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GERMANY'S LOSS IN ROMANIAN OIL SUPPLIES

Next to Germany proper, Romania has been the largest contributor of oil supplies to the Axis war effort, yet the entire Romanian oil industry is essentially concentrated in a small area centering around the city of Ploesti, in the southern part of the country some 30 miles north of the capital city of Bucarest.

Within a radius of 15 miles north, east and west of Ploesti are 20 large and numerous small oil fields which produce about 95% of Romania's potential crude output of 5,300,000 metric tons/year. A few small fields in the Suzau and Bacau districts, roughly 30 miles northeast of Ploesti, make up the balance of this production. A network of pipelines brings the crude oil from the fields to the refineries, which number 16 important plants, located for the most part around the outskirts of the city of Ploesti.

In addition to the good railroad facilities available, oil products may be shipped from Ploesti over two major pipeline systems. One of these comprises four parallel lines running nearly due south, a distance of 47 miles to the Danube port at Giurgiu where oil barges are loaded for the upstream haul on the Danube into central and northwestern Europe. The second pipeline system runs a distance of 182 miles east, southeast from Ploesti to the Black Sea port of Constanta, formerly the most important point of export for Romanian oil. Under German domination the Giurgiu pipelines have been of

great importance in moving Romanian oil, but the pipeline to Constanta and the oil facilities of that port have been little used, owing to the difficulties facing Axis tank steamers on the Black Sea and in the Mediterranean.

Until it began to be reduced by aerial attacks in April of this year the Romanian output of about 4,800,000 metric tons/year of finished oil products constituted 28% of Axis Europe's entire oil supply. Not all of this quantity was directly available to Germany however, as Romania is the second largest consumer of oil among the countries of Axis Europe. Having a large domestic oil production, the country developed its railways, Danube shipping, agriculture and industry to use oil as a fuel. As late as the first quarter of 1944, Romanian internal oil consumption is estimated to have been at the rate of 1,600,000 metric tons/year. Of Romania's exportable surplus of 3,200,000 metric tons/year, about 2,500,000 metric tons went more or less directly to Germany; perhaps 200,000 tons were sent to Axis satellite and neutral countries, and the remaining 500,000 tons was consumed by German and Romanian troops as part of the requirements for fighting on the southern Russian front.

In consequence of the cumulative destruction of the refinery capacity in the Ploesti district, Romanian output of finished oil products has been reduced by some 55% during recent months. At the same time, the widespread damaging of refineries elsewhere in Europe, and the disruption of oil transport facilities, have prevented large-scale exports of crude oil from Romania.

It is thus apparent that the capture of the Ploesti oil fields and refineries results in the loss to Germany of only those quantities of oil products which Romania could be expected to supply despite the aerial bombardment, or, say, some 2,400,000 metric tons/year of petroleum products. On the other hand, with the loss of Romania, Germany will have no responsibility for supplying Romanian civilian oil requirements, and the defection of some 30 Romanian divisions will likewise eliminate their oil consumption from the Western Axis supply slate.

As its supplies became increasingly curtailed by bombardment, Romania endeavored to reduce the use of oil by civilians, and it is probable that the rate of civilian consumption during August did not exceed 1,200,000 metric tons/year, equal to about 50% of the rate of Romanian production for that month. The total oil consumption of the Romanian armed forces may be estimated in round numbers of 100,000 metric tons/year.

When Romanian civilian and military consumption are deducted from the total of oil supplies available from that country, the resulting net loss to Germany is about 1,100,000 metric tons/year of oil products. In view of the disastrously low levels to which these have already been reduced, this is another major calamity for Germany, as is shown by a brief review of their resulting oil position:

Since June 1944, the aerial attacks on Axis refineries and synthetic plants have beaten down the German-controlled production

of oil supplies from all sources to an average level of about ~~7,300,000~~ ^{7,300,000} ~~9,000,000~~ metric tons/year. The present Axis oil consumption, which reflects desperate efforts to reduce demand, is estimated at the rate of 11,000,000 metric tons/year. Thus, there is currently a deficiency of some ~~1,700,000~~ ³⁰⁰ 1,000,000 metric tons/month. The net loss of Romanian oil supplies will increase this deficiency a further 100,000 metric tons/month to a total of ~~2,400,000~~ ⁴⁰⁰ 2,000,000 metric tons/month, a quantity which cannot be made good from German stocks for any significant period. Moreover, the Germans will henceforth be dependent on their synthetic oil plants for about 40% of their remaining oil supplies.

In the present condition of their oil economy, the Germans have no opportunity for materially increasing oil supplies from sources still under their control so long as the scale of past aerial attacks ^{is} ~~are~~ maintained. The only discernable German recourse to offset the total loss of Romanian production is to further reduce ~~their~~ consumption. Their resources in this regard have been so far exhausted that the most apparent means by which they can effect an adequate decrease in their oil consumption is to withdraw from the entire Balkan peninsula and from northern Italy, which areas, in consequence of the loss of Romanian supplies, become a serious liability from the standpoint of oil.