

26 October 1944

Mr. Brandon H. Grove
 Foreign Economic Administration
 Room 1408 - Tempo "Y" Building
 12th and Constitution Ave., N.W.
 Washington 25, D. C.

Dear Brandon:

We have now obtained official statistics on the petroleum consumption of Rumania and France in 1943. As these figures should prove of interest to the Enemy Oil Committee, I have prepared a comparison between these data and the consumption estimates made by EOC. I would suggest that we circulate these comparisons to the members of our committee.

The following tables show that the difference between the official statistics and the EOC estimates for the petroleum consumption of Rumania and France during 1943 is less than 4 percent.

Table 1. FRENCH CIVILIAN CONSUMPTION OF PETROLEUM IN 1943

(In thousands of metric tons)

| | <u>French Official</u> | <u>EOC¹</u> |
|----------------------------|----------------------------|------------------------|
| Gasoline with blenders | 129 | 130 |
| Kerosene and white spirits | 14 | 10 |
| Lubricating oil | 66 | 66 |
| Gas oil (Diesel) | 62 | 60 |
| Fuel oil ² | <u>17</u> | <u>46</u> |
| Total ³ | 288 | 300 |

1. Data taken from EOC 68-4 dated January 1944.
2. The discrepancy between the French official figure and the EOC estimate is most likely due to the fact that the EOC figure included tar oil used as fuel oil, whereas the French official figures most likely referred to fuel oil obtained from crude oil.
3. US Industry estimated French consumption in 1943 at 554,000 tons.

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These figures were obtained by Messrs. Peck and Noel on their official mission to France and incorporated in a report to Brigadier General George C. McDonald, Director of Intelligence, USSTAF.

The figures obtained by OSS in Bucharest on Rumanian consumption compare with our estimates as follows:

Table 2. ROMANIAN CONSUMPTION OF PETROLEUM PRODUCTS IN 1943

(In thousands of metric tons)

| | <u>Rumanian Official</u> | <u>EOC¹</u> | | |
|------------|------------------------------|------------------------|--------------------|-----------------------|
| | | of which: | | |
| | | Total | Civilian | Military ² |
| Gasoline | 185 | 184 | 125 | 59 |
| Kerosene | 307 | 300 | 300 | -- |
| Lubricants | 41 | 39 | 30 | 9 |
| Gas oil | 210 | 180 | 120 | 60 |
| Fuel oil | <u>1,201</u> | <u>1,200</u> | <u>1,150</u> | <u>50</u> |
| Total | 1,944 | 1,903 | 1,725 ³ | 178 |

The EOC figures originally did not include Rumania's military consumption. The official figures obtained by OSS in Rumania most likely do include this consumption because the requirements of Rumanian armed forces would otherwise not have been provided for in the statistics obtained for Rumania's production, consumption, and exports. For this reason we have compared the official figures for Rumanian consumption with EOC estimates for Rumania's civilian plus military consumption. However, as far as we can judge, the requirements of aviation gasoline for the Rumanian Air Force were not included in the official consumption data as these did not specify any figures for aviation gasoline consumption. We have therefore omitted from our military consumption 60,000 tons of aviation gasoline which according to our estimates were needed by the Rumanian Air Force in 1943.

1. Data taken from EOC 68-4 dated January 1944, and EOC 68-6 to 8 January 1944.
2. Excluding 60,000 tons of aviation gasoline consumed by the Rumanian Air Force
3. US Industry estimated Rumanian civilian consumption in 1943 at 1,366,000 tons.

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I believe ROC has done well in the first official check on some of its estimates. It must not be forgotten that these estimates were obtained on the basis of a use and product breakdown, country by country, involving the estimation of a large number of items on which intelligence was scanty.

Sincerely yours,

Walter Levy

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cc: Sidney Kilbey
Charles Rayner
Norris G. Wood
Major Russell S. Tarr ✓