.9	4.0	6.0	2.1	7.1	-2.4
Forging press machines	9.2	1.5	6.2	-2.9	0.0	-5.7
Consumer durables						
Television sets	11.2	14.0	10.0	17.1	19.2	15.3
Washing machines	39.8	28.0	27.8	28.2	26.9	29.4
Refrigerators	22.0	8.7	11.0	6.6	6.1	7.2
Radios and radio phonographs	0.5	12.9	0.9	22.7	30.0	16.7
Motorcycles and motor scooters	5.6	4.2	5.3	3.1	4.5	1.7
Bicycles and motor bikes	10.1	7.0	7.0	9.9	14.3	6.3
Clocks	0.0	3.9	5.0	2.2	1.5	2.9
Sewing machines	1.5	-22.2	-15.0	-29.0	N.A.	N.A.

Table 2

USSR: Rates of Growth in Production of Industrial Commodities  
1962-63  
(Continued)

Commodity	Percentage Change from Corresponding Period of Previous Year					
	Full Year 1962	Full Year 1963	Periods in 1963			
			Half-Year		Quarter-Year	
			Jan-Jun	Jul-Dec	Jul-Sep	Oct-Dec
Consumer nondurable goods						
Based on agricultural raw materials						
Cotton fabrics	0.8	3.2	0.5	7.8	8.3	8.3
Woolen fabrics	3.2	0.4	-1.7	2.5	2.5	2.5
Linen fabrics	-1.7	5.0	3.6	6.5	9.4	4.1
Silk fabrics	15.3	1.8	8.4	-4.1	-3.4	-4.7
Leather footwear	3.0	1.5	0.4	2.5	2.7	2.3
Meat <u>d/</u>	13.1	13.0	21.4	8.8	16.7	4.5
Milk products <u>d/</u>	2.2	2.2	2.1	2.2	4.0	0.0
Butter <u>d/</u>	6.3	-7.0	-6.9	-7.0	-2.7	-18.3
Vegetable oil <u>d/</u>	17.6	5.0	7.0	0.0	0.0	0.0
Canned goods	6.6	8.2	9.1	6.8	7.4	6.7

a. Unless otherwise indicated, both annual and quarterly rates of growth are computed from output data expressed in physical units. The rates of increase by half-years and quarters for 1963 reflect changes in absolute levels of output in 1963 compared with absolute levels of output within the corresponding period in 1962. Because the published data for periods within a given year are rounded (in physical units or ruble values of output) and because of the possible undetected revision of quarterly production data for the preceding year, an error of plus or minus 2 percentage points may be introduced in the output of any one commodity.

Output data (expressed as absolute quantities) are published quarterly during the year. Significant official revisions of the quarterly production data for 1962 could be detected because of the publication during 1963 of quarterly performance data. Thus the cumulative measures of absolute output published for the four quarters of 1963 were related to the cumulative production of 1962 by means of index numbers. If a comparison of cumulative indexes of growth indicated that revisions had been made in the official data, the data on absolute levels of output, originally published in 1962, were adjusted.

Table 2

USSR: Rates of Growth in Production of Industrial Commodities  
1962-63  
(Continued)

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The rate of increase in output for the year 1962 compared with 1961 was computed from unrounded production data appearing in the statistical yearbooks. The rate of increase in the full year 1963 was computed from production data (rounded) published in the announcement of plan fulfillment (Pravda, 24 January 1964) and the unrounded data appearing in the annual yearbook (Narodnoye khozyaystvo v 1962 g.). These rates of change were computed to the nearest tenth of one percent. If on rounding these percentage rates of change for the full year 1963 to the nearest full percentage point, it was found that the increases did not correspond to rates of growth recently published in the announcement of plan fulfillment (expressed in full percentage points) the computed percentage was rejected and the published percentage increase (rounded) was used. This "rounding" procedure for the full year 1963 was found to be necessary for 17 of the 62 commodity categories used in constructing the indexes in Table 1.

b. The electric power industry (central supply) produces 95 percent of the urban supply of electricity. The remaining 5 percent of the supply in urban areas is generated by small subsidiary plants attached to individual enterprises. In addition, about 5 percent of total production of electricity is produced by small generating stations in rural areas, mostly in agricultural enterprises.

c. Percentage change computed from output expressed in rubles.

d. Excluding production of collective farms and individual households.

APPENDIX A

1. Notes to Table 1

a. The rates of growth indicated in Table 1 show the change in output for each period in 1963 compared with production within the same period of the previous year. For example, the 6.3-percent increase in industrial materials in the third quarter of 1963 is a rate of growth reflecting change in output for that quarter compared with the absolute level of output in the third quarter of 1962.

b. The following commodities are excluded from the rates of growth for the third and fourth quarters (data available only for semiannual periods):

Civilian machinery -- metallurgical and oil equipment, generators for turbines, and sewing machines.

Consumer goods -- confectionary products and knitted wear.

c. The sample of commodities included in Table 1 cover the following percentages of the total value of output (final sales) of commodities included in the ORR civilian industrial index -- industrial materials, 66 percent; civilian machinery, 78 percent; and consumer goods, 71 percent. These are shares of the total commodity coverage, often for broad categories, such as coal, and do not reflect changes in the relative shares of output within a commodity group, such as for bituminous and lignite.

The rates of growth for 1962 over 1961, derived by use of the limited sample of commodities used in Table 1, can be compared with rates of growth computed from the ORR indexes, which have more extensive coverage, as follows:

	<u>1962 over 1961</u>	
	<u>ORR Index</u>	<u>Table 1</u>
Industrial materials	6.5	7.0
Civilian machinery	8.7	9.7
Consumer nondurable goods	5.7	5.7

d. Output indicators are shown in Table 2 for most of the commodities included in Table 1.

2. Element of Seasonality in Soviet Industrial Growth

The analysis in this publication of trends of industrial output over the past 2 years has been based -- appropriately -- on a comparison of levels of output for the same period of time in the 2 years under review. An alternative method is to compare rates of change in output for a given period of time over the preceding period -- for example, change in absolute levels of output in the last 6 months of 1963 compared with output in the first 6 months of 1963. The "same period" approach is more appropriate for the present analysis because it eliminates, to a certain extent, the seasonal effect on production. As indicated in Table 3, the strongest seasonal element in Soviet industrial production is -- as would be expected -- in changes in the levels of output of processed foods. But an element of seasonality also is present for industrial materials and civilian machinery. This tends to result (in any given year) in a predominate share of growth in industrial materials in the first half of a year -- but in civilian machinery, in the last 6 months of a year. As noted on p. 2, above, there were indications of a possible slowdown in the rate of expansion in the first half of 1963, possibly caused in part by the severe weather in early 1963 and because output of civilian machinery did not maintain its usual seasonal pace in the first half of 1963 (see Table 3, below). But because the expansion of industrial materials required to support the machine building sector appeared to be holding up well for the first 6 months of 1963, it was believed that output of civilian machinery during the last 6 months would result in an over-all annual rate of increase comparable to that of recent years.

Table 3 gives the average rates of change by 6-month period compared with the previous 6-month period for the years 1959-62 and presents a comparison with the performance for the same period of 1963.

Table 3

Semiannual Rates of Growth of Soviet Output for Three Major Components  
 of Industrial Output

<u>Industrial Category</u>	<u>Percentage Change</u>			
	<u>First 6 Months of Year over Last 6 Months of Preceding Year</u>		<u>Last 6 Months of Year over First 6 Months of Same Year</u>	
	<u>1959-62 Average</u>	<u>1963</u>	<u>1959-62 Average</u>	<u>1963</u>
Processed foods	-34.2	-20.2	52.6	34.1
Industrial materials	5.9	6.6	0.6	-1.0
Civilian machinery	3.6	1.8	7.0	5.4

APPENDIX B

It is possible that the low rates of growth for the three major components of civilian industrial production in the fourth quarter of 1963 were the result of relating a recent level of absolute production to a base -- same period of time in 1962 -- which, in turn, reflected an abnormally high rate of increase. For example, the annual rate of growth in 1962 in the production of rolled steel (7.4 percent above that of 1961) possibly obscures wide fluctuations in the quarterly rates of growth during the year. Thus the rate of increase for the fourth quarter of 1962 may have been much above the annual average or, alternatively, higher in relation to the annual average than usual. Deriving a rate of increase in the fourth quarter of 1963 by relating absolute levels of output for the same quarter in 1962 and 1963, therefore, possibly could lead to spurious results.

An examination of the data on rates of growth in output for 1962 compared with 1961 (both annually and quarterly) leads to a rejection of this element as an important factor. Of the 49 commodities for which the relevant data are available, the rate of growth in the fourth quarter of 1962 (over the same quarter in 1961) can be compared with the annual rate of growth for 1962 (over 1961) as shown in Table 4.

Table 4

Divergence Between the Rate of Growth in Output for 1962  
(Full Year) and Fourth Quarter of 1962  
over Same Periods in 1961

<u>Category</u>	<u>Number of Commodities</u>
Annual rate of growth more than 1 percentage point above rate of growth in 4th quarter	18
0 to 1 percentage point above Annual rate of growth more than 1 percentage point below rate of growth in 4th quarter	9
0 to 1 percentage point below	16
	6



As shown in Table 4, there does not appear to have been a significant distortion in the pattern of growth in the fourth quarter of 1962 compared with that for the full year. Thus the computation of rates of growth for 1963 over 1962, as computed in Table 2, probably is not biased as a result of this effect. To carry out a more complete demonstration of the lack of a possible statistical aberration in changes in the rates of growth in the fourth quarter related to that of previous years, the above analysis should be carried back to 1960. Although such a statistical presentation is not undertaken, a visual inspection of patterns of growth for years before 1962 suggests no divergency from the pattern indicated in Table 4.

Weather conditions are a cyclical element that can dampen substantially the rate of growth in industrial activity over the period of one quarter. The extremely cold weather of the early months of 1963, for example, apparently was a contributing factor to the slowdown in the first quarter in industrial activity in Western and Eastern Europe and in the USSR.

An inspection of weather data for November and December of 1962 and 1963 does not suggest this element as a disturbing factor in levels of Soviet industrial output. Temperatures in November for both years were well above normal for the country as a whole; in December of both years temperatures were below normal, but colder in December 1962 than December 1963. In both years the magnitude of the temperature differential (compared with normal) was not enough to have the depressing effect on industrial output that occurred.

Analyst: [REDACTED]

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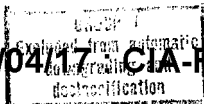
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