

*REPORTS ON ENEMY  
INDUSTRIES AND RESOURCES*

INTELLIGENCE SECTION  
COMBINED OPERATIONAL PLANNING COMMITTEE  
c/o HQ., EIGHTH AIR FORCE, APO. 634.

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Date:- 13 April, 1944.

Ref:-

Subject:- German Oil Position.

To :- Senior Intelligence Officer.

In very generalized terms the estimated position of the German oil economy for the six months after 1 March, 1944, is as follows:-

TABLE I.

Production.

Millions of  
Metric Tons.

Crude and Shale Oil Products	4.1
Synthetic Oil Product	3.3
Substitute Products (vegetable oils etc.)	1.2
<u>Total:</u>	8.6

TABLE II.

Present Reserves.

Military and Consumer Reserves	1.0
Operating Stocks	1.6
Stocks in Transit (pipelines, tank cars)	.6
Refinery and Synthetic Storage	.8
<u>Total:</u>	4.0

2. Two reliable estimates of consumption are available and they do not differ to any considerable extent.

TABLE III.

Consumption.

Military consumption:

Army	2.7	2.7
Air Force	1.3	1.1
Navy	.9	.7
	4.9	4.5
	6.9	5.0

Civil Consumption:

Millions of  
Metric Tons.

Industrial & Commercial	2.9	3.1
Miscellaneous	.1	.2
Increase in Stocks	<u>.7</u>	<u>.8</u>
	3.7	4.1

Total Military & Civil: 8.6

3. Thus the total position is such that there are adequate stocks to account for practically three months consumption if all production ceased. Furthermore stocks in the next six months will tend to increase by perhaps 20%. However, by the very nature of these stocks, their total consumption would seem to be an economic impossibility if any production were to continue.

4. Synthetic oil capacity is expected to produce 3.3 million tons of this production in the next 6 months. Approximately 80% of this synthetic production is concentrated in fourteen plants. In these plants there is no question of excess capacity as exists in the crude oil facilities. A synthetic plant which is destroyed will cut output of synthetic products to the full extent of the destruction. The crude oil refining system, however, is somewhat different. There does exist a great deal of excess refinery capacity over and above crude oil production.

TABLE IV.

Oil Refining Capacity  
Million metric tons Semi-Annual.

	<u>Operational.</u>	<u>Excess.</u>
<del>Polestic</del>		
Polestic	2.75	1.9
Non-Polestic	<u>1.7</u>	<u>5.75</u>
	4.45	7.65

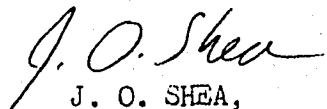
5. It will be noted that this operational refining capacity differs by about ten percent from the figure given in TABLE I. However, these figures in part have been drawn from two different sources.

6. At present there are two major geographic concentrations of this crude oil refinery capacity. 12 major plants in the Polestic complex have a capacity of 3.5 million tons semi-annually. In the BREMEN, HANNOVER, HAMBURG Area 4 plants have a capacity .65 million tons. All of this latter capacity is believed to be operational at present and amounts to about 22% of operational capacity existing other than in the Polestic Area.

~~Polestic~~

7. With the existence of the enormous excess over capacity in areas other than Polestic it is obvious that any destruction of these refineries would not result in decreasing German production by the gross amount of the capacity destroyed. However, due to inevitable time lags incumbent upon the opening of plants formerly closed and dislocations occasioned by the necessity of using less suitable located oil capacity, a sizeable decrease in refinery capacity might be occasioned. However, the necessary information for a precise analysis

of the economic ramifications of such a disruption have not as yet been obtained. In general the great majority of the large plants at present not operational are located in the area HAMBURG-HANNOVER-BREMEN Area or on the FRENCH-HOLLAND-BELGIUM Coast, and are thus very vulnerable as well as being placed in economically undesirable localities. It is obvious that a reduction of German oil production to zero is a practical if not a theoretical impossibility, but even with the utmost of restrictions which have developed out of an already tight oil position, the German economy, military and civil, still will need 7.8 millions tons of production in the next six months. Any decrease in production below this level can of course be taken up for a time by the reserve cushion. However, a far reaching oil destruction program should soon make its effect felt in the economy.

  
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