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ORR PROJECT ...

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Requested:
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SOVIET BLOC MOTOR VEHICLE PRODUCTION ESTIMATE FOR THE

YEARS 1947, 1950, 1953

IP-359

Contributed by

18 January 1954

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A. Introduction.

1. This contribution does not satisfy the project action memorandum for this study in either quantity or quality. The deficiencies are as follows:

a. Separate figures on bus production are not available and in some cases may be included in truck production.

b. Satellite production figures have not been determined for all of the desired years and those which are determined are under suspicion because they are based on only brief research.

c. Although the figures on truck production for the USSR are based on better information than has been available before 1953, the totals for 1952 and 1953 have not been recapitulated by model.

d. Satellite truck totals have not been recapitulated by model for Czechoslovakia and Hungary.

2. This summary contains the best estimates for this Branch on motor vehicle production in the Soviet Bloc for the desired period. It does not satisfy the need of the intelligence community for such intelligence. This type of intelligence is needed as a basis not only for the determination of vehicle ~~PARKs~~ (inventories), but also for the determination of the allocation of economic resources to the production of motor vehicles, and of the consumption of tires, batteries and other replacement parts.

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3. This Branch proposed a project (ORP) more than a year ago which was intended to satisfy our need for Soviet Bloc motor vehicle production intelligence. This project is still deferred for lack of analyst time to progress it.

B. Production Estimates.

1. For convenience, production estimates have been placed in two tables - Table I, Truck Production, and Table II, Passenger Car Production.

2. These estimates have been taken from Branch contributions to various intelligence studies which are referred to in the documentation of the tables.

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TABLE I TRUCK PRODUCTION

Country	Type	1948	1949	1950	1951	1952	1953	1954	1955
USSR [a]	¼ ton Jeeps	81,000	10,200	22,000	30,000				
	1½ to 2½ ton		83,300	150,000	165,000				
	3½ ton	18,000	24,000	29,000	30,000				
	4 ton	65,000	89,000	89,000	90,000				
	4½ ton	—	5,000	7,000	7,000				
	7 ton	600	1,200	4,000	7,500				
	12 ton	—			500				
	Total	164,600	212,700	301,000	330,000	342,000	346,000	346,000	346,150
East Germany [b]	3/4 ton				850				
	1½-2 ton				1,800				
	3 ton	230			2,000				
	6 ton				30				
	Total	230			4,680	7,300 [d]			
Czechoslovakia [c]	1½ ton Praga								
	3½ ton Tatra Praga								
	7 ton Skoda								
	10 ton (Tatra 111)								
	Total	7,000	7,250	6,000	9,120				

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Table I Truck Production - Continued

Country	Type	1948	1949	1950	1951	1952	1953	1954	1955
Hungary c/	3/4 ton								
	3 ½ ton								
	5 ton								
	Total	375		1,600	4,400				
Poland c/	2½ ton					2,000 d/			
	3½ ton	20	240	960	2,500	4,500 d/			
	Total	20	240	960	2,500	6,500 d/			

China, Albania, Rumania and Bulgaria - no truck production

a/ Figures for the U SR for 1947 through 1955 were developed in the contribution which this branch made to the output phase of ORR Project 0.6, now called Project 2. The figures for 1948 although not appearing in that contribution were developed at the same time by the same methods and are in the analyst's work file.

b/ The East German figures are from a Branch study a copy of which is attached.

c/ All figures for Czechoslovakia, Hungary and Poland are from the Branch's contribution to NIE-65 unless marked d/.

d/ Figures marked d/ are from the contribution of this Branch to NIE-87.

TABLE II PASSENGER CAR PRODUCTION

Country	1948	1949	1950	1951	1952	1953	1954	1955
USSR [a/]	16,300	36,900	52,000	62,000	68,000	72,000	75,000	77,300
East Germany [b/]			5,000	10,500	16,400			
Czechoslovakia [b/]	16,198	20,000	24,243	23,500				
Poland [b/]					1,500			

China, Albania, Rumania, Bulgaria and Hungary -- no passenger car production.

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a/ From ORR

b/ From

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NOTES ON THE AUTOMOTIVE INDUSTRY OF SOVIET ZONE, GERMANY

ORR

20 SEPTEMBER, 1952

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NOTES ON THE AUTOMOTIVE INDUSTRY OF SOVIET ZONE, GERMANY

Prewar.

The following automotive plants existed in the Sovzone prior to the war:

Auto-Union (Consisting of)		
Horch at Zwickau	-	trucks and sedans
Audi at Zwickau	-	sedans
Siegmar at Chemnitz	-	sedans (Wanderer)
DKW at Chemnitz	-	sedans
DKW at Zschopau	-	sedans
BMW at Eisenach	-	sedans & motorcycles
Presto at Chemnitz	-	sedans
Phaenomen at Zittau	-	trucks and sedans
Vomag at Plauen	-	trucks
Framo at Hainichen	-	small trucks
Fichtel & Sachs at Reichenbach	-	small motorcycles
Opel - Brandenburg	-	largest truck factory in Germany

These plants were dependent on plants in Western Germany for many components but they produced about 20 percent of Germany's automotive product.

Wartime and Postwar.

During the war, the Auto-Union plants in Zwickau and Chemnitz built military trucks and half-tracks and BMW built military motorcycles, command cars and aircraft engines.

The plants sustained bomb damage, especially Opel at Brandenburg, but it was the Soviet dismantling of 1945-46 that shut down the automotive industry completely. It has been estimated 1/ that only 16% of the 1938 level of capacity remained after dismantling. Only BMW at Eisenach and Fichtel & Sachs, Reichenback were not dismantled and these two became SAGs.

1/

There was no immediate activity in rebuilding the automotive industry since emphasis was placed by the Soviet Occupying Power on rebuilding industries which were to produce reparations. Also the machine tool industry had to be reconstructed first to provide equipment for rebuilding the automotive industry. The first intensive steps to rebuild the automotive industry were taken under the Two-Year Plan (1949-1950).

The most important vehicle and vehicle accessory factories, which did not become SAGs, were consolidated under the IFA Union of People-Owned Vehicle Plants, Chemnitz. This organization includes at least 40 plants and 20,000 workers, and is under the Ministry for Machine Construction. Recently, SAGs, BMW, Eisenach and Fichtel & Sachs, Reichenbach were returned to the IFA-VVB.

The industry is growing as can be shown by a few production figures in recent years. Planned production for 1950 was 2400 trucks and 10,000 sedans, and for 1955 it is 24,000 trucks and 25,000 sedans. There have been many set backs in these plans so far, due to shortages of material and equipment. For example, in 1952, several hundred Phaenomen "Granit 27" trucks were parked on the street in Zittau without front axles because the axle forging die was damaged and it was not possible to get a large enough block of alloy steel to make another die, 1/ and 700 Horch H3A trucks could not be delivered because they lacked starters and windshields although otherwise complete. 2/ Table I lists probable production figures by plant and model.

The plans for 1952 were rather ambitious but had to be scaled down because of material shortages. In 1952 the LOWA (locomotives and RR car) plants at Werdau and Bautzen are being made available for the manufacture of military trucks and full tracked vehicles because they are not required for the manufacture of railroad rolling stock. Werdau is to make the G-5 and H-6 army trucks and Bautzen is to make the KS-05 full track vehicle. Since these plants are principally assembly plants, their production throws an increased load on the present suppliers of engines, transmissions, frames, etc., making it all the more difficult to obtain the required increase in production of civilian trucks.

1/

2/

General Makarov of the Soviet Control Commission said on 12 June 1951 that no further deliveries of trucks from the USSR would be made to the German economy and therefore the HVA requirement must be supplied by the DDR. (SO 22 Sept. 1951). This is probably the reason that the production of military vehicles is receiving such a high priority in 1952.

The vehicle industry is growing but is continually hampered by material shortages. The final assembly capacity of the industry far exceeds the capacity of the manufacturing and accessory facilities (starters, generators, batteries, injectors, wheels, bearings, etc.). Many accessories were not made in the Sovzone before the war and the machinery for making other accessories was removed as reparations so that new industries are now being created in Sovzone Germany.

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TABLE I. TRUCK PRODUCTION — SOVZONE GERMANY

		1947	1948	1949	1950	1951	1952
H orch (Zwickau)	H-3, 3 Ton, 65 HP gasoline	110	230	375	about 300	—	—
	H-3A, 3 Ton, 80 HP Diesel				—	2,000	675 by June (4,000 plan)
	H-3B, low bed version of H-3A for buses					—	a few
	H-6, Ton, 120 HP Diesel					Prototype	1,500 plan cut to 600
	H-L, 1 Ton, 4x4, WC, 80 HP, V-8 gasoline 1/				a few	30	—
Lowa (Werdau)	G-5, 5 Ton, 6x6, 120 HP Diesel					Prototype	Plan 1,000-1,200
	Buses					Prototype in 1st 6 mos. 2/	some
Phonemen (Zittau)	"Granite 27" 1½ Ton, 4x2, gasoline				1,000 planned	1,800	2,550 planned
	"Granite 32" 2 Ton, 4x2, Diesel					Prototype	1,000 planned
Framo (Heinichen)	"Liliput" 3/4 Ton, 15 HP gas				some	850	maybe discontinued
	½ Ton, 28 HP, F-9 engine						plan
	H-1, 1 Ton, 4x4, WC, 80 HP, V-8 gasoline 1/					Prototype	152
Unknown	P-1, 55 HP BMW engine					160 in first series	
Lowa (Bautzen)	KS-05 (KS-120), full track, 150 HP						300 planned
	4 cyl Diesel						
	Total for year				1,195	4,840	

1/ Assembled to use up Horch KPZ-15 parts on hand using 80 HP Horch V-8 gasoline engine which Russians consider archaic.
2/ SO , 3 August 1951.
3/ Expected to be ready for production in July 1952 - SO , 9 April 1952.

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