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CIA/RR CB 65-14
March 1965

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INTELLIGENCE BRIEF

CONTINUED SLOWDOWN
IN SOVIET CIVILIAN INDUSTRIAL PRODUCTION
IN 1964

DIRECTORATE OF INTELLIGENCE
Office of Research and Reports

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W A R N I N G

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CONTINUED SLOWDOWN
IN SOVIET CIVILIAN INDUSTRIAL PRODUCTION
IN 1964

The first Soviet reports of plan fulfillment for 1964 confirm the downward trend in rates of growth of industrial production. Civilian industrial production -- with which this publication is concerned -- has shown the following pattern of growth:

<u>Period</u>	<u>Average Annual Rate of Growth*</u>
1956-59	9.5
1960-62	6.8
1963	6.0
1964	5.8 (preliminary)

Within the civilian industrial sector, however, the three major components fared differently between 1963 and 1964. Production of industrial materials and consumer nondurables grew at a faster rate in 1964, whereas growth in civilian machinery fell sharply, from 8 percent in 1963 to 5 percent in 1964. Rates of growth of the three major components in 1963-64 are given by quarter in the chart, and rates of growth for 63 major commodities are given by quarter in the table.**

1. Total Civilian Industrial Production

The increase in Soviet civilian industrial production in the first 9 months of 1963 implied that growth for the year 1963 would be at about

* The percentages for years before 1964 are derived from the ORR index of Soviet civilian industrial production. The percentage for 1964 is based on the sample of items listed in the table. Production of commodities shown in the table is reported quarterly in plan fulfillment reports. The ORR index of civilian industrial production reflects a more extensive coverage of items reported for the year as a whole in the Soviet statistical yearbooks as well as CIA estimates for products such as electronics, shipbuilding, aircraft, and nonferrous metals. For a complete list of the sample for the civilian industrial production index, see CIA/RR ER 63-29, Index of Civilian Industrial Production in the USSR, September 1963, UNCLASSIFIED.

** The indexes for the major sectors shown in the chart for 1963-64 are based on the sample of items listed in the table.

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the same level as in 1960-62, but a sharp drop in the rate of growth in the last 3 months of 1963 resulted in a decline for the year as a whole compared with the previous 3-year average. An upturn in the rate of increase in the first 3 months of 1964, especially in industrial materials, suggested that the poor performance in the previous quarter was a "pause" and that the level of growth prevailing in 1960-62 could be restored. The improved performance in the first quarter of 1964, however, was followed by a relapse in all three major sectors in the second quarter. In the last half of the year an increase in the rate of growth for consumer goods was the only encouraging sign. Rates of increase in industrial materials were below those of the first half of the year, and production of civilian machinery continued to slide to the lowest levels of growth since 1951-52.

2. Civilian Machinery

The most notable development in 1964 was the continued deceleration in the growth of production of civilian machinery. Production of metallurgical equipment, diesel and electric locomotives, and forging press machines actually fell, and percentage increases of only 1 to 3 percent were registered for machine tools, trucks, buses and automobiles, tractors, agricultural equipment, and weaving looms. Sizable increases (but still below plan) in production of chemical and petroleum equipment and the delivery to agriculture of substantial numbers of fertilizer and herbicide spreaders reflected the high priority of the chemical program.

The slowdown in the production of civilian machinery may be explained in part by the confusion attributable to the attempted conversion of machine building plants to production of chemical equipment.* The current campaign for improving the reliability and service life of new machinery also may have contributed to the quantitative slowdown.

3. Industrial Materials

After an exceptionally poor performance in the fourth quarter of 1963 (an increase of 3.5 percent) the rate of growth for industrial materials in 1964 returned to the average of the previous 4 years (6 to 7 percent). Moreover, production of most major categories of materials

* For evidence that the conversion program outlined a year ago is not going as planned, see CIA/RR CB 65-5, Lag in Soviet Efforts to Conscript Plants to Produce Chemical Equipment, January 1965, SECRET.

exceeded the goals set for 1964. As expected, there were large increases (17 to 35 percent) in production of important chemicals -- fertilizers, other agricultural chemicals, fibers, and plastics.

The rate of increase in total production of primary energy in 1964 was maintained at the level of 1960-63 (7 to 7.5 percent per year). Although the increase in production of crude oil and gas (9 percent combined) was the lowest since World War II, this was offset by an upturn in the low rates of growth that had prevailed since 1959 in production of coal.

A high rate of increase in consumption of electric power (11 to 12 percent) persisted in the face of the over-all slowdown in industrial growth. In the period 1955-60 the rate of growth for production of electric power exceeded the rate for over-all industrial production (including military) by less than 50 percent. In 1961-62 the differential increased to about three-fourths and was followed by 2 years (1963-64) of rates of increase in consumption of electric power that doubled those estimated for aggregate industrial output.

4. Consumer Nondurable Goods

The low and declining rates of increase recently prevailing in production of consumer nondurable goods finally were reversed in the second half of 1964. This upturn was due to an acceleration in production of processed foods -- up almost 7 percent. The depressed rates of growth in processed foods in the first half of 1964 reflected the effects of the almost disastrous harvest in 1963 and the distress slaughtering of livestock in late 1963 because of the shortage of livestock feed. A return to normal or above-normal weather conditions in agriculture in 1964 resulted in a greatly improved supply of materials (with the exception of meat) in the latter part of 1964. The lower production of meat -- down one-fourth for the year -- was partly offset by a rise of more than a tenth in the fish catch.

Although there was only a small absolute increase in the growth of production of soft goods in 1964, the rate of increase of 4 to 5 percent was twice as high as in 1963 and matched the performance in 1960-62.

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USSR: Rates of Growth in Production of Civilian Industrial Commodities a/
1963-64

Percentage Change from the Corresponding Period of the Previous Year

Commodity	Periods in 1963			Periods in 1964				
	Jan-Sep	Oct-Dec	Full Year	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	Full Year
Industrial materials								
Metals								
Usable iron ore	8.3	4.5	7.3	7.3	5.2	2.2	10.2	6.2
Pig iron	6.6	4.9	6.2	8.5	3.4	6.8	6.7	6.3
Crude steel	5.3	4.6	5.1	7.2	4.5	6.0	6.3	6.0
Rolled steel	5.7	3.5	5.1	7.1	5.1	7.9	4.4	6.1
Steel pipe	11.4	6.5	10.1	6.9	1.9	0.3	-0.9	2.0
Fuels and power								
Electric power	N.A.	N.A.	11.6	N.A.	N.A.	N.A.	N.A.	11.4
Of which:								
Central supply <u>b/</u>	15.1	14.7	15.0	12.6	11.5	12.2	12.0	12.1
Coal	2.3	4.1	2.8	5.3	3.1	3.7	4.7	4.2
Petroleum, crude	10.9	9.8	10.6	10.0	8.0	9.6	7.3	8.7
Gas	22.4	19.4	21.6	17.7	23.5	23.8	16.9	20.2
Chemicals								
Sulfuric acid	12.1	12.7	12.3	13.0	10.9	12.4	8.3	11.1
Caustic soda	10.0	7.1	9.2	10.8	8.5	8.9	11.5	9.9

S-E-C-R-E-T

USSR: Rates of Growth in Production of Civilian Industrial Commodities a/
1963-64
(Continued)

Percentage Change from the Corresponding Period of the Previous Year

Commodity	Periods in 1963			Periods in 1964				
	Jan-Sep	Oct-Dec	Full Year	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	Full Year
Industrial materials								
Chemicals (Continued)								
Soda ash	9.0	9.4	9.1	10.1	8.0	8.9	5.2	8.0
Mineral fertilizers	14.1	19.0	15.5	19.6	27.8	35.7	29.5	28.4
Artificial and synthetic fibers	12.7	7.3	11.2	14.3	14.8	18.8	20.0	17.1
Automobile tires	7.8	9.5	8.2	10.0	7.1	8.9	5.7	8.1
Plastics and resins	N.A.	N.A.	24.6	25.7	28.7	N.A.	N.A.	22.2
Pesticides and herbicides	N.A.	N.A.	24.6	50.4	42.5	N.A.	N.A.	35.0
Construction materials								
Cement	8.8	-0.1	6.4	1.3	5.2	7.9	11.0	6.4
Precast, reinforced structurals (concrete)	13.4	-0.9	7.4	12.2	9.6	8.7	6.0	9.0
Window glass	1.0	5.1	2.1	16.7	24.8	6.7	-5.3	10.0
Asbestos cement shingles	3.6	2.6	3.3	6.7	3.8	3.4	4.9	5.0
Forest products								
Commercial timber haulage	6.1	-2.0	3.3	4.0	4.0	0.0	3.2	2.8
Paper	2.9	5.7	3.6	6.1	5.9	6.1	6.0	6.0
Furniture <u>c/</u>	12.5	2.7	10.0	10.3	7.6	3.6	3.9	6.3

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USSR: Rates of Growth in Production of Civilian Industrial Commodities a/
1963-64
(Continued)

Commodity	Percentage Change from the Corresponding Period of the Previous Year								
	Periods in 1963			Periods in 1964					
	Jan-Sep	Oct-Dec	Full Year	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	Full Year	
Civilian machinery									
Producer durables									
Chemical equipment <u>c/</u>	10.7	5.4	7.9	13.0	16.8	23.6	22.0	19.0	
Metallurgical equipment	(-1.2)	(-3.4)	-1.7	(-3.4)	(-3.4)	(0.0)	(0.0)	-1.7	
Oil equipment	(-3.2)	(-10.6)	-5.1	2.0	11.6	(38.0)	(38.0)	21.7	
Agricultural equipment <u>c/</u>	17.0	20.3	17.4	8.1	4.8	-2.5	-4.8	1.0	
Instruments <u>c/</u>	15.0	5.3	12.4	9.7	4.4	4.6	1.6	5.0	
Trucks, buses, and automobiles	2.5	-1.0	1.6	2.7	3.4	3.3	1.4	2.7	
Tractors	14.9	9.1	13.3	-2.8	0.2	3.3	3.6	1.1	
Metalcutting machine tools	3.0	3.8	3.2	0.2	-1.3	1.1	3.0	0.8	
Turbines (kilowatt-hours)	9.4	-21.6	-0.2	-3.6	-8.0	3.1	55.1	11.2	
Generators for turbines	(7.8)	(7.1)	7.4	(3.0)	(3.0)	(11.7)	(11.7)	8.0	
Electric motors	9.6	9.4	9.6	7.0	4.8	2.9	3.0	4.4	
Diesel locomotives	-1.0	12.6	2.4	15.4	4.6	-6.8	-18.1	-2.3	
Electric locomotives	6.8	-3.1	4.2	5.7	0.6	-10.3	1.3	-0.8	
Weaving looms	9.3	-7.0	5.3	-1.6	3.2	3.2	3.8	2.1	
Excavators	6.6	-1.7	4.4	6.8	11.1	15.1	19.1	13.1	
Forging press machines	4.6	-2.0	2.7	-1.2	1.2	1.0	-1.4	-0.1	
Consumer durables									
Television sets	13.0	17.0	14.1	21.4	16.0	20.7	14.3	18.0	
Washing machines	27.5	25.8	27.0	28.8	25.3	24.2	22.5	25.0	

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USSR: Rates of Growth in Production of Civilian Industrial Commodities a/
1963-64
(Continued)

Percentage Change from the Corresponding Period of the Previous Year

Commodity	Periods in 1963			Periods in 1964				
	Jan-Sep	Oct-Dec	Full Year	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	Full Year
Civilian machinery								
Consumer durables (Continued)								
Refrigerators	9.3	7.0	8.7	18.1	22.0	23.9	33.2	24.5
Radios and radio phonographs	6.5	25.0	12.9	8.0	11.8	-1.6	-15.5	-0.8
Motorcycles and motor scooters	5.0	2.0	4.2	6.2	5.6	5.5	7.4	6.1
Bicycles and motor bikes	8.7	0.6	6.5	8.5	7.4	8.0	8.0	8.0
Clocks	4.1	3.1	3.9	10.0	5.9	5.9	1.4	5.9
Consumer nondurable goods								
Cotton fabrics	2.1	6.5	3.2	5.0	5.7	7.6	5.3	5.9
Woolen fabrics	-0.3	2.4	0.4	1.7	2.9	-2.4	-1.6	0.0
Linen fabrics	5.4	4.3	5.1	7.0	5.4	12.9	2.7	6.8
Silk fabrics	4.2	-5.0	1.7	1.5	3.0	3.5	5.2	3.3
Leather footwear	1.2	2.1	1.4	4.3	0.9	1.8	5.0	3.0
Meat <u>d/</u>	20.2	3.7	12.6	-10.6	-25.0	-22.8	-27.0	-23.0
Milk products <u>d/</u>	2.8	0.0	1.9	1.9	5.5	8.1	23.1	9.3
Butter	-4.9	-15.7	-6.5	-11.6	-0.1	(18.3)	(18.3)	8.9
Vegetable oil <u>d/</u>	7.7	(1.0)	4.6	1.0	-6.0	(7.5)	(7.5)	2.0
Canned goods	10.7	0.4	8.0	11.1	8.4	18.2	11.1	14.0
Knitted outerwear	(6.7)	(5.5)	6.4	(13.0)	(13.0)	(19.0)	(19.0)	16.0
Knitted underwear	(6.7)	(6.9)	6.8	(13.2)	(13.2)	(18.8)	(18.8)	16.0
Fish	9.6	22.9	12.1	12.1	6.1	12.3	16.6	11.3

USSR: Rates of Growth in Production of Civilian Industrial Commodities a/
 1963-64
 (Continued)

Percentage Change from the Corresponding Period of the Previous Year

Commodity	Periods in 1963			Periods in 1964				
	Jan-Sep	Oct-Dec	Full Year	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	Full Year
Consumer nondurable goods (Continued)								
Soap	11.1	1.9	8.5	6.9	7.1	0.5	1.2	4.0
Sausage	7.8	14.4	9.6	6.0	1.8	-1.3	-5.2	0.0
Confectionery products	(6.7)	(1.6)	5.4	8.9	11.1	(14.2)	(14.2)	11.9

a. Unless otherwise indicated, both annual and quarterly rates of growth are computed from production data expressed in physical units. The rates of increase by quarters for 1963 and 1964 reflect changes in absolute levels of production in 1964 compared with absolute levels of production within the corresponding period of 1962 and 1963. Because the published data for periods within a given year are rounded (in physical units or ruble values of production) and because of the possible undetected revision of quarterly production data for the preceding year, a slight possible revision may be introduced in the production of any one commodity.

Production data (expressed as absolute quantities) are published quarterly during the year. Significant official revisions of the quarterly production data for 1962 and 1963 could be detected because of the publication during 1963 and 1964 of quarterly performance data. Thus the comparison of cumulative measures of absolute production published for 1963 and 1964 was related to the cumulative production of 1962 and 1963 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 production, originally published in 1962 and 1963, were adjusted.

Where quarterly data are not available, half-year percentages have been used (shown in parentheses) -- for example, the over-all rates of increase for the second half of 1964 are shown for both the third and fourth quarters.

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 production expressed in rubles.

d. Excluding production of collective farms and individual households.

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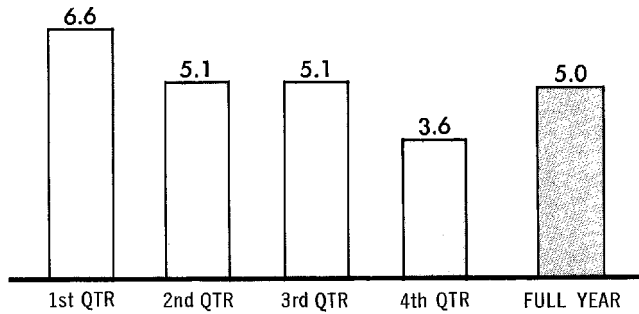
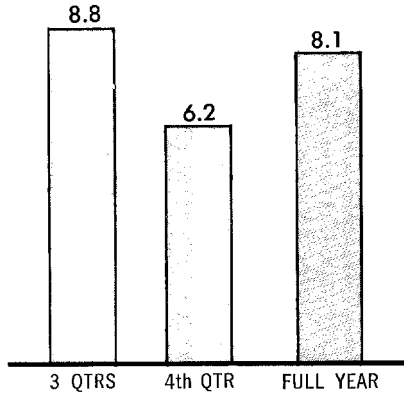
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OF CIVILIAN INDUSTRIAL PRODUCTION, 1963 AND 1964**

(Percentage Change From Corresponding Period of Previous Year)

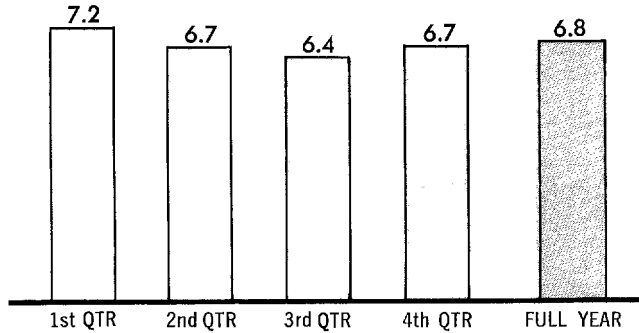
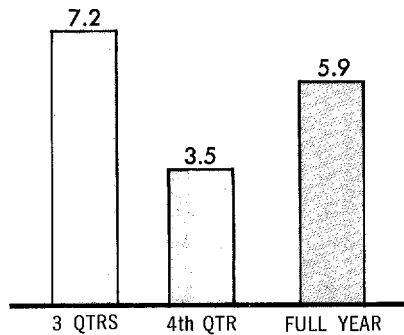
1963

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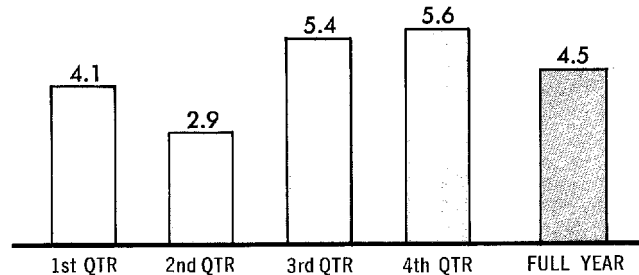
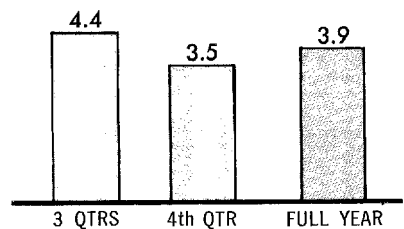
CIVILIAN MACHINERY



INDUSTRIAL MATERIALS



CONSUMER NONDURABLE GOODS



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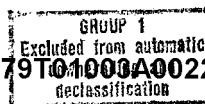
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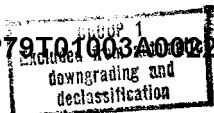
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25 March 1965

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SUBJECT : Transmittal of Material

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this memorandum has been completed.

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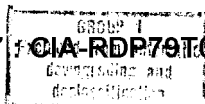
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