

WEEKLY SURVEY OF GERMAN OIL PRODUCTION.No. 3: July 28th 1944.

Note: This survey summarises the conclusions of the Working Committee of the Joint Anglo-American Oil Targets Committee, regarding the current status of Axis oil production. The assessments are based on ground intelligence and deductions from air cover; the forecast of future output takes into account the enemy's potential repair performance, but makes no allowance for additional damage in further attacks. The present report includes the results of all attacks up to and including July 21st.

I. SUMMARY OF EFFECTS ON PRODUCTION.

Additional data received has enabled some revision to be made to the estimates of production during May and June. A number of successful attacks during the week under review have also caused a reduction in the output estimates for July and August.

The situation is now estimated as follows:-

				<u>Tons per month</u>
Pre-raid normal output of finished products.				1,360,000 (100%)
Estimated production in May	-			1,082,500 (80%)
" " " June	-			797,000 (58.5%)
" " " July	-			673,500 (49.5%)
" " " August	-			933,000 (68.5%)

Air cover has enabled the progress of repairs to be traced regularly in the case of the majority of the damaged plants. In all cases reconstruction appears to be progressing less rapidly than would be expected under optimum conditions.

The probable output of each producing area is summarised in Table I, and the major factors in the current situation are summarised below:

II. CURRENT DEVELOPMENTS.

Reports continue to be received of the critical situation arising from the shortage of oil. A number of these reports refer particularly to the lack of motor fuel, aviation spirit and high quality lubricants.

Measures taken by the Germans to combat the deterioration in the situation include a decree giving the Minister of Transport wide powers of control over all types of road traffic, including municipal tram services. Hitler has also appointed a Special Commissioner to be responsible for the repair of damaged refineries.

Indications of the dislocation being caused by the lack of refining facilities are to be found in the long distances over which oil has to be transported. A large quantity of tar oil have been allocated for shipment from Germany to Roumania during the month of July to provide fuel for locomotives in Roumania; this tar oil may be surplus to current requirements as feedstock for hydrogenation on account of damage to the Bergius plants. Hungarian crude oil is being transported for refining at Hamburg; this oil doubtless being given preference over indigenous German crudes on account of its much needed gasoline content. Distillates from Roumania have been shipped to Monheim, near Düsseldorf, for further refining. It is also reported that plans are being made to refine a quantity of Roumanian crude in Bulgaria.

III./

III. CURRENT SITUATION IN PRINCIPAL PRODUCING AREAS.

(a) Germany: Benzin Hydrocracking Plants

The further attacks in the last week have considerably modified the situation. Output from these plants stands now at 106,500 tons, or 28% of pre-raid normal. Two plants (LEUEN & POLTEROP-WOLFFELI) have been attacked, although the results have not yet been assessed. Two plants (ZEITZ & LUTHEMENDORF) are likely to be inactive for a considerable time. Six plants (HACHENBURG, POLITZ, SCHOLVEN, WESSELING, BOHLER, and WODSTERN) may be able to resume partial production before the end of August. The major producers at the present time are LEUEN and the two RECHENBERGERS.

(b) Germany: Fischer-Tropsch Plants

One attack was made during the week on Fischer-Tropsch, the HOLTZHEG plant being very severely damaged; it is likely to be out of production throughout July and August. RUTLAND is still inactive, but may resume partial production by the end of August. STARKER DE-HOLDS is in partial operation. Five plants remain fully active.

July output is likely to be reduced to 57,000 tons or 57% of normal.

(c) Germany: Refineries

There have been no further attacks, and some plants show signs of resuming production. Of the crude refineries only OSBENBACH and BEROLING-DE-BAIR are completely out of action and incapable of production for a considerable period, though only REIDE-DE-BAIR is operating normally. Three plants are in partial operation or under repair.

The major finishing and lubricating oil plants are all operating normally.

(d) France, Holland, and Belgium: Refineries

There is no evidence that major refining activity has been restarted in any of the idle plants.

(e) Roumania: Refineries

Attacks on Ploesti during the past two weeks have hit the two most important of the remaining active Roumanian refineries (CONCORDIA VAGA and ROMULO AMERICANO). The former was fairly heavily damaged. The condition of the latter depends on the results of the further very heavy attack of July 22nd.

Four other plants in Ploesti (ASTRA ROMANA, PETROL BLOK, PRIDEVENTZA ZENIA, and DACIA ROMULO) are capable of either full or partial output, and two others (UNITA SIERANTZA and COLOMIA AQUILA) may be resuming activity.

Five plants remain out of action.

(f) Austria: Refineries

The Austrian refineries are believed to have been virtually inoperative during the latter part of July, but high priority is being given to their repair. In spite of this, KIGER and VOITZDORF are likely to be out of action during August; though some production may be possible at FLORSDORF, SCHNECHT, ROSENBERG, and LOREN.

(g) Hungary: Refineries

SEONY and FANTO are likely to be out of production during August. CSEFEL, MAGYAR-IPAR, ALASFUZITO and FETTERDO may be capable of resuming operations on a small scale before the end of August.

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(h) Czechoslovakia: Refineries

The position is unchanged. APOLLO, Bratislava, is likely to be out of action until the end of August. The effects of an attack on July 21st/22nd on PARDUBICE are not yet known, but the remaining four plants are probably working to full capacity.

(i) Poland: Refineries

The position remains as at last week. POLMIN-DROHOBYCE will be out of action until the end of August: six plants are operating, though possibly not fully, and the largest of the Polish oilfields is now in imminent danger of capture by the Red Army.

(j) Italy, Yugoslavia, and Albania: Refineries

Results of an attack on July 19th/20th on the FIUME (lubricating oil) refinery are not yet known. The other Italian refineries are inactive.

The 1st remaining active plant in Yugoslavia (SARAJEVO) was attacked on July 16th/17th, but the results are not yet known.

The same applies to the KUCOVA topping plant in Albania, attacked on July 23rd.

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29.7.44.

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TABLE 1: ESTIMATED OUTPUT OF AXIS OIL PLANTS
FROM INFORMATION AVAILABLE UP TO
22 JULY 1944

(all figures in thousands of metric tons per month)

	<u>Normal</u> <u>Finished</u> <u>Products</u> <u>Output</u>	<u>Estimated Output of</u> <u>Finished Products</u>			
		<u>May</u>	<u>June</u>	<u>July</u>	<u>August</u>
<u>SYNTHETIC PLANTS:</u>					
1. Bergius Hydrogenation	380.5	286.5	157.5	106.5	180.5
2. Fischer-Tropsch	100	98	72.5	57	64.5
3. Unknown Plants	16	16	16	16	16
Total from Synthetic Plants	496.5	400.5	246	179.5	261
Percentage of Pre-raid total	100%	80%	58%	49%	62%

<u>REFINERIES:</u>		<u>Normal</u> <u>Capacity</u> <u>Finished</u> <u>Products</u> <u>Output (B)</u>				
4. Germany	149	(From	90(A)	68(A)	30(A)	80(A)
5. France	260	avail-	6	6	6	6
6. Belgium	52	able	0	0	0	0
7. Holland	42	crude	0	0	0	0
8. Czechoslovakia	43	Notes	43(A)	38(A)	32(A)	36(A)
9. Poland	73	(C)	55(A)	53(A)	43(A)	40(A)
10. Austria	54		56	54	20	31
11. Hungary	60		51.5	31	14	23
12. Italy	80		1	4	3	3
13. Yugoslavia	21		21(A)	9(A)	3	2
14. Albania	2		2	2	2	2
15. Roumania	714		190.5	170	162	257
Total from Crude Oil	1555		697.5	516	385	302
Percentage of pre-raid total			100%	74%	55%	43.3%

GRAND TOTALS:

(i) Synthetic Plants	496.5	400.5	246	179.5	261
(ii) Crude Oil	697.5	516	385	302	430
(iii) Other Sources (D)	166	166	166	192	192
TOTAL -	1360	1082.5	797	673.5	933
Percentage of pre-raid total	100%	80%	58.6%	49.5%	68.6%

NOTE: (A) Assumes imports of crude to extent of available capacity.

(B) Crude oil refinery capacity less 10% for refining loss.

(C) Figures for normal finished products output from available crude by individual countries not indicated. Total figure is used for comparative purposes.

(D) From sources not subject to attack. These include benzol, alcohol, tar oils, etc.