

22 May 1944JOINT INTELLIGENCE COMMITTEECOMMENTS ON J.I.C. MEMORANDUM FOR INFORMATION NUMBER 66
(British J.I.C. (44) 168)THE EFFECT ON THE GERMAN OIL SITUATION OF THE LOSS OF THE RUMANIAN,
HUNGARIAN, POLISH, AND ESTONIAN OILFIELDSReport by the Enemy Oil Committee

1. We agree with the essential conclusions of the subject paper.

2. However, we believe that stocks in the West should not be considered apart from stocks in general. In our judgment these latter are sufficient to make good, for the period of approximately six months, the calculated deficit resulting from the loss of the territories mentioned. It should be emphasized that available stocks would not be used to exhaustion except in the case of extreme emergency and that the enemy would endeavor to reduce military activity some time in advance of any threatened exhaustion of strategic stocks.

3. By emphasizing that 60% of Germany's remaining oil supplies would come from synthetic plants if Estonia, Poland, Rumania and Hungary were lost, the British paper takes cognizance of the resultant vital position in the German oil economy which would be occupied by the synthetic plants.

4. The preliminary interpretation of the results of the May attacks on syntehtic plants indicates a reduction in output by about 200,000 tons a month for a period in excess of two months and perhaps as long as six months. Such reduction being combined with the postulated loss of oil resources in the areas mentioned would, at the present rate of consumption, involve a deficit of about 400,000 tons a month. The deficit of this magnitude might be met only to a small extent by further ruthless cuts in civilian

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consumption; the bulk must be met by withdrawals from stocks which in these conditions might suffice for a limited period of about three months. Increased military consumption resulting from second front operations would make the position correspondingly worse.